

Village of Orland Park
RFP #017 - Water and Sewer Rate Study

	FINALISTS			REJECTED CANDIDATES			
	Municipal & Financial Services Group	Raftelis Financial Consultants, Inc.	Ehlers and Associates, Inc.	Baxter & Woodman, Inc.	Burns & McDonnell Engineering Company, Inc.	Horner Shifrin	Nelsnick Enterprises Inc.
Price	\$45,400.00 4	\$54,900.00 3	\$32,000.00 5	\$25,900.00 5	\$90,700.00 1	\$98,900.00 1	\$34,000.00 4
Qualifications	5 person team; 4 hands-on. Three acctg/financial ppl. One engineer. Manager - 7 yrs exp. Eng. - 36 yrs exp. Financial modeling person - 5 yrs exp. 4	4 person team, 3 will be hands-on. Project Director (PE) has 39 yrs experience; Project Mgr has 14 yrs 4	3 person team; 2 - MPA's, 1 - MBA. Two have experience with rate studies 3	3 person team; Two PE's One EIT. Two Hands-on. Project Manager (PE) has 23 yrs experience (engineering related) 3	6 person team; 4 hands on, one director (mba w. 35yrs exp.) and one liaison (PE w/ 30 yrs exp.) Others - 3 financial, one eng. From 3 - 24 years exp 5	6 person team; all PE's. One for each Utility (water, sewer, stormwater).3 separate companies/consulting firms. 2	One person has background in Civil Eng; Company is described as providing City Planning and Instructional Design services. 1
Service	1 kickoff meeting, 3 status meetings and a Village Board presentation. Training provided. 5	3 web meetings and 4 in-person meetings in the schedule-including workshops. Training provided 5	2 Board Meetings, 4 hours training 4	3 in-person meetings; 2	7 team meetings, 3 presentations, training provided 4	Unclear 1	5 in-person meetings; Training provided 3
Timeline	12 week timeline 5	Early August - November. 5	12-15 week schedule 5	Early August - November. 5	Early August - December 5	8 month schedule ending in the middle of April. 1	Proposed timeline begins early August & ends early November. 5
Experience	Matrix of recently completed or on-going rate studies provided. Includes Skokie, South Elgin, Batavia, Downers Grove, Winnetka, Effingham and Moline. 5	Registered Municipal Advisor.9 studies included in proposal that were done by the team (in part or whole).Saginaw, Naperville, St. Louis Sewer, Bloomington, Wichita, Flint, Junction City, Topeka 5	Registered Municipal Advisor. 5 projects cited where the team was involved, in part or in whole, in the study. New Lenox, Waukesha, Portage, Chanhassen and Edina. 5	The company has completed 40 studies over the past 11 years. Hoffman Estates, Morrison, Crystal Lake, Bensenville, Park Ridge and Elmhurst studies referenced 5	Matrix of rate consulting experience provided. 2 included in the proposal. 3	7 studies referenced as having been completed in the past 36 months. 2	5 rate studies completed in GA 1
Other	City of Batavia rate study included. Stormwater rate study experience presented is weak.Indicated that they could complete the study in the Village's timeframe. Draft model provided during the process. Engineer on staff to complement financial analysis.Familiarity with Village from previous rate study. 5	Over budget; draft Excel model provided during the process. Cost and consumption analysis; workshops for rates and pricing.Strong emphasis on presentation to key stakeholders - elected officials, staff, residents. 4	Stormwater study outside of the cost in the bid - can explore the basis for stormwater cost recovery. Separate analysis for operational vs. growth costs.Billing not to exceed leaves the possibility of reduced cost. 3	Engineering focus; No excel model provided 1	Way over budget; Analyze usage trends by customer class 1	Way over budget. Too complex - the opposite of easy to understand request in the RFP. Fixed/Variable cost approach. Change the stormwater charges to impervious area basis. 3	No rate study was included in the proposal as requested. 1
References	Village of Downers Grove - Used MFSG for 2010 Water Rate Study and 2013 Stormwater Rate Study. Stormwater rates were transitioned from a property tax basis to an impervious area basis. Strongly recommended MFSG. Liked their professionalism and responsiveness, felt that they did a great job of presenting to elected officials. Created Excel Model in 2010, which was used until recently, when MFSG was contracted to do a "model refresh" which updated the data and assumptions. 5	Junction City, MO - Contracted with RFC in 2014 to develop a 10 year business plan and Excel model for water and wastewater rates. Felt that RFC did a very good job communicating options to their elected officials. Junction City has had the excel model for 6 months, so they haven't used it much, but did feel that the model was easy to use. 5	Contacts used Ehlers for financial consulting, debt issuances; no users of Excel model. Village of New Lenox - Used Ehlers for a sanitary sewer rate study. Are still in development - will be presenting to their Board in August. Don't currently have an excel model. Found that Jon with Ehlers has an engineering background that helped to cover both engineering and financial issues. Ehlers has been very responsive to the Village. 3				
Total Points	33	31	28	21	19	10	15