



REQUEST FOR PROPOSALS

for critical review services for

PHILADELPHIA ENERGY AUTHORITY (“PEA”)

Issued by:

THE PHILADELPHIA ENERGY AUTHORITY (“PEA”)

All proposals must be submitted electronically through email to Emily Schapira, Campaign Director at eschapira@philaenergy.org.

Proposals must be received no later than 5:00pm Philadelphia, PA, local time
On Wednesday, September 7, 2016.

RFP Schedule

RFP Issued: August 25, 2016

Proposals Due: 5pm, September 7, 2016

Selection of Vendor: No later than Wednesday, September 14, 2016

Study commencement: Upon negotiation of final contract

Study completion: Targeting October 14, 2016 (open to alternate timeline proposals)

I. Project Overview

1. Overview

The Philadelphia Energy Authority (PEA) is seeking proposals from qualified consultant teams to perform a review of the underlying economic components of a recently launched initiative, the Philadelphia Energy Campaign (the “Campaign”). The purpose of this review is to provide critical analysis of the methodologies incorporated in the report supporting that Campaign and of the job creation estimates, to discuss the findings of the review at a meeting with the PEA and to provide a memorandum of the pertinent findings of the review. Most importantly, the consultant team will develop a methodology to track job creation numbers throughout the course of the Campaign. Our goal is to keep this as straightforward as possible, rooted in real data with transparent assumptions.

2. Background

The Philadelphia Energy Authority (PEA) is a municipal authority focused on issues of energy affordability and sustainability for Philadelphia's government and its citizens. Established in 2010 through the leadership of now-Council President Darrell Clarke and then-Mayor Michael Nutter, the PEA seeks systemic solutions to our energy challenges, supporting the work of a robust community of energy experts, advocates, and champions citywide.

In February 2016, PEA and Council President Clarke launched the Philadelphia Energy Campaign, a 10-year initiative to leverage \$1 billion in investment in energy efficiency and clean energy projects across four key sectors: City buildings, the School District of Philadelphia, low-income residential housing and small businesses. Our goal is to create 10,000 jobs, reach 25,000 households and support 2,500 small businesses. The Energy Campaign is neighborhood-driven, and strives to strengthen communities, cut energy bills, reduce Philadelphia's carbon footprint and build our local economy equitably.

3. Request for Proposals

The Philadelphia Energy Authority is seeking a Consultant with previous experience in critically reviewing studies and assumptions underlying economic and employment impact models. The Consultant will need to develop an employment monitoring and tracking program to measure the impacts of the ongoing Campaign. The selected Applicant shall have expertise examining economics, policy and energy efficiency issues.

II. Scope of Work

The services to be performed by the Consultant will include the following three tasks:

Task 1: Review and comment on the methodology used for the February 2016 Launch Report

The Consultant will:

- Review and assess the methodologies used for developing the assumptions and for calculating the expected expenditures, cost savings and job impacts.
- Review the baseline and preliminary analyses of the potential impacts from the Energy Campaign derived by the Report (spreadsheet will be provided)
- Provide a brief memorandum that includes a list of critical items (e.g., assumptions, methodologies, models, etc.) that greatly impact the overall analyses, a list of potential flaws, inconsistencies and/or errors, and comment on the appropriateness of the assumptions.
- Discuss the findings during a meeting with the PEA and other relevant stakeholders.

Task 2: Adjust the methodology (if appropriate)

After presenting the results of Task 1, the Consultant will propose any adjustments to the methodology if deemed appropriate and helpful to generate the costs savings and job impacts calculated for the Campaign. At minimum, we expect the model will need to be updated to reflect more recent economic data.

Task 3: Define a data collection process and analytical model to track the Campaign's resulting employment generation impacts

The Consultant will identify processes and systems to streamline data collection and reporting so that PEA can track the jobs created directly and indirectly through the implementation of the Campaign. The Consultant will research the different types of vendors and the distribution of jobs per industry.

Each sector will have a somewhat different way of tracking expenditure and savings, depending on the user and implementation model, so we expect the consultant to assume we will have reliable input numbers on both investment and savings available.

Deliverables

PEA requires the following deliverables from the successful applicant:

- Memorandum addressing key findings
- Revised methodology to create an ongoing capacity to assess cost savings and measure job impacts
- Validated cost savings and job impact calculations, with documented justification for their modeling approach
- Data collection tool

The selected firm should target completion the deliverable by October 14, 2016.

Questions can be directed to Emily Schapira (eschapira@philaenergy.org).

III. Requirements

The proposal should address all appropriate points in this RFP. The proposal must not exceed 5 pages. You may also submit additional information on your firm and project team in addition to the 5 pages.

The following requirements shall be included in your submission and will be used to evaluate your proposal.

1. Applicant Profile

Provide a narrative description of the Applicant itself, including the following:

- a. Applicant's business identification information, including name, business address, telephone number, website address, and federal taxpayer identification number or federal employer identification number;
- b. A primary contact for the Applicant, including name, job title, address, telephone and fax numbers, and email address;
- c. A description of Applicant's business background, including, if not an individual, Applicant's business organization (corporation, partnership, LLC, for profit or not for profit, etc.), whether registered to do business in Philadelphia and/or Pennsylvania, country and state of business formation, number of years in business, primary mission of business, significant business experience, whether registered as a minority-, woman-, or disabled-owned business or as a disadvantaged business and with which certifying agency, and any other

information about Applicant's business organization that Applicant deems pertinent to this RFP.

- d. A description of the Applicant's key personnel for this project.

2. Project Understanding

Provide a statement of the objectives, goals and tasks to demonstrate the Applicant's view of the nature of the project. Applicants must identify known and potential project challenges.

3. Work Plan and Timeline

Applicant must provide a work plan, including a project timetable, that identifies and describes the project tasks to be accomplished, and a description of the proposed project approach and methodology to be utilized and deliverables to be provided by the responder.

4. Fee proposal

As part of the 5 pages, Applicant must provide a fee proposal that indicates the overall fixed fee for the project. The proposed fee must include all costs that will be charged to the PEA for the services and tangible work products the Applicant proposes to perform and deliver to complete the project, and a proposed payment schedule.

5. Statement of Qualifications; Relevant Experience

Provide a statement of qualifications and capability to perform the services sought by this RFP, including a description of relevant experience with projects of similar nature to that which is the subject of this RFP.