



# Request for Proposal Market Research Services

***The Oklahoma Municipal Power Authority is an agency of the state of Oklahoma and as such is subject to and complies with the Oklahoma Open Records Act, 51 O.S. §§ 24A.1, et seq., and the Oklahoma Open Meeting Act, 25 O.S. §§ 301, et seq.***

**OKLAHOMA MUNICIPAL POWER AUTHORITY**

P.O. Box 1960 • Edmond, Oklahoma 73083-1960

Telephone # (405) 340-2500 Fax # (405) 359-1071 E-mail [marketresearch@ompa.com](mailto:marketresearch@ompa.com)

*Oklahoma Municipal Power Authority (OMPA) is a not-for-profit organization, established in Title 11, the Municipal Code of the Oklahoma statutes. OMPA was created for the purpose of providing an adequate, reliable and affordable supply of electrical power and energy to Oklahoma's municipally owned electric systems. The Authority presently serves 42 municipally owned electric systems in Oklahoma. As a consumer-owned public power entity, OMPA is owned by the member cities it serves.*

## BACKGROUND

The Oklahoma Municipal Power Authority (OMPA), an agency of the state of Oklahoma, is a public power agency which sells wholesale electricity to its 42 member cities across the state. The Oklahoma Municipal Power Authority requests proposals for a full-service market research firm to perform a marketing survey in 2023 to evaluate customer service, interest in programs, and future technology from a sampling of customers from each of OMPA's **42 member cities**. The purpose of the survey is to provide information to OMPA and its member cities relating to residential customer satisfaction, services, and potential market size and penetration of some renewable energy options, as well as price sensitivity information. OMPA uses the results of this survey to develop future programs and services, as well as identify areas that need improvement. OMPA is requesting proposals for one survey, with the option to extend the awarded contract for up to two additional rounds of surveys, for a total of three surveys over a five-year period.

An electronic copy of this RFP may be found at: [www.OMPA.com](http://www.OMPA.com)

Bids must be received by 4:00 pm CDST on April 19, 2023. Bids may be submitted electronically by email to [marketresearch@ompa.com](mailto:marketresearch@ompa.com), or as a hard copy to:

If by U.S. Mail:  
Palma Lough  
Oklahoma Municipal Power Authority  
PO Box 1960  
Edmond, OK 73083-1960

or

If hand-delivered or by delivery service:  
Palma Lough  
Oklahoma Municipal Power Authority  
2701 W. I-35 Frontage Road  
Edmond, OK 73013

OMPA will accept questions by email only to [marketresearch@ompa.com](mailto:marketresearch@ompa.com), regarding this RFP until 4:00 pm, CDST on April 11<sup>th</sup>. Responses to questions posed will be made available on the OMPA website.

Award of the contract will be made by May 11, 2023, and it is expected all work on the survey should be completed on or before November 1, 2023.

## **REQUIREMENTS FOR BIDDING AND INSTRUCTIONS TO BIDDERS**

### DEFINITIONS

1. "Addendum" means any addition, clarification, revision, or change to this RFP, as published on the OMPA website, which may alter the terms of this RFP. "Addendum" includes any response to questions posed to OMPA by prospective Bidders, as published on the OMPA website.
2. "Bid" means the formal proposal submitted by a Bidder in response to this RFP.
3. "Bid Documents" includes the RFP, the Requirements for Bidding and Instructions to Bidders, the Bid forms, the Specifications, the Contract, and any Addenda issued prior to receipt of Bids.
4. "Bidder" means a person or entity that submits a Bid in response to this RFP.
5. "Board of Directors" means the rule-making authority and governing body of OMPA as defined by 11 O.S. § 24-105(b).
6. "Contract" means the contract attached to this RFP.
7. "OMPA" means the Oklahoma Municipal Power Authority, a governmental agency of the state of Oklahoma, as established by the Oklahoma Municipal Power Authority Act, 11 O.S. §§ 24-101, *et seq.*
8. "Work" means the work that is the subject of this RFP and any Contract resulting from this RFP.

