

Monroe School District #70

Request For Proposal (RFP) For Guaranteed Energy Savings Contract Project

**Monroe School District #70
5137 W. Cisna Rd.
Bartonville, IL 61607**

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GUARANTEED ENERGY SAVINGS CONTRACT

ESTIMATED TIMELINE

Monroe School District #70

<u>Date</u>	<u>Action Item</u>
1/5/15	RFP is posted on the Capital Development Board website.
E-mail Mr. Reiley	Walkthroughs of District facilities
2/3/15	Proposals are received at Administration Building (2pm).
2/9-2/13	Interviews-(if necessary)
2/19/15	Board approves the selection of Qualified Provider recommended by Administration
TBD	Board approves contract with the Provider.

Legal notifications/announcements for issuing RFP

- The requests for proposals (RFP) shall be announced in the Illinois Procurement Bulletin and through at least one public notice, at least **30 days** before the proposals are due. Posting an RFP on the Illinois Procurement Bulletin requires the public entity to send an email with an attachment of the RFP document to Janet.Blanchard@illinois.gov
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Request for Proposals for a Guaranteed Facility Improvement Program

"Notice is hereby given that Monroe School District #70 is requesting Qualified Providers to propose energy conservation measures through a guaranteed facility improvement contract on a performance contracting basis. The District's objective in issuing this Request for Proposal (RFP) is to provide a competitive means in which to select a single qualified provider of a Guaranteed Energy Savings Contract. The contract shall follow the requirements of Article 19b of the School Code of the State of Illinois – "School Energy Conservation and Savings Measures."

Proposals will be received no later than February 3rd, 2015 at 2:00pm, at the District office, 5137 Cisna Rd., Bartonville, IL 61607. EXTENSIONS WILL NOT BE GRANTED. The District is requesting (7) sealed copies and (1) electronic copy of the proposals which will be publicly opened and announced immediately following the proposal due date and time. Proposals will be in accordance with said Article 19b of the School Code and the RFP guidelines. For more information, contact Darrick Reiley, by E-Mail only, at dreiley@monroe.org.

The successful provider shall be required to submit a 100% Performance and Material Payment Bond upon award of Contract along with a Certificate of Insurance. The District may elect to implement similar facility improvements to those proposed, throughout the duration of the contract with the Qualified Provider pursuant to the contract.

The District reserves the right to reject any and all proposals and to be the sole judge of the value and merit of the proposals offered. Such decisions shall be final. Failure to meet any of the "required" criteria will result in automatic rejection of the proposal.

By order of the Monroe School District #70.

- Sealed proposals must be opened by a member or employee of the District at a public opening. Each entity submitting a sealed proposal must receive at least **13 days** notice of the time and place of the opening
- The District shall select the qualified provider that best meets the overall needs of the District
- The District shall provide public notice of the meeting at which it proposes to award a guaranteed energy contract. The public notice shall be made at least **10 days** prior to the meeting

In accordance with the Illinois School Code Article 19B-3, we disclose that Performance Services, Inc. participated in the preparation of these specifications.

I. PROPOSAL CONTENT & FORMAT

Monroe School District #70 (District) requests proposals for the implementation of energy conservation measures, repairs and replacement services at Monroe School District #70 on a Guaranteed Energy Savings basis. The District's objectives in issuing this Request for Proposal are to provide a competitive means in which to select a single Qualified Provider (state certified guaranteed energy savings company) to perform the implementation of a guaranteed savings contract. The contract shall follow the Illinois School Code and the following RFP format. Qualified Providers must submit Seven (7) sealed copies and one (1) electronic copy of their proposals.

Proposals must be submitted in the format outlined in this section. For each proposal a checklist will be used in reviewing the proposal 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.

A. Table of Contents

Responses shall include a table of contents properly indicating the section and page numbers of the requested information.

B. Executive Summary

Responses shall include a concise abstract stating the respondent's overview of the project. Project pricing/breakdown must be included in the summary.

C. Company Profile

This section should include the following information on the Qualified Provider.

1. ESCO Information- Complete Exhibit A. ESCO Information Form, provided.
2. Resumes of all key project personnel
3. References- List completed Guaranteed Energy Savings Contracts (GESC's) where similar solutions to those proposed for this project have been implemented in the last three (3) years.
4. Drawings and Equipment List – It is the expectation of the District, the successful ESCO will provide detailed engineered drawings and equipment details for all contracted work, prior to final contract and implementation. Provide a sample of the drawings and equipment list that will be provided.

D. Technical Approach

Section D should contain the following information about the respondent's technical approach to meet the District's energy efficiency, operating cost reduction and comfort objectives.

