

(Proposed) Request for Proposals

**SOUTHERN CALIFORNIA EDISON COMPANY**  
**EVAPORATIVE COOLER BULK PURCHASE**

September 17, 1999

**"This program is funded by California utility customers and administered by Southern California Edison Company, under the auspices of the California Public Utilities Commission."**

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## ATTACHMENTS

Attachment 1 – Intent to Bid Form (optional)

Attachment 2 – Company Information Form

Attachment 3 – Company Profile/Proposal

Attachment 4 – Price Proposal

Attachment 5 – Subcontractor Information

Attachment 6 – Subcontracting Plan and Reporting Requirements

Attachment 7 – Sample Contract – SCE Purchase Order

# 1. Introduction

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## 1.1 Overview

Southern California Edison Company (“SCE”) intends to provide approximately 2,000 evaporative coolers to its low-income customers through its *Evaporative Cooler Installation Program*. (“Program”). The Program is designed to assist low-income customers manage summer energy use by offering an evaporative cooler as an alternative to an existing electric central, window, or through-the-wall air conditioning system for a small co-payment. This Request for Proposal (“RFP”) seeks proposals from manufacturers of evaporative coolers for the purchase of the 2,000 coolers.

SCE is issuing this RFP pursuant to 2000 program designs filed with the California Public Utilities Commission (“CPUC”) on July 1, 1999, and as approved in Decision **TBD**.

The expected contract award date is \_\_\_\_\_ (**Date**), with contract signing expected to occur by \_\_\_\_\_ (**Date**). The Program will run through the end of 2000. Depending on regulatory approval of the Program and funding authorization, the Program may be extended through 2001. The anticipated start date for implementation of this Program is \_\_\_\_\_, 2000.

## 1.2 Terms and Conditions

The parties agree that this RFP will not establish an exclusive contract between SCE and the bidder. SCE expressly reserves all rights, including but not limited to the following: the right to utilize others to perform or supply work of the type contemplated by this RFP; the right to request proposals from others with or without requesting proposal(s) from bidders for work of the type contemplated by this RFP; and, finally, the unrestricted right of SCE to re-bid or perform any such work.

SCE reserves the right to modify or withdraw the RFP, to negotiate with qualified bidders to clarify technical or contractual issues which may arise, to reject any and all responses which are deemed incomplete and/or nonresponsive, and to terminate negotiations at any time after determining that a proposal is incomplete and/or nonresponsive.

All questions relating to this RFP must be submitted in writing to the official contact person designated in Section 3 of this RFP. All proposals must be prepared in accordance with the requirements discussed in Section 3. All costs of preparing and submitting proposals will be borne by bidders. Bidders will also bear any costs incurred during negotiations preceding the execution of a contract relating to this solicitation.

### **1.3 Eligibility**

Manufacturers of evaporative coolers must meet the following criteria:

- Demonstrated skills and experience in performing the type of work proposed in response to this RFP.
- Sufficient financial strength to implement its proposal.

It is within SCE's sole judgment to determine whether a manufacturer meets these eligibility criteria. Any proposal submitted by a manufacturer that does not meet the eligibility criteria listed above shall be rejected without review.

### **1.4 Schedule**

The schedule for this solicitation is shown below in Table 1. The dates commence on the effective date of the CPUC's decision approving SCE's low-income program plans and this RFP.

**TABLE 1**

<b>Event</b>	<b>Deadline (Business Days After CPUC Approval)</b>
Request for Proposals Issued	8 days
Deadline for Intent to Bid	12 days
Deadline for Written Questions	15 days
Deadline for Responses to Questions	20 days
Deadline for Receipt of Proposals	34 days
Interviews with Short-Listed Suppliers (if needed)	39 days
Selection of Supplier(s)	44 days
Signing of Contract by Supplier(s)	51 days
Signing of Contract by SCE	61 days
Start of Implementation of Program	71 days

## **1.5 Organization of the RFP**

The remainder of this RFP is organized as follows:

- Section 2 describes the specifications, delivery requirements, and support requirements for the equipment.
- Section 3 provides detailed instructions for preparing a proposal in response to this RFP.
- Section 4 enumerates and explains the criteria that will be used to evaluate proposals.
- Attachments 1 through 6 provide forms to be used in preparing a response to this RFP.

### ***Intent to Bid Form (Optional)***

Use the Intent to Bid form in **Attachment 1** to indicate your intent to bid and to receive additional information from SCE regarding this solicitation. The form may be returned to SCE by mail or fax. The intent to bid information may also be provided to SCE by e-mail at: \_\_\_\_\_ Receipt of e-mails will be acknowledged by return e-mail.

