

**Request for Performance Contracting Proposals  
For a Guaranteed Energy Savings Contract Project  
and Construction Management Services**



**Carbondale Elementary SD #95  
925 S. Giant City Road  
Carbondale, IL 62902  
(618) 457-3591**

**Superintendent: Mr. Daniel Booth**

**Issue Date: December 9, 2019  
Proposal Due Date: January 7, 2020**

## **Request for Proposals for Guaranteed Energy Savings Contract**

Notice is hereby given that the Board of Education of Carbondale Elementary School District No. 95 (the "District") at 925 S. Giant City Road, Carbondale, IL 62902, is requesting Qualified Providers to propose innovative solutions and energy conservation measures through a Guaranteed Energy Savings Contract Carbondale Elementary SD #95. The District's objective in issuing this Request for Proposal (RFP) is to provide a competitive means in which to select a qualified provider for a Guaranteed Energy Savings Contract under a phased approach for all buildings including health, life safety needs. The contract shall follow the requirements of Article 19b of the Illinois *School Code*. Proposals shall be in sealed form and submitted no later than 2:00 p.m. on January 7, 2020, at the existing Administrative Building. The District's RFP is available online. For questions or a copy of the District's RFP, contact Mr. Daniel Booth, the District's Superintendent, (618) 457-3591.

Providers shall submit five (5) sealed copies of the proposals. EXTENSIONS WILL NOT BE GRANTED. No faxed nor electronically submitted proposal shall be accepted. Proposals will be in accordance with said Article 19b of the *School Code* and the RFP guidelines. It is strongly encouraged that all Providers perform a walk-through of the District's facilities. A Provider performing a walkthrough of the District's facilities must contact the District prior to the walk-through date, in order to give the District sufficient time to prepare for the Providers arrival. Copies of building plans, energy/utility bills and other historical cost data will be from the District.

Proposals may include, but are not limited to, implementation of energy equipment; repair, renovation, modernization and maintenance services at all District buildings and other energy conservation measures on a performance contracting basis as defined by the State of Illinois, in Article 5/19b, School Energy Conservation and Savings Measures of the School Code (105 ILCS/5).

The District reserves the right to reject any or all proposals, to waive irregularities in the proposal procedure, or accept the proposal that, in its opinion, will serve the best interest of the School District. The District further reserves the right to award all or a portion of the work to one or more Providers. Any such decision shall be considered final. The District reserves the right to reject a proposal from a provider who, in the District's opinion, does not exhibit past experience equal to the size and scope of this project. Failure to meet any of the required criteria may result in automatic rejection of the proposal.

The District will not provide compensation to the Respondent(s) for any expense incurred by the Respondent(s) for Submission preparation, product evaluations, or demonstrations that may be made.

In accordance with the Illinois *School Code* Article 19b-5, the District discloses that GRP Mechanical Inc. participated in the preparation of this RFP.

# I. Proposed Project

- A. The work to be included in the project may include but not limited to upgrades or replacement of equipment and/or material include in, but not limited to roofing, tuck-pointing, parking lots, doors, windows, flooring, lighting, plumbing, domestic water, HVAC and security.
- B. The intent of this RFP is to provide the owner with the means to realize maximum energy and operational savings and/or related improvements to its facilities.
- C. The qualified provider will provide a financial package that will allow payments over a specified term.
- D. A savings guarantee will be offered as part of the qualified provider's proposal. The savings in energy and operating costs are guaranteed to cover the cost of the contract.
- E. 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 which it is found. Data or information so identified will be used by the school solely for the purpose of evaluating proposals and conducting contract negotiations. Disclosure of any proprietary information by the District shall be in accordance with the laws and regulations regarding disclosure in force in the State of Illinois.

## II. Proposal Format

Proposals must contain all required information 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. Moreover, the Board reserves the right to reject any and all proposals and to waive any deficiencies in a proposal.

### A. TABLE OF CONTENTS

### B. EXECUTIVE OVERVIEW

Request for Proposals shall include a concise abstract stating the respondent's overview of the company. Please summarize the scope of services that would be offered by your firm for this project.

### C. EXPERIENCE and QUALIFICATIONS

Include: General Information, Name of Firm, Business Address, Telephone Numbers, Name of the Officer Authorized to Bind the Firm, Contact Person for this Project and K-12 Experience Overview. The District reserves the right to request additional information from any Provider.

#### 1. Qualifications:

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 any person or employee shall have under this agreement shall include the satisfactory completion of at least 40 hours of course instruction dealing with energy conservation measures. Documentation must be submitted to support required qualifications as part of the Qualified Provider's response:

- Resumes of the key project personnel to the project
- Current Professional Engineering License for the audit team
- Background checks of all employees on the job site working within the District
- Current Certification from the State of IL that your firm is in good standing with the State of Illinois to perform work/business in Illinois
- Member of NAESCO
- Litigation: List any projects with schools with which the Provider has entered into litigation or arbitration during the past 10 years. Provide a brief summary detailing the litigation/arbitration. Omission of any past litigation will result in disqualification.