## SPECIFIC BID PROCEDURES AND REQUIREMENTS

1. Sealed Bids shall be submitted in accordance with the requirements of this RFP. The envelope, or if submitted electronically, the memo line, shall state: "PROPOSAL to the Oklahoma Municipal Power Authority for Contract: Market Research."

2. Form of Bid Submission. Bids may be submitted in an individually sealed envelope marked "Sealed Bid Market Research" and addressed to:

If by U.S. Mail:  
Palma Lough  
Oklahoma Municipal Power Authority  
PO Box 1960  
Edmond, OK 73083-1960

or

If hand-delivered or by delivery service:  
Palma Lough  
Oklahoma Municipal Power Authority  
2701 W. I-35 Frontage Road  
Edmond, OK 73013

Or

Bids may be submitted electronically by email to [marketresearch@ompa.com](mailto:marketresearch@ompa.com).

3. Modification, Withdrawal, or Cancellation of Bids.
- a. Bidders may withdraw, change, and resubmit their Bids by appearing in person prior to the time designated for the opening of the Bids. Upon presenting proper picture identification to OMPA, the sealed Bid will be returned to the Bidder. The withdrawn Bid shall not be opened by or otherwise disclosed to OMPA. Withdrawn Bids may be resubmitted prior to the time designated for the opening of Bids provided the resubmitted bid is in complete conformance with these Instructions to Bidders.
  - b. A Bid may not be modified, withdrawn, or canceled by the Bidder after the time and date designated for the opening of Bids.
  - c. No Bidder may withdraw a Bid for sixty (60) days after the actual date of the Bid Opening.
4. Early or Late Bids. Bids received more than ninety-six (96) hours, excluding Saturday, Sunday, and holidays, before the time set for the opening of the Bids and Bids received after the time set for opening of Bids will not be considered and will be returned unopened. OMPA is not responsible for delay of receipt of Bids.

5. Addenda for and Interpretations of Bid.
  - a. All clarifications, revisions, or changes to this RFP or any of the Bid Documents (collectively, "Addenda") will be posted to the OMPA website. All Bidders have a duty to monitor the OMPA website for Addenda. By submitting a Bid, Bidder represents that Bidder has reviewed the most recent version of the RFP and agrees to comply with the RFP and all Addenda.
  - b. Questions regarding this RFP may only be submitted in writing via email at [marketresearch@ompa.com](mailto:marketresearch@ompa.com) on or before 4:00 pm CDST on April 11, 2023. Responses will only be made in writing, posted to the OMPA website as Addenda. OMPA may or may not respond to any question asked.
  - c. All Addenda shall become part of the Bidding Documents.
6. Required Statements from Bidder to be Included in Bid. Each Bidder shall accompany his Bid with a written statement under oath disclosing the following information:
  - a. The nature of any partnership, joint venture or other business relationships then in effect or which existed within one (1) year prior to the date of such statement with any architect, engineer or other party to the Work;
  - b. Any such business relationship then in effect or which existed within one (1) year prior to the date of such statement between any officer or director of the Bidder company and any officer or director of any architectural or engineering firm or other party to the project; and
  - c. The names of all persons having any such business relationships and the positions they hold with their respective companies or firms. If no such business relationships exist, Bidder shall include a statement to that effect.
7. Bidder's References Must be Included in Bid. The Bidder is required to be experienced and an expert in the supply of the services described in the specifications and other documents attached hereto. Bidder must demonstrate expertise in the field of work described by the RFP. The Bidder shall include with its Bid a listing of at least current customers, comparable in size and scope, where the Bidder has performed similar services in the past 10 years. Bidder must include contact names, telephone numbers, company name, and location on the "Listing of Applicable Experience" form included with this RFP. By submitting this information, Bidder authorizes OMPA to contact any such reference, and to make any such investigations necessary to determine the ability of the Bidder to perform the work. Bidder shall furnish to OMPA all information and data for this purpose as OMPA may request.
8. Qualifications of Supervisory Personnel. Bidder shall include the resumes of all supervisory personnel that may be assigned to work on the Work. The Bidder shall demonstrate that trained and experienced supervisory personnel are available to support the work described in the RFP.

