

**Request for Proposals (RFP)
for Electric Bicycle Manufacturers and Shops
for the Intermountain Drives Electric Program**

**Sponsored by Intermountain Healthcare
Administered by Utah Clean Energy**

August 7, 2017

This Request for Proposals is being distributed by Utah Clean Energy

Contact:

Please direct all questions and communications to
ev@utahcleanenergy.org

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1. Introduction

The purpose of this Request for Proposals (RFP) is to request proposals from bike shops or manufacturers (suppliers) for the sale of new electric bicycles (“e-bikes”) at discounted prices for Intermountain Healthcare employees. The intent is to select one or more suppliers to offer qualifying e-bikes for participation in this initiative. For the purposes of this program a qualifying e-bike is defined as a bicycle with an electric motor which does not require a license plate, driver’s license, or registration to operate. This program will include discounted pricing for e-bikes and electric vehicles, however this RFP is intended only to secure discounted pricing for e-bikes.

2. Background.

The Intermountain Drives Electric Program (or “Program”) facilitates a discounted rate for e-bikes for program participants. Utah Clean Energy is requesting proposals from suppliers who are interested in offering a discount to individuals to purchase an e-bike. The Program’s objective is to help Intermountain Healthcare employees to purchase e-bikes at a lower cost, through a simplified process, and reduce the criteria air pollutants and greenhouse gases associated with their transportation. Individuals interested in taking advantage of this program will purchase e-bikes directly from the participating supplier(s). Utah Clean Energy and Intermountain Healthcare will not be a party to these sales or be responsible for any financial or other obligations related to the individual sales between participants and the selected supplier(s). Utah Clean Energy and Intermountain Healthcare intend to promote the Program and the e-bikes offered by the selected supplier(s) through education and outreach efforts targeted to Intermountain Healthcare employees, and by engaging with the local media. Respondents to this Request for Proposals should provide a discounted pricing structure for the purchase of qualifying e-bikes to individuals who choose to participate in the Program.

3. Submittal Instructions

Questions about this Request for Proposals can be submitted in writing to ev@utahcleanenergy.org by 5:00 PM on August 21. Responses to questions will be made available by 5:00 PM on August 23. To maintain the fairness and integrity of the selection process, proposals must conform to the requirements, including structure, of this RFP. Communications with Utah Clean Energy or Intermountain Healthcare for the purpose of influencing the outcome of this RFP may be cause for disqualification from further consideration.

Proposals are due by 5:00 p.m. Mountain Daylight Time Friday, September 8, 2017.

Proposals should be submitted as PDF files electronically via email to ev@utahcleanenergy.org with the subject line “Response to Drive Electric Program RFP”, or may be submitted electronically by completing the online form available at <http://utahev.org/request-for-proposals>. Proposals received after this deadline will be late and ineligible for consideration. All information submitted will remain confidential.

Utah Clean Energy may select one or more suppliers based on initial proposals received without discussion of such proposals with suppliers. However, Utah Clean Energy may

require an interview with a supplier to supplement their written proposals. These presentations will be scheduled, if required, by Utah Clean Energy after proposals are received and prior to the selection of a supplier. See Appendix for timeline.

Each initial proposal should be submitted with the most favorable price and service available. However, Utah Clean Energy may request a Best and Final Offer (BAFO).

Upon completion of the evaluation process, Utah Clean Energy may select one or more suppliers to provide services for the Program. The selected supplier(s) will be asked to complete a Memorandum of Understanding (MOU) with Utah Clean Energy.

4. Important Dates.

Request for Proposals released	August 7, 2017
Questions about Request for Proposals due	August 21, 2017
Responses to questions released	August 23, 2017
Proposals due	September 8, 2017
Potential applicant interviews	September 13, 2017
Selected supplier(s) notified	September 15, 2017
Program Launch	October 2, 2017
Informational Workshop	TBD, 2017
Informational Workshop	TBD, 2017
Informational Workshop	TBD, 2017
Enrollment closes and Program ends	November 11, 2017

