

RIDGEWOOD HIGH SCHOOL DISTRICT 234



Request for Proposal Energy Performance Contracting Project May 27, 2015

11:00 A.M.

NORRIDGE, ILLINOIS

**RIDGEWOOD HIGH SCHOOL
DISTRICT 234**
7500 W. Montrose Avenue
Norridge, IL 60706
(708) 456-4242

Request for Proposal – Energy Performance Contracting Project

Ridgewood High School District 234 is proposals for the above named project. Sealed proposals are due by **Wednesday May 27, 2015 at 11:00 A.M.**, at which time they will be publicly opened and read aloud. Proposals are to be submitted to:

Ridgewood High School District 234
Attn: Tim Keeley, Assistant Superintendent for Finance and Operations
7500 West Montrose Avenue
Norridge, Illinois 60706

Failure to comply with these with proposal documents and submit all required forms may lead to disqualification of your proposal.

We look forward to your participation in this proposal.

Sincerely,

Tim Keeley
Assistant Superintendent for Finance and Operations

PROPOSAL GUIDELINES

1. Ridgewood High School (the "District") is presently soliciting proposals for an Energy Performance Contract Project. Proposals placed in a sealed envelope bearing the title of the proposal and the name of the vendor, shall be addressed and delivered to Ridgewood High School, District 234, Tim Keeley, Assistant Superintendent for Finance and Operations, 7500 W. Montrose, Norridge, Illinois 60706 any time prior to, but no later than 11:00 AM., Central Time, Wednesday May 27, 2015. Proposals received after this deadline, will not be considered and will be returned unopened.
2. The submission of a proposal by a contractor will be construed as an indication that it is fully informed as to the extent and character of the service and materials required and can offer the services and materials satisfactorily in compliance with the specifications. The items and criteria set forth herein are minimal standards and statements, and shall be provided for in proposal submissions and contractual arrangements.
3. Please be informed that, should a contractor find discrepancies and omissions in the specifications or instructions, or should he be in doubt as to their true meaning, he shall at once notify the Assistant Superintendent for Finance and Operations. The Assistant Superintendent for Finance and Operations will in turn clarify such specifications and notify each and every person who has received specification documents as to the true interpretation thereof. *No oral interpretation by Ridgewood Community High School District 234 will be binding; only instructions in writing will be deemed valid.* The District shall not be held responsible for oral instructions to contractors.
4. The District reserves the right to accept or reject any or all proposals, and to waive technicalities, if deemed to be in the best interest of the District. Award will be made by the District and shall be based on the fees, experience, reputation and the financial stability of the contractor as well as compliance with the format, terms, and conditions of this Request for Proposals. The District encourages proposal submissions from MWBE firms.
5. Upon selection of a proposal winner, Contractor shall enter into a contract with the Board of Education of Ridgewood High School 234 in accordance with the specific provisions of the attached Proposal Specifications ("Contract") between the District and the supplier. The Contractor, by signing the Contract, acknowledges and agrees to comply with all other requirements, terms provisions, and conditions as listed in these proposal specifications.
6. Each Contractor, by submitting a proposal, acknowledges the provisions of the attached Contract and does thereby agree to comply with all provisions of the Contract. No Contractor shall make any changes to the wording of the Contract. If exception to any provision is requested, the Contractor will submit a listing of all requested exceptions and attach this listing as a separate document attached to the Contract.
7. Failure to complete any question in whole or in part, or any deliberate attempt by the proposer to mislead the District, may be used as grounds to find the proposing ESCO ineligible.

8. A pre-proposal meeting will be held on May 6, 2015 at 2:00p at the District office. Attendees must submit attached Qualified Provider Profile form by May 6, 2015 to be considered. Proposals from those who do not provide the Company Profile will not be considered.

Please submit the Qualified Provider Profile Form to the following contact person:

Mr. Tim Keeley, Assistant Superintendent of Finance and Operations
Ridgewood High School District 234
7500 West Montrose Avenue
Norridge, IL 60706
Email: tkeeley@ridgenet.org
Phone: (708) 456-4242

9. Any contact with Board of Education Members during the RFP Process without prior approval of the Superintendent will be grounds for immediate disqualification of the firm.

EXHIBITS

- A. PROPOSAL SPECIFICATIONS
- B. CERTIFICATE OF ELIGIBILITY
- C. QUALIFIED PROVIDER PROFILE FORM
- D. PROPOSAL
- E. REFERENCES
- F. BACKGROUND CHECK AFFIDAVIT

EXHIBIT A

PROPOSAL SPECIFICATIONS

Ridgewood High School District (referred to as “District”) is seeking specific proposals from Qualified Energy Services companies (ESCOs) which are capable of providing comprehensive infrastructure and energy-related capital improvement services.

