



EI00260~2023RFP EV CHARGING INFRASTRUCTURE AND SERVICES

SCOPE DOCUMENT

RESPONSE DUE DATE – WEDNESDAY, SEPTEMBER 13, 2023 (1 PM ET)

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1. General Overview

1.1 Project Overview and Objectives

E&I Cooperative Services, Inc. ("E&I") is requesting proposals for **EV Charging Infrastructure and Services** to result in a contracting solution for use by its Members. E&I is committed to utilizing purchasing and business practices in accordance with the National Association of Educational Procurement Code of Ethics.

The primary goals and objectives of E&I are to:

- (1) assist our Members to obtain the absolute lowest cost and best value that exceeds other public sector consortia agreements,
- (2) establish a strategic sourcing partnership with any selected manufacturer(s) and authorized dealers, and
- (3) enhance our position as the premier Procurement Cooperative for Education.

2. Standard RFP Provisions

2.1 RFP Deadline

E&I will accept proposals submitted in response to this RFP only on the Jaggaer tool until 1:00 PM EST, on September 13, 2023 (the "Submittal Deadline"). The timeline for the RFP can be found in Section 2.2

2.2 Tentative Schedule of Key Events

The following is a tentative schedule of events for this RFP:

Activity	Planned Date
Request for Proposal issued ("Open Date")	08/14/2023
5 PM ET Deadline for submission of RFP-related written questions ("Q&A Submission Close Date")	09/04/2023
E&I Response to RFP-related questions	09/05/2023
1 PM ET Deadline for Receipt of Proposals ("Close Date")	09/13/2023
Evaluation and Supplier Clarifications Begin	09/14/2023
Negotiations Begin with Shortlisted Suppliers	10/18/2023
Anticipated Award(s)	11/08/2023
Acceptance and Execution of Agreement	11/22/2023
Implementation	11/29/2023

2.3 Evaluation Process and Criteria

Any contract(s) resulting from this Request for Proposal will be awarded in writing to responsive and responsible Respondents whose proposal, in the opinion of the evaluation team, offers the greatest benefit to our members when considering the total value including the quality, service levels, customer service and total cost (including any trade, prompt payment discounts, and other miscellaneous charges).

All proposals should be complete to be considered responsive.

As part of the evaluation process, E&I may require a demonstration/presentation before the award is made and the demonstration/presentation may be considered as an additional factor in the award. In addition, E&I may decide to make site visits, as needed, during the evaluation process which shall be coordinated with the respective Respondent(s).

The RFP evaluation team will review and evaluate RFP responses according to the following weighted criteria based on a total of 100 points.

No.	Criteria	Criteria Overview	Points
1	Contract Alignment & Connection	<ul style="list-style-type: none"> Contract connection process to Member Contract channeling to E&I (direct, net new, etc.) 	10
2	Supplier Diversity	<ul style="list-style-type: none"> Certifications and Designations Company Program and Overall Commitment to Supplier Diversity Reporting, Metrics, & KPI's 	10
3	Supplier Capability	<ul style="list-style-type: none"> Company Experience Service Capability E-Procurement Performance Tracking & Reporting Quality Management Training, Support & Account Management Compliance 	20
4	Economic Value and Financial Overview	<ul style="list-style-type: none"> Contract Administrative and Marketing Fee (CAF) Financial Offer Requirements & Proposal Financial Reporting Capabilities 	25
5	E&I Risk Profile	<ul style="list-style-type: none"> RFP response quality Litigation Financial Health Existing contracts with direct competitors 	10
6	Scope Questions	<ul style="list-style-type: none"> Questions related to the scope of the RFP 	15
7	RFP Exceptions	<ul style="list-style-type: none"> Supplier Performance Expectations Compliance with RFP specifications Compliance with Master Agreement terms & conditions Compliance with Members' institutional policies, federal, state, and local legal and regulatory requirements, and policies 	10

2.4 Sole Point of Contact for the RFP

Bob Solak

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Educational and Institutional Cooperative Services, Inc.
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Respondents to this RFP or persons acting on their behalf shall not contact any E&I employee, officer, or agent; any E&I Board of Directors; or any E&I Member concerning any aspect of this RFP, except in writing to the Sole Point of Contact, from the date of release of this RFP through the official award date. Violation of this provision may be grounds for rejecting a proposal response. See Section 2.7 in the Cover Letter on how to submit questions.

3. Scope of Products and Services

E&I is seeking proposals from qualified, experienced, financially sound, and responsible experienced suppliers to submit proposals for the design, implementation, and maintenance of an integrated Electric Vehicle (EV) Charging Infrastructure and Services for its Higher education and K-12. E&I desires the broadest possible selection of services being offered over the largest possible geographic area and to the largest possible cross-section of E&I's current and future Members. The intent of this solicitation is to provide E&I Members with a comprehensive offering of services to meet their various needs.

