



Community Energy Planning Guide

with

Model RFP Template for Consultant Services*

August 2022

Disclaimer

*The model RFP template is intended to provide sample language for users to consider in the process of procuring a consultant for community energy planning. Users are responsible for determining the final content of any solicitation.

Introduction to Community Energy Planning

The New Jersey Board of Public Utilities created the Community Energy Plan Grant (CEPG) program to assist municipalities in developing community energy plans to meet the goals of the state's Energy Master Plan (EMP), *New Jersey's Energy Master Plan: Pathway to 2050*. The EMP established that community-level action is necessary to achieve the state's goal of 100% clean energy by 2050.

CEPG awards support municipalities in planning for energy resilience, renewable energy, and energy efficiency to work towards a better environment for all residents. CEPG awardees can utilize Sustainable Jersey resources to review and select strategies that meet the unique needs and opportunities in their communities to increase clean energy production, reduce energy use, and cut greenhouse gas emissions.

Municipalities participating in the CEPG program must utilize the [Community Energy Plan Workplan Template](#) developed by Sustainable Jersey and NJBPU to triage known practical and impactful strategies to reduce greenhouse gases and achieve a sustainable energy future. The Workplan Template and accompanying [Guide for Sustainable Energy Communities](#) offer guidance on high-impact initiatives that New Jersey municipalities can implement, enabling grant recipients to focus efforts on creating a specific timeline for implementing their selected initiatives.

Sustainable Jersey Resources for Community Energy Plans (CEP)

[Sustainable Jersey Guide for Sustainable Energy Communities](#)

Case studies and best practices of energy initiatives for the CEP

[Sustainable Jersey Community Energy Plan Workplan Template](#)

Workbook for selecting and prioritizing energy initiatives

[Sustainable Jersey Data Center](#)

Comprehensive energy data by municipality

Sustainable Jersey Model Community Energy Plan

Sample community energy plan (coming soon)

To develop the Community Energy Plan (CEP), municipalities may use grant funds to offset the costs of having staff complete the plan, or the municipality may work with a consultant. Before engaging the services of an outside consultant, the municipal team should review this Guide and the Community Energy Plan Workplan Template to carefully assess which initiatives might most benefit from the specific technical expertise that a consultant may be able to provide.

Example. If a municipality desires to complete Initiative 1.6 for siting EV charging infrastructure in the community, a consultant with specific expertise in EV Readiness Planning may be utilized.

Municipalities receiving a \$25,000 CEPG award are eligible for additional technical assistance from Sustainable Jersey. Send a copy of the municipal CEPG application to Sustainable Jersey info@sustainablejersey.com to get started.

Requirements for Community Energy Plan Grant Awardees

The BPU CEPG program requires:

1. Completion of the Sustainable Jersey Community Energy Plan Workplan Template
 - The municipality must complete one *Initiative Planning Template* form for each initiative selected. Blank *Initiative Planning Template* forms are provided in the [Workplan Template](#). Each selected initiative should identify the lead department(s), estimated timeline, assessment of current status, and next steps.
 - All initiatives not selected must include a rationale explaining why the initiative is not a good fit for the municipality at this time. This explanation can be typed directly into the Workplan Template fillable pdf.
2. At least one stakeholder meeting to review/develop the Community Energy Plan
3. A final Community Energy Plan adopted by municipal resolution

Community Energy Planning Process

Team Building

Create working group of municipal representatives to lead planning process. (elected representatives, administration, facilities, green team)

Community Profile and Energy Data

Compile community data* to help municipality prioritize energy initiatives. Resource: Sustainable Jersey Data Center

Community Energy Workplan Template

Review and prioritize energy initiatives. Identify lead department, timeline, etc. Resource: Sustainable Jersey CEP Workplan Template

Stakeholder Engagement

Plan stakeholder engagement process to collect community input on selection and prioritization of energy initiatives.

Community Energy Plan Adopted by Resolution

Use Community Energy Data and Workplan to create the CEP. Resource: Sustainable Jersey Model Community Energy Plan

*Community profile data and community energy use data for community energy plans are provided on the [Sustainable Jersey Data Center](#). The Sustainable Jersey Model Community Energy Plan (coming soon) Appendix provides the original source for all data and instructions on how to find the data on the Sustainable Jersey website.