I. Project Overview

District is interested in contracting for a full range of energy and water service and energy-related capital improvements at Ridgewood High School. These services and improvements are to be delivered on a performance contracting basis with guaranteed savings.

The District is requesting that each qualified provider utilize their skill and expertise to make recommendations that will result in a more comfortable energy efficient learning environment.

The District’s objective in issuing this Request for Proposal is to provide a competitive means in which to select a single provider to fulfill all aspects of this project. The Board of Education may elect to implement further improvement measures in phases pursuant to the final contract.

The work to be included in the contract may include upgrades to or replacement of equipment included in, but would not be limited to, the following systems: roofing, building envelope and infrastructure, windows, doors, insulation, weather stripping, caulking, security, flooring and sidewalks, electrical, lighting, heating, air conditioning, building automation, temperature control, facility management, bathroom renovations including domestic water and sewer, fire alarm, energy recovery systems, or other energy conservation measures that provide long term operating cost reduction.

Specifically, the District limits the scope of work to Room 131 and the adjacent areas, with the goal of integrating the project and energy savings outcomes into the school curriculum.

II. Disclosure

The School District discloses that Trane has participated in the preparation of the specifications issued by the District for the following RFP.

III. Qualified Provider

A Qualified Provider is a person or business experienced in the design, implementation and installation of energy cost savings measures. As required by Section 19b-1.3 of the School Code, the minimum training required for any person or employee under shall include the satisfactory completion of at least 40 hours of course instruction dealing with energy conservation measures. In addition, the District is requiring that the Qualified Provider have at least 10 years of experience in performance contracting and must be accredited by the National Association of Energy Service Companies (NAESCO).

IV. Required Capabilities

The ESCO must have the demonstrated technical and managerial capabilities to provide a comprehensive set of energy and water services including, but not limited to design, acquisition,

installation, training and commissioning of new and/or existing energy systems as well as project monitoring and savings measurement and verification. Additional services may include operation and maintenance for all improvements and/or training of District's staff on routine maintenance and operation of systems. Monitoring and verification services shall include appropriate measurements and timely reporting of the performance and savings from project.

V. Overview of Terms and Conditions

- a. Contract Term. The duration of the contract will be mutually determined between the ESCO and the District based on authorizing legislation, final project scope and financial factors. No contract shall exceed 20 years in duration.
- b. Guarantee. The project must result in a guaranteed minimum annual energy, water and O&M savings guarantee, as well as defined levels of occupant comfort, maintenance, monitoring, training or other services.
- c. Execution of Guaranteed Energy Savings Contract and Financing Documents. The District will negotiate and execute the Guaranteed Energy Savings Contract with the selected ESCO and all financing documents required by the selected financing source. The ESCO to whom the contract is awarded shall give a sufficient bond to the District for its faithful performance. The ESCO shall also provide a written guarantee that either the energy or operational cost savings, or both, will meet or exceed within 20 years the costs of the energy conservation measures. The ESCO shall reimburse the District for any shortfall of guaranteed energy savings projected in the contract.

VI. Procurement Process

The District expects to undertake the selection process described below according to the schedule listed below:

- 4/16/15 RFP notification made, RFP packets released, publication in newspaper.
- 5/6/15 Submission of Qualified Provider Profile Form
- 5/6/15 2:00PM Mandatory Pre-Proposal Meeting and Site Visit (7500 W. Montrose Avenue, Norridge, IL)
- 5/27/15 11:00 AM RFP opening (7500 W. Montrose Avenue, Norridge, IL).
- Week of June 1 Vendor Interviews
- 6/15/15 7:00 PM Board of Education Meeting- Contract approval by Board. (7500 W. Montrose, Norridge, IL).

VII. Submission of Written Proposals

ESCO's interested in providing the services requested, must respond in writing. All submissions become the property of the District and will not be returned to the ESCO. All costs associated with submission preparation will be borne by the submitting ESCO.

VIII. Proposal Review and Selection of Finalists

The District will establish a Project Evaluation Team to review and evaluate the ESCOs written responses to this RFP in accordance with the evaluation criteria identified below. The Project Evaluation Team will check client references which will also be included in the evaluation. The District intends to select one ESCO for the work.

Responses will be evaluated based on the quality and completeness of the information provided. Failure to provide and of the requested information may result in disqualification. The criteria listed below will be in the evaluation of the written proposals, client references and responses of the ESCO finalist during oral interviews, as appropriate.

Contract Award may be considered for the qualified provider who rates the highest in the categories outlined below and who best matches the needs of the District the maximum number of points is 100.

- | | | |
|----|-----------------------------|-----------|
| a. | Experience & Qualifications | 25 Points |
| b. | Technical Approach | 25 Points |
| c. | Financial Approach | 25 Points |
| d. | Project Management | 25 Points |

IX. Professional Engineer Involvement.

A registered professional engineer must, at a minimum, review and approve design work done under this contract.