5. Scope of Work Overview

The purpose of the Drive Electric Program is to facilitate a supplier discount for e-bike purchases for Program participants. The Program sponsor, Intermountain Healthcare, and the Program administrator, Utah Clean Energy, will promote the Program through community outreach, educational events, and partnerships with local organizations. Utah Clean Energy will be responsible for program administration, including managing outreach and educational activities and coordination among the selected supplier(s) and Program participants. **All contracts, financial negotiations and obligations will be between the selected supplier(s) and the Program participants. Neither Intermountain Healthcare nor Utah Clean Energy shall be parties to this contract and will have no responsibility or liability under this contract.**

The selected supplier(s) will provide discounted prices for qualifying e-bikes to Program participants. The selected supplier(s) will complete the sale of e-bikes for Program participants in accordance with the scope of work outlined below. Individuals who wish to participate in the Program will purchase e-bikes from the selected supplier(s). Utah Clean Energy reserves the option to select one or more suppliers for participation in this program.

Based on the results of past e-bike discount programs in Utah, Utah Clean Energy anticipates that approximately 75 e-bikes may be sold during this program. However, the number of sales during the program and the number of sales per supplier is dependent on interest and not guaranteed by Intermountain Healthcare, or Utah Clean Energy.

This discount program will be offered to Intermountain Healthcare's approximately 37,000 employees. The number of participants is not guaranteed by Intermountain Healthcare or Utah Clean Energy.

6. Participant Enrollment & Education

Interested participants will be asked to complete an Enrollment Form on the Program website (www.UtahEV.org). Once enrolled, participants will be referred to the selected supplier(s) and instructed to visit with their preferred supplier(s) or purchase a bike from their preferred supplier(s) at their convenience.

Utah Clean Energy and the selected supplier(s) will coordinate regularly to track the status of enrolled participants throughout the enrollment and education period.

Between the public launch of the Program on October 2 and the close of the enrollment period on November 11, Utah Clean Energy will:

- Require that interested participants complete an Enrollment Form and provide their contact information. Selected supplier(s) may suggest additional questions to be included on this form
- Supply enrolled participants with a confirmation email containing a discount code, contact information for participating supplier(s), and instructions about how to schedule an appointment with the supplier(s) that individual participants are interested in visiting
- Host workshops and other outreach activities to educate participants about e-bikes and promote the Program
- Field calls from participants about the Program to answer questions or refer individuals to the selected supplier(s) for more information, as appropriate
- Develop and distribute informational collateral materials
- Promote the Program to the targeted audience of Intermountain Healthcare employees
- Manage a website to promote the Program and maintain a social media presence
- Conduct media outreach
- Serve as the point of contact for inquiries about the Program

The selected supplier(s) will:

- Coordinate with participants to facilitate the sale of e-bikes
- Provide contact information for a designated e-bike specialist who is informed about the specific e-bikes sold by the supplier and will serve as the first point of contact for interested participants
- Attend workshops to provide information about the e-bikes offered through the Program, and upon request, have e-bike models available at the workshops or other events for showcase. Workshops are currently scheduled for TBD, TBD and TBD.
- Attend other outreach events as requested
- Participate in media events and interviews as requested
- Provide feedback on the Enrollment Form questions
- Provide weekly status updates to Utah Clean Energy reporting the number of participant inquiries, number of participant visits, number of e-bikes sold, and any relevant issues, challenges, and/or delays

- Communicate regularly with Utah Clean Energy until all sales are finalized
- Participate in an exit interview and provide feedback on the Program

7. Project Completion and Assessment

After the end of the Program, the selected supplier(s) will report on all purchases made through the Program. Utah Clean Energy will conduct an exit interview with participating supplier(s) and a follow up survey of all Program participants.

8. Proposal Requirements

Interested applicants should complete Exhibits A, B and C to respond to each of the following requirements:

A. Qualifications and Expertise of Staff (see Exhibit A)

Please provide the names, titles, and years of relevant experience of key staff that will be assigned to the program. (As outlined in Exhibit A.) Selected suppliers(s) shall notify Utah Clean Energy of any changes to key personnel during the program timeline.

B. Minimum Inventory Requirements (see Exhibit A)

All applicants must adhere to the following minimum qualifications; any applicants not meeting minimum qualifications will not be considered. The applicant's submission should address the following components:

- Applicants must have at least one of each proposed e-bike model available for test ride for the duration of the program. Please confirm that you will have an e-bike available for test ride.
- Applicants must have at least three of each e-bike model available for sale or by special order during the program. Please specify the minimum number of proposed e-bikes you expect to be available during the program.
- If inventory is not available onsite and additional e-bikes need to be ordered and delivered, please describe the timeline for procuring additional inventory and any additional costs to participants associated with placing an order.

