

# Request for Proposal (RFP) for Guaranteed Energy Savings Contract

Issued by: *Monroe ESD 70*

**Monroe ESD 70** (hereinafter referred to as the District) is seeking proposals from experienced and qualified Energy Services Companies (ESCOs) which are capable of reducing energy consumption or operating costs using energy conservation measures throughout the District's facilities.

## Project Overview

The District is utilizing the comprehensive implementation process as described and outlined in the State of Illinois, Article 5/19b, School Energy Conservation and Savings Measures of the School Code (105 ILCS/5). The district is requesting qualified providers to propose energy conservation measures through a guaranteed energy savings contract. It is the District's intent to select a single qualified ESCO which best meets the needs of the District to negotiate a final contract. The District may elect to implement energy conservation measures in phases as allowed by the contract.

## Proposal Submission Details

### District Office:

Monroe ESD 70  
5137 W. Cisna Rd.  
Bartonville, IL 61607

### Contact Person:

Darrick Reiley  
Superintendent  
309-697-3120

### Submission Information:

Due Date: Friday December 21, 2018 at 9:00 AM local time **NO Extensions Will Be Granted**

Number of Copies: 10 Hard Copies and 1 Electronic Copy

The sealed proposals will be publicly opened on the due date and the contents will be announced

## Disclosure

The District discloses that Energy Systems Group (ESG) assisted in the preparation of the Request for Proposal (RFP) document.

## Procurement Process

The evaluation and selection of an ESCO, and the negotiation and procurement of services, will proceed as follows:

**Mandatory ESCO Conference and Site Visits.** A *Mandatory ESCO Conference* will be held on Tuesday November 27, 2018 at 2:00 PM local time. The conference will be held at Monroe ESD 70, 5137 W. Cisna Rd., Bartonville, IL 61607. ESCOs failing to attend this Conference and Site Visits will automatically be disqualified from responding to the RFP.

For any and all questions related to the ESCO conference and/or the RFP, contact Darrick Reiley, Superintendent, 309-697-3120. ESCOs, or any representatives thereof, **MAY NOT**, directly or indirectly, contact any other District employee, Administrator, Staff member or Board Member.

**Submission of Written Proposals.** ESCOs interested in providing the services requested must respond in writing by the date and time specified in the RFP. All submissions become the property of the District and will not be returned to the ESCO. All costs associated with submission and preparation will be borne by the submitting ESCO.

**Response Review and Selection of ESCO.** The District will review and evaluate the ESCOs' written responses to this RFP in accordance with the Evaluation Criteria identified in Part 1 of this document. The ESCOs' client references may also be contacted and evaluated.

**The District reserves the right to reject any or all submissions and to waive informalities and minor irregularities in submissions received, and to accept any submissions if deemed in the best interest of the District to do so. The District will determine how well ESCOs meet the requirements and evaluation criteria. The District will rank responses, without consideration of price, from best to least qualified as an aid in conducting the evaluation. ESCOs that fail to meet minimum requirements will not be considered for an award.**

**Development of Guaranteed Energy Savings Contract.** After the selection process, the District intends to negotiate a Guaranteed Energy Savings Contract (GESc). The District may elect to accomplish the work in one or more phases by entering into one or more GESCs based on the recommendations of the ESCO or determination by the District that it is in the District's best interest to do so.

To aid the ESCOs in their response to this RFP, the following information is attached:

- 1. EVALUATION CRITERIA**
- 2. INSTRUCTIONS TO ESCOS**

### 1. EVALUATION CRITERIA

**Evaluation of Responses.** Responses will be evaluated based on the quality and completeness of the information provided. Failure to provide any of the requested information may result in disqualification. The criteria listed below will be used in the evaluation of the written responses.

**Experience and Qualifications –**

- Qualifications, expertise and experience of ESCOs' personnel with guaranteed energy savings contracts.
- National Association of Energy Service Companies (NAESCO) accreditation.
- Customer references.
- Overview of past projects.
- Clarity, organization and level of detail in written response.
- Approach to equipment, vendor and service installation neutrality.

**Technical –**

- Quality of a proposed technical approach to conducting a facility energy review, including methods of analysis and understanding of existing building systems and conditions.
- A proven track record of performing all necessary project work (including asbestos abatement) as part of the turnkey project solution.
- Quality of proposed training for facility staff.
- Quality of approach to savings measurement and verification.
- Quality of approach to project commissioning.

