

REQUEST FOR PROPOSAL (RFP)
SELECTION OF GUARANTEED ENERGY SAVINGS CONTRACT
QUALIFIED PROVIDER
January 14, 2019
Burbank SD 111

Introduction

The Board of Education for Burbank SD111 is soliciting Proposals from Qualified Providers to consider entering into a Guaranteed Energy Savings Contract pursuant to Article 19b of the Illinois School Code - "School Energy Conservation and Savings Measures," 105 ILCS 5/19b-1 *et. seq.* (Article 19b) Any contract awarded pursuant to this RFP shall satisfy the requirements of Article 19b.

Potential proposals may at a minimum include: (a) the implementation of an energy audit, data collection, and other related analysis 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 Article 19b.

Disclosure

The District discloses that it has worked with McKinstry and CTS Group in the preparation of this RFP.

RFP Submission

Proposals in responses to this RFP are due by no later than February 14, 2019 at 10:00am local time. Timely delivery is at the risk of the Respondent. **NO EXTENSIONS WILL BE GRANTED. NO LATE PROPOSALS WILL BE ACCEPTED. Any submittals received after the deadline will be rejected.**

Please submit five (5) bound copies and one (1) digital copy via CD/USB Drive to:
Dr. Ana Ochoa
Chief School Business Official
Burbank School District 111
7600 S. Central Avenue
Burbank, IL 60459
708-496-0500

All proposals submitted shall be sealed. Proposals submitted in any other manner or form will not be considered.

ADVERTISEMENT FOR PROPOSALS

- A. The District requests proposals related to the installation and implementation of Energy Conservation Measures as defined in Section 5/19b-1.1 of the Illinois School Code (105 ILCS 5/19b-1.1), for the repair, alteration, or betterment of the District's facilities, including any equipment, or fixtures to be added to or used in such facilities that are designed to reduce energy consumption or operating costs. The District's objectives in issuing this Request for Proposal are to provide a means through which to select a single Qualified Provider to perform the implementation of guaranteed savings contracts.
- B. Sealed proposals will be received by the Board of Education, Burbank School District 111 no later than Thursday, February 14, 2019 at 10:00 AM local time. Please submit five (5) bound copies and one (1) digital copy via CD/USB Drive in a sealed envelope/container marked "Request for Proposal - Guaranteed Energy Savings Contract - Burbank School District 111," addressed to: Dr. Ana Ochoa, Chief School Business Official, Burbank School District 111, 7600 S. Central Avenue, Burbank, IL 60459. **NO EXTENSIONS WILL BE GRANTED. NO LATE PROPOSALS WILL BE ACCEPTED. Any submittals received after the deadline will be rejected.**
- C. **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 Board of Education after the date and time established for their receipt. All proposals shall be valid for a minimum of sixty (60) days after the date established for their receipt.** Respondents must satisfy themselves, upon examination of these requirements, as to the intent of the requirements. After the submission of a proposal, no complaint or claim that there was any misunderstanding regarding the proposal will be entertained from any party.
- D. Proposals will be opened publicly and the names of the ESCOs who responded will be announced.
- E. A mandatory Pre-Submittal Conference and Walkthrough has been scheduled on Thursday, January 17, 2019 at 10:00 AM at the District Office, 7600 S. Central, Burbank, IL 60459. No other site visits will be allowed.
- F. The Board of Education reserves the right to reject any or all proposals or parts thereof, or waive any irregularities or informalities, and to make the award in the best interest of the District.

- G. All proposals must comply with applicable Illinois law requiring the payment of prevailing wages by all contractors working on public works. All proposals must comply with applicable Illinois law regarding labor, including but not limited to equal employment opportunity laws.
- H. Proposal documents are available in electronic format from Burbank SD111, Joe Ficker, email jficker@bsd111.org on or after January 17, 2019.

Schedule

The following is the proposed schedule for the selection of firms to provide guaranteed energy savings contract services:

January 14th, 2019 - RFP is published and posted on the Capital Development Board website

January 17th, 2019 – Mandatory Pre-Submittal Conference; 10:00am at District Office 7600 S. Central Ave, Burbank, IL 60459. Mandatory Walkthroughs to follow at: Kennedy School, 7644 S. Central, Burbank, IL and McCord School, 8450 S. Nashville, Burbank, IL.

January 24th, 2019 – Last date for respondents to send clarifications / questions

February 14th, 2019, 10:00am - Submissions due; evaluation of proposals begins

February 27, 2019 - Proposed Board action on firm to provide Services

Respondents' Inquiries and Addenda

Any questions or concerns regarding this RFP shall be directed to:

Joe Ficker, Director of Buildings and Grounds

Burbank School District 111

7600 S. Central Avenue

Burbank, IL 60459

708-496-0500

jficker@bsd111.org

Any changes to this RFP, may be issued in writing as an addendum.

School District Background

Burbank School District 111 is an elementary school district located in Burbank Illinois. There are 7 elementary schools and one junior high in the district. The district has just recently completed the construction of the new Luther Burbank School to replace the old building. Energy efficient upgrades have been completed throughout the district including: Geo-thermal systems at 3 buildings, recent replacement of exterior lighting and interior lighting upgrades in 2013.