C. Demonstrated Ability to Meet Scope of Work (See Exhibits B & C)

The supplier(s) submission should address the following components:

- Proposed e-bike(s) make(s) and model(s) to be included in the program, including total number of each type of e-bike that is expected to be available during the program. See Exhibits B and C.
- Designated point of contact for e-bike sales. See Exhibit B.
- Detailed response to Customer Service Flowchart. See Exhibit B.

D. Cost (see Exhibit B & C)

Please complete Exhibit B with information about the e-bike discounts you are offering. Provide information about the current base model cost for all e-bikes you propose to include in the program, and the discount amount, as a percentage or as a total dollar amount, that the supplier will offer to participants in the program. Please also indicate the time period that the discount will be available; preference will be given to respondents

able to offer a consistent discount over the entire program period (October 2 through November 11, 2017).

Please also provide any additional incentives or benefits you are willing to make available to the program or to participants in the program.

9. Proposal Evaluation Criteria.

Utah Clean Energy intends to select one or more suppliers by utilizing the criteria listed below with their relative weights in points to evaluate proposals.

A. Qualifications and Expertise of Staff	20 Points
B. Minimum Inventory Requirements	20 Points
C. Demonstrated Ability to Meet Scope of Work	20 Points
D. Cost	40 Points

10. Evaluation Process.

All proposals in response to this Request for Proposals will be evaluated as follows:

- Utah Clean Energy will review all proposals received on time. Proposals that do not meet the minimum RFP requirements will be eliminated. **Utah Clean Energy reserves the right to disqualify any proposal that includes significant deviations or exceptions to the terms, conditions, and/or specifications in this RFP.**
- At the conclusion of this initial evaluation phase, Utah Clean Energy may request interviews with the highest scored applicant(s). **Utah Clean Energy will be the sole judge as to the overall acceptability of any proposal or to judge the individual merits of specific provisions within competing offers.**

11. Additional Information

A. Incurring Costs.

Utah Clean Energy will not be liable for any cost which suppliers may incur in connection with the preparation or presentation of their proposal(s). Proposals should be concise, straightforward, and prepared simply and economically. Expensive displays, bindings, or promotional materials are neither desired nor required. However, these instructions are not intended to limit a proposal's content or exclude any relevant or essential data therefrom.

B. Proposal Validity.

All proposals shall remain valid for a minimum of 120 calendar days after the Proposal Due Date to allow adequate time for evaluation.

C. Addendum to RFP.

In the event that it becomes necessary to revise this RFP in whole or in part, an addendum will be provided to all suppliers on record as having received this RFP.

D. Other Communications.

During the RFP process (from the date of issue through the date of supplier selection, award, or other final decision), Utah Clean Energy is the sole source of official information regarding this RFP. All other communications, both spoken and written, which are received by any representative of the supplier from other sources should be confirmed with Utah Clean Energy as being true and accurate prior to incorporating such information into their proposal. This refers to both formal and informal conversations and communications. Significant changes to the RFP will always be issued as a formal, written addendum.

E. Authorized Supplier Representatives.

Utah Clean Energy reserves the right to request a change in the individual assigned to represent the supplier if the assigned representative is not serving the needs of Utah Clean Energy in an acceptable manner. This right shall carry forward through the response period and during the term of the Program.

F. Compliance.

The supplier hereby agrees to abide with all applicable federal, state, county, and city laws and regulations, and to be responsible for obtaining and/or possessing any and all permits and licenses that may be required.

G. Right to Reject.

Utah Clean Energy reserves the right to reject any or all proposals and to waive any formality or technicality in any proposal in the interest of the Program.

H. Relationship of the Parties.

In assuming and performing the obligations of any Program, Utah Clean Energy and any supplier shall each be acting as independent parties and neither shall be considered or represent itself as a joint venturer, partner, or employee of the other.

