



COMMUNITY CONSOLIDATED  
SCHOOL DISTRICT 59

**Request for Proposal  
For  
Guaranteed Energy Savings Contract Project**

**December 6, 2019**

1001 Leicester Rd. - Elk Grove Village, IL 60007  
P: (847) 593-4300 - F: (847) 593-4409

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## GUARANTEED ENERGY SAVINGS CONTRACT

### I. TIMELINE

#### Community Consolidated SD 59

<u>Date</u>	<u>Action Item</u>
12/06/19	RFP is posted on the Capital Development Board website and published in a newspaper circulated in the District.
12/12/19	Walkthroughs of District facilities (3pm-7pm) *must schedule ahead
12/16/19	Walkthroughs of District facilities (3pm-7pm) *must schedule ahead
12/17/19	Walkthroughs of District facilities (3pm-7pm) *must schedule ahead
01/06/20	Proposals are received at the District Office (2pm).
01/07/20- 01/12/20	Evaluation by District and consultant (registered professional engineer or licensed architect retained by the District) pursuant to School Code Section 19b-2.
TBD	Interview with Finalist (if deemed necessary)
01/13/20	Board Considers approval of the selection of Qualified Provider recommended by Administration.
TBD	The District will provide public notice, at least 10 days prior to the Board meeting, of its intent to award the guaranteed energy savings contract. The notice shall include the names of the parties to the proposed contract and purpose of the contract.
TBD	Board considers approval of the guaranteed energy savings contract.

*This schedule is subject to change at the District's discretion. Notice of any schedule changes will be provided as required by law.*

### II.

### 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 [Nicki.Patterson@Illinois.gov](mailto:Nicki.Patterson@Illinois.gov)

#### **Request for Proposals for a Guaranteed Facility Improvement Program**

"Notice is hereby given that Community Consolidated SD 59 is soliciting Proposals from Qualified Providers to select a provider and subsequently consider a Guaranteed Energy Savings Contract pursuant to Article 19b of the Illinois School Code (105 ILCS 5/19b-1 et. seq.) The contract shall follow the requirements of Section 19b of the Illinois School Code – "School Energy Conservation and Savings Measures," as well as those listed in this RFP.

The District's objective in issuing this Request for Proposal (RFP) is to provide a transparent and open means through which to select a Qualified Provider to potentially implement a Guaranteed Energy Savings Contract on behalf of the district.

Proposals will be received no later than 2:00pm 01/06/20 at the District Office located at 1001 Leicester Road, Elk Grove Village, IL 60007. **EXTENSIONS WILL NOT BE GRANTED for each proposal.** The District is requesting 4 sealed copies and one (1) electronic copy provided on a flash drive. Proposals will be publicly opened and announced immediately following the proposal due date and time. Proposals will be in accordance with said Section 19b of the School Code and the RFP guidelines. For more information, contact Vickie Nissen Assistant Superintendent for Business Services/CSBO by E-Mail only, at [Nissen.vickie@ccsd59.org](mailto:Nissen.vickie@ccsd59.org).

The successful Qualified Provider shall be required to submit a 100% Performance and Material Payment Bond upon award of Contract along with a Certificate of Insurance. To the extent permitted by law, 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.

- Sealed proposals will be opened by a member or employee of the District at a public opening.
- The District will select the qualified provider that best meets the overall needs of the District
- All submissions become property of the District and will not be returned to the Qualified Provider. The District will conduct a public opening at which the contents of the proposals must be announced.

#### Confidentiality

- If a respondent believes that its proposal includes any trade secrets, commercial information, or financial information that is proprietary, privileged, or confidential, and that disclosure of the information will cause competitive harm, said information must be specifically identified as such on every page on which it is found. However, respondents should be aware the School District is subject to the Illinois Freedom of Information Act and cannot guarantee that any information provided by a respondent will be considered exempt from public disclosure under such Act.

### **III. PROJECT OVERVIEW**

#### **A. Purpose**

The District is interested in contracting for a range of energy and energy-related capital improvements (hereinafter referred to as Project). These services and improvements are to be delivered on a performance contracting basis utilizing a Guaranteed Energy Savings Contract.

The District's objective in issuing this Request for Proposals is to provide a competitive means in which to select a Qualified Provider to fulfill all aspects of this Project. The Board of Education is interested in developing an Infrastructure Master Plan and may elect to implement improvement measures in phases pursuant to the final Guaranteed Energy Savings Contract. The proposal should include the Recommended Solutions set forth in Section VII(E5b) of this RFP and may include improvements to all district facilities, including, but not limited to; mechanical equipment, roofing, insulation, building envelope, windows, doors, weather stripping, caulking, electrical, lighting, heating, air conditioning, building automation, security, access control, facility management, bathroom renovations including domestic water and sewer, fire alarm, energy recovery systems, other Energy Conservation Measures that provide long term operating cost reductions, as well as work related to the implementation of the Energy Conservation Measures that are deemed reasonable or necessary.