Confidentiality

- A. Respondents should be aware that the District is subject to the Illinois Freedom of Information Act and cannot guarantee that any information or document provided by a respondent will be considered exempt from public disclosure under such Act.

- B. 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 on which it is found. If the District receives a request for disclosure of information marked as confidential, the District may choose to withhold such information from disclosure at the request of the Qualified Provider provided that the Qualified Provider agree to reimburse the District for all costs, expenses, and fees, including attorney fees, that the District incurs arising from such request.

Minimum Requirements for Qualified Providers

- A. Proven ability to provide comprehensive energy services and innovative solutions for the District, which may include any improvement, repair, alteration, or betterment of any building or facility owned or operated by a school district or area vocational center or any equipment or fixture to be added to or used in any such building or facility. The specific nature of these items will be determined between the successful Qualified Provider and the District.
- B. Proven ability to provide a more comfortable indoor environment for building occupants. This may include repair or modernization of existing environmental systems. The specific nature of repair or modernization will be determined between the successful Qualified Provider and the District.
- C. Ability to demonstrate successful implementation of no less than 5 (five) energy savings contracts within the last 5 years.
- D. Provide evidence that it is a “Qualified Provider” as that term is defined in Section 19b-1.3 of the Illinois School Code (105 ILCS 5/19b-1.3).
- E. Provide proof of Accreditation in the National Association of Energy Services Companies (NAESCO)
- F. Certifies by submission of a proposal, that it does not engage in discriminatory practices regarding employment or delivery of or access to services and programming and that it fully complies with the requirements of federal and State civil rights laws, including but not limited to: the Illinois Civil Rights Act of 2003, P.A. 93-0425; Illinois Human Rights Act, 775 ILCS 5/1-101 et seq.; the Americans with Disabilities Act, 42 U.S.C.12101 et seq., and the Rehabilitation Act of 1973, as amended, 29 USC 701 et seq., the Prevailing Wage Act, the Public Construction Bond Act, the Public Works Preference Act (repealed on June 16, 2010 by Public Act 96-929), the Employment of Illinois Workers on Public Works Act, the Freedom of Information Act, the Open Meetings Act, the Illinois Architecture Practice Act of 1989, the Professional Engineering Practice Act of 1989, the Structural Engineering Practice Act of 1989, and the Contractor Unified License and Permit Bond Act, as well as the rules and regulations promulgated there under. By submission of a proposal, each respondent

acknowledges and agrees that the Board of Education may declare any contract awarded pursuant to this RFP void if this certification is false or inaccurate in any respect.

General Terms and Conditions

- A. All costs associated with developing or submitting a proposal in response to this RFP, or to provide oral or written clarification of its content shall be borne by the respondent. The District assumes no responsibility for these costs. This RFP does not commit the District to pay any costs incurred in preparation or submission of a response or in anticipation of a contract.
- B. The District reserves the right to terminate this project at any time prior to or after proposals are received. The District may enter into a contract with the Qualified Provider that best meets the needs of the District.
- C. 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.
- D. This RFP does not commit the District to enter into a contract. The District reserves the right to award one, more than one, or no contract(s) in response to this RFP. The District reserves the right to waive informalities and irregularities in the submissions received. The District also reserves the right to terminate this RFP, and reissue a subsequent solicitation, and/or remedy technical errors in the RFP process.
- E. An eventual contract with a Qualified Provider, if awarded, will be awarded to the respondent(s) whose submittal(s) is deemed to be in the best interests of the District, as determined by the selection committee, upon approval of the District Board of Education.
- F. The District reserves the right to contact any respondent for clarification, interviews or to negotiate if such is deemed desirable by the District.
- G. Site visit and introductory meeting will be allowed on January 17, 2019 only. No other site visits will be allowed.
- H. The District's architect of record or third-party architect/engineer shall provide the third-party evaluation of the final proposal.
- I. Any respondent awarded a contract pursuant to this RFP shall collect and remit all Illinois use tax that may be required by law to be collected due to the performance of the services described in the proposal.
- J. Any respondent awarded a contract pursuant to this RFP shall provide all certifications required by the District evidencing its compliance with applicable law, including but not limited to certifications that it has in effect a written sexual harassment policy in full compliance with Section 2-105A(4) of the Illinois Human Rights Act, as amended, 775 ILCS 5/2-105A(4), and a drug-free workplace policy and practice in full compliance with Section 3 of the Illinois Drug-Free Workplace Act, as amended, 30 ILCS 580/3.
- K. Time is of the essence in the performance of any contract awarded by the District pursuant to this RFP.

- L. Any respondent that is awarded a contract pursuant to this RFP shall, at its expense, maintain worker's compensation, vehicle, general liability, and umbrella coverage in such amounts and with companies satisfactory to the District. Such Insurance shall include the Board of Education, its members, officers, employees and agents, as additional insureds.
- M. Any respondent that is awarded a contract pursuant to this RFP shall as part of said contract, indemnify, hold harmless and defend the District, members of the Board of Education, officers, employees, student teachers, and agents against all suits, actions, legal proceedings, claims and demands and against all damages, losses, costs, expenses and attorney's fees in any matter caused by, arising from, incidental to, connected with or growing out of the performance of this contract. This obligation shall not be limited by the amount of any insurance maintained by the respondent.
- N. No person may be employed by any respondent that is awarded a contract pursuant to this RFP who has been convicted of committing or attempting to commit any one or more of the offenses listed in the Illinois School Code. No employees of any such respondent shall use any tobacco products on school grounds.

