Identify a problem or need

The solution is simple and clearly identifiable. Consider using loans, the SCEO's ConserFund, or self-funding methods. Self-manage the project.

Contact the SC Energy Office
803-737-8030

The solution is complex or unclear, help is needed with project management, or financing is unavailable. **Consider entering into an Energy Performance Contract.**

Create a Selection Committee. It must have at least 3 (but typically has 5) voting members; OSE will appoint the non-voting chair and will oversee the selection process. Develop a Selection Plan. The plan explains how the agency will solicit proposals, conduct negotiations, evaluate proposals, and create milestone dates.

Document: 801

Agency may conduct a pre-proposal meeting to clarify expectations and obtain feedback.

RFQ Request For Qualifications (Doc 810 to advertise). The RFQ ***must*** state the relative importance of design requirement compliance, offeror's qualifications, financial capacity, project schedule, price/life-cycle price, and any other factors. The RFQ ***must*** be advertised in the SCBO in accordance with document 810. The offerors submit document 821.

Documents:
801
810
820
821

Agency may conduct a pre-proposal meeting to clarify expectations and obtain feedback.

The Selection Committee usually selects 3-5 firms to prepare a full RFP, chosen from the RFQ respondents. Firms will base their responses on an investment grade audit (IGA) or less extensive studies. The agency may engage an independent party or the ESCOs (partial reimbursement may be available to unsuccessful bidders) to perform the IGA. The short list of firms is announced publically and the RFP is submitted to these firms.

RFP Request For Proposal (Schedule A, Doc 830 and 860). The RFP ***must*** include design requirements and solicit proposal development documents. The RFP ***may*** specify that stipends will be paid to unsuccessful bidders. The RFP ***should*** include attachments that will be in the final contract (Schedules B-G) in order to assist in proposal evaluation. In some circumstances, the offeror is required to identify an Independent Peer Reviewer. [State agencies (not School Districts or local governments) must manage financing through the State Treasurer's Office.]

Documents:
830
860
Schedules:
A-G

The Selection Committee evaluates and ranks all received applicable proposals. The Procurement Officer begins negotiations with the highest ranked bidder (may move to a lower ranked bidder if an agreement cannot be reached) until the contract is awarded.

The contract is awarded.

Documents: 860
Schedules: B-G

The contract is reviewed for approval by the Joint Bond Review Committee and the Budget and Control Board.

http://procurement.sc.gov/PS/vendor/PS-vendor-ose-news.phtm