9. Bid Detail Requirements. The Bid must provide sufficient details for OMPA to perform a complete Bid evaluation. The Bidder shall comply with all requirements in the specification.

10. Bid Price Schedule: This project is to be submitted as a lump sum Bid. All Bids must include a completed copy of the attached Unit and Task Price Schedule with all prices and other information provided.

~~11. Bid Bond/Bid Security. A Bid must be accompanied by a certified check, cashier's check, an irrevocable letter of credit, or a bid bond duly executed by the Bidder as principal and having as surety thereon a surety company authorized and registered to do business in Oklahoma and listed in Federal Circular 570 ("Bid Security"). The Bid Security shall be equal to five percent (5%) of the total Bid and shall be deposited with OMPA as a guaranty. OMPA will retain the Bid Security for the three lowest responsible Bidders, as determined by OMPA. All other Bid Security will be returned to the other Bidders within three (3) days after the opening of Bids. The remaining Bid Security will be returned promptly after OMPA and the accepted Bidder have executed the Contract, or if no award has been made within sixty (60) days after the date of the opening of Bids. The Federal Circular may be found at: <https://fiscal.treasury.gov/surety-bonds/list-certified-companies.html>~~

12. Equal Opportunity Employment Requirements. OMPA is an Equal Opportunity Employer. OMPA does not discriminate in its hiring practices and requires its contractors to abide by all federal law applicable to discrimination. All Bidders shall acknowledge in the Bid Documents that they are Equal Employment Opportunity employers.

13. Bidder's Representations. Each Bidder, by making a Bid, represents that the Bidder has read and understands the Bid Documents (including all questions and clarifications related thereto) and the Bid is made in accordance with the Bid Documents.

- a. COVER LETTER (identifying the project)
- b. BID PROPOSAL FOR CONTRACT: Market Research
- c. BID SECURITY in the amount of 5% of the Bid, in the form of a Bid Bond or Cashier's Check, Certified Check, or Irrevocable Letter of Credit
- d. LIST OF SUBCONTRACTORS IF ANY
- e. EXCEPTION STATEMENT TO THE CONTRACT
- f. BIDDER'S DOCUMENTATION OF EXPERIENCE
- g. BIDDER'S RATES FOR ADDITIONAL WORK
- h. RATE QUOTATION SHEET
- i. CONTRACTOR'S CERTIFICATIONS

## BID OPENING AND PRELIMINARY REVIEW

1. Bid Receipt and Opening. There will be no public bid opening.
2. Preliminary Review. The Bids shall be initially reviewed for completeness and correctness. Any deficiency may be grounds for disqualifying the Bid. OMPA's review may include, but is not limited to, verifying that:
  - a. each of the Addenda is acknowledged in the Bid; and
  - b. each required document is included, properly signed, and if applicable, notarized.
3. OMPA Rejection of Incomplete Bids.
  - a. OMPA may reject any bid that OMPA considers to be incomplete. This may include, but is not limited to, Bids in which the Bidder submits another form of Contract in lieu of the attached Contract. Exceptions taken to the Contract terms and/or Bidding Documents may be cause for rejection of a Bid.
  - b. OMPA will reject any Bid that is not signed by the authorized representative of the Bidder, and/or does not contain the required documents, properly signed, and if necessary notarized, as required by the Bidding Documents.
  - c. Bids will become the property of OMPA upon submission.