#### **B. Statement of Intent**

The intent of this Project is to provide the District with the means to realize maximum utility savings and/or energy related improvements at the CCSD59 facilities. Timely implementation of the energy conservation program and minimal disruption of educational activities is of the essence in this Project.

#### **C. Issuing Office**

In accordance with Illinois School Code Section 19b-5, this RFP is issued for and by CCSD59 with the assistance of CTS Group. Vickie Nissen, Assistant Superintendent for Business Services/CSBO will coordinate the Project and will provide names of contact persons and other information as required.

#### **D. For purposes of the Recommended Solutions set forth in Section VII(E5b) of this RFP, we ask that your focus be on Brentwood, Byrd, Devonshire, Forest View, Grove, Ridge, Rupley, and Holmes Schools. Recommendations shall include, at a minimum, scopes of work identified for Summer of 2020.**

#### **E. Prime Contractor**

The selected Qualified Provider will be required to assume responsibility for all services offered in the proposal. Furthermore, the District will consider the selected Qualified Provider to be the sole point of contact regarding contractual matters, including payment of any and all charges resulting from the agreement.

#### IV. REQUIRED CRITERIA

##### Qualified Provider

Pursuant to School Code Section 19b-1.3, a qualified provider is defined as a person or business whose employees are experienced and trained in the design, implementation, or installation of energy conservation measures, with each person or employee having satisfactorily completed at least 40 hours of course instruction dealing with energy conservation measures. In addition, the District requires the Qualified Provider have at least 10 years of experience in Guaranteed Energy Savings Contracting work completed with Illinois School Districts and be Accredited by the National Association of Energy Services Companies (NAESCO).

##### Capabilities

The Qualified Provider must have 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 the District or any equipment, fixture, or furnishing to be added to, or used in, any such building or facility. The specific nature of these items will be determined through future engagement between the Qualified Provider and the District. In addition, the Qualified Provider must have a proven ability to provide a more comfortable and healthier 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 through future engagement between the Qualified Provider and the District.

#### V. OVERVIEW OF TERMS AND CONDITIONS

1. **Contract Term.** The duration of the contract will be mutually determined between the Qualified Provider and the District based on applicable law, final project scope and financial factors.
2. **Open Book Model.** The Qualified Provider chosen by the District through this RFP Process agrees the final proposal will be presented to the District in an "Open Book Format" that will show the bid amounts provided by the contractors and the additional costs which total the final proposal amount.
3. **Guarantee.** The Project must result in a guaranteed minimum **annual** energy and Operations and Maintenance (O&M) savings guarantee, as well as defined levels of occupant comfort; maintenance, monitoring, training or other services.
4. **Execution of Guaranteed Energy Savings Contract and Financing Documents.** The District will negotiate and execute the Guaranteed Energy Savings Contract with the selected Qualified Provider and any financing documents with the appropriate financing source. The Qualified Provider to whom the contract is awarded shall give a sufficient bond to the District for its faithful performance. The Qualified Provider 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

Qualified Provider 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 set forth in Section I.

**Submission of Written Proposals.** Qualified Providers interested in providing the services requested, must respond in writing. All submissions become the property of District and will not be returned to the Qualified Provider. All costs associated with submission preparation will be borne by the submitting Qualified Provider.

**The District reserves the right to reject any or all submissions and to waive informalities and minor irregularities in submissions received and to be the sole judge of the value and merit of the proposals offered.**

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### 1. Submission of Response

The response should follow the outline below and be concise. Failure to follow any of the RFP's instructions could nullify the response from consideration. It will be the responsibility of the Qualified Provider to submit 4 sealed copies and 1 electronic copy (provided on a flash drive) of the proposal. Submissions should be addressed to:

**Vickie Nissen, Assistant Superintendent for Business Services/CSBO**

District Administrative Office  
1001 Leicester Road  
Elk Grove Village, IL 60007

The proposal must be sealed and packaged with clear identification on the container to read as follows: "Request for Proposal Response for Guaranteed Energy Savings Contract Projects"

The deadline for submitting the response will be no later than January 6<sup>th</sup>, 2020 at **2:00PM**. Submissions received after that date and time will not be considered. No electronic submissions or electronic modifications to the submission will be considered.

