

# REQUEST FOR PROPOSALS: STAFFING SERVICES AGENCY

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PRE-PROPOSAL MEETING

OCTOBER 15, 2020

10:00AM

# OVERVIEW

Metropolitan Energy Center (MEC) is seeking the services of an Agency (Offerors) to provide staffing services for contract positions in two categories. In particular, we seek a part-time bookkeeper to work across programs within MEC's administrative department and three customer service positions to work in the Buildings / Energy Efficiency Program.

It is expected that this proposal will secure the services outlined herein for up to 3 years. Upon mutual agreement between MEC and the Offeror, services may be extended for two (2) additional, one (1) year periods for a maximum term of five (5) years in total.

# OVERVIEW (FUNDING & SCHEDULE)

The Bookkeeping position is supported by MEC administrative funding and is available to start immediately upon placement.

The Customer Service positions will be supported by federal funds under a contractual project agreement and will not be available until our third-party project agreement is executed. This is anticipated to be late 2020 or early 2021.

# SCOPE OF SERVICES



The intent and purpose of this Request for Proposal (RFP) is to solicit proposals to provide contract staffing services on an as needed basis to Metropolitan Energy Center.



Attachment A to this Request for Proposal contains a list of the position titles and job descriptions.



MEC reserves the right to add position titles at any time during the contract term as stated below.

# SCOPE OF SERVICES (CON'T)



The Offeror(s) shall furnish contract staffing services as required by MEC for the job classifications shown on Attachment A. If during the contract period, positions not listed on Attachment A are required, MEC may solicit price quotations from the Offeror(s) and add the positions to the contract.



There is no guarantee of any minimum amount of services that may be requested during the term of the contract.

# SCOPE OF SERVICES-REQUIREMENTS

- A. Contract personnel shall be employed by the Offeror. The Offeror shall be responsible for all payroll taxes, workers' compensation, payroll reports, applicable insurances, and other employer federal and state requirements for contract personnel.
- B. Contract personnel supplied by the Offeror must meet minimum qualifications as specified by MEC (see Attachment A).

# SCOPE OF SERVICES-REQUIREMENTS (CON'T.)

- C. Contract employees should be available for the entire length of the assignment. Every attempt must be made to minimize staffing gaps. As a minimum, a replacement employee must be made available within two (2) business days of employee separation or request by MEC for additional employees.
- D. MEC will have the right at any time to refuse any contract personnel supplied by the Offeror for any job-related deficiency and to request immediate removal of the employee. Refusal of any contract personnel shall not be made on any discriminatory basis.

# SCOPE OF SERVICES-REQUIREMENTS (CON'T.)

- E. The normal working hours for contract personnel are 9:00a.m.to 5:00p.m., Monday through Friday. Weekend work will occasionally be required. MEC reserves the right to adjust schedules as needed.
- F. The Offeror shall assign a single point of contact to coordinate and assist in any employment requests, availability, scheduling, billing, contract compliance requirements, reports and problem solving. When requested, the Offeror must meet periodically with MEC to discuss all services.

# SCOPE OF SERVICES-REQUIREMENTS (CON'T.)

- G. MEC will assign, and identify to the Offeror, the person(s) who are authorized to request contract personnel. A telephone call from MEC authorized representative along with a job requisition shall constitute a job request for service under this contract. MEC will not pay any invoices without a signed job requisition.
- H. The Offeror will be given 24 hours to confirm availability of a contract worker to fill the request.

# SCOPE OF SERVICES-REQUIREMENTS (CON'T.)

- I. The Offeror shall supply all contract personnel with time cards or equivalent. All hours worked must be approved on a weekly basis by the MEC supervisor. The Offeror shall supply MEC with copies of the approved time sheets upon submission of invoices to MEC. MEC shall not be liable for invoices that cannot be substantiated by the Offeror.
  
- J. The Offeror shall not charge MEC or any authorized user of the contract any placement fees or agency fees if a contract employee submits an application for employment with MEC, or any authorized user of the contract, and is selected for employment after ninety (90) days.