1. **Needs & Solutions:** Include a “Needs & Solutions” section explaining facility needs and solutions the Provider recommends for all proposed improvements.
2. **Scope of Work:** Proposals may include any and all improvements the Provider feels would be of benefit to the District as part of this RFP response. All equipment is assumed to be new and complete. Solutions based on rebuilding or replacing parts will not be accepted. Improvements should be identified for the specific school where the Provider identifies needs and appropriate solutions.
3. **Engineering Approach:** Describe your firm’s approach to the technical design of this project.
4. **Energy Engineering:** Provide a detailed explanation of how the Provider intends to calculate energy savings and what types of guarantees will be offered for each facility improvement and the methodology to be used for measurement and verification (utility bill analysis, actual measurements and stipulated savings and the cost of each option).
5. **Contractor Selection:** Described the process the Provider utilizes to obtain their contractors and what criteria will be used to make the contractor selections.
6. **Equipment Selection:** Described the process the Provider utilizes to obtain the equipment to be used on the project and specifically what criteria will be used to make equipment selections.
7. **Installation Approach:** Describe how the Provider intends to implement the installation phase of the project in terms of approach, priorities, philosophies, timelines, change-orders and commissioning
8. **Commissioning:** Describe, in detail, the commissioning processes the Provider intends to utilize to commission the building for the learning environment and energy efficiency. Provide actual documents for past projects where a similar approach was utilized.
9. **Performance Assurance:** Described in detail the performance assurance processes the Provider intends to utilize to insure the building operates at peak performance both at the completion of the installation phase and throughout the contract term. Provide actual guaranteed savings reports from past projects where this same approach was utilized showing how both energy and operational savings were calculated.
10. **Additional Information:** Any additional information about the Provider’s technical approach to the project may be included in the proposal.

E. Financial Aspects

Section E should contain the financial components of the proposed work as identified below.

1. **Pricing:** Describe in detail the process the Provider intends to utilize to obtain the best prices for the District both initially and if additional work is required. Explain the benefits of this approach.
 - a. Complete the ***Fee Schedule Section of the Open Book Model (Exhibit B)***
 - ◆ The Percentages Listed in this section will be viewed as Mark-up, not Margin percentages. The percentages listed in this section will constitute the maximum amounts added to any work performed. All Mark-Ups (including Overhead and Profit) will only be calculated on the Sub Total.
 - ◆ The successful ESCO will be expected to provide all pricing for contracted work utilizing the Open Book Model Form.
 - b. Include the estimated cost and guaranteed energy savings amount for all proposed improvements.
 - c. Provide the Measurement and Verification Cost for the recommended facility improvements. ****Respondents must provide an option for utilizing the Option “B” approach (based on IPMVP standards) for savings guarantee for all electrical savings associated with mechanical savings, and a yearly cost for the Measurement & Verification associated with this option. Additionally, Respondents must provide an option for utilizing the Option “C” approach (based on IPMVP standards) for savings guarantees for ALL gas savings guarantees. Only Lighting, Windows, and Roofing are excluded.***
 - d. Provide the pricing model for any future work.
2. **Energy Savings:** Explain how the Provider intends to maximize energy savings and the advantage to the Provider’s approach. Include in this proposal the Provider’s Guarantee Energy Savings Contract for the base solution.
3. **Project Funding:** Project funding will be developed by the school after selection of the provider.
4. **Required Contract Language:** The agreement between the district and the successful ESCO must include language that ensures the district receives all financial benefit from any savings gained from the final contract compared to the RFP response pricing. ****Provide a contract with the language included.***
 - a. It is understood the ESCO will provide copies of all final contracts with all subcontractors and suppliers utilized for the project. Upon final completion the ESCO shall provide a detailed accounting of total amounts paid to all subcontractors and suppliers including Lien Waivers.

F. Implementation Plan

1. Include in your proposal an implementation plan including dates describing how the qualified provider intends to execute the project that meets the timelines set forth in these specifications.
2. Provide a staffing plan, identifying key project management personnel and their roles.
3. Describe in detail your approach to project management for this energy conservation program, including a staffing plan identifying key project management personnel.

II. EVALUATION CRITERIA

The District may reject any proposals that do NOT meet the minimum criteria described in this RFP and/or identified in the Checklist, and may at their discretion deduct points from the scoring rubric if the RFP format is not followed. For proposals meeting or exceeding the minimum criteria, the District will rate each proposal based on the weighted scoring criteria shown below. The District intends to award a contract to the Provider offering the best value proposal. The best value proposal will be the proposal with the highest score based on 100 total points.