Questions or clarification may be directed to Albert Tijerina Director of Facilities and Maintenance, by e-mail, at [Tijerina.albert@ccsd59.org](mailto:Tijerina.albert@ccsd59.org).

***Any contact with the Board of Education members, without the superintendent's authorization, during the RFP process will be grounds for immediate disqualification of the firm.***

### 2. Proposal Review and Selection of Finalists

District will establish a Project Evaluation Team to review and evaluate the Qualified Provider's written responses to this RFP. The Project Evaluation Team will check client

references which will also be included in the evaluation. The District intends to select no more than two (2) Qualified Providers as finalists and may elect not to hold any interviews.

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 proposals, client references and responses of the Qualified Provider finalist during oral interviews (if any), as appropriate.

In addition, pursuant to School Code Section 19b-2, proposals will be evaluated by a licensed architect or registered professional engineer retained by the District. The evaluation will analyze the estimates of all costs of installations, modifications or remodeling, including, without limitation, costs of a pre-installation energy audit or analysis, design, engineering, installation, maintenance, repairs, debt service, conversation to a different energy or fuel source, or post-installation project monitoring, data collection, and reporting. The evaluation will include a detailed analysis of whether either the energy consumed or the operating costs, or both, will be reduced.

Letter of Intent Award may be considered for the Qualified Provider who best meets the needs of the District.

### 3. Professional Engineer Involvement

A registered professional engineer must design work done for the Project. The District requires a LEED® AP Certification for the Qualified Provider's professional engineer who will head the Project design team.

### 4. As-Built Drawings

Where applicable, the Qualified Provider must provide reproducible "as built" and record drawings (or such electronic equivalents as may be agreed to with District) of all existing and modified conditions associated with the Project, conforming to typical engineering standards. These should include architectural, mechanical, electrical, structural, and control drawings and operating manuals within 30 days of completed Project installation. The Qualified Provider must provide a complete project closeout documentation package in electronic format, to include:

- a. Issued for Construction, ROE approved Plans and Specifications.
- b. Project Record Documents
- c. Approved Submittals
- d. Operation and Maintenance Manuals
- e. Warranties
- f. Owner Training Videos (.WMV or .MP4 format)
- g. Project Contact Directory

The Electronic Closeout Documentation shall be provided to and stored by BHFX imaging. The Qualified Provider shall be responsible for fees charged by BHFX related to this process. Please contact Sarah Jacobs at 847-593-3161 ext. 206 or [sarah.jacobs@bhfx.net](mailto:sarah.jacobs@bhfx.net) for pricing and Closeout organization Information. In order to



facilitate the Electronic Closeout Documentation process, comply with the following procedures.

1. Contact BHFx Imaging for a Project Order Form. The following components are to be reviewed with BHFx:
  - a. Format of Documents: PDF electronic format for all documents.
  - b. Folder structure for storage and transfer of files
  - c. Schedule for collection and turn-over of closeout documentation
  - d. Record Document format procedures.
  - e. Provide contact information for the individual responsible for the collection and transfer of the Electronic Closeout Documentation Package contents.
  - f. Review a complete listing of Electronic Closeout Documentation Package contents.
2. Provide all documentation to BHFx Imaging for processing no later than 30 days after the date of Substantial Completion.

The Qualified Provider will be responsible for permits and associated paperwork and construction documents.

5. 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. The District requires that the bond surety must carry a "AM Best Rating of A+ of Better" and the District has no objection to the Bond Surety.

6. Insurance Requirements

Prior to the commencement of work, the Qualified Provider must provide evidence of insurance in amounts and types acceptable to the District, for both the construction and operations phases of the Project.

7. Subcontractor Approval

The District retains the right to approve any Qualified Provider selected subcontractor prior to its commencement of work on this Project. Names and qualifications of subcontractors must be submitted at least two weeks in advance of subcontractor scheduled start date. \_

8. Hiring and Wage Requirements

The Qualified Provider shall comply with prevailing wage requirements (including the provisions requiring that not less than the prevailing rate of wages as found by the Department of Labor shall be paid to all laborers, workers, and mechanics performing work on the Project) and, if applicable, requirements relating to minority and women-owned business enterprises.

9. Follow-up Maintenance, Monitoring and Training Services

The Qualified Provider 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. Project savings will be verified and reconciled on an annual basis.

10. In accordance with Illinois School Code Section 19b-5, we disclose that CTS Group assisted in the preparation of this RFP, with the final document reviewed and produced by the District. The District further discloses that an Energy Audit has not been performed in the last three years.

