

***WOODLAND SCHOOL DISTRICT 50***  
**PERFORMANCE CONTRACT**  
**REQUEST FOR PROPOSAL (RFP)**

**October 8, 2021**

**Mr. John Fuhrer, Director of Operations & Facilities**  
**Woodland School District 50**  
**1105 N. Hunt Club Rd. Gurnee, Illinois 60031**  
**(847) 596-5652**

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## I. NOTICE OF RFP

Notice is hereby given that Woodland School District 50 is requesting Qualified Providers to propose a roof-mounted solar project for the Middle School through a guaranteed facility improvement contract on a performance contracting basis. All respondents are required to follow District policies and Illinois School Code. The District's objective in issuing this Request for Proposal (RFP) is to provide a competitive means in which to select a single qualified provider of a Guaranteed Savings Contract. The contract shall follow the requirements of Article 19b of the School Code of the State of Illinois – "School Energy Conservation and Savings Measures."

**Proposals will be received no later than 9:00 AM on November 8, 2021** at the Educational Support Center located at 1105 N. Hunt Club Rd, Gurnee, IL 60031. **EXTENSIONS WILL NOT BE GRANTED.** The District is requesting 3 sealed hard copies and 3 electronic copies (flash drives preferred). Proposals will be time stamped upon arrival and will be in accordance with said Article 19b of the School Code and the RFP guidelines. For more information, contact John Fuhrer, Director of Operations and Facilities at (847) 596-5652 / [jfuhrer@dist50.net](mailto:jfuhrer@dist50.net)

A mandatory pre-bid meeting at the Educational Support Center is scheduled for **October 15, 2021 at 8:00 am**. NO site visits will be scheduled after this day. This meeting will allow respondents to ask specific questions about the project and receive copies of utility invoices. Any additional information requested should be directed to Mr. John Fuhrer at this meeting or, via email only, any time prior to the Question Submittal due date of **October 19**. All questions will be responded to by **October 25**.

### **THE DISTRICT WILL ONLY CONSIDER RESPONSES FROM THOSE FIRMS PRESENT.**

The District will base its qualified provider selection on the following criteria:

1. Experience and Qualifications
2. Proposal Presentation and Technical Approach
3. Financial Consideration and Economic Impact
4. Ability to Implement Project in a Timely Manner
5. Ability to Provide Maintenance and Training
6. Ability to Provide Elementary Level Curriculum for Student Learning

Upon review of Proposals received in response to this RFP, the District will enter into a contract with the provider that is most responsible and responsive to requested criteria and which provides the best overall value to the District. **The District will only consider those companies who meet the requirements in Section 1. A. Experience and Qualifications.**

The District may elect to implement additional facility improvements in a multi-phased approach with the selected Qualified Provider for work that would be documented on the District's Life Health Safety report, but not limited to renewable energy, mechanical, electrical, plumbing (MEP), and building envelope projects 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. Notices of all final recommendations will be made public and posted and consistent with the requirements of the Illinois compiled statutes, 5 ILCS 120/2.02 (OPEN MEETINGS ACT).

## II. PROPOSAL CONTENT & 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. Experience and Qualifications

1. Company history - structure of company, financial stability, and longevity
2. Location and Description of Illinois Base of Operations
3. Number of employees based and working in Illinois
4. The company's experience with guaranteed energy savings contracts (references)

**Qualified Providers MUST possess the following credentials: Failure to comply with the items shown below will be seen as UN-QUALIFIED and not be considered for award.**

- Demonstration of accreditation level as ESCO from National Association of Energy Services Companies (NAESCO)
- Respondents must confirm that any work related to the installation of solar photovoltaic or other forms of generation on the District is done by a "qualified person" as defined in the recently enacted Energy Transition Act by the State of Illinois."
- Minimum of ten (5) Illinois K-12 PC references with contracts (individual or as an aggregate of multiple phased work exceeding \$1 million)
- Minimum of two (2) Illinois K-12 references demonstrating ability to secure SREC's and Utility Interconnect Agreements.
- Consideration will only be given to those firms that have contracted directly with these customers per the requirements in Section 5, Article 19b of the Illinois School Code
- References must include the project cost, savings, scope of work, date work was completed. Include all multiple phases if applicable, school district name, address, contact person, telephone number, email address
- Qualifications of all key project personnel
- Most recent Annual Report and Audited Financial Statement

#### **B. Scope of Work Description**

Section B should contain the following information about the respondent's technical approach to meeting the District's comfort, energy efficiency and operating cost reduction objectives.

1. Describe in detail the roof-mounted solar project the respondent proposes for the Middle School.
2. The District reserves the right to review and modify all equipment manufacturers and proposed products.
4. The District reserves the right to review and approve a list of all subcontractors from which the contractor will be soliciting bids.
5. Include a section explaining the methodology used for calculating energy savings for each measure and a price to provide measurement and verification (M&V). If M&V is not the most appropriate method, respondents are allowed to use operational savings / capital offsets (Stipulated Savings) for the cash flow so long as the approach is specifically described in the response.
6. All work must fully comply with all requirements in 23 Illinois Administrative Code Part 180 and all current editions of the International Building Code, the International Energy Conservation Code, the Illinois Plumbing Code, the Illinois Accessibility Code, and the Americans with Disabilities Act.
7. All work completed or any of its components must not impact the existing roof warranty.