## BID EVALUATION

1. Bid Evaluation by OMPA. After the preliminary review, the Bids will be reviewed and evaluated by the appropriate OMPA management and staff. The following items shall be reviewed:
  - a. Technical and Commercial Qualifications. Bids will be evaluated based on technical and commercial criteria applicable to the scope of work specified.
  - b. The Bid's evaluated price;
  - c. Demonstration of project experience; and
  - d. Conformance to commercial terms.
2. Bidder's Performance Capability. OMPA may consider the Bidder's demonstrated ability to perform the required work.
3. Disqualification of the Bidder. Any of the following may be grounds for disqualifying the Bidder:
  - a. More than one (1) Bid for the same work from an individual, firm, partnership, joint venture, or corporation under the same or different names.

- b. Evidence of collusion among Bidders, subcontractors, or material suppliers.
  - c. Lack of responsibility as shown by past work for OMPA judged from the standpoint of workmanship and progress.
  - d. Uncompleted work under any Contract with OMPA or any other entity.
  - e. Being in arrears on existing Contracts with the state of Oklahoma or OMPA, having defaulted or failed to comply with a previous State or OMPA Contract, or any other just and reasonable cause.
  - f. Certificate by the Oklahoma Human Rights Commission that the Bidder has engaged or is engaging in a discriminatory practice.
  - g. Any violation of OMPA or state of Oklahoma rules, or other information indicating that the Bidder is no longer responsible nor qualified to do business with the State.
4. Bid Comparisons. In comparing Bids, OMPA may consider not only the Bid prices, but also other factors that impact whether a Bidder is the lowest responsible bidder, including, but not limited to, efficiency, reliability, durability, economy of operation and maintenance, performance record of the Bidder, relative risk associated with the Bidder, and any guarantees associated with the Work.

## CONTRACT AWARD

1. Anticipated Contract Award. OMPA anticipates that, if a Contract is awarded pursuant to this RFP, the award will be made on or after May 11, 2023.
2. Contract Award and Execution.
  - a. Contract Award. The Contract, if any, shall be awarded to the lowest responsible Bidder as determined by the review of the Bids. Within five (5) business days after approval by the OMPA Board of Directors, the successful Bidder will be notified by OMPA of its selection and will be provided copies of the Contract to execute. The OMPA Board of Directors may grant a reasonable extension of the awarding period, by formal recorded action for good cause shown. The successful Bidder must execute the Contract within sixty (60) days of notification by OMPA. No Bidder shall obtain any property right in a Contract awarded under these provisions until the Contract has been fully executed by both the Bidder and OMPA.
  - b. Contract Insurance. The prevailing Bidder must provide proof of insurance with terms approved by OMPA, as described in the Contract.
  - c. Failure to Execute Contract. If the prevailing Bidder fails to execute the Contract within sixty (60) days and/or provide the required security and insurance to OMPA, the Bidder will be deemed to have abandoned the Contract, and the cost of republication of the Notice to Bidders, actual expenses incurred by



reason of the Bidder's default, and the difference between the low Bid of the defaulting Bidder and the amount of the Bid of the Bidder to whom the Contract is subsequently awarded, but not to exceed the amount of the certified check, cashier's check, bid bond, or irrevocable letter of credit may, at the discretion of OMPA, be forfeited to OMPA.

- d. Return of Bid Security upon Contract Execution. The Bid Security posted by the prevailing Bidder and the next two lowest responsible Bidders will be returned to those Bidders upon the prevailing Bidder's execution and delivery of the Contract and required bonds or irrevocable letters of credit, and insurance.