#### 2. Relevant Experience:

Qualified provider must be able to demonstrate at least 15 successful guaranteed energy savings projects within the past 5 years in Illinois. Preference will be given to experience with projects in the K-12 market in the State of Illinois. Include: List projects completed,

contacts, contract value and scopes implemented. Provide information on similar projects in Illinois K-12 schools market completed by your firm as well as the individuals that will be working on this project, including a copy of at least one sample measurement and verification report. Please provide the name and contact information of a reference person for each project that can speak to the work your company performed.

**3. Personnel Qualifications:**

Include: Project team member names, backgrounds and actual projects they worked on in the K-12 market in Illinois.

**D. TECHNICAL APPROACH**

Include: A description of the facility needs and recommended solutions, as well as the Provider's approach to the technical design of this Project. Proposals may include any and all improvements that the Provider feels would be of benefit to the District.

**E. ENERGY OR OPERATING COST ENGINEERING**

Provide a detailed explanation of how the Provider will calculate energy and/or operational cost savings and what types of guarantees will be offered. Describe in detail the methodology your firm will use to compute baseline of energy use and operation & maintenance baseline as well as performance.

**F. FINANCIAL APPROACH and GUARANTEE**

Include: Pricing for proposed recommended solutions, alternatives if applicable, and financing options.

**G. PROJECT MANAGEMENT**

Include: Description of approach for project and construction management including processes, type and availability of company resources to support the project.

**H. SERVICE**

Include: Any additional information, service and training.

### III. Contract Requirements

By submitting a proposal, the Provider agrees that it has read fully and understands the terms and conditions stated herein. Provider also represents and warrants that it has visited the site for the project and is familiar with the conditions under which the work will be performed.

The contract shall contain the following:

#### A. GUARANTEE

The contract must result in a guaranteed minimum annual energy and operational costs savings, as well as defined levels of occupant comfort; maintenance, monitoring, training or other services. The contract shall provide that either the energy, operational cost savings, or capital cost avoidance, will meet or exceed within a specified number of years (not to exceed 20 years) the costs of the ECMs. During the guarantee period, the Provider shall reimburse the District for any shortfall of guaranteed energy savings projected in the contract.

#### B. PAYMENT AND PERFORMANCE BONDS

The qualified provider must submit to the Board payment and performance bonds in the amount of 100% of the construction costs. The payment bond must provide that it will pay the applicable prevailing wages. The payment and performance bonds shall be provided by the successful contractor prior to commencing the work. The bonds shall include such provision as will guarantee the faithful performance of the Provider’s obligations hereunder and pursuant to the *Prevailing Wage Act*.

#### C. INSURANCE

The Provider shall purchase from and maintain in a company or companies lawfully authorized to do business in the jurisdiction in which the Project is located such insurance as will protect the Provider from claims set forth below which may arise out of or result from the Provider’s operations and completed operations under the Contract and for which the Provider may be legally liable, whether such operations be by the Provider or by a subcontractor or by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable.

1. Worker’s Compensation:

- (a) State: Statutory
- (b) Employer’s Liability: \$1,000,000 per Accident  
\$1,000,000 Disease, Policy Limit  
\$1,000,000 Disease, Each Employee

2. Commercial General Liability, including Premises-Operations; Independent Contractors’ Protective; Products and Completed Operations; Broad Form Property Damage;

- (a) Each Occurrence \$1,000,000

- General Aggregate                    \$1,000,000
- Products and Completed
- Operations Aggregate                \$1,000,000
- Personal Injury and
- Advertising Each
- Occurrence                            \$1,000,000
- (b) Property Damage Liability Insurance
- (c) Broad Form Property Damage Coverage shall include Products and Completed Operations.

- 3. Contractual Liability covering the Provider’s obligations under Indemnification, and any other indemnification obligation of the Provider contained in the Contract Documents.
- 4. Personal Injury Liability; with Employment Exclusion deleted:
  - Aggregate                    \$1,000,000
- 5. Business Auto Liability (including owned, non-owned, and hired vehicles)
  - Each Occurrence        \$1,000,000
- 6. Umbrella Excess Liability:
  - \$3,000,000 over primary insurance
- 7. Products and Completed Operations coverage to be maintained for one (1) year after final payment

Certificates of insurance acceptable to the District shall be filed with the District prior to commencement of the Work and thereafter upon renewal or replacement of each required policy of insurance. Information concerning reduction of coverage on account of revised limits or claims paid under the General Aggregate, or both, shall be furnished by the Provider with reasonable promptness. Upon the request of the District, the Provider and subcontractor shall provide the District with copies of any insurance policy, with all endorsements, required by the Contract Documents.