# SCOPE OF SERVICES-REQUIREMENTS (CON'T.)

- K. The Offeror will be paid based on invoices submitted. Invoices shall be submitted by the Offeror to MEC on a bi-weekly basis. The invoices should include the employee's name, dates, hours worked, job classification, and the hourly bill rate and pay rate. Attached to each invoice, must be a copy of the weekly time sheet.
- L. If at any point, MEC determines the contract employee is not performing their duties to MEC's standard, the Offeror, upon notice from MEC, shall remove the contract personnel from the assignment at no charge to MEC, and the Offeror shall find a suitable replacement.

# SCOPE OF SERVICES-REQUIREMENTS (CON'T.)

- M. The Offeror shall provide a usage report on a quarterly basis to MEC's representative named upon award. It shall contain the number of people sent in a particular job classification and total payments received.
- N. All work under this Agreement must be performed by properly trained and competent personnel within the specific job description and must be in accordance with industry standards.
- O. The Offeror shall be responsible at all times for the actions and work of its personnel.

# SCOPE OF SERVICES-REQUIREMENTS (CON'T.)

- P. Contract personnel may be required to undergo a criminal history background check and drug test; if required, the Offeror shall ensure that any Offeror employees providing services at MEC has a criminal history background check
- Q. MEC will provide on-the-job training as needed for customer service workers in technical areas relating to energy efficiency benchmarking, ENERGY STAR Portfolio Manager, and applicable benchmarking laws.

# SCOPE OF SERVICES-ALL INCLUSIVE

Additional work necessary to meet the terms of service under the above scope of work should be identified and included in Proposals.

# ATTACHMENT A-BOOKKEEPER

## Services

- Use Microsoft Teams and SharePoint office systems, as well as QuickBooks Online accounting software, to record day-to-day finance activity.

- Accounts Receivable: use payroll and staff timekeeping data to prepare invoices to funders, following established grant invoicing procedures. Receive and allocate/record revenue in QuickBooks Online. Prepare bank deposits for checks and cash received.

- Accounts payable: retrieve / receive bills and correspondence from vendors, sub-awardees and creditors. Record same in virtual filing and accounting systems. Prepare and record payments. Manage requests and receipt of W-9 from vendors, maintain W-9 data in QuickBooks Online accounts, and prepare for annual form 1099 filings.

- Ensure costs are allocated by program and/or project, following the established Classification, Customer and Products/Services designations in QuickBooks Online

- Work with Development Department in assisting with Grant Reporting
- Enter Payroll information into QuickBooks Online accounting system

# ATTACHMENT A-BOOKKEEPER Services

- Review staff timekeeping and labor reports and prepare grant allocation within QuickBooks Online

- Maintain Customer and Vendor files by Account and Fiscal Year

- Follow Accrual Accounting method for maintaining the books

- Monthly reconciliation of expenses for invoicing to grantors

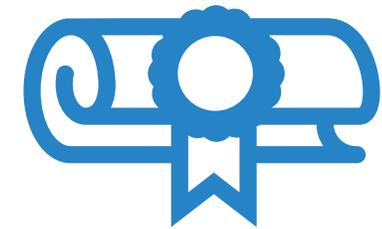
- Weekly trips to the physical office facility to open, review and digitally scan incoming mail.

- Identify areas for management review regarding process and practice to improve efficiency and ensure compliance

# ATTACHMENT A-BOOKKEEPER

## Qualifications

- Three (3) years of successful and progressively responsible experience in bookkeeping.
- Be able to work from home; contract requires
  - a personal computer (PC) (A laptop PC can be furnished by MEC if necessary), and
  - ability to maintain one's own office facilities, especially during the pandemic. MEC's office is accessible as needed during the pandemic, but colleagues are primarily working from home at present.
- Strong organizational skills
- Knowledge of federal grants preferred
- Ability to work independently and multi-task



# ATTACHMENT A-CUSTOMER SERVICE

## Energy Efficiency Benchmarking Support

Will perform customer service support activities for Metropolitan Energy Center's energy efficiency program, Energy Solutions Hub.

The ideal candidate should have experience with utility-sponsored energy efficiency programs and energy benchmarking with Energy Star Portfolio Manager.

The candidate should have a strong customer engagement and sales background and excellent time management skills, including the ability to monitor and manage efficiency project progress while seeking additional opportunities within new or repeat customers.