## OTHER PROVISIONS

1. Bid Ambiguities and Discrepancies. If the total price of the Bid is inconsistent with the unit price times number of units to be delivered, the unit price shall govern. If there is a variance between the amount in words and the figures, the amount in words shall govern.
2. Bid Protests. Bidder protests must be submitted in writing to OMPA within ten (10) days of OMPA's award of a contract or purchase order. Any Bidder who does not timely protest waives all claims arising from or related to the contract or purchase order, and the RFP process.
3. Tax Exempt Status. OMPA is exempt from the payment of any sales taxes, pursuant to 68 O.S. § 1356, and Article 10, Section 6 of the Oklahoma Constitution.
4. Applicable Laws. By submitting a Bid, the Bidder acknowledges that all applicable state laws, municipal ordinances, and the rules and regulations of all authorities having jurisdiction over construction of the project (in force and effect now, and as amended) shall apply to the Contract throughout, and they will be deemed to be included in the Contract. The laws of the state of Oklahoma shall apply to any dispute arising from or related to this Bid. The District Court of Oklahoma County, Oklahoma shall have exclusive jurisdiction to adjudicate any such disputes.
5. Drug-Free Workplace. OMPA seeks to provide a drug-free workplace for all of its employees. All contractors working on an OMPA facility shall comply with OMPA's drug-free workplace policies.
6. OMPA Reservation of Rights. OMPA reserves the right to reject any or all Bids, to waive any and all informalities, to evaluate Bids, and to disregard all nonconforming, nonresponsive, and/or conditional Bids.

## SCOPE OF WORK

The RFP requests bids to perform the following tasks:

*Sample Selection* – There are approximately 100,000 residential customers of OMPA member cities, but there is no consolidated directory listing available for the customers of OMPA's 42 member cities. The research firm will design a data collection method that will provide results that can be disaggregated to six geographic areas (Southwest Oklahoma, South Central Oklahoma, Central Oklahoma, North Central Oklahoma, Northwest Oklahoma, and Eastern Oklahoma). Historically, the survey has produced 365 completed surveys in the southwest area, 315 in the south-central area, 425 in the central area, 570 in the north central area, 320 in the northwest area and 320 in the east area. While the goal will be to ultimately increase sample size per region where feasible, the research firm will survey customers from all 42 member cities within the six different regions. OMPA will attempt to provide information about the member cities' customers (i.e., phone, email, etc.) so appropriate data collection can be obtained and verified. OMPA will work with the research firm to determine the feasibility of quotas for each of the 42 member cities.<sup>1</sup> The research firm will conduct screening at the beginning of each interview to select only customers buying electricity from member cities and to ensure the energy decision maker in each household is reached.

*Data Collection Methodology* – OMPA is open to the research firm's suggestions on data collection methodology since there is no consolidated population listing, and there are several screening questions required to establish eligibility to complete the survey. It is anticipated that the interview will run approximately 10 minutes in length. Prospective research firms should detail their capability to conduct data collection both digitally and by phone, including interviewer qualifications and training, CATI facilities, and interviewer monitoring ability. The research firm should also be capable of achieving a high response rate as demonstrated by results from previous surveys conducted by both digital and telephone methods.

*Questionnaire Design* – The survey questionnaire will be developed in conjunction with OMPA staff. Survey questions will be similar to those asked in a survey performed in 2021 (a sample copy of which is attached). Areas to be covered will include customer satisfaction, current and new service offerings, renewable energy (including prices) and emerging technologies. Questions around customer needs and desires, both met and unmet, will also be included. The instrument will consist primarily of close-ended questions, but some open-ended items will be included. The survey will consist of no more than 30 questions.

*Data Analysis* – The research firm will perform all analysis of survey data, including data entry and logic and consistency checks. Deliverables will include, but not necessarily be limited to, frequency distributions, cross tabulations, and multiple regressions.

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<sup>1</sup> Quota numbers may be subject to alteration, depending on data collection method and availability of customer contact information.