## **2. Equipment Specifications, Delivery Requirements, and Support**

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### **2.1 Equipment Specifications**

Evaporative coolers must have the following specifications:

1. A standard high-speed capacity of approximately 4,000 CFM.
2. Able to be installed in a window or through-the-wall.
3. Must contain all necessary parts for operation, including, but not limited to, cabinets, pads, motors, pulleys, belts, switches, water pumps, operating controls, chain kits, and window kits.
4. Must be fully assembled, with the exception of air ducts, which may be separated from coolers for shipping purposes.
5. Fan motors must be at least two-speed, 115 volt, and factory wired so that coolers can be plugged into common household sockets.
6. A duct, grill, and airtight grill cover must be included with each cooler.
7. All cooler components (i.e., motor, pump, float, bearings, and accessories) must be guaranteed for at least one year from the time of installation. Components excluded from this warranty should be noted.
8. Cooler air duct width shall not exceed 20-3/4 inches.
9. Any additional accessories included with the cooler should be defined in the bid package.

### **2.2 Delivery Requirements**

SCE expects to purchase coolers in bulk loads (truckload) and authorize the successful bidder to ship directly to designated SCE installation contractors on an as-needed basis. 1999 shipping destinations for SCE installation contractors were as follows:

- Avenal
- Barstow
- Commerce
- Fullerton
- Palm Springs
- Riverside
- Santa Fe Springs
- Visalia

**Note: SCE intends to re-bid the Evaporative Cooler Installation Program so the delivery destinations for installing contractors may change from those listed above.**

The successful bidder may choose to manufacture SCE's complete order, as authorized in a "Release for Manufacture" from SCE. The evaporative coolers must be warehoused at the successful bidder's facility and held for shipment as directed by SCE. These coolers shall remain the property of the successful bidder until they are received by SCE's agents (i.e., shipped on an FOB basis to SCE's agent's address).

### **2.3 Support Activities**

The successful bidder will be required to work directly with SCE installation contractors to resolve warranty issues and provide necessary training and technical assistance, as necessary.

### **2.4 Contract Length**

The Program is intended to be a two-year program. It is SCE's intention that the Program run through December 2001, and that any contract arising from this solicitation cover the Program term. The contract will provide for annual renewals, and will allow SCE the right to terminate for cause. Annual renewals will be contingent upon CPUC approval and appropriation of funds for the Program.



## 3. Proposal Instructions

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### 3.1 Overview/Submittal of Proposals

This section outlines the procedures to be followed in this solicitation process. The bidder is responsible for reading and following these provisions. All communications regarding this RFP must be conveyed in writing to:

Southern California Edison  
GO-3 1<sup>st</sup> Floor  
2131 Walnut Grove Avenue  
Rosemead, CA 91770  
Attention: \_\_\_\_\_

All revisions to this RFP will be made in writing by SCE.

### 3.2 Schedule

The schedule for this solicitation is shown in Table 1 in Section 1.4.

### 3.3 Written Responses to Questions

All questions submitted in writing by \_\_\_\_\_ (*Date*) will be answered by SCE in writing by \_\_\_\_\_ (*Date*). Questions may also be submitted via fax or via e-mail.

SCE

Attention:

Fax:

e-mail address:

Responses will be sent to all parties who have indicated that they will submit a proposal by returning the Intent to Bid Form (**Attachment 1**) or who have notified SCE of intent to bid through other written or electronic means.

### 3.4 Submission of Proposals

Proposals must be **received** by SCE no later than 4:30 p.m. on \_\_\_\_\_ (*Date*). Proposals received after this deadline may not be considered at SCE's sole discretion.

Bidders are encouraged to take all necessary steps to ensure that proposals are received on time.

One unbound original and three (3) bound copies and a complete electronic version in Microsoft Word format must be submitted in a sealed envelope or carton to:

Southern California Edison  
GO-3 1<sup>st</sup> Floor  
2131 Walnut Grove Avenue  
Rosemead, CA 91770  
Attention:

The outside envelope of your proposal should be labeled clearly as follows:

**Bulk Purchase of Evaporative Cooler**

Proposals must be prepared according to the instructions provided below in this section.

Proposals are prepared at the bidder's expense. SCE assumes no liability for any expenses associated with preparation or delivery of any proposal.

**3.5 Initial Bid Screening**

SCE will review bids to ensure that directions have been followed and that required information has been included. SCE will notify bidders who have made errors or omissions that can be easily corrected. These bidders will be given three days to submit corrections to the address shown for submission of proposals. After this process, proposals that fail to meet minimum criteria for completeness will be eliminated from further consideration.

**3.6 Interviews with Short List**

If considered necessary by SCE, the top-ranked bidders will be interviewed. If required, interviews will be scheduled for the period \_\_\_\_\_ to \_\_\_\_\_ (*Date to Date*). The interviews will focus on clarifying proposals, rather than offering bidders an opportunity to revise proposal terms.

### **3.7 Selection of the Winning Bidder(s)**

SCE will select the winning bidder(s) for the Program and will notify the selected bidder(s) in writing by \_\_\_\_\_ (Date). SCE and the winning bidder(s) will sign a contract(s) on or before \_\_\_\_\_ (Date). A sample contract is attached (**Attachment 7**).

The manufacturer(s) may commence work on the date that the contract has been signed by SCE and the manufacturer(s).