The candidate will support the implementation and marketing of benchmarking programs (at minimum) to support program goals and maximize energy savings in the commercial and multifamily marketplace.

- Using established customer lists and historical reporting data, identify businesses and buildings that haven't reported or that have lapsed reporting; conduct research to update contact information and establish or re-establish a reporting contact

# ATTACHMENT A-CUSTOMER SERVICE

## Energy Efficiency Benchmarking Support

- Conduct demos and training for using Energy Star Portfolio Manager, create reports.

- Act as an Energy Advisor by helping customers identify their unique opportunities under energy efficiency initiatives.

- Assistance with completing submissions into Energy Star Portfolio Manager to ensure compliance with program guidelines and procedures

- Maintain, update, and add entries to the system databases accurately.

- Provide assistance with customer service, scheduling, Energy Star Portfolio Manager and other issues as needed.

- Direct communications with customers and trade ally contractors.

- Identifying and implementing process improvements.

# ATTACHMENT A-CUSTOMER SERVICE

## Basic Qualifications

- Understanding of energy efficiency technologies and energy-saving solutions
- Strong communication skills, experience with client engagement and coordination
- Proficient in Microsoft Office Suite, including Word, Excel, Outlook, Teams and SharePoint
- Experience with tracking systems and databases
- Advanced written and oral communication skills
- Strong customer service skills
- Good organizational and planning skills
- Ability to build and maintain relationships

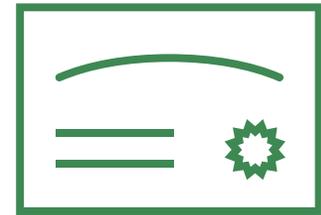


# ATTACHMENT A-CUSTOMER SERVICE

## Preferred Qualifications

### Preferred Qualifications:

- 1+ years of experience with energy efficiency technologies and Energy Star Portfolio Manager
- Bachelor's degree or higher in a related field and 3 or more years of related work experience
- 3-5 years of sales or outreach experience
- 2-3 years' experience in the energy efficiency industry preferred
- Experience interacting with diverse populations and demographic groups



### Professional Skills:

- Sound business ethics, including the protection of proprietary and confidential information
- Ability to apply detailed knowledge of organizational procedures to make independent decisions and serve as a credible resource for a senior management team
- Ability to work with all levels of internal staff, as well as outside clients and vendors
- Excellent problem-solving skills with ability to analyze situations, identify existing or potential problems and recommend solutions

# RESPONSE FORMAT & PROPOSAL REQUIREMENTS

## GENERAL INSTRUCTIONS



To be considered, each firm must submit a response to this RFP using the format provided in the following slides.

Proposals should be prepared simply and economically providing a straightforward, concise description of the Offeror's ability to meet the requirements of the RFP.

# RESPONSE FORMAT & PROPOSAL REQUIREMENTS

## GENERAL INSTRUCTIONS (CON'T.)

Agencies should organize Proposals into the following Sections:



A. Professional Qualifications



B. Past Involvement with Similar Projects



C. Proposed Work Plan



D. Price Proposal (include in a separate file clearly marked "Price Proposal")



E. Authorized Negotiator

## RESPONSE FORMAT & PROPOSAL REQUIREMENTS

### GENERAL INSTRUCTIONS (CON'T.)

Proposals, including cover page and table of contents, will consist of two electronic files:

1. a technical proposal, responding to the narrative requirements;
2. and a price proposal.

Each will be submitted on 8.5x11-inch page format with 11- or 12-point font in black text. No hard copy proposals will be accepted. Digital proposals in PDF format must be sent to Jeff Windsor at [rfp@metroenergy.org](mailto:rfp@metroenergy.org).

Any confidential/proprietary information should be readily identified, marked and included in ONE (1) additional attached document, separate from the rest of the proposal (see Section IV.A. Proprietary/Confidential Information).

# CRITERIA FOR EVALUATION



All proposals will be reviewed by a Review Committee consisting of MEC staff and other members offering technical evaluations and assistance, as necessary.



Offerors will be notified when and if additional information or documentation is required.