Consultants in Community Energy Planning

The role(s) for consultants in community energy planning will depend on the needs of the municipality. If the municipality does not have capacity to manage the process, a consultant serving as project manager will be beneficial. If the municipality can manage all or some of the process, more funds are available for the consultant to bring technical expertise to undertake research to support planning for specific projects, such as EV readiness or microgrid feasibility.

As Sustainable Jersey is providing a model for the completed plan and data needed to prepare the plan, the development of a carbon footprint, GHG targets, and demographic profile for the municipality should, at most, constitute a small part of the scope of services for an RFP.

Before deciding to hire a consultant consider:

- Municipal capacity to complete all or some of the community energy plan with in-house staff and/or volunteer resources (green team or other community groups)
- Sustainable Jersey resources (model Community Energy Plan, Data Center, Guide to Sustainable Energy Communities, technical assistance)
- Initiatives that will require specific (outside) technical expertise

Developing a Scope of Services for a Consultant in Community Energy Planning

Below are two ways that consultants can be used in community energy planning.
Depending on municipal needs, the scope of services may include:

Consultant Manages Community Energy Planning Process

- Community engagement process
- NJBPU CEPG reporting
- Complete Community Energy Plan Workplan Template
- Create Community Energy Plan to be approved by governing body

Consultant Provides Technical Expertise for Specific Initiatives

Feasibility Study

- Review existing infrastructure and site conditions
- Provide cost estimates and cost-to-benefit analysis
- E.g., Microgrid Feasibility Study, Solar Feasibility Study*

Implementation Plan

- Cost estimates, site plans, etc. to make project “shovel-ready”
- E.g., EV Charging Infrastructure Plan, Fleet Electrification Plan

** Note: A basic solar assessment is included in the NJCEP Local Government Energy Audit.*

Sample Specifications to Include in RFP Scope of Service

The [Scope of Services \(Section 3\)](#) of the model RFP template contains sample specifications that the municipality can adapt to fit their needs.

Sample specifications address the categories below:

- A. Community Energy Plan Community Stakeholder Engagement Process
- B. Community Energy Plan Development
- C. Administrative Support (grant reporting, etc.)
- D. Implementation Plan/Feasibility Study for Specific Project

Engaging consultants for community energy planning is a balancing act between securing the assistance the municipality requires and keeping the cost of the project within budget.

If the municipality can manage all or some of the process of drafting the Community Energy Plan, there will be more funds available for planning specific projects.

Examples of Using Consultants in Community Energy Planning

Municipality A

After looking at the Community Energy Plan Workplan Template, “Municipality A” identified 10 energy initiatives for implementation in the near future. One of those initiatives requires a feasibility study before a determination to implement can be made. Specifically, a proposed e-Mobility project calling for electric shuttles to and from the train station, needs cost estimates and infrastructure planning by a transportation consultant. The municipality issues an RFP with a scope of work limited to the e-Mobility project.

Municipality B

“Municipality B” has limited staff capacity. The municipality decides to issue an RFP for a consultant to complete the Workplan Template, lead the stakeholder engagement process, and create the Community Energy Plan.

Municipality C

“Municipality C” reviewed the Community Energy Plan Workplan Template and other Sustainable Jersey resources and data and decided to use CEPG funds to offset the cost having existing staff complete the Community Energy Plan. Staff will also utilize the green team and other community organization volunteers.

Frequently Asked Questions

If the municipality already works with a consultant, can the municipality expand the consultant's existing scope of work to include Community Energy Planning?

No. Consulting services funded by NJBPU's CEPG must be billed separately from other consulting services used by the municipality.

Is a Competitive Bidding Process (RFP) Required?

Maybe. Talk to your municipal procurement representatives early in the project to determine if, and what type of, solicitation is required for the project and how best to use the Model RFP Template. Municipal policies may be different from state requirements.

New Jersey Bid/Quote Thresholds	
<i>Note: If the cost of a project is above the threshold, a competitive selection process is required.</i>	
Bid threshold with Qualified Purchasing Agent (QPA)	\$44,000
Quote threshold with QPA	\$ 6,600
Bid threshold without QPA	\$17,500
Quote threshold without QPA	\$ 2,625

Regardless of the procurement method used to select a consultant, understanding the different ways consultants can be used in community energy planning can help a municipality identify the most beneficial scope of consulting services for their Community Energy Plan.