*Reporting* – The research firm will prepare one composite report (total findings) including executive summary and a narrative report of survey findings, six regional reports, seven large utility reports and thirty-five data frequency reports for each remaining individual utility. The research firm will also break out the results from the data collection methodology used (phone, email, etc.). These reports can be delivered to OMPA electronically. The research firm will also be responsible for an in-person presentation of survey results to the OMPA Board of Directors and staff, preferably at the January 2024 board meeting, and for providing the presentation package for subsequent use by OMPA staff in presentations to individual member cities. Comparisons to previous survey results for up to 30 questions and ability to benchmark against regional and national public power utilities must be included in the report and presentation packages; OMPA will provide previous survey results in electronic and/or hard copy format.

*Qualifications* – Research firm must have 5 years of experience working with 35 quota groups or larger. Research firms should detail their experience in conducting customer needs and new product research, including any case studies or comparable studies with both utility and non-utility clients. Biographical information about proposed key project personnel must be provided. Research firm must provide a quality assurance procedure and references. Research firm must have errors and omissions insurance.

*Subcontracting* – Any proposed subcontracting of specific survey tasks should be clearly detailed, and information about subcontractor firm qualifications must be furnished.

*Quality Assurance* – The research firm’s approach to quality should be described particularly as it relates to interviewer training, interviewer monitoring, data entry, etc.

The successful Bidder will be required to sign and abide by a Non-Disclosure or Confidentiality Agreement with respect to receipt of confidential customer information.

## **COST PROPOSAL**

The cost proposal should state the cost to perform the tasks outlined above. Bidders may provide alternate methods of obtaining information and the costs associated with each method. Bidder should provide the cost to perform a survey in calendar year 2023 (completed by November 1, 2023), and the cost to perform each additional survey in 2025 and 2027.

**PROPOSAL TO THE OKLAHOMA MUNICIPAL POWER AUTHORITY FOR CONTRACT  
PROJECT:  
RESEARCH SURVEY**

MADE BY: \_\_\_\_\_

Business Address: \_\_\_\_\_

City: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ State: \_\_\_\_ Zip Code: \_\_\_\_\_

Fax Number: \_\_\_\_\_

E-Mail: \_\_\_\_\_

The Bidder named above hereby tenders its Bid and declares that the only person(s) or entity(ies) interested in this proposal is or are named above; that the Bid is made without collusion with any other Bidder and is in all respects without collusion or fraud. The Bidder further declares it has examined the pro forma contract, the specifications and the contract drawings referred to, all Bidding Documents, and has read the attached "REQUEST FOR PROPOSAL, REQUIREMENTS FOR BIDDING AND INSTRUCTIONS TO BIDDERS"; and agrees to furnish all the materials necessary or proper to carry out such contract in the manner, on the terms, and under the conditions set forth therein and in the specifications, and to perform all work in accordance with the terms of this Contract, at Contractor's bid price, with a total Not-to-Exceed bid price of:

\_\_\_\_\_

Note: If this Bid is made by an individual, it shall be signed with his/her usual business signature, with his/her business address and place of residence; if by a firm, the co-partnership name shall be signed by a member of the firm and the name and address of each member shall be given; and if by a corporation, it shall be signed by a duly authorized officer, with the corporate name attested by the corporate seal, and the business address of the corporation shall be given.

Signed: \_\_\_\_\_

(Seal)

## **LISTING OF APPLICABLE EXPERIENCE**

## **LIST OF SUBCONTRACTORS**

## **EXCEPTION STATEMENT CONTRACT PROJECT: RESEARCH SURVEY**

This part of the proposal must be completed even if no exceptions are stated. Attach additional pages if required. If no exceptions, state "NONE".

## **NOTICE OF SPECIFICATIONS CONTRACT PROJECT: RESEARCH SURVEY**

The binding and mandatory Specifications applicable to this RFP are attached to the RFP as Attachment A and are hereby fully incorporated by reference.

By executing this form, Bidder acknowledges that Bidder has fully and completely examined the Specifications, the Bidding Documents, and any questions or clarifications related thereto, and agrees that any work arising from or related to this Contract must be performed in full compliance with each of these terms.

Signed: \_\_\_\_\_



## UNIT AND TASK PRICE SCHEDULE