Proposal Content and Format

The proposal shall follow the Illinois School Code and the following RFP format. 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 depicting an overview of the proposal. Project pricing/breakdown must be included in the summary.

C. Provider Profile

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

1. Company Description including:

- a. Firm Name, address, web address, telephone and fax numbers
- b. Contact person (provide direct phone number and e-mail)
- c. Number of years in business under current name
- d. Type of organization
- e. Disciplines offered in-house
- f. Staffing information (number or project managers, site superintendents, estimators, engineers, etc.) of ESCO division.

8. Provide a copy of the Qualified Provider's(s') certificate of insurance indicating the levels of insurance coverage carried by the firm. Minimum coverage to be as follows:

General Liability \$1,000,000/\$2,000,000
Automotive Liability \$1,000,000
Professional Liability \$1,000,000/\$1,000,000
Worker's Compensation Statutory Limits
Umbrella/Excess Liability \$3,000,000

9. Company Workload - Provide a list of all projects for which the Qualified Provider is currently under contract.

D. Technical Approach

Section D shall contain the following information about the Qualified Provider'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 Qualified Provider recommends for all proposed improvements.
2. **Detailed Scope of Work:** Proposals shall include any and all improvements that the Qualified Provider feels would be of benefit to the District as part of this RFP. The main focus of this proposal is internal lighting upgrades at Kennedy and McCord School. Improvements should be listed for Kennedy and McCord Schools where the Qualified Provider identifies needs and appropriate solutions and broken into specific and separate components. These separate components should be described independently within each section of the proposal.
3. **Documentation:** For any work where the Qualified Provider will be providing not to exceed pricing, provide the following documentation for the scope of work being proposed:

Equipment/Material Table providing: manufacturer, type, model, size, and quantity for all equipment provided, where applicable.
4. **Engineering Approach:** Describe the Qualified Provider's approach to the technical design of this project.
5. **Energy Engineering:** Provide a detailed explanation of how the Qualified Provider intends to calculate energy savings, what types of guarantees will be offered and the methodology to be used for measurement and verification (utility bill analysis, actual measurements and the cost of each option).

6. **Contractor Selection:** Describe the process that the Qualified Provider utilizes to obtain their contractors and what criteria will be used to make the contractor selections.
7. **Equipment Selection:** Described the process that the Qualified Provider utilizes to obtain the equipment to be used on the project and specifically what criteria will be used to make equipment selections.
8. **Installation Approach and Quality Control:** Describe how the Qualified Provider intends to implement the installation phase of the project in terms of approach, priorities, philosophies, timelines, change-orders and commissioning.
9. **Commissioning:** Describe in detail the commissioning processes that the Qualified Provider intends to utilize to commission the building for the learning environment and energy efficiency. Provide actual documents for past projects where this same approach was utilized.
10. **Performance Assurance:** Described in detail the performance assurance processes that the Qualified 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.
11. **Additional Information:** Any additional information about the Qualified Provider's technical approach to the project may be included in the proposal.

E. Financial Aspects

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

1. **Pricing:** Describe in detail the process that the Qualified Provider intends to utilize to obtain the best prices for the District. Explain why this is the best approach.
 - a. Include the Qualified Provider's cost and guaranteed energy savings amount for all proposed improvements for each facility in the project.
 - b. Provide the pricing process including percentage markup for expected general conditions/internal costs, Architecture/Engineering labor, project management labor and profit markup.
 - c. Provide the Measurement and Verification Cost for all recommended facility improvements.
 - d. Provide the pricing model or approach, for any future work.

2. **Energy Savings:** Explain how the Qualified Provider intends to maximize energy savings and the advantage to the Qualified Provider's approach. Include in this proposal the Qualified Provider's actual Guarantee Energy Savings Contract for the priced improvements along with all corresponding calculations and formulas. Break out actual (real dollar) energy savings and energy related operational savings in the RFP response.
3. **Energy Savings Results:**
 - a. Provide an annual energy savings report (M&V) to the District. Detail how the report is generated. Include any information with regards to cost and timing of the report.
 - b. Shortfalls - The Qualified Provider must include a summary of the reported annual savings for all completed projects. Any projects that did not meet the annual energy guarantee must be listed with an explanation for the shortfall, how the respondent resolved the shortfall issue, and contact information for the customer.
4. **Project Funding:** Project funding will be developed by the District after selection of the Qualified Provider.

F. Implementation Plan

1. Include a proposed implementation plan including dates describing how the qualified Qualified Provider intends to execute the project.
2. Describe in detail the Qualified Provider's approach to project management for this energy conservation program.
3. Provide an implementation timetable as well as a staffing plan identifying key project management personnel.