

REQUEST FOR PROPOSAL (RFP)
Town of Arlington 179D Consulting Services
RFP #13-29

The Department of Public Works (DPW) acting through the Town Manager is requesting proposals from qualified individuals and firms for Consulting Services to develop and complete a 179D tax refund project for the Town of Arlington.

A copy of the RFP outlining the requirements for submission is available for viewing and downloading at the Town website - www.arlingtonma.gov/purchasing as well as from the Purchasing Agent, Domenic Lanzillotti at dlanzillotti@town.arlington.ma.us. For further information contact Ruthy Bennett, Regional Energy Manager for the Town of Arlington at rbennett@town.arlington.ma.us.

Proposals are invited and will be received as an **attachment via email only**. All proposals shall be in pdf or similar format and sent to the Purchasing Officer, Town of Arlington, Massachusetts on or before 1:00 p.m., August 29, 2013.

Proposals must be sent to the address: 179Dproposal@town.arlington.ma.us

Price proposals must be sent separately to the address: 179DPrice@town.arlington.ma.us

Proposals and price proposals must be received on or before 1:00pm on August 29, 2013. A confirmation email will be immediately generated and sent back to the sender once the proposal is received. Respondents shall be responsible to insure that they have received confirmation emails for each proposal and price proposal. Proposals received after the appointed time and date will not be considered.

Proposals may only be submitted via email. No hard copies will be accepted. All proposals shall be sent with the subject line "179D RFP Proposal."

The Town reserves the right to cancel any request for proposals and to reject in whole or in part any and all proposals when it is deemed in the best interests of the Town to do so.

Adam W. Chapdelaine
Town Manager

August 12, 2013

REQUEST FOR PROPOSALS
TOWN OF ARLINGTON 179D CONSULTING SERVICES
UPDATE IN FINAL VERSION

Responses Due:

August 29, 2013 at 1:00pm
Late Responses Will Be Rejected

Deliver Complete Responses

Via Email To:

Domenic Lanzillotti
179DProposal@town.arlington.ma.us
179DPrice@town.arlington.ma.us

For Further Information Please Contact:

Ruthy Bennett, Regional Energy Manager
781-589-0331
Email: rbennett@town.arlington.ma.us

RFP No. 13-29

I. Purpose

The Town of Arlington, acting through its Department of Public Works (hereinafter referred to as the Department), seeks proposals from professional consultants experienced in tax planning, engineering, and project management to manage a multi-contractor 179D tax deduction project. The 179D consultant (hereinafter referred to as the Consultant) will be expected to review all municipal construction projects completed in the Town of Arlington since 2009 and prepare a 179D tax deduction plan for the Town of Arlington in consultation with the project contractors. The Consultant will be responsible for negotiating a percentage split of rebate funds between Town and contractor, shepherding the plan through the Internal Revenue Service, and ensuring final Town receipt of amended returns. The Town has approximately 10-15 projects that are potentially eligible under the guidelines of the 179D program as achieving more than 50 percent in energy efficiency as compared to the ASHRAE 90.1-2001 benchmark outlined in IRS guidelines.

II. Scope of Work

The following is an outline of the tasks that the consultant will be responsible for. This list is not an exhaustive list but only a summary description of the work to be completed by the Consultant.

- Review all of the construction projects completed since 2009 that are potentially eligible for 179D tax deductions. A list of these projects will be provided by the Department upon award of this contract.
- Update Town-created spreadsheet of projects and potential eligible amounts listed in amended returns.
- With Town approval, contact the individual contractors to explain the 179D program and necessary next steps for the contractors and their tax consultants.

- Conduct engineering reviews to preliminarily approve construction projects as eligible for 179D deductions. Update project spreadsheet for Town review.
- On behalf of the Town, negotiate a percentage split of the amended tax returns between the Town and the contractor. This task will be undertaken in close consultation with Ruthy Bennett, Regional Energy Manager for Arlington.
- Finalize tax-deduction plans for eligible projects and assist contractors in submitting applications to IRS for 179D deductions.
- Communicate with contractors and pursue completion of deduction application, IRS approval, and Town receipt of funds.

