

**REQUEST FOR PROPOSALS
GUARANTEED ENERGY SAVINGS CONTRACT**

Meridian Community Unit School District #223
207 W Main Street
Stillman Valley, IL 61084

INTRODUCTION

The Board of Education of Meridian Community Unit School District #223 (the "District"), Ogle County, is requesting qualified providers to propose innovative solutions and Energy Conservation Measures through a guaranteed energy savings contract. These proposals shall include: (a) the implementation of a facility audit, data collection, and other related analyses preliminary to the undertaking of Energy Conservation Measures; (b) the evaluation and recommendation of Energy Conservation Measures; (c) the implementation of one or more Energy Conservation Measures; and (d) the implementation of project monitoring and data collection to verify post-installation energy consumption and energy related operating costs pursuant to 105 ILCS 5119b-1 et seq. This RFP is issued on the following date pursuant to as defined in Section 1.4 of Article I 9b which provides for a negotiated procurement.

OpTerra Energy Services participated in the preparation of these specifications issued by the District pursuant to this Request for Proposal.

Date issued: November 9, 2015

Proposed Project Calendar

Issuance of RFP	November 9, 2015
Submission of Proposals and Opening	December 9, 2015 Noon
Selection of Qualified Provider	December 17, 2015

Upon selection of the Qualified Provider by the District, the District will negotiate and execute the Guaranteed Energy Savings Contract with the selected Qualified Provider.

Please provide 1 electronic copy of your response. All proposals shall be sealed and received in the following office no later than **Noon on December 9, 2015**

Jon Mickle
Meridian Community Unit School District #223
207 W Main Street
Stillman Valley, IL 61084

If there are any requests for public information or site visitation, please contact Jon Mickle via phone at (815) 645-2230 or via fax at (815) 645-4325 on or before November 16, 2015.

PLEASE NOTE THAT NO EXTENSIONS WILL BE GRANTED and any contact with the Administration and/or Board of Education during the RFP process will be grounds for immediate disqualification of the firm.

Minimum Requirements for Proposal

- A. Provide comprehensive energy services and innovative solutions for the District, which may include the installation of energy savings equipment and material. The specific nature of this equipment and material will be left up to the Qualified Provider and may be based upon the Qualified Provider's understanding of the District's needs.
- B. Provide a more comfortable environment for building occupants. This may include repair or modernization of mechanical, electrical, plumbing, building envelope, environmental systems and classroom, office and/or administrative areas to maximize energy and operational efficiencies. The specific nature of repair or modernization will be left up to the Qualified Provider and may be based upon the Qualified Provider's understanding of the District's needs.
- C. The Qualified Provider will provide a financial package that will be customized to meet the financial requirements of the District.
- D. A savings guarantee will be offered as part of the Qualified Providers proposal in accordance with 105 ILCS 5119b-1 et seq. The savings in energy and operating costs are guaranteed to cover the cost of the program.
- E. If actual savings fall short of the guaranteed savings, the Qualified Provider will reimburse the District for the difference.
- F. It is preferred that the Qualified Provider demonstrate successful implementation of at least twelve similar performance contracts within the last ten years, for Illinois public schools. Please provide contacts for all projects in Illinois. See Section A.
- G. If a proposal includes any proprietary data or information that the respondent does not want disclosed to the public, such data or information must be specifically identified as such on every page where it is found. Respondent should be aware that the District is subject to the Illinois Freedom of Information Act and cannot guarantee that any document provided by a respondent will be considered as exempt from public disclosure under such Act.
- H. Qualified Provider shall provide evidence that it is a "qualified provider" as that term is defined in 105 ILCS 5119b-1 et seq and shall provide evidence as to whether it is an accredited Energy Service Provider (ESP) by the National Association of Energy Service Companies (NAESCO) and provide documentation to this fact.
- I. Qualified Provider shall provide evidence that it has at least one full-time employee in the Illinois local office that is a LEED[®] AP (LEED[®] Accredited Professional) and provide documentation to this fact.
- J. By submitting a proposal, each Qualified Provider agrees, that if awarded the contract, the Qualified Provider shall comply with criminal history background requirements on its employees who are working on District property, if required under Illinois law.
- K. By submitting a proposal, each Qualified Provider agrees that, if awarded the contract, it shall comply with the provisions of the Prevailing Wage Act (820 ILCS 130/0.01 et seq.) and each law identified in the 105 ILCS 5119b-1 et seq.

- L. By submitting a proposal, each Qualified Provider agrees to furnish a Performance Bond and Payment Bond in the amount of one hundred percent (100%) of the Contract Sum. Owner requires that the bond surety must carry an A.M. BEST rating of A.
- M. The successful proposer agrees to furnish and maintain, for the duration of the contract, insurance for claims against injuries to persons and damage to property which may arise from or in connection with any work under the contract, including, without limitation, workers' compensation insurance, employers' liability insurance and commercial general liability insurance with a limitation of \$1,000,000. All insurers shall be licensed by the State of Illinois and rated B+:VIII or better by A.M. Best.
- N. The successful proposer agrees to indemnify and hold harmless the District, its Board Members, employees, officers and officials, from and against all suits, actions or claims arising out of damages to property or persons due to the negligent acts or omissions of the Qualified Provider or its subcontractors related to the performance of the work.
- O. The District is very interested in working with a company whose focus is based primarily on Guaranteed Energy Projects. Indicate your firm's revenue as a percentage of the following:
 - Guaranteed Energy Projects: _____%
 - Equipment Manufacturing: _____%
 - Service and Maintenance: _____%
 - Bid and Spec: _____%
 - Other: _____%
- P. The District is very interested in working with a company that provides comprehensive coverage at every step in the process. Please indicate whether or not the company is committed to dedicating full-time Project Management, Construction Management and other staff at each stage.