Community Energy Plan Grant (CEPG) funds are to be used for planning purposes, not implementation of the selected initiatives.

Available funding sources for implementation should be identified as part of the planning process and included in the *Initiative Planning Template* forms found in the Workplan Template.

Model RFP Template

NOTE: Sections in *green italics* are suggested text and should be deleted before the RFP is issued. Download a fillable version of the Model RFP Template [here](#).

**REQUEST FOR PROPOSALS
FOR
<MUNICIPALITY NAME>
ENERGY-RELATED CONSULTANT SERVICES FOR
<MUNICIPALITY>'S COMMUNITY ENERGY PLAN**

1 GENERAL INFORMATION AND SUBMISSION REQUIREMENTS

1.1 <Municipality>, <County>, NJ is requesting proposals from consultants to provide support for the creation of <Municipality>'s Community Energy Plan. As a recipient of a Community Energy Plan Grant, the municipality is soliciting for *<state in plain language the municipality's needs, e.g., "project management for creation of the municipal Community Energy Plan" or "electric vehicle charging station infrastructure plan for Town Hall">*.

All submitted proposals for planning services shall be in accordance with the attached requirements.

1.2 The **RFP package** is available at <Location/URL> as of <date>.

Please submit proposals no later than <time and date> to the following address:

Name:

Name of Municipality:

Address of Municipality:

In addition to submitting a hard copy please submit an electronic copy of the full proposal to:

<Instructions for electronic submittal>

All inquiries should be directed to:

Name:

Title:

Address:

Telephone number:

Email:

1.3 All proposal prices submitted in response to this RFP must remain firm for sixty (60) days following the proposal due date.

1.4 The municipality reserves the right to cancel this RFP, or reject in whole or in part any and all proposals, if the Municipality determines that cancellation or rejection serves the best interests of the Municipality.

2 PROPOSAL REQUIREMENTS

Respondents shall provide a comprehensive proposal that includes, at a minimum, the following:

- A. Description of the consulting firm, its capabilities and capacity.
- B. Prior experience with community energy planning in the State of New Jersey.
- C. ***(For projects with scopes of work that include energy project research and planning, such as feasibility studies/implementation plans)*** Description of consultant's qualifications to prepare required planning documents, or description of any subcontractors consultant intends to engage for planning documents.
- D. Detailed description of consultant's plan to perform scope of services as set forth below.
- E. Proposed schedule for performance of work.
- F. A firm, fixed price for each of the lettered items listed in the scope of work.
- G. Name and qualifications of the individual who will be the project leader and point of contact, and any team members who will work on this project.
- H. Disclosure of any potential conflicts of interest the consultant, or any member of his/her firm, may have in performing the work.

3 SCOPE OF SERVICES

The Consultant will administer and provide technical oversight of <Municipality>'s Community Energy Plan in accordance with the guidance set forth by the New Jersey Board of Utilities, including:

The list of specifications in A-D below should be reviewed and amended to fit municipal needs.

- A. Community Energy Plan Community Stakeholder Engagement Process
 - 1. Work with municipality to identify and conduct outreach to community stakeholders;
 - 2. Assist municipality in creating a stakeholder engagement plan, including meeting schedule, agenda, and stakeholder input collection method; and
 - 3. Attend all stakeholder events and collect stakeholder input on the initiatives that should be considered for the community energy plan.
- B. Community Energy Plan Development
 - 1. Draft community profile section of Community Energy Plan.
Note: All of the community data required for the Community Energy Plan is available on the Sustainable Jersey Data Center.
 - 2. Assist municipality in completing Community Energy Plan Workplan Template;
 - 3. Draft workplan section of the Community Energy Plan;
 - 4. Provide draft Community Energy Plan for municipal review; and
 - 5. Finalize the Community Energy Plan for publication.
- C. Administrative Support
 - 1. Complete Community Energy Plan Grant reporting requirements; and
 - 2. Provide routine updates and attend meetings with Business Administrator and Municipal Council, as needed.

D. <Implementation Plan/Feasibility Study for specific project>

1. Consulting services for <specific project research and/or planning>

Example: feasibility study for municipal microgrid

2. Develop planning documents for <specific project description> including:

Modify list to fit the needs of the municipality.

- a. Report with cost estimates and cost-benefit analysis
- b. Implementation plan, for example: site plan drawing for EV charging installation
- c. Procurement guidance and creation of necessary procurement documents