## **VII. PROPOSAL CONTENT & FORMAT**

Proposals 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**

Proposals must include a concise abstract stating the Qualified Provider's overview of the Project.

### **B. QUALIFIED PROVIDER PROFILE**

1. General Firm Information- Firm name, mailing address, and phone number. Names, titles, and phone number of two principal contact persons. List any division of 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. Five-year summary of Contract values for energy related services within Illinois.
6. Corporate Background
  - a. Years in energy business- How many years has the firm been providing energy efficiency related business for Illinois School Districts?
  - b. How many years has the firm offered performance contracting services?
  - c. Is performance contracting services the firm's primary business? If not, indicate what % of the firm's business is performance contracting business vs. core business?
  - d. Bankruptcy involvement- Has the firm, or any of its parents or subsidiaries, ever had a bankruptcy petition filed in its name, voluntarily or involuntarily? If yes, explain in detail the circumstances, date the protection order was filed and the resolution of the case (or current status, if still ongoing)

- e. Litigation- List any Illinois projects with which the Qualified Provider has been involved in litigation or arbitration during the past 5 years arising out of any work for any School District; status, or if concluded, the result. Provide a summary detailing the litigation/arbitration. Omission of past litigation (as defined in this section) will result in disqualification.
- f. List if an installation contract between the Qualified Provider (under current or previous names) and an Illinois school district has been terminated within the last 5 years. If so, list the name and contact information for the School District. Provide a summary detailing the circumstances of the termination. Omission of this information (as defined in this section) will result in disqualification.
- g. How many years has your company been an Accredited member of the National Association of Energy Services Companies (NAESCO)?

### C. GENERAL QUALIFICATIONS

1. Number of contracts- Provide a list of the firm's most recently completed (past 5 years) Guaranteed Energy Savings Contracts for Illinois School Districts. Include only projects located within the state of Illinois ***If the firm's experience is from projects designed and implemented in other states or personal references when working with other companies, they will not be considered to be qualified. List only references where the current firm was the prime contractor.***
2. Energy Guarantee History- Briefly describe all energy performance contract guarantees that the firm has managed within the last five (5) years in Illinois. Identify those project guarantees involving buildings similar to the District's type. Provide, at a minimum, a copy of at least 3 measurement and verification reports from the above referenced projects that are located in Illinois.
3. Personnel Information
  - a. Full time personnel- indicate the number of full-time personnel employed by the firm and those specifically that will take an active role on this Project. Provide all energy related engineering qualifications such as LEED AP, or Certified Energy Manager, for the company's personnel assigned to this Project.
4. Qualifications and experience
  - a. Include an organizational chart for all members of the firm with specific responsibilities for performance-based facility modernization and energy services for public sector. Include a brief description and/or resume for each team member who will be actively involved in the proposed Project.
  - b. Include any LEED® AP Certification or current Professional Engineering License for lead member of the firm's project team.

5. Areas of Expertise
  - a. List all areas of expertise related to potential energy and water improvements in facilities and infrastructure. Include specialized area of expertise in areas that might be relevant to the Project. Also describe the professional and skilled trades that the firm customarily performs with employees.
6. Grants and Rebates
  - a. Identify grants the firm has applied for and received for the firm's customers in the past two years.
  - b. Explain the firm's approach to obtaining rebates.

#### **D. GENERAL APPROACH**

1. Project Summary
  - a. Summarize the scope of services (planning, auditing, design, construction, monitoring, operations, maintenance, training, financing, etc.) that would be offered for this project. Include a brief description of the firm's approach to management and specific benefits the firm can offer the District.
2. Training Provisions
  - a. Describe the technical training to be provided by the firm to the District's facility personnel and identify experience on past projects. Describe the firm's involvement in developing training manuals for facility staff.
3. Engineering Design
  - a. Describe the firm's approach to the technical design of the Project.
4. Technical Audit
  - a. Briefly describe the firm's approach to auditing and long-term facility planning.
5. Handling of Hazardous Materials.
  - a. All work completed under this Contract must follow all applicable federal, state and local laws, rules and regulations regarding waste disposal and treatment/disposal of any hazardous materials that could result from this Project. Work must also be in accordance with sound engineering and safety practices, and in compliance with all District rules relative to the premises. The selected Qualified Provider will be contractually responsible for the removal of any asbestos or other hazardous material required for the Project. Qualified Provider must be an EPA Lead-Safe Certified Firm for Renovations and the Qualified Provider must have a full-time project manager on site that is a RRP certified renovator.
6. Monitoring and Verification

