

Request for Proposal (RFP) for Guaranteed Energy Savings Contract

Issued by: *Bellwood School District 88*

Bellwood School District 88 (hereinafter referred to as the District) is seeking proposals from experienced and qualified Energy Services Companies (ESCOs) which are capable of reducing energy consumption or operating costs using energy conservation measures throughout the District's facilities.

Project Overview

The District is utilizing the comprehensive implementation process as described and outlined in the State of Illinois, Article 5/19b, School Energy Conservation and Savings Measures of the School Code (105 ILCS/5). The district is requesting qualified providers to propose energy conservation measures through a guaranteed energy savings contract. It is the District's intent to select a single qualified ESCO which best meets the needs of the District to negotiate a final contract. The District may elect to implement energy conservation measures in phases as allowed by the contract.

Proposal Submission Details

District Office:

Bellwood School District 88
640 Eastern Avenue
Bellwood, IL 60104

Contact Person:

Dr. Victoria Hansen
708.410.3000