The Provider shall cause the commercial liability coverage and the umbrella coverage required by the Contract Documents to include the District, its individual board members, agents, employees, and consultants as additional insureds.

**D. COMPLIANCE WITH LAWS**

Provider and all subcontractors shall pay not less than the general prevailing hourly rate of wages in the locality in which the work is to be performed for each craft or type of work or mechanic needed to execute the agreement or perform such work, and shall in all other respects comply with the *Prevailing Wage Act, 820 ILCS 130/1.et. seq.* (the “Act”), in carrying out the work. The Department of Labor wage rates are available on the Department's official website. Provider shall have the sole responsibility and duty to ensure that the revised prevailing rate of hourly wages is paid by Provider and all subcontractors to each worker to whom a revised rate is applicable; however, in no event shall the increase in any prevailing rate of hourly wages be a basis for a change order or other claim for an increase in the contract sum. Further, the Provider shall comply with the *Illinois Human Rights Act, 775 ILCS 5/1-101 et seq.* and the provision of sexual

harassment policies and procedures pursuant to Section 2-105 of that Act, including the regulations attached hereto as Exhibit A. The Contractor further agrees to comply with all federal Equal Employment Opportunity Laws, including, but not limited to, the *Americans With Disabilities Act*, 42 U.S.C. Section 12101 *et seq.*, and rules and regulations promulgated thereunder. The Illinois *Employment of Illinois Workers on Public Works Act*, 30 ILCS 570/0.01 *et seq.*, and the *Steel Products Procurement Act*, 30 ILCS 565/1 *et seq.*, shall prevail on this project to the extent such Acts are applicable and enforceable. To the extent applicable, the Contractor shall collect and remit Illinois Use Tax on all sales of tangible personal property into the State of Illinois in accordance with the Illinois Use Tax Act, 35 ILCS 105/1 *et seq.*

**E. WARRANTIES**

The Provider warrants to the District that materials and equipment furnished under the Contract Documents will be of good quality and new unless the Contract Documents require or permit otherwise. The Provider further warrants that the Work will conform to the requirements of the Contract Documents and will be free from faults and defects, except for those inherent in the quality of the Work the Contract Documents require or permit. Work, materials, or equipment not conforming to these requirements shall be considered defective. The warranty will not be affected by the specification of any product or procedure, unless the Provider objects promptly to such product or procedure and advises the District of possible substitute products or procedures which will not affect the warranty. This warranty shall not be restricted by the limitations of any manufacturer's warranty. Inability or refusal of the subcontractor or supplier responsible for the defective work to correct such work shall not excuse the Provider from performing under the warranty.

**F. CONSEQUENTIAL DAMAGES**

The District shall not waive any claims for consequential damages arising out of or relating to this Contract; however, Provider shall waive any and all claims for consequential damages arising out of or relating to this Contract.

**G. INDEMNIFICATION**

To the fullest extent permitted by law, the provider shall indemnify and hold harmless the District, its agents and employees from and against claims, damages, losses and expenses, including, but not limited to, attorney's fees, arising out of or resulting from performance of the Contract provided that such claim, damage, loss or expense is attributable to bodily injury, sickness, disease or death, or to injury to or destruction of tangible property (other than the Work itself), but only to the extent caused in whole or in part by negligent acts or omissions of the provider, its subcontractors, anyone directly or indirectly employed by them or anyone for whose acts they may be liable. In no event shall the preceding indemnification apply to liability to the extent caused by the negligence or willful misconduct of the party indemnified or held harmless. This indemnification shall not be limited to damages, compensation or benefits payable under insurance policies, workers' compensation act, disability benefit acts, or other employees' benefit acts. To the fullest extent permitted by law, District shall indemnify and hold harmless the provider, its subcontractors, agents and employees from and against claims, damages, losses and expenses, including, but not limited to, attorney's fees, arising out of or resulting from

performance of the Contract provided that such claim, damage, loss or expense is attributable to bodily injury, sickness, disease or death, or to injury to or destruction of tangible property (other than the Work itself), but only to the extent caused in whole or in part by negligent acts or omissions of District, its contractors, agents and employees, anyone directly or indirectly employed by them or anyone for whose acts they may be liable. In no event shall the preceding indemnification apply to liability to the extent caused by the negligence or willful misconduct of the party indemnified or held harmless. This indemnification shall not be limited to damages, compensation or benefits payable under insurance policies, workers' compensation act, disability benefit acts, or other employees' benefit acts.