Proposal Format

The Proposal must be submitted in the three section format (A, B, and C) outlined in this section. Each proposal will be reviewed to determine if it is complete prior to actual evaluation. The District reserves the right to eliminate from further consideration any proposal deemed to be substantially or materially unresponsive to the requests for information contained herein.

At a minimum, each submitted proposal **MUST** contain the following information.

- ✓ Executive Summary
- ✓ Experience and Qualifications of the Qualified Provider
- ✓ Annual Financials of the Qualified Provider
- ✓ Resumes of Key Personnel
- ✓ Proposed Scope of Work
- ✓ Project Management Capabilities
- ✓ Proposed Project Cost and Savings

A. EXPERIENCE AND QUALIFICATIONS

Provide a description of the Qualified Provider including the following:

1. The Qualified Provider's experience with energy and energy related services.
2. Provide evidence as to whether the Qualified Provider is an accredited Energy Service Provider (ESP) by the National Association of Energy Service Companies (NAESCO) and provide documentation to this fact.
3. It is preferred that the Qualified Provider demonstrate successful implementation of at least twelve similar performance contracts within the last ten years, for Illinois public schools. Please provide contacts for all projects in Illinois.
4. Resumes of all key project personnel, including projects in which they have participated throughout their career at the current company (may be included in the appendix)
5. Description of how the Qualified Provider will insure and bond the project.
6. Include the most recent financials for the Qualified Provider (may be included in the appendix)

B. SCOPE OF WORK DESCRIPTION

Section B should contain the following information about the respondent's technical approach to meeting the District's comfort, energy efficiency & operating cost reduction objectives:

1. List of specific innovative conservation measures the respondent proposes to implement.
2. Include a section explaining each of the innovative conservation measures in some level of detail.
3. Additional information about the respondent's technical approach to the project may be included in this section.
4. Describe how the Qualified Provider would manage the project
5. Describe "on-site" construction management services.
6. Proposals must include a schedule indicating how the project will be completed on a timely basis.

C. PROJECT COST AND SAVINGS

Section C of the proposal should contain the following information about the financial terms of the proposed transaction.

1. The Total Guaranteed Project Cost for the Implementation of the Improvements should be included within this section.
2. Information about the Qualified Provider's projections as to total annual savings, payments to the respondent, and the net benefit to the District from the proposed transaction (cash flow analysis).
3. A description of important financial terms should be included in the proposal. This section must include:
 - a) Type and source of financing.
 - b) Interest rate (including any associated annual fees) estimated at the time of submittal.
 - c) The frequency of these payments.
 - d) The term of the proposed agreement.
 - e) A guarantee of energy savings on an annual basis.
 - f) Any other terms or information relevant to the financial aspects of the proposed transactions.
4. A description of the method to be used to measure energy savings achieved in the building through the efforts of the Qualified Provider should be included within this section.

Evaluation Criteria

Each proposal will be evaluated by the following criteria:

- A. Experience and Qualifications 45%
 - Experience and Qualifications of Project Team 25%
 - Experience with Illinois K-12 School Districts 20%

- B. Scope of Work 40%:
 - Technical Approach 20%
 - Comprehensive Project and Construction Management Approach 20%

- C. Project Cost and Savings 15%:
 - Financial Approach and Guarantee 15%

The District reserves the right to reject any and all proposals and/or waive any informality, irregularity or defect in any or all proposals and to accept that proposal which in its opinion is in the best interest of the District. Any such decision will be final.

All proposals shall be deemed final, conclusive and irrevocable. Once opened, no proposal shall be subject to correction or amendment for any error or miscalculation. No proposal shall be withdrawn without the consent of the District after the date and time established for their receipt. All proposals shall be valid for a minimum of 60 days after the date established for their receipt. Providers must satisfy themselves, upon examination of these requirements, as to the intent of these requirements. After the submission of the proposal, no complaint or claim that there was any misunderstanding in regard to the proposal will be entertained from any party.

Attachments to this RFP

Copy of floor plan for each building
Copy of one recent gas, electric and water bill for each building
No energy audit was conducted

Facility Owned by the District	Building Age	Building Area (Square Feet)	Building Address
Stillman Valley High School	1974 (addition in 2001)	122,788	425 South Pine Street Stillman Valley, IL 61084
Meridian Junior High School	1938 (additions in 1957 & 2001)	83,552	207 W Main Street Stillman Valley, IL 61084
Highland Elementary School	1963 (additions in 1967, 1996 & 2001)	40,877	410 S Hickory Street Stillman Valley, IL 61084
Monroe Center Elementary School	1967 (additions in 1974, 1996 & 2001)	52,935	17500 Highway 72 Monroe Center, IL 61052