III. Schedule

1. Within 3 days of awarding contract, Town will deliver a preliminary spreadsheet of eligible projects including name, location, square footage, contractor contact and description of project.
2. Within 14 days of awarding contract, Consultant will deliver an updated spreadsheet with preliminary assessments of project eligibility and communication with contractors.
3. Within one month of awarding contract, consultant will create a list of all contractors interested in working with the Town on 179D projects and a list of those who are not interested and the communication with the uninterested contractors.
4. Within 2 months of awarding contract, consultant will have completed all project site visits and initial engineering review of the projects and will update the spreadsheet to include potential tax deduction estimates.
5. Within 3 months of awarding contract, the consultant will have assisted all participating contractors in applying for 179D deductions.
6. Consultant will follow up consistently but at a minimum once per month with IRS and contractors on tax deduction status and update Town on project status monthly.

IV. CONSULTANT QUALIFICATIONS

At a minimum, the proposing firm/team must meet the following requirements:

- a. The firm/team must have at least five (5) years' experience in engineering or tax consulting or project management.
- b. The firm/team must have previous experience in the management of projects with municipalities and proven experience in working with federal, state, and municipal agencies.
- c. The firm/team must have completed two (2) 179D deduction projects successfully in the last three (3) years.
- d. The volume of the firm's current and projected workload must not adversely affect its ability to immediately initiate work and to follow through with the project in a timely and professional manner. The firm and all team members must be capable of devoting a significant amount of time to this project in order to complete the work within the schedule outlined in this RFP.

V. SELECTION CRITERIA

The Town will award the contract to the Consultant offering the most advantageous response to this RFP, taking into consideration all evaluation criteria and price proposals. The selection process will include an evaluation procedure based on the criteria identified below. Finalists may be required to appear for an interview.

- a. Staffing Plan and Methodology, including the professional qualifications of all project personnel with particular attention to training, educational background, and professional experience relevant to this project. Demonstrated expertise and experience of the Principal-in-Charge, Project Manager, and other key personnel, and any Consultants to be assigned to the Project, including professional registration of the Consultants and their qualifications.

Highly Advantageous: The plan of services proposes a detailed, logical, creative, and highly efficient scheme for producing a complete project that addresses all of the required issues and schedule and meets all the minimum applicant qualifications detailed in Section IV, "Consultant Qualifications."

Advantageous: The plan of services proposes a credible scheme for producing a complete project that addresses all of the required issues and schedule and meets all the minimum applicant qualifications detailed in Section IV, "Consultant Qualifications."

Not Advantageous: The plan of services is not sufficiently detailed to fully evaluate, or the plan does not contain all the components necessary to produce a complete project that addresses all of the required issues and schedule and meets all the minimum applicant qualifications detailed in Section IV, "Consultant Qualifications."

Unacceptable: The plan of services does not meet all the minimum applicant qualifications detailed in Section IV, "Consultant Qualifications."

- b. Depth of experience with 179D projects, and prior experience with municipalities and private contractors.

Highly Advantageous: The Consultant has at least five (5) years of experience consulting with municipalities on projects of similar scope to this project.

Advantageous: The Consultant has at least three (3) years of experience consulting with municipalities on projects of similar scope to this project.

Not Advantageous: The Consultant has less than three (3) years of experience but more than one (1) year consulting with municipalities on projects of similar scope to this project.

Unacceptable: The Consultant has less than one (1) year of experience consulting with municipalities on projects of similar scope to this project.

- c. Strength and credibility of client references. Prior client satisfaction with working relationship, project management capabilities, technical expertise in developing similar projects and success with 179D funding.

Highly Advantageous: More than three (3) clients who consider your services satisfactory or better.

Advantageous: Three (3) clients who consider your services satisfactory or better.

Not Advantageous: Three (3) or more clients not all of whom consider your services satisfactory or better.

Unacceptable: Fewer than three (3) clients who consider your services satisfactory or better, or three or more clients who consider your services unsatisfactory.

- d. Demonstrated ability to meet project schedule.
- Highly Advantageous:** All of the Consultant's references indicate that the projects were completed on schedule or with minimal delays.
- Advantageous:** One of the Consultant's references indicates that the project was not completed on schedule, with substantial delays attributable to the Consultant, and no current project or project completed in the last three (3) years experienced substantial delays attributable to the Consultant.
- Not Advantageous:** Two (2) of the Consultant's references indicate that the project was not completed on schedule, with substantial delays attributable to the Consultant, and no current project or project completed in the last year experienced substantial delays attributable to the Consultant.
- Unacceptable:** More than two (2) of the Consultant's references indicate that the project was completed with substantial delays attributable to the Consultant.
- e. Timing of payment to Consultant.
- Highly Advantageous:** 100% of payment to Consultant occurs when Town receives funds from the tax deduction funds.
- Advantageous:** 50% of payment to Consultant occurs when Town receives funds from the tax deduction funds and 50% of payment to Consultant occurs after final application to IRS.
- Not Advantageous:** More than 50% of payment to Consultant occurs before final application to IRS.