It is not mandatory for suppliers to cover ALL scope areas outlined in this RFP. They may choose to respond to one or more of the following scope areas, based on their expertise:

3.1 EV Charging Infrastructure

3.1.1 Electric Vehicle Charging Infrastructure

- The Supplier shall provide and install an EV charging infrastructure like Level 1, Level 2, and/or Level 3/DC Fast Charge stations. The charging infrastructure should be strategically located to provide convenient access for campus visitors, staff, and students of Member Institutions
- The Supplier shall provide and install all necessary equipment like cables, cords, conductors, connectors, couplers, enclosures, attachment plugs, power outlets, power electronics, transformer, switchgear, switches and controls, network interfaces, point of sale equipment, and associated apparatus designed and used for the purpose of transferring energy from the electric supply system to a plug-in electric vehicle
- The stations must be compatible with a wide range of electric vehicles
- The stations must be installed in accordance with all applicable codes and regulations
- The installation work shall include all labor, materials and services required for installation
- The Supplier must incorporate the industry-standard Open Charge Point Interface (OCPI) into the EV charging infrastructure to enable seamless communication between charging stations and users, allowing access to charging stations from various network providers

3.1.2 Site Assessment and Preparation

The supplier shall conduct thorough site assessments to identify optimal locations for charging stations. Site preparation services, such as trenching and electrical upgrades, should be included as necessary to ensure a smooth installation

3.1.3 Equipment Maintenance Solutions

The supplier shall provide comprehensive maintenance solutions to ensure the charging stations' optimal performance, including making a maintenance plan, conducting regular inspections, testing user interface to ensure it works correctly, conducting an electrical test for safe and timely EV charging to ensure that it supplies the power it's rated to supply and that built-in safety mechanisms are functioning and undertaking repairs and servicing.

3.1.4 Tracking/Monitoring Software Solutions

The supplier shall offer a comprehensive tracking and monitoring software solution that includes the following features:

- Enable Member Institutions to set flat rate or metered pricing for charging
- Access control mechanisms to manage authorized user access to charging stations.
- Billing and payment systems integration for transparent and efficient billing processes.
- Queueing management to optimize charging queue and reduce waiting times.
- Station support services, including real-time assistance and troubleshooting.
- Mobile apps for users to reserve available charging stations.

3.1.5 Training Services

The supplier shall provide training services for the campus staff of the Member Institutions on handling charging equipment and software, ensuring proper usage and safety protocols

3.1.6 Technical Support

Supplier shall provide customer support service (telephone or e-mail) during normal business hours during the warranty period and beyond the warranty period that allows Member Institutions to request repairs and troubleshoot technical problems with Contractor's technicians

3.1.7 Real-time Reporting and Visibility

The supplier shall offer real-time reporting and visibility features, enabling the Member Institutions to monitor charging station utilization, energy consumption, and billing data

3.1.8 Warranty and After Useful Life Activities

The supplier shall provide a comprehensive warranty for the installed charging equipment. Additionally, they should provide a detailed plan for after useful life activities, including decommissioning and environmentally responsible disposal of charging infrastructure

3.2 Value Added Services

3.2.1 Solar energy and Storage units

- Conduct detailed site assessment for solar installations
- Design and install optimal solar energy system
- Integrate solar energy system into existing electrical grid
- Monitor system performance and perform regular maintenance
- Provide solar energy storage units for excess energy storage
- Implement monitoring and control for solar storage units

3.2.2 EV Charging as a Service

Provide subscription-based model that provides Member Institutions with access to EV charging stations, it should eliminate the need for Member Institutions to purchase and maintain their own EV charging station. The service should include

- Installation and commissioning of EV charging stations
- Maintenance of EV charging stations
- Provision of 24/7 customer support
- Billing and payment processing
- Software platform for managing EV charging stations

3.2.3 Mobile EV Solutions

Provide EV charging solutions that can be easily transported and deployed

- Design and development of mobile EV charging stations
- Provision of 24/7 customer support
- Software platform for managing mobile EV charging stations

3.3 New Product and Service Addition

- The awarded contract(s) have the flexibility to accommodate new technology or technological upgrades related to the procured items
- New or upgraded systems, equipment, modules, components, and other supplementary items can be incorporated into the contract(s)
- Maintenance or service agreements associated with the procured items can also be modified to include new technology or technological upgrades
- Any contract modification for new technology will pertain specifically to the procured items and will align with the original procurement or contract scope

3.4 No Exclusions

No products, or services provided by your company have been excluded from this RFP. All products, supplies and accessories carried in a Respondent's catalog(s), price book(s) or otherwise available by special order are part of this solicitation.