Exhibit A – Information about Applicant

Dealer Name:

Today's Date:

Primary Contact Name:

Primary Contact Phone:

Primary Contact Email:

Please describe:

a) Your ability to serve the needs of the community. For purposes of this Request for Proposals, "program area" shall include Salt Lake County, Davis County, Summit County, Utah County, Weber County and Tooele County. Please explain your experience working with residents of the geographic area of the program area and your available inventory for program participants.

Answer:

b) Your plan for implementation of the Program, including sales agents made available to work with those in the program, anticipated inventory of e-bikes, and expected delivery schedules for e-bikes (if not available onsite).

Answer:

c) Your home delivery options for program participants who purchase e-bikes.

Answer:

d) Your proposed approach to maintain high quality customer service throughout the program.

Answer:

e) Identify any possible challenges you may encounter during this process and how you plan to address them.

Answer:

g) Provide names, titles, and relevant years of experience of key staff that will be assigned to the program.

Answer:

Exhibit B – Cost Proposal Form, Discount Pricing Structure, and Project Schedule (all Program participants):

Applicant Firm(s):

Today's Date:

Primary Contact Name:

Primary Contact Phone:

Primary Contact Email:

Part I: Please provide pricing for each e-bike included in this proposal. Include additional lines as necessary.

E-bike Purchase Information					
Make Name	Model Name	Specific configuration(s), or packages (if applicable)	Sticker Price	Discount (% or \$ amount)	Final discounted price ^[1]

[1] Dealers providing discounted pricing agree to offer this discounted price to all participants.

Part II: Additional benefits or discounts. Be as specific as possible and include any additional Options that were not addressed above. Add additional rows as necessary. For example: warranties, complimentary safety or repair kits, maintenance package, free annual tune up, etc.

Option	Description

Part III: Please modify this Customer Service Flowchart and Project Schedule as needed. The supplier(s) will be responsible for following up with all interested program participants in a timely manner in addition to providing regular information to Utah Clean Energy regarding customer and project status.

Please address any and all of the applicable steps in this process: Communication with customer after receiving contact information from Utah Clean Energy, ability to meet with sales associates trained in e-bike technology, and presenting customer with purchase and delivery options. *Please add additional steps as you consider appropriate.*

Step	Expectation	Supplier Response
Customer Visit to Supplier	<i>Specify if appointments will be required</i>	
Presentation of Purchase Options	<i>Provide information on the estimated number of models and options available for customers to test ride, how will information on options be presented, etc.</i>	
Purchase & Delivery	<i>Outline process for purchasing and delivery. Will e-bikes be available on site, if not, estimated wait time and additional cost factor(s). Does the supplier provide home delivery options?</i>	
Follow Up	<i>Provide Utah Clean Energy with names of customers purchasing e-bikes ___ times per week.</i>	
Marketing & Outreach	<i>Please describe how you intend to market and advertise the program, subject to approval of all marketing and advertising materials by Utah Clean Energy.</i>	

Total Number of e-bikes Purchased	Estimated availability and/or wait time
0 - 25	<i>Same day availability or estimated 1 week wait time for delivery</i>
26 - 50	
51+	

Appendix – Program Timeline:

Intermountain Drives Electric Program Schedule	
Milestones	Timeline*
PHASE I: Request for Proposals	
Distribute Request for Proposals (RFP) to e-bike Dealers	August 7, 2017
Due Date for RFP questions for Utah Clean Energy	August 21, 2017
Utah Clean Energy responses to RFP questions	August 23, 2017
Due date for Suppliers to submit proposals	September 8, 2017
Hold for potential interview(s) with applicant(s)	September 13, 2017
Selection of Supplier(s)	September 15, 2017
Negotiations with Supplier(s) and project details finalized through Memorandum of Understanding (MOU)	September 18-29, 2017
PHASE II: Program Launch & Recruitment of Participants	
Pre-Launch of Program website	September 18, 2017
Formal launch of Program: Full website is published and open enrollment begins	October 2, 2017
Informational Workshop	Oct./Nov., 2017
Informational Workshop	Oct./Nov., 2017
Informational Workshop	Oct./Nov., 2017
Program enrollment closes	November 11, 2017

*All dates are subject to change at Utah Clean Energy's discretion. In the event that the timeline is adapted, Utah Clean Energy will inform the Supplier(s) of any changes to the timeline, and where necessary collaborate with the Supplier(s) in adapting the timeline.