### **3.8 Proposal Instructions**

Proposals should be submitted based on a purchase quantity of 2,000 evaporative coolers during a calendar year. Bidders are required to submit proposals that include the following:

#### **A. Company Information**

The Company Information Form is presented as **Attachment 2** and the Company Profile/Proposal is presented as **Attachment 3**. These documents ask for information regarding the company that will be used to evaluate qualifications to provide evaporative coolers. In addition to these documents, the bidder shall include a short description of all contracts entered into between the bidder and SCE within the past five (5) years. This shall include a description of the nature of the work, the contract amount, the status of the work (ongoing or completed), and any significant problems or disputes which arose between the contracting parties. Identify any actual or possible conflicts of interest.

#### **B. Price Proposal**

The Price Proposal is presented as **Attachment 4**. It asks for a unit price, including delivery and warehousing, for each evaporative cooler included in a proposal.

#### **C. Subcontracting Plan And Reporting Requirements**

The Subcontracting Plan and Reporting Requirements form is presented as **Attachment 6**.

### **3.9 Signature Required**

The proposal and accompanying documents must each be signed by a person authorized to commit the manufacturer to the terms of the proposal. The original signed pages should be included in the unbound copy of the proposal. Failure to sign the proposal as required may result in rejection of the proposal.

### **3.10 Confidential Information**

Proposals, including copies and supporting documents submitted in response to this RFP, shall become the property of SCE. Information provided in the proposal package may be made available to the public. SCE will make reasonable efforts to protect any information clearly indicated as confidential by bidders. Confidential information must be clearly identified and designated as **“Proprietary”** or **“Confidential”** on each page where sensitive or confidential information appears in the proposal. Upon prior notice to the bidder, confidential information may be made available to the CPUC. Required information withheld from proposals due to confidentiality claims may result in disqualification of the bid.

## 4. Proposal Evaluation Criteria

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### 4.1 Overview

The evaluation process will consist of three steps:

1. Review of all proposals to identify bids deemed to be nonresponsive;
2. Scoring of all responsive proposals; and
3. Ranking the proposals based on the numerical scores.

In order to be considered responsive, a proposal must meet the following minimum requirements:

- It must propose services that meet the requirements specified in Section 2.
- It must follow the proposal preparation instructions given in Section 3.

SCE will notify bidders who have made errors or omissions that can be easily corrected, and these bidders will be given three days to submit corrections. After this grace period, proposals failing to meet the minimum requirements will be eliminated from further consideration.

### 4.2 Scoring Proposals That Meet Minimum Requirements

Proposals will be scored on a 100 point system based on the following criteria:

- Price Proposal -- 65 points; and
- Contractor Profile/Proposal -- 35 points.

These criteria are discussed below.

#### **4.2.1 Price/Proposal - Total Possible Score: 65 Points**

The price proposal will be evaluated by totaling two scores:

- Raw price score
- Competitive price score

The **Total Bid Price** for each evaporative cooler will be ranked from highest to lowest for all bidders.

##### ***Raw Price Score***

- The total number of bidders will be divided by **XX**. This will become the **points per bidder**.
- The bidders will be ranked on the basis of their **Total Bid Price**. The bidder having the highest **Total Bid Price** will be **assigned the number 1**. The next highest bidder will be **assigned number 2**, and so on.
- The **Raw Point Score** is calculated by multiplying the **points per bidder** by the **assigned number**.

##### ***Competitive Price Score***

Each bidder's **Total Bid Price** for each measure will be totaled and divided by the number of bidders to calculate **Average Bid Price**.

The percent difference between each bidder's **Total Bid Price** and the **Average Bid Price** will be calculated.

Each bidder will receive points for their percent difference.

**The total of the Raw Price Score and Competitive Price Score will comprise the Price Proposal Score for each bidder.**

### **4.2.2 Company Profile/Proposal - Total Possible Score: 35 Points**

The Contractor Profile score will be calculated by totaling one score for each of the following components:

1. Specifications documented for the following for each evaporative cooler being quoted:
  - Features
  - Dimensions
  - Coating type
  - Warranty
  - Capacities
  - Underwriters Laboratories approval
  - Any other information necessary, in the opinion of the bidder, to evaluate the product
2. Confirmation that the evaporative coolers being quoted meet the specifications identified in Section 2.1 of this Request for Proposal.
3. Confirmation that the requirement for evaporative cooler warehousing specified in Section 2.2 of this Request for Proposal can be met.
4. Confirmation that the shipping requirements specified in Section 2.2 of this Request for Proposal can be met.
5. Earliest date that evaporative coolers would be available for shipment if bidder is successful.
6. Means by which bidder can provide SCE any evaporative cooler, specified in their bid, for technical evaluation.
7. Financial/Credit reporting  
Dun & Bradstreet ("D&B") company reports, if available. If a D&B report is not available, a payment history for all debts incurred in the last year and the most current financial data including a Balance Sheet and Income Statement will be considered.

8. Technical Evaluation of the Evaporative Cooler

<b>Evaporative Cooler Construction</b>
Float valve construction
Bearings on blower wheel
Grill construction and features
Coating on bottom of unit
Panels construction and ease of removal
Dimensions
Ease of control use

**4.3      *Right to Reject***

SCE reserves the right to reject any or all proposals submitted in response to this RFP, if they are deemed untimely, incomplete and/or nonresponsive.