All information required to complete the proposal is provided in this RFP. Any additional information pertaining to submissions, including email and phone calls, will not be considered once the review process is under way.



The overall quality of the proposal, containing all required information in a clear and concise format, is a prevailing consideration throughout all categories.

## CRITERIA FOR EVALUATION (CON'T.)

When evaluating proposals, the Review Committee will consider the following criteria. The potential maximum number of points is listed to the right for each category.

 CATEGORY	Points
 PROFESSIONAL QUALIFICATIONS	30
 PAST INVOLVEMENT WITH SIMILAR PROJECTS	20
 PROPOSED WORK PLAN	30
 PRICE PROPOSAL	20
 TOTAL	100

## CRITERIA FOR EVALUATION (CON'T.)

### Professional Qualifications :

30 Points

The following describes the elements that should be included in each of the proposal sections and the weighted point system that will be used for evaluation of the proposals.

- A. Professional Qualifications –30 points
  - 1. State the full name and address of your organization and, if applicable, the branch office or other subsidiary element that will perform, or assist in performing, the work hereunder. Indicate whether it operates as an individual, partnership, or corporation. If as a corporation, include whether it is licensed to operate in the State of Missouri.
  - 2. Include the name of executive and professional personnel by skill and qualification that will be employed in the work. Qualifications and capabilities of any subcontractors must also be included.
  - 3. State history of the firm, in terms of length of existence, types of services provided, etc. Identify the technical details that make the firm uniquely qualified for this work.

## CRITERIA FOR EVALUATION (CON'T.)

Professional Qualifications :

30 Points

Minority, Disadvantaged and Women – Owned Businesses

4. Describe MBE/WBE status and certifications, if applicable. If the Offeror is certified as MBE/WBE with a local municipality (KCMO preferred), give type of certification, date of certification and history. Submit evidence that the certification is current.

## CRITERIA FOR EVALUATION (CON'T.)

### Past Involvement with Similar Projects

20 points

#### B. Past Involvement with Similar Projects-20 points

The written proposal must include a summary of the Respondent's demonstrated experience and success in the recruitment and placement of contract personnel in non-for-profit positions. A complete list of client references must be provided for similar projects recently completed. It shall include the firm/Offeror name, address, telephone number, project title, and contact person.

# CRITERIA FOR EVALUATION (CON'T.)

## Proposed Work Plan

30 points

### C. Proposed Work Plan –30 points

Provide a detailed and comprehensive description of how the Offeror intends to provide the services requested in this RFP, including process and timeline for placement and replacement of personnel and plan for communicating and understanding needs of MEC. The work plan must include:



Description of the Offeror's candidate screening process and the Offeror's employee training plan.



Ability of firm to provide personnel on all shifts and all days



Ability to provide personnel with appropriate minimum experience and licensing requirements.

## CRITERIA FOR EVALUATION (CON'T.)

Price Proposal

20 points

### D. Price Proposal -20 points

Price schedules shall be submitted in a separate file of the proposal. Offeror shall prepare and submit a price proposal signed by principle or other official authorized to bind the Offer. Price quotations are to include the names, title, hourly rates, overhead factors, and any other relevant details. The proposal should highlight key staff and positions that would likely be involved with projects. Agencies shall be capable of justifying the details of the price proposal relative to personnel costs, overhead, how the overhead rate is derived, material and time.

## CRITERIA FOR EVALUATION (CON'T.)

### Authorized Negotiator

#### E. Authorized Negotiator

Include the name, phone number, and e-mail address of the person(s) in your organization authorized to negotiate the agreement with MEC.