**Project Management –**

- Ability to effectively manage project construction and complete projects on schedule.
- Clear assignment of responsibility for various project tasks to specific individuals.

**Financial Standing –**

- Financial soundness and stability of the ESCO.
- Demonstrated ability to provide or arrange project financing.
- Adequate bonding capability.
- Attractiveness of ESCO's guarantee.

## **2. INSTRUCTIONS TO ESCOS**

All the following information must be provided by the ESCO in order for this response to be properly completed. Failure to answer any question, provide requested information or comply with any directive contained in this RFP may be used by the District as grounds to find the ESCO ineligible. If a question or directive does not pertain to your company in any way, please indicate with the symbol "N/A."

**A. Executive Summary (1 page)**

**B. Company Information**

- ESCO name with local address and corporate address.
- Name and title of primary customer representative.
- Present company information including, but not limited to the number of years ESCO has been in business, number of years ESCO has been operating in Illinois, parent company information, and financial information which must include at least five (5) years of annual gross revenue.
- Identify ESCO's legal counsel for this project.
- Certify that your company is not currently under suspension or debarment by any government entity, and that it does not owe any back taxes.

**C. Firm Qualifications** (Please provide documentation to support required qualifications)

- Member of National Association of Energy Services Companies (NAESCO).
- Listed on the qualified US Department of Energy (DOE) list of ESCOs.
- Licensed Design Firm in the State of Illinois.
- Names of all licensed Illinois Professional Engineers that reside in Illinois.
- References: Provide project information on at least ten (10) Illinois k-12 projects where the contract was between your ESCO and a School District.

**D. Personnel Qualifications** (Please provide documentation to support required qualifications)

- Brief Bio of key personnel for this project
  - Include: Name, job title, number of years in industry, job description and educational background.

**E. Financial References**

- Provide a copy of your company's most recent annual report.
- Enclose banking references including financial institution, address, contact person, telephone number, and specific information on your company's credit that may be used to fund construction for large-scale projects.
- Enclose bonding references including company name, address, contact person, telephone number and information on your company's maximum bonding capability.

**F. Project Financing**

- Describe your company's approach to providing or arranging financing for this project, if required by the District.

**G. Technical Approach**

- Describe the design process that your company utilizes to assure that the technical approach will meet the District's needs.
- Asbestos Abatement:
  - Does your firm include asbestos removal within your guaranteed energy savings contract?
- Building Permits:
  - Will your firm be using a licensed engineer or licensed architect employed by your firm to stamp building permit packages?
- Recommended solutions for the District.

#### **H. Financial Approach**

- Please provide pricing for Energy Conservation Measures and Energy and Operational Savings

#### **I. Project Management**

- Describe how your company would work with current building management and maintenance personnel in order to coordinate construction and avoid conflicts with the building's operation and use.

#### **J. Training Provisions**

- Describe your company's proposed approach to providing technical training for facility personnel.
- Indicate the type and frequency of training that may be provided for the duration of the contract.
- Indicate how your company will address any turnover of key facility personnel as it relates to project performance.

#### **K. Non-Performance and Litigation History**

- Describe, including reference to customer entity, jurisdiction and date of the relevant agreement, any and all performance contracting projects within the past 10 years that your firm has started but not completed, whether due to a customer stop work order, poor performance, non-appropriation, or otherwise.
- Describe, including reference to customer entity, jurisdiction and date of the relevant agreement, any and all instances of litigation within the past 10 years between your company and your customer which included a claim by your customer that your firm failed to perform its contractual obligations.
- Reference, generally, to publicly available documents in response to this Section K shall be considered non-responsive.

#### **L. Approach to Equipment Maintenance**

- Describe any major changes in operations or maintenance that may occur as a result of implementing an Energy Performance Contract.
- Address how you would approach the role of the District's personnel in performing maintenance on any new and existing equipment.

#### **M. Measurement and Verification of Energy Savings**

- Describe the methods you expect to use to compute baseline energy use for this project.
- Describe any computerized modeling programs used by your company to establish baseline consumption.
- Describe factors that would necessitate a baseline adjustment.
- Describe the methods you will use to adjust the guaranteed level of savings from any material changes that occur due to such factors as weather, occupancy, facility use changes, etc.
- Indicate how your company identifies, documents and measures operational cost savings opportunities.
- Describe your company's proposed approach to the treatment of savings achieved and how those savings will be documented and verified.

**N. Supporting Documents**

- Include any supporting documents you deem appropriate