X. As-Built Drawings

Where applicable, ESCO must provide, reproducible “as built” and record drawings (or such electronic equivalents as may be agreed to with the District) of all existing and modified conditions associated with the project conforming to typical engineered standards. These should include architectural, mechanical, electrical, structural, and control drawings and operating manuals within 30 days of completed project installation. ESCO will be responsible for ROE permits and associated paperwork and construction documents.

XI. Bonding Requirements

By submitting a proposal each Qualified Provider agrees to furnish a Performance Bond and Labor and Material Payment Bond in the amount of one hundred percent (100%) of the contract sum. Owner requires that the bond surety must carry a Best Rating of A and the owner has no objection to the bond Surety.

XII. Insurance Requirements

Prior to the commencement of work, the ESCO must provide evidence of insurance for both the construction and the operations phases of the project.

XIII. Hiring and Wage Requirements

If applicable, the ESCO will comply with all requirements for the payment of prevailing wages and minority and women-owned business enterprises.

XIV. Follow-up Maintenance, Monitoring and Training Services

The ESCO will be responsible for measurement and verification of implemented measures to ensure optimal performance as well as for ongoing training, however, the District has the option to negotiate the extent of any contracted on-going maintenance service contract.

XV. Proposal Content and Format

Proposal must be submitted in the format 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:

A. Executive Summary.

B. Experience & Qualifications.

1. General Firm Information. Firm name, mailing address, and phone number. Names, titles, and phone numbers of two principal contact persons. List any division or Branch Offices that will participate materially in the development of the proposal, in its evaluation process, and/or in the conduct of any services provided.

2. Type of Firm.

3. Federal Employer Identification Number.

4. Year Firm Established.

5. Annual Report. Include the latest Annual Financial Report for your firm.

6. School References.

a. Provide five (5) K-12 case studies (past 5 years.)

b. Provide full resume (list) of projects that the project team has worked on (include dollar amount.)

7. Personnel information. Full time personnel – indicate the number of full-time personnel employed by your firm at your Chicagoland office and list those specifically that will take an active role on this project.

8. Qualifications and Experience. Include an organizational chart for all members of your company with specific responsibilities for performance based facility modernization and energy and energy services for public sector. Include a brief description and/or resume for each team member to whom will be actively involved in the proposed project.

9. Emergency Support Services. Describe your ability to provide emergency support service for the District.

10. **Monitoring.** Explain your ability to remotely monitor building for performance and alarm notification and respond locally.

11. **Training Capabilities.** Explain your ability to provide local training to the district. Provide specific approach to training on equipment, controls, energy use and procurement. Describe in detail your local training facility and all training available.

12. **Service Capabilities.** Describe your firm's full service support capabilities.

C. Technical Approach.

1. **Project Summary.** Summarize the scope of services (auditing, design, construction, monitoring, operations, maintenance, training, financing, etc.) that would be offered for this project. Include a brief description of your firm's approach to management and specific benefits your firm can offer the owner.

2. **Site Specific Approach.**

a. Describe overall existing conditions and potential recommendations. Include the costs and the guaranteed energy savings for all proposed improvements. Provide a cash flow analysis for the proposed improvements.

b. **Standards of Comfort.** Describe the standards of comfort and functionality that will be used for light levels, space temperatures, ventilation rates, etc. in the intended facilities. Also describe how those standards will be maintained throughout the contract term.

c. **Construction management.** Describe how your firm would work with current building management and maintenance personnel in order to coordinate construction and avoid conflicts with the building's operation and use. Describe your flexibility and/or limitations regarding possible owner's monitoring and installation and performance of ESCO projects, owner's integration of other identified capital needs with ESCO projects that may or may not contain energy and water savings opportunities.

3. **Engineering Design.** Describe your firm's approach to the technical design of the project.

4. **Monitoring and Verification.** Describe the methodology proposed for ongoing monitoring and verification.

5. **Maintenance Contract Flexibility.** Describe the types of services included in the maintenance contract. Comment on whether the owner's maintenance staff can perform some of these duties if desired, and describe any impact on the guarantee. Describe the required length of the maintenance contract and the relationship with the guarantee in the event the owner chooses to terminate the maintenance contract prior to the end of the performance contract.

D. Financial Approach

1. **Savings Calculations.** Describe the procedure to assign values to the long term operational savings, repair & maintenance savings, and energy and water Savings.

2. **Project Funding.**

a. Describe you firm's approach to providing or arranging financing for the proposed project.

