

Winthrop Harbor School District 1

**Public Notice for a Request for Proposals for a
Guaranteed Energy Savings Contract Project**

Winthrop Harbor School District 1
500 North Avenue
Winthrop Harbor,
IL 60096

12/10/2021

PUBLIC NOTICE FOR REQUEST FOR PROPOSALS

Winthrop Harbor School District 1 hereby gives public notice that it is requesting proposals from interested and qualified energy services companies for the following project:

PERFORMANCE CONTRACT FOR ENERGY CONSERVATION & FACILITY IMPROVEMENT PROJECTS

In conjunction with this contract, the District is interested in solutions for the following baseline opportunity:

1. Upgrade automated or computer controlled energy control system
2. Upgrade ventilation, heating, and cooling in schools

to be paid from guaranteed annual energy and operation cost savings in accordance with 105 ILCS 5/Article 19b requirements.

The District plans to select the most qualified provider for the purpose of negotiating a final contract. A Letter-of-Intent (LOI) will be issued to the selected qualified provider.

Copies of the Request-for-Proposal (RFP) are available from:

<https://www2.illinois.gov/cdb/procurement/escos/>

All questions will be answered during the mandatory pre-proposal meeting. **Potential respondents shall not call or contact any representative from the district directly.**

The district will host an optional pre-proposal meeting December 21, 2021. The meeting will commence at 1:00 p.m. at the District Office, 500 North Avenue, Winthrop Harbor, IL 60096. After a brief review of the RFP, attendees will have the option to tour the facilities.

Proposals must be received by January 31, 2022 by 4:00 p.m., after which time they will no longer be accepted. A public opening of all proposals received shall follow immediately.

NO DUE DATE EXTENSIONS SHALL BE GRANTED.

Disclosure

The District discloses that Precision Control Systems assisted in the preparation of the specifications issued by Winthrop Harbor School District 1.

**REQUEST FOR PROPOSALS FOR A COMPREHENSIVE PERFORMANCE CONTRACT
FOR ENERGY CONSERVATION & FACILITY IMPROVEMENT PROJECTS**

SECTION **TABLE OF CONTENTS**

I.	BACKGROUND AND PROCESS OVERVIEW	3-4
	A.	Type of Procurement
	B.	Scope of Services
	C.	Definitions
	D.	Project Timetable
	E.	Letter-of-Intent
II.	RFP PROCEDURES.....	5-6
	A.	Point of Contact
	B.	Submission of Proposals
	C.	Bonds
	D.	Energy and Operational Savings
	E.	Proprietary Information
	F.	Modification or Withdrawal of Proposals
	G.	Right to Reject
	H.	Cost of Proposal Preparation
	I.	Technical Requirements
III.	EVALUATION / SELECTION CRITERIA	7
IV.	PROPOSAL FORMAT AND CONTENTS	8-10
	A.	Respondent Background and Qualifications
	B.	Technical Aspects of the Proposal
	C.	Financial Aspects of the Proposal
	D.	Schedule for Completion of the Project
	E.	Official Statements by Respondent
	F.	Additional Information
V.	GENERAL CONDITIONS	11-12
	A.	Standards of Service
	B.	Liability
	C.	Design Work
	D.	Prevailing Wages
	E.	Permits, Licenses, Inspections and Taxes
	F.	Sales Tax
	G.	Code Compliance

SECTION I - BACKGROUND AND PROCESS OVERVIEW

A. TYPE OF PROCUREMENT

Pursuant to *105 ILCS 5/19b*, these specifications are structured as a Request-For-Proposal (RFP) type procurement to allow Winthrop Harbor School District 1 ("District") to select a firm ("Qualified Provider") which, in the sole judgement of the District, offers the greatest value to the District.

B. SCOPE OF SERVICES

Scope of Facility Audit/Services will include Respondents' proposed energy and operational cost saving measures as defined in Section I, paragraph C.1 of this RFP for District wide improvements with the possibility of multiple phases. The main focus of this phase is to upgrade the automated or computerized energy control system and the upgrade ventilation, heating, and cooling in schools.

C. 105 ILCS 5/19b DEFINITIONS

1. **"Energy Cost Savings Measure"**. "Energy conservation measure" means any improvement, repair, alteration, or betterment of any building or facility owned or operated by a school district or any equipment, fixture, or furnishing to be added to or used in any such building or facility that is designed to reduce energy consumption or operating costs, and may include, without limitation, one or more of the following:
 - (1) Insulation of the building structure or systems within the building.
 - (2) Storm windows or doors, caulking or weather-stripping, multiglazed windows or doors, heat absorbing or heat reflective glazed and coated window or door systems, additional glazing, reductions in glass area, or other window and door system modifications that reduce energy consumption.
 - (3) Automated or computerized energy controlsystems.
 - (4) Heating, ventilating, or air conditioning system modifications or replacements.
 - (5) Replacement or modification of lighting fixtures to increase the energy efficiency of the lighting system without increasing the overall illumination of a facility, unless an increase in illumination is necessary to conform to the applicable State or local building code for the lighting system after the proposed modifications are made.
 - (6) Energy recovery systems.
 - (7) Energy conservation measures that provide long-term operating cost reductions.
 - (8) Commissioning

2. **"Guaranteed Energy Savings Contract"**. A contract for: (i) the implementation of an energy audit, data collection, and other related analyses preliminary to the undertaking of energy conservation measures; (ii) the evaluation and recommendation of energy conservation measures; (iii) the implementation of one or more energy conservation measures; and (iv) the implementation of project monitoring and data collection to verify post- installation energy consumption and energy-related operating costs. The contract shall provide that all payments, except obligations on termination of the contract before its expiration, are to be made over time and that the savings are guaranteed to the extent necessary to pay the costs of the energy conservation measures.