# PRE-PROPOSAL MEETING AND QUESTIONS



A pre-proposal meeting will be held on October 15, 2020, at 10:00AM CST. During the meeting, MEC staff will conduct a walk-through of the RFP document. The meeting will be conducted on-line only; on-line attendees should join this meeting:

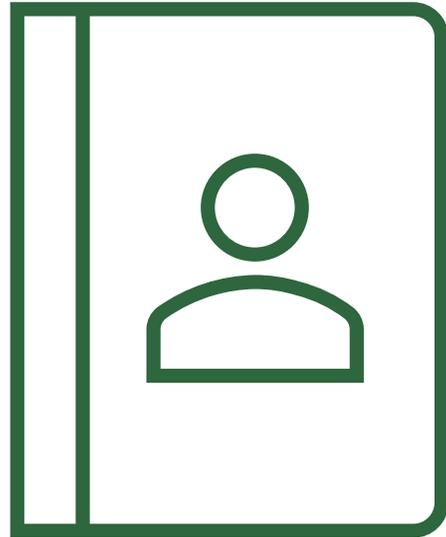


Offerors will have the opportunity to ask questions about MEC and the proposal process. A record of the meeting will be made for prospective Offerors who cannot participate at this time.

# PROPOSAL SUBMISSION

DEADLINE

OCTOBER 27



Proposals must be received by October 27, 2020. MEC is not responsible for technical or transmittal issues when submitting a proposal.

# PROPOSAL SUBMISSION

**Only electronic proposals will be accepted.** Hard copy proposals will not be accepted. Please e-mail your proposal to [rfp@metroenergy.org](mailto:rfp@metroenergy.org) subject: “Staffing Services Agency—<Organization/Company Name>”. Proposals, including cover page and table of contents; will consist of two electronic files: a technical proposal, responding to the narrative requirements; and a price proposal. Again, Confidential/Proprietary information must be readily identified, marked and separated/ packaged from the rest of the proposal. MEC requests that all materials be included as attachments to one email. Offerors will receive an e-mail response notification of the receipt of their proposal within two business days upon submission.



# PROPRIETARY/CONFIDENTIAL INFORMATION

Any restrictions of the use of or inspection of material contained within the proposal shall be clearly stated in the proposal itself. Written requests by the Offeror for confidentiality shall be submitted to MEC in advance of the proposal submission deadline, along with the proposal material. The Offeror must state specifically what elements of the proposal are to be considered confidential/proprietary.



# ORGANIZATIONAL CONFLICT OF INTEREST

Any business entity or person is prohibited from being awarded an Agreement, if the business entity or person has an “Organizational Conflict of Interest” with regard to this solicitation and the resulting Agreement. Offerors should provide a brief written statement noting any conflict of interest within the “Organizational Conflict of Interest” section of the Proposal.

# GENERAL INFORMATION

**Binding Offer:** Proposal submitted in response to this RFP shall constitute a binding offer.

**Material Ownership:** MEC has the right to retain Offerors' original RFP Submission and other RFP response materials for its files.

**Debarment:** Proposers must not be presently debarred, suspended, proposed for disbarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal, state or local debarment or agency.

**Compliance:** Successful Offerors shall comply with applicable Federal, State and local laws and regulations in the performance of all work under resulting Agreement. Offeror shall obtain all Federal, State and local permits, authorizations, and approvals of all work performed under the Agreement.

All statistical and fiscal information contained within this RFP, and any amendments and modifications thereto, reflect the best and most accurate information available to MEC at the time of RFP preparation.

# INCURRED COSTS

MEC is not liable for any cost incurred by the Offeror prior to issuance of a legally executed Agreement, purchase order or other authorized acquisition document.

# AWARD DETERMINATION

The Notice(s) of Intent to Award are anticipated to be made in early November, 2020.



# QUESTIONS



Offerors are encouraged to submit questions in writing to Jeff Windsor at Metropolitan Energy Center at [rfp@metroenergy.org](mailto:rfp@metroenergy.org) by October 16, 2020. MEC will try to respond to all questions publicly via an FAQ on its website, [www.metroenergy.org](http://www.metroenergy.org), by October 20, 2020. Emails should use the subject line: “Query for Staffing Services Agency RFP”.

# QUESTIONS & INFORMATION

For more information, please contact:

Jeff Windsor, Contract Specialist

[rfp@metroenergy.org](mailto:rfp@metroenergy.org)

The logo for Metropolitan Energy Center features a large yellow circle. The word "Metropolitan" is written in a bold, black, sans-serif font across the middle of the circle. Below the circle, the words "ENERGY CENTER" are written in a black, sans-serif font, with "ENERGY" on the top line and "CENTER" on the bottom line.

**Metropolitan**  
ENERGY CENTER