- a. Describe the methodology proposed for ongoing monitoring and savings verification of each recommended Project's performance, including the frequency of such efforts. Note if an industry standard such as the International Monitoring and Verification protocol is used and describe the preferred method.
7. **Baseline Calculation Methodology**
    - a. Describe in detail the methodology the firm normally uses to compute baseline of energy and water use as well as performance.
  8. **Adjustment to Baseline Methodology**
    - a. Describe the method(s) used to adjust the energy, water and O&M baseline due to such factors as weather and facility use changes. Describe the factors that would necessitate adjustment.
  9. **Savings Calculations**
    - a. List all procedures, formulas, and methodologies including special metering or equipment the firm will use to calculate energy, water and O&M savings. Include assumptions made in calculations.
  10. **Dollar Savings Calculations**
    - a. Describe the procedure to assign values to the O&M and energy & water savings.
  11. **Maintenance Contract Flexibility**
    - a. Describe the types of services included in the maintenance contract (where applicable). Comment on whether the District's maintenance staff can perform some of these duties if desired, and describe any impact on the guarantee (These could include programming and maintaining the control system, installing lighting retrofits, maintaining HVAC equipment, etc.) Describe the required length of the maintenance contract and the relationship with the guarantee in the event the District chooses to terminate the maintenance contract prior to the end of the performance contract.
  12. **Provision of Warranties**
    - a. State the nature and term of all warranties that will apply to the Project. Describe how the firm supports the District in the applications of warranties.
  13. **Provisions of Insurance**
    - a. Describe the level and types of insurance policies maintained by the firm, applicable to the Project.
  14. **Sample Contract**

Contract negotiation personnel

    - a. Give the name and address of the person who will have primary responsibility for contract negotiations.

- b. Provide a sample copy of the firm's standard Contract document including the energy Guarantee

## **E. SPECIFIC APPROACH AND IMPLEMENTATION PLAN**

1. Standards of Comfort
  - a. Describe 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
2. Construction Management
  - a. The Qualified Provider shall provide a full-time on-site construction superintendent (approved by the District) during the construction of the project. The construction manager shall be employed directly by the Qualified Provider.
  - b. Describe how the 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.
  - c. Describe the firm's flexibility and/or limitations regarding possible District's monitoring and installation and performance of Qualified Provider projects, District's integration of other identified capital needs with Qualified Provider projects that may or may not contain energy and water savings opportunities.
  - d. Describe the firm's flexibility and willingness to work with the District's architect on the final design of proposed facility improvements.
3. Project Financing
  - a. Describe the firm's approach to providing or arranging financing for the proposed Project.
  - b. Describe the mechanics of the financing arrangement, equipment ownership, responsibilities/liabilities of each party, security interest required and any special terms and conditions that may be associated with financing this Project.
4. Investment Grade Audit
  - a. Indicate the total cost of the Investment Grade Audit and final Project development services to District if no contract is negotiated.
5. Recommended Solutions
  - a. List the details of all Recommended Solutions, for each facility, evaluated as part of the firm's RFP response.
  - b. Recommended Solutions shall include, at a minimum, the following:

1) Devonshire - Roof removal and replacement
2) Byrd - Roof removal and replacement
3) Grove - Roof replacement northeast section
4) Grove - Roof replacement northwest section
5) Grove - Roof removal and replacement southeast section

1) Byrd - HVAC Upgrade including (2) boilers & pumps
2) Ridge - Air cooled chiller replacement
3) Brentwood - Air cooled chiller replacement
4) Devonshire - Hot Water Hydronic Pump System & 2 Boiler replacement
5) Grove - Chiller & RTU'S 1,5,8
6) Brentwood - Boilers (4) Replacements
7) Forest View - RTU (2) Replacements
8) Rupley - Cooling tower&Chiller Replacement

1) Byrd - Asphalt
2) Holmes - West Lot - Asphalt
3) Forest View - Asphalt
4) Grove - Main Lot

Automation System Upgrade HVAC (2 buildings)
Automation System Upgrade Security (2 buildings)

**F. Signature**

1. The proposal must be signed by an individual authorized to bind the firm.

**VIII. COMPLIANCE**

All work completed for the Project must comply 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 comply with all District regulations relative to the premises. The Qualified Provider and its subcontractors will be responsible for obtaining any and all required governmental permits, consents and authorizations, and for payment of any and all state and city required taxes and fees which result from the Project.

## **IX. CONTRACT NEGOTIATIONS**

*Community Consolidated School District 59* will attempt to negotiate and contract for services described in this RFP solicitation with the firm that best meets the needs of the District. If an agreement cannot be reached, there may be an attempt to negotiate a contract with the second qualified firm.