#### **C. Financial Approach**

Section C should contain the following information about the financial terms of the proposed transaction:

1. Cash Flow Analysis: Include a cash flow analysis with energy savings, operational savings, annual program cost and net cash flow. List energy and operational savings separately.
2. Respondent should describe in detail the available incentives (e.g. renewable energy credits, etc.), and their approach to securing and managing those incentives for the life of project. Included in the description should be the value of the incentives if they are known. If they are not yet finalized, please describe the process and timing of when they will be known and secured along with an estimate of their potential value. A timeline for when they would be paid out should also be included.
3. Respondent should provide their recommendations for how the District can achieve the maximum benefit from the available incentive programs.
4. Change Orders will NOT be accepted by the District after a contractual agreement has been reached between the provider and the District. The only exception to this will be if the District requires a change in scope or any other change at the District's sole discretion.
5. Payments: Respondents must list the start date, payment amount and frequency (payment schedule) for the proposed scope of work.

6. Guarantee: Provide an explicitly written guarantee of the savings on an annual basis throughout the term of the agreement. Also provide a complete description of the guarantee methodology of measurement and verification that will be used for each facility improvement proposed.

**D. Implementation Plan**

1. Include in your proposal an implementation plan and timetable including completion dates describing how the qualified provider intends to execute the project.
2. Describe in detail your approach to project management for this energy conservation Program.
3. Provide a post-installation support plan including information regarding project warranties as well as your company's process for identifying and addressing any project issues that occur after substantial completion of the project.

**E. Maintenance and Training Services**

1. Respondents shall describe in detail their training capabilities and the services to be provided for the new solar equipment. This is to include, but not limited to, illustrating a comprehensive preventative maintenance report that identifies specific tasks and corresponding schedules to address their maintenance requirements.
2. Respondents must provide materials and/or resources which can be used for educational purposes.

**F. Litigation and Arbitration**

Respondents must notify the District of any litigation or arbitration on K-12 projects in the last seven (7) years.

**III. EVALUATION PROCESS**

The District's evaluation team is internal and will consist of administrative personnel and/or members of the Board of Education. The evaluation team members will evaluate the proposals and promptly make a recommendation to the School Board. Vendor selection will take place at the November 18<sup>th</sup> meeting with the expectation of the School Board to award the FINAL contract at its December 16<sup>th</sup> meeting.

**IV. EVALUATION CRITERIA**

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 and Qualifications 25**

1. Company history - structure of company, financial stability and longevity.
2. The company's experience/performance with guaranteed energy saving contracts based on the strength of past customer references.
3. Qualifications of all key project personnel.

Preference will be given to those firms who with extensive national experience in the field of Performance Contracting and possess a minimum of five (5) clients in Illinois who are currently in the Guarantee Period.

**B. Proposal Preparation and Technical Approach 25**

Proposals should include a detailed and sound technical approach to meeting the District's operational and educational needs, capital infrastructure, energy and operating efficiency objectives.

**C. Financial Consideration and Net Economic Impact 25**

Preference will be given to the proposals that responsibly maximize the net economic benefit and overall life cycle costs to the District, in connection with the proposed transaction. In order to receive full points, SRECs must be guaranteed. Respondents must use energy and operational savings within the cash flow that meet or exceed the overall cost of the project. Operational Savings or Capital Offsets are defined as monies that would normally be allocated for the specific improvements recommended by the respondent.

**D. Ability to Implement Project 20**

Proposals should illustrate that a reliable and proven project team has been identified for the work. Preference will be given to those firms who have the following:

- a. A project team dedicated to Woodland SD 50 comprised of experienced Engineers and Project Managers.
- b. Both the firm and its assigned representatives that are to be included on this project should have worked on contracts within the Northern Illinois area.
- c. A firmly established timeline proving the feasibility of the project and ensuring substantial completion by August 15, 2022 with a construction start date of no earlier than June 8, 2022.

**E. Provide Comprehensive Maintenance Services**

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Proposals should outline the respondent's specific ability to maintain and repair installed equipment and supporting systems.

**V. CONTRACT REQUIREMENTS**

**A. General**

1. The District is not liable for any costs incurred by a respondent in preparing or submitting a proposal, or in preparing the contract.
2. All responses, inquiries or correspondence relating to or in reference to the RFP, and all other reports, charts, displays, schedules, exhibits and other material submitted as part of a proposal will become the property of the District when received.
3. Pursuant to State law, and under penalty of perjury, the signer of any proposal submitted in response to the RFP thereby certifies that this proposal has not been arrived at collusively or otherwise in violation of either federal or State antitrust laws.

**B. Warrantees**

The District expects that all projects recommended, and equipment replaced will have a minimum of one-year manufacturers or construction warrantees appropriate to the project. District also expects that all work completed will not negatively impact the new roof warranty.

**C. Insurance**

The District's insurance requirements will be available for the successful respondent.

**VI. CONTRACT**

**A. Type of Contract.** The District is authorized to enter into an installment payment contract, a lease purchase contract, or a financing arrangement using currently existing funds. The choice of debt instrument should attempt to best meet the requirements of the District's overall program needs.

**B. Terms of Contract.** The Qualified Provider will review and/or prepare all contract documents and must submit a copy of any contract which it requests the Board consider. The final contract must comply with the provisions of Article 19b of the School Code of Illinois and the requirements outlined above.

**VII. APPENDICES**

**A. Disclosure:** The District discloses that Siemens Industry, Inc., assisted with development of this RFP.