- b. Describe the mechanics of the financing arrangement, equipment ownership, responsibilities and liabilities of each party, security interest required and any special terms and conditions that may be associated with financing this project.
 - c. Describe your firm's approach to obtaining grants and rebates for the project.
3. Pricing. Describe your firm's approach to project, equipment and service pricing.
 4. Provisions of Insurance. Describe the level and types of insurance policies applicable to the project.
 5. Provisions of Warranties. State the nature and term of all warranties that will apply to the project.

XVI. Compliance

All work completed under this contract must be in compliance with all applicable federal, state and local laws, rules and regulations including all building codes and appropriate accreditation, certification and licensing standards. Work must be in accordance with sound engineering and safety practices, be installed in a workmanlike manner and be in compliance with all District regulations relative to the premises. The ESCO and its subcontractors will be responsible for obtaining any and all required government permits, consents and authorizations, and payments of any and all state and city required taxes and fees which result from this contract.

XVII. Contract Negotiation

Ridgewood High School District 234 will attempt to negotiate and contract for services described in this RFP solicitation with the most qualified firm. If an agreement cannot be reached, there may be an attempt to negotiate a contract with the second qualified firm.

XVIII. Cost for Proposal Preparation

The District is not liable for any cost incurred by the respondent in preparing or submitting a proposal, or in preparing the contract or for any finder's fee.

EXHIBIT B

CERTIFICATE OF ELIGIBILITY

_____ (the "Contractor"), pursuant to Section 33E-1 et seq. of the Illinois Criminal Code of 1961 as amended, hereby certifies that neither (he, she, it) nor any of (his, her, its) partners, officers, or owners of (his, her, its) business has been convicted in the past five (5) years of the offense of proposal-rigging under Section 33E-3 of the Illinois Criminal Code of 1961 as amended, that neither (he, she, it) nor any of (his, her, its) partners, offices or owners of (his, her, its) business has ever been convicted of the offense of proposal-rotating under Section 33E-4 of the Illinois Criminal Code of 1961 as amended, that neither (he, she, it) nor any of (his, her, its) partners, officers, or owners of (his, her, its) business has been convicted in the past five (5) years of the offense of offering or providing any kickback under Section 33E-7 of the Illinois Criminal Code of 1961 as amended, and that neither (he, she, it) nor any of (his, her, its) partners, offices or owners of (his, her, its) business has ever been convicted of the offense of bribery under Section 33E-8 of the Illinois Criminal Code of 1961 as amended.

Name of Company

By (Name and Title)

Date

EXHIBIT C

QUALIFIED PROVIDER PROFILE FORM

The District requests that submittal of this form be mandatory by May 11, 2015. In submitting this form, it is understood by the respondent that the right is reserved by the District to reject any and all proposals of respondents that do not meet the specified minimum requirements of a Qualified Provider (see below).

1. Firm Name.

Address of Project Execution Office

2. Names and Title of Two Contact People.

a. _____

Phone _____

b. _____

Phone _____

3. Year Firm was Established (minimum requirement of 10 years of operation).

4. Years of Performance Contracting Experience under Present Company Name (minimum requirement of 10 years).

5. Provide a Copy of your Firms NAESCO Accreditation. **Firms without Accreditation will not be considered.**

EXHIBIT D

PROPOSAL

Ridgewood High School
Energy Performance Contracting Project
Norridge, Illinois

The undersigned Contractor, in compliance with your notice to Contractor for the services at Ridgewood High School in Norridge, Illinois, having examined specifications and related documents, and site of the proposed project, hereby proposes to furnish the services as described in the specifications and vendor proposal submission.

PROJECT COST (as outlined in vendor submission):

1. _____ \$ _____
Total amount in words Total amount in figures

Respectfully submitted,

Company Name

Telephone Number

Authorized Signature

Business Address

Date

EXHIBIT E

REFERENCES

Include a list of schools for which vendor currently holds a proposal contract for these products (with contact information).

1. _____
2. _____
3. _____
4. _____

Years in Business: _____

EXHIBIT F

Background Check Affidavit

Ridgewood High School
District 234
7500 W. Montrose
Norridge, IL 60706

STATE OF ILLINOIS

SS:

_____ COUNTY

Pursuant to Illinois Public Act 095-0241, the undersigned vendor or agent, being duly sworn, on oath says that s(he) has successfully completed a criminal background check as required by Section 10-21.9 of Illinois School Code within three months prior to submission of the proposal on all vendor employees scheduled to do business on district property. Results of said background check must be made available upon request of the School Board.

Vendor shall comply with current and future regulations requiring that all employees provide the necessary documentation to affirm that they are eligible for employment (Form I-9, US Dept. of Justice, Immigration and Naturalization Service).

Vendor will also be in compliance with current and future local, state and federal laws and regulations.

The District Reserves the right to reject the assignment of any employee.

Vendor of Agent

For _____
Firm or Corporation

Subscribed and sworn to before me on this _____ day of _____, 201__.

My commission expires:

Signature:

Notary Public