VI. SUBMITTAL REQUIREMENTS

Interested qualified firms must submit one (1) response as an attachment to an email addressing the objectives, scope, and schedule described in this RFP. Responses must include, at a minimum, each of the following:

- General description of the firm/team's experience.
- Description, with examples, of the firm/team's experience in working with municipalities and private contractors on preparing, submitting and completing 179D tax deduction applications. A detailed scope of services for the proposed work, including the firm/team's general approach to such work, evidence of the firm/team's understanding of the goals and objectives of the project, and methodology for accomplishing the tasks as listed in this RFP.
- Any comments on, or perceived problems with, the outlined schedule for completion of tasks as presented in this RFP.
- Description of the assigned staff members' experience, educational background, availability, and chain of responsibility, including the name and title of the principal and project manager assigned to the project, names of all sub-consultants, and resumés of all personnel to be associated with the project.
- List of references, including name, title, agency, address, description of project, project cost, and telephone number for clients with similar projects completed by the Consultant within the last five (5) years (including dates). References must have a first-hand working relationship with Consultant.
- Identification of current and pending work commitments of the firm/team and a description of how this project will receive adequate attention amid the team/firm's workload.

- Other pertinent information about the firm/team that would aid the Town in making a selection.
- Completed Attachments in Section VIII, Required Forms.
- Evidence of insurance coverage, including general and professional liability and worker's compensation insurance.
- Completed Price Proposal for entire project, to be submitted separately.

Proposals which are most advantageous based upon consideration of all the evaluation criteria and price will be selected.

Proposals must clearly address all the submittal requirements; that is, the response should include a section addressing all of the minimum consultant qualifications, the minimum submittal requirements, and each of the selection criteria. The proposal will be reviewed based on each of these items and it will be to the benefit of the responder to clearly address each of the items. Where the requirements specify a minimum level of experience, indicate the dates of said experience.

Proposals will be reviewed by Ruthy Bennett, Regional Energy Manager, and Town Manager designee. Finalist(s) may be asked to attend an interview.

The Town reserves the right to reject any or all proposals, to cancel the RFP at any time prior to execution of a contract, to waive any non-material irregularities in any RFP, and to accept or reject any item or combination of items. The Town also reserves the right to seek additional information and revised proposals prior to selection of a Consultant through written notice to and all of the respondents.

Questions and/or comments may be submitted to Ruthy Bennett, Regional Energy Manager, at:

Email: rbennett@town.arlington.ma.us

Phone: 781-589-0331

Responses to the RFP are due by **1:00 p.m. on August 29, 2013 as an attachment to an email.** Facsimile and/or hard copy responses will not be accepted. All responses should be addressed to Domenic Lanzillotti and submitted at 179DProposal@town.arlington.ma.us and 179DPrice@town.arlington.ma.us

VII. PROJECT FUNDING

Consultants must submit a Price Proposal. Fees shown will include all costs and expenses (copying, mileage, plans, etc.) to complete the Scope of Services defined in this RFP. Also, the selected Consultant will be required to submit invoices identifying hours, work completed, expenses and total cost by specific tasks.

VIII. REQUIRED FORMS

All required forms must be submitted with the proposal.

- A. Certificate of Non-Collusion
- B. Certificate of Tax Compliance
- C. Evidence of Insurance Coverage

CERTIFICATE OF NON-COLLUSION FORM
TOWN OF ARLINGTON 179D CONSULTING SERVICES

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith, and without collusion or fraud with any other person. As used in this certification the word “person” shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

Signature of Individual Submitting Bid or Proposal

Name of Individual Submitting Bid or Proposal

Name of Business

Date

BY STATE LAW THIS NON-COLLUSION FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

CERTIFICATE OF TAX COMPLIANCE FORM

TOWN OF ARLINGTON 179D CONSULTING SERVICES

Pursuant to MGL Chapter 62C, Section 49A, I certify under the penalties of perjury that I have complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Social Security Number or
Federal Identification Number

Signature and Title of Individual or
Responsible Corporate Officer

**BY STATE LAW THIS CERTIFICATE OF TAX COMPLIANCE FORM MUST
BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.**