A. Experience and Qualifications (20 points)

1. Refer to I-C for criteria.

B. Technical Approach (30 points)

1. Refer to section I-D for criteria.

C. Financial Consideration & Net Economic Impact (30 points)

1. Refer to section I-E for criteria.

D. Performance Guarantees (20 points)

1. Value offered by the energy savings guarantee
2. Methodology and value of proposed measurement and verification plan.

EXHIBIT A – ESCO Information

General Firm Information

Firm Name:

Illinois Mailing Address:

Physical Address:

Corporate Address:

Contact Person(s):

Former Name(s) of Firm:

Tax Identification Number:

Length of time known by this name:

1. Type of Firm:

2. Federal Employer Identification Number:

3. Year Established:

4. Three year Summary of Contract Values for Energy Related Services:

a. 2013 – \$

b. 2012 – \$

c. 2011 – \$

Estimate of total value for all energy related contracts that are currently in force:

5. Corporate Background

a. How many years has your firm been in business under its present name?

b. How many years has your firm been providing energy-efficiency related business?

c. How many years has your firm offered performance-contracting services?

d. Indicate the number of energy savings performance contracts actually implemented by your firm.

e. Is your firm currently involved in any arbitration and/or litigation related to performing energy services or implementing energy projects? If Yes, please describe.

7. Project Professional Services Information

a. Name of Design Engineer(s) and Company providing the design engineering for this project. Include their PE numbers. Must be professional engineers registered in the State of Illinois.

b. Name of Engineer and Company who will be the engineer of record for the project

EXHIBIT B – Open Book Model Form

Subcontractor	ECM #	ECM #	ECM #	ECM #	ECM #	ECM #	ECM #
Trade Subcontractor							
Company A							
Company B							
Company C							
Trade Subcontractor							
Company A							
Company B							
Company C							
Trade Subcontractor							
Company A							
Company B							
Company C							
Trade Subcontractor							
Company A							
Company B							
Company C							
Trade Subcontractor							
Company A							
Company B							
Company C							
Trade Subcontractor							
Company A							
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Company C							
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Company A							
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Company B							
Company C							
Trade Subcontractor							
Company A							
Company B							
Company C							
Trade Subcontractor							
Company A							
Company B							
Company C							

Subcontractor	ECM #	ECM #	ECM #	ECM #	ECM #	ECM #	ECM #
Equipment Type							
Company A							
Company B							
Company C							
Equipment Type							
Company A							
Company B							
Company C							
Equipment Type							
Company A							
Company B							
Company C							
Equipment Type							
Company A							
Company B							
Company C							
Equipment Type							
Company A							
Company B							
Company C							
Equipment Type							
Company A							
Company B							
Company C							
Misc. Construction Costs							
Sub-Total							
FEE SCHEDULE SECTION							
Add. Costs Assoc w/ ECM							
Engineering							
Project Management							
General Conditions							
Risk							
Warranty							
Bond							
Any Additional Costs Not Listed Above							
Overhead							
Profit							
Total Price	\$	\$	\$	\$	\$	\$	\$

*Provide all Subcontractor and Equipment Pricing for Each ECM proposed. Copy this form for additional space. Add Costs (Engineering, Project Management, etc.) and costs not listed, should be provided in the form of a percentage of mark-up.

**Should your firm be selected, any savings from these initial prices shall be given to the district and reduce the final contract amount.

EXHIBIT C – Cash Flow Analysis Form

Base Scope Includes

ECMs: _____

District:

Date

Base Solution (To Include ECM(s) # _____)	\$
Total Financed Cost	\$
Total Savings Over Term of Guarantee	\$
Rate of Financing	%
Term of Guarantee	Yrs
Annual Utility Rate Escalation	%
Annual Operational Savings Escalation	%
Estimated Grant Incentives	\$
Amount of Stipulated Savings for Lighting, Windows, or Roofing	\$
M&V Cost for Stipulated Savings Guarantee	\$
Amount Guaranteed Using Option B & C as stated in section E1c	\$
M&V Cost for Option B & C Guarantee	\$
Options Used for M&V Cost	\$
Net Positive Cash Flow	\$
Additional Info:	\$

Year	Annual Energy Savings	Annual Operational Savings	Total Program Savings	Annual Program Cost	Annual M&V Costs	Annual Total Cost	Annual Cash Flow
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
Totals:	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Additional Savings In Cost

Avoidance:

1		
2		
3		

RFP CHECKLIST:
(To be Completed by The District)

<i>Minimum Criteria:</i>	Provided	
	Yes	No
1) If Mandatory, attended the Pre-Bid Meeting		
2) Four Copies of Proposal Submitted		
3) Exhibit A Completed		
4) Exhibit B Completed		
5) Exhibit C Completed		
6) Schematic Drawings Provided		
7) Equipment Material Table Provided		
8) M&V Criteria, per section E1c (in Financial Aspects)		
9) Contract Provided with Required Language		

<i>Additional Requirements:</i>	Provided	
	Yes	No
1) All Sections Provided:		
Section A, Table of Contents		
Section B		
Section C and All Criteria		
Section D and All Criteria		
Section E and All Criteria		
Section F and All Criteria		