4. Pricing

Supplier must complete the 'Pricing Sheet' and upload it on the Jaggaer tool. The first tab 'Instructions' in the 'Pricing Sheet' lists out the different sections and pricing requested by E&I. Please ensure to review the 'Instructions' tab before you start filling in the pricing

5. Appendix

5.1 Definitions

The following are the definitions of general terms used in this RFP.

DAYS: All days specified are based on calendar days unless otherwise noted.

EDUCATION: The combination of Higher Education and K-12.

GO TO MARKET: Strategy or action plan specifying how the Respondent will utilize its inside and outside resources (e.g. sales force and distributors, marketing initiatives, etc.) to deliver its products and/or services to the Education market through an E&I contract.

Contract Region Key

Northeast
Mid-Atlantic
Southeast
Central
Great Lakes
Western

States

CT, MA, ME, NH, NY, RI, VT
DC, DE, MD, NJ, PA, VA, WV
AL, FL, GA, KY, MS, NC, SC, TN
AR, IA, KS, LA, MN, MO, ND, NE, OK, SD, TX
IL, IN, MI, OH, WI
AK, AZ, CA, CO, HI, ID, MT, NM, NV, OR, UT, WA, WY

GREATEST BENEFIT: The decision for award will be based on an overall combination of variables such as quality, price and various elements of required service that in total are optimal relative to the needs of the E&I Membership.

HIGHER EDUCATION: All Universities, Colleges, Healthcare Facilities (private and public), i.e., Associate, Bachelor, Master, and/or PhD in the United States, that provide for advanced learning and/or grant degrees. These Universities, Colleges and Healthcare Facilities may or may not be members of E&I.

HUBS: Historically Underutilized Businesses e.g., minority, women-owned businesses (for the State of Texas, Certified HUBS within the State of Texas).

K-12: All School Systems and Districts (private and public) in the United States that provide education for students in Kindergarten through 12th Grade. These School Systems and Districts may or may not be members of E&I.

MANUFACTURER: Indicates an entity that makes the products from raw materials outlined in this RFP, all of its agents, and employees.

MAY: Indicates something that is not mandatory but permissible/desirable.

MEMBERS: Includes Institutions, Universities, Colleges (private and public) and K-12 schools that are listed in the E&I record.

MONTH END: Shall mean the last calendar day of each month.

MOST RESPONSIBLE: A Respondent whose reputation, past performance, and business and financial capabilities are such that the Respondent would be deemed most capable of satisfying Member needs for a specific contract.

MUST, SHALL, WILL: The words "shall," "must," or "will" are equivalent and indicate mandatory requirements or conditions. E&I will not waive Responder's material deviation from any of the mandatory requirements.

RMWBE: Minority, Woman-owned Business Enterprises.

NATIONAL AGREEMENT: E&I awards an Agreement which is available throughout the United States (including Alaska and Hawaii).

REGIONAL AGREEMENT: E&I may elect to award an Agreement by Geographical Areas of the United States. See table below for geographic breakdown:

RESPONDENT: Entity who submits a proposal to an RFP.

RESPONSIBLE: A Respondent is responsible if they are capable or qualified to perform the work.

RESPONSIVE: A proposal is responsive if it meets all of the requirements of the RFP.

SHALL, MUST, WILL: Indicates a mandatory requirement(s) that must be addressed. Failure to address these mandatory requirements will result in rejection of your proposal as non-responsive. E&I may, but is not required to, reserve the right to request additional information.

SHOULD: Indicates something that is recommended but not mandatory. If the Respondent fails to provide recommended information, E&I may, at its sole option, ask the Respondent to provide the information or evaluate the proposal without the information.

SOLE POINT OF CONTACT: The Contract Manager or designee to whom Respondents shall address any questions regarding the solicitation or award process. The sole point of contact shall be the arbitrator of any dispute concerning performance of the Contract.

SUCCESSFUL RESPONDENT: The Respondent(s) or individual(s) who are the recommended recipient(s) of the award of a contract under this RFP (also synonymous with "Payee," "Offeror," "Contractor," "Vendor," and "Supplier"). If a Respondent is a manufacturer, its certified dealers and resellers may also furnish products under the Contract; in choosing to do so, the dealers and resellers agree to honor the Contract and the term "contractor" shall be deemed to refer to them. Unless awarded the Contract as a direct Respondent, however, dealers and resellers are not parties to the Contract, and the Respondent that certifies them shall be responsible for their actions and omissions.

SUPPLIER: Indicates an entity that distributes/furnishes the products and or services of a company, all of its agents, and employees. For the purposes of this RFP, the terms Supplier and Respondent may be used interchangeably.