## IV. Proposal Evaluation Criteria

A School District evaluation team will evaluate all proposals and recommend an award subject to approval by the School Board offering the best value proposal. The District reserves the right to, but is not obligated to, request and require that the proposing firm provide an oral presentation of its proposal. The written proposal and oral presentation, if required, will be the basis for determining the successful firm. Proposals will be evaluated according to the following criteria:

- Qualifications and experience of the proposer and past performance of the firm on other contracts in terms of size, scope and quality of services. The District may solicit reference information from previous clients.
- Qualifications and experience of committed personnel.
- Technical Approach – quality and responsiveness of the proposal to the needs of the district in terms of scope of work, methodology, and project management.
- Financial Approach – Total Project Cost, Projected Savings and sources and types of potential financing.

The School Board or its designee will, in the exercise of their sole discretion, determine which proposal best meets the needs of the School District. The District is not liable for any cost incurred by the respondent in preparing or submitting a proposal, or in preparing the contract.

## V. Timetable

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

<u>Date</u>	<u>Action Item</u>
12/9/2019	RFP is submitted for posting on the Capital Development Board website and notice is published in the newspaper
1/7/2020	Proposals are received and opened at Administrative Office at 2:00 p.m.
1/16/2020	Interviews-(if necessary)
1//23/2020	Letter of Intent Issued and Public notice of award of contract
2/27/20 or sooner	Board approval of contract with the provider

# EXHIBIT A

**[NOTE: Illinois law requires that this statement be included in all Illinois bids and public contracts (See 44 Ill. Adm. Code 1120.2570)]**

The following provisions are included in this Contract pursuant to the requirements of the regulations of the Illinois Department of Human Rights, Title 44, Part 750, of the Illinois Administrative Code, and Contractor shall be required to comply with these provisions. As required by Illinois law, in the event of the Contractor's non-compliance with the provisions of this Equal Employment Opportunity Clause, the *Illinois Human Rights Act* or the Rules and Regulations of the Illinois Department of Human Rights ("Department"), the Contractor may be declared ineligible for future contracts or subcontracts with the State of Illinois or any of its political subdivisions or municipal corporations, and the contract may be canceled or voided in whole or in part, and such other sanctions or penalties may be imposed or remedies invoked as provided by statute or regulations. During the performance of this contract, the Contractor agrees as follows:

A. That it will not discriminate against any employee or applicant for employment because of race, color, religion, sex, sexual orientation, marital status, national origin or ancestry, age, citizenship status, physical or mental handicap or disability unrelated to ability, military status or an unfavorable discharge from military service, or arrest record status; and further that it will examine all job classifications to determine if minority persons or women are underutilized and will take appropriate affirmative action to rectify any such underutilization.

B. That, if it hires additional employees in order to perform this contract or any portion thereof, it will determine the availability (in accordance with the Department's Rules) of minorities and women in the area(s) from which it may reasonably recruit and it will hire for each job classification for which employees are hired in such a way that minorities and women are not underutilized.

C. That, in all solicitations or advertisements for employees placed by it or on its behalf, it will state that all applicants will be afforded equal opportunity without discrimination because of race, color, religion, sex, sexual orientation, marital status, national origin or ancestry, age, citizenship status, physical or mental handicap or disability unrelated to ability, military status or an unfavorable discharge from military service, or arrest record status.

D. That it will send to each labor organization or representative of workers with which it has or is bound by a collective bargaining or other agreement or understanding, a notice advising such labor organization or representative of the Contractor's obligation under the *Illinois Human Rights Act* and the Department's Rules. If any such labor organization or representative fails or refuses to cooperate with the Contractor in its efforts to comply with such Act and Rules, the Contractor will promptly so notify the Department and the contracting agency and will recruit employees from other sources when necessary to fulfill its obligation thereunder.

E. That it will submit reports as required by the Department's Rules, furnish all relevant information as may from time to time be requested by the Department or the contracting agency, and in all respects comply with the *Illinois Human Rights Act* and the Department's Rules.

F. That it will permit access to all relevant books, records, accounts and work sites by personnel of the contracting agency and the Department for purposes of investigation to ascertain compliance with *Illinois Human Rights Act* and the Department's Rules.

G. That it will include verbatim or by reference the provisions of this clause in every subcontract it awards under which any portion of the contract obligations are undertaken or assumed, so that such provisions will be binding upon such subcontractor. In the same manner as with other provisions of this contract, the Contractor will be liable for compliance with applicable provisions of this clause by such subcontractors; and further it will promptly notify the contracting agency and the Department in the event any subcontractor fails or refuses to comply therewith. In addition, the Contractor will not utilize any subcontractor declared by the Illinois Human Rights Commission to be ineligible for contracts or subcontracts with the State of Illinois or any of its political subdivisions or municipal corporations.