3. **"Qualified provider"**. A person or business whose employees are experienced and trained in the design, implementation, or installation of energy conservation measures. The minimum training required for any person or employee under this Section shall be the satisfactory completion of at least 40 hours of course instruction dealing with energy conservation measures. A qualified provider to whom the contract is awarded shall give a sufficient bond to the school district or area vocational center for its faithful performance.

4. **"Request-for-Proposals" or "RFP"**. A negotiated procurement.

D. PROJECT TIMETABLE

<u>Date</u>	<u>Selection Process Step</u>
12/13/2021	Advertise RFP
12/21/2021	Optional Meeting and Walkthrough
01/31/2022	Proposal Due Date
02/02/2022	Select Qualified Provider
To Be Determined	Contract Approval

E. LETTER-OF-INTENT

Once a selection has been made the Qualified Provider will be issued a Letter-of-Intent to proceed with a Detailed Energy Audit. This audit with the District will result in a final Project scope of work, including specific project cost and guaranteed savings. Upon agreement of the scope, cost, and savings, the Qualified Provider shall enter into a Performance Contract Agreement in accordance with *105 /LCS 5/19b* and as subsequently negotiated between the Qualified Provider and the District.

SECTION II – RPF PROCEDURES

A. POINT OF CONTACT

Questions will be answered during the mandatory pre-proposal meeting. Mr. Jeff McCartney, Superintendent, shall be the point of contact for this RFP.

B. SUBMISSION OF PROPOSALS

Respondent should submit three (3) copies of its proposal by the proposal due date noted on the first page. **RFPs are to be enclosed in a sealed envelope clearly marked “Sealed Performance Contract for Energy Conservation and Facility Improvement Projects due January 31, 2022” in the lower left-hand corner of the envelope and should be addressed to:**

Winthrop Harbor School District #1
500 North Avenue, Winthrop Harbor, IL 60096
Attn: Jeff McCartney - Superintendent

The District will disqualify from consideration proposals received after the time and date specified above.

C. BONDS

A Payment & Performance bond is required to provide the District with adequate protection in the event of default by and/or dispute with the chosen Qualified Provider.

The selected Qualified Provider shall furnish the District with a Payment & Performance Bond for the faithful installation of the proposed/accepted facility improvement included in the final Agreement. The Installation Performance Bond shall be for 100% of the present value of the installation/renovation. The Qualified Provider shall also furnish evidence of bonding ability with the response.

D. ENERGY AND OPERATIONAL SAVINGS

1. One hundred percent (100%) of all energy and operational savings shall be retained by the District.
2. The reconciliation of guaranteed sums shall be provided by the Qualified Provider on an annual basis, commencing one year from the date of completion and acceptance of the work by the District.
3. The Qualified Provider's energy and operational guarantees shall be a first party direct guarantee from the Qualified Provider to the District. No third party guarantee for the above shall be accepted.

E. PROPRIETARY INFORMATION

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. Data or information so identified will be used by the District solely for the purposes of evaluating proposals and conducting contract negotiations and will not be disclosed to the public.

F. MODIFICATION OR WITHDRAWAL OF PROPOSAL

Any proposal may be withdrawn or modified by written request of the respondent, provided such request is received by the District at the above address prior to the date and time set for receipt of proposals.

G. RIGHT TO REJECT

In submitting this proposal, it is understood by the respondent that the right is reserved by District to accept any proposal, to reject any and all proposals as non-responsive and to waive any irregularities or informalities when to do so is in the best interest of the District.

H. COST OF PROPOSAL PREPARATION

The cost of preparing a response to this RFP will not be reimbursed by the District.

I. TECHNICAL REQUIREMENTS

Facility analysis and savings calculations shall be performed in accordance with generally accepted engineering practices and professional judgment. All direct engineering and design work related to the installation or modification of facilities, and all installation and construction work, shall be performed by engineers and contractors respectively licensed in the State of Illinois.

SECTION III - EVALUATION / SELECTION CRITERIA

All proposals submitted shall be reviewed and evaluated by Administration in order to select a Qualified Provider for recommendation to the Board of Education.

Proposals will be evaluated and scored on the basis of the following criteria, which will be accorded the relative weight indicated in parentheses:

- A. Overall Quality of Proposal (10%)
- B. Experience and Qualifications (20%)
- C. Technical Approach (20%)
- D. Financial Terms (20%)
- E. Project Management Approach (10%)
- F. Post-Installation Services (20%)

SECTION IV - PROPOSAL PREPARATION INSTRUCTIONS

The proposal shall set forth, in sufficient detail, the technical and financial plan by which it intends to meet each requirement contained herein. The proposal shall also provide sufficient information for the District to evaluate its experience and its qualifications to perform this project.

Proposal must be submitted in the format outlined in this section, with each of the described forms and sections completed in full. Each proposal will be reviewed to determine if it is complete prior to actual evaluation. Proposals not containing the information requested in the following format will be considered unacceptable by the District. Proposals will be evaluated in light of the material and the substantiating evidence presented in the proposal, and not on the basis of what is inferred.

A. FORMAT FOR RESPONSE:

1. Executive Summary
2. Background and Qualifications

Section B of the proposal should contain the following information about the respondent and any subcontractors with which the respondent intends to work on the project:

- a. Please provide an overview of your company that describes your firm's history and current capabilities. This should include the year the company was established, years providing energy services, and office locations.
- b. Provide an overview of your proposed team who will be working on this project from your firm and describe what their responsibilities will be.
- c. Resumes of not more than one page each for the employees that will be providing ESCO services. Include: years in the energy services industry, years with the ESCO, experience, education, any relevant affiliations or accreditations.
- d. Include five projects where your firm has assisted an Illinois school district with energy efficiency projects including a primary reference and their contact information.
- e. Provide company's safety initiatives, including; safety record, project safety planning, and key personnel and their contact information.
- f. Proof of insurance showing the coverage and limits in place the time of this RFP.
- g. Evidence of bonding ability in accordance with requirements in Section II- RFP Procedures.

- h. Provide resumes of Qualified Provider's in-house commissioning agents that will be responsible for this project.

B. TECHNICAL ASPECTS OF THE PROPOSAL

Provide a detailed summary of your firm's technical approach to meeting the energy efficiency and operational cost reduction needs and objectives of the district. This section should include, but not be limited to the following:

- a. Design – describe your proposed design approach and include any preferred design and engineering consultants that your firm would like to utilize within the scope of this project.
- b. Construction – describe how you see your approach to all phases of construction in regards to the projects from bid process through project punch list and testing.
- c. Commissioning – describe how your firm intends to provide commissioning for the project. Include in-house commissioning approach.
- d. Performance Assurance – describe in detail the performance assurance processes that you intend to use to ensure the buildings operate at the desired performance both at the completion of the construction phase and throughout the contract term.

C. FINANCIAL ASPECTS OF THE PROPOSAL

- a. A description of the savings guarantee and how the respondent will minimize the risk to the District.
- b. Sample cash flow using 2.5% interest rate and 3% escalation factors

D. SCHEDULE FOR COMPLETION OF THE PROJECT

- a. Description of Project Management Approach
- b. The respondent's projected schedule for completion of the tasks and responsibilities outlined in the proposal.

E. OFFICIAL STATEMENTS BY RESPONDENT

a. The text of the following certification must be included in the Proposal:

I certify that I am authorized to represent the ESCO named below and that the answers to the foregoing questions and all statements contained in this Proposal are true and correct.

Dated this __ day of _____ 2021

Name of ESCO: _____

By: _____

Title /Position: _____

F. ADDITIONAL INFORMATION

Any additional information the respondent believes to be relevant to the District's selection efforts may be included in the proposal.

SECTION V -GENERAL CONDITIONS

A. STANDARDS OF SERVICE

The standards of service provided for the facility including heating, ventilation, air conditioning, and humidity; shall be in accordance with the requirements of local codes.

B. LIABILITY

The Qualified Provider shall provide comprehensive general liability, comprehensive automobile liability and worker's compensation insurance coverage, according to the requirements for design and construction work in the District.

Required minimum levels of insurance coverage for Commercial General Liability are as follow:

- General Aggregate - \$1 Million
- Products Comp/Ops Aggregate - \$1 Million
- Personal & Advertising - \$1 Million
- Each Occurrence - \$1 Million
- Fire Damage - \$50,000
- Medical Expense - \$25,000
- Employer's Liability and Workmen's Comp - \$500,000

C. DESIGN WORK

All design work related to the installation or modification of facilities shall be performed and sealed by architects/engineers licensed in the State of Illinois, as required. All installation and construction work, shall be performed by contractors licensed in the State of Illinois. All project construction work shall be in accordance with all applicable codes, standards and regulations.

D. PREVAILING WAGES

The Qualified Provider shall pay the rate of wages for workmen required for any proposed work or construction to comply with the Illinois Department of Labor.

E. PERMITS, LICENSES, INSPECTIONS AND TAXES

The Qualified Provider shall obtain and pay for all permits and licenses, and shall give all notices, pay all taxes and comply with all laws, ordinances, rules and regulations bearing on the work. If the specifications are at variance herewith, the work shall be installed in accordance with local laws, rules and regulations and ordinances.

F. SALES TAX

The Qualified Provider shall not include Illinois sales tax on all materials furnished in connection with this contract.

The District shall provide Qualified Provider with an exemption certificate giving the District's tax- exempt status number after selection.

G. CODE COMPLIANCE

All work performed shall comply with the requirements of all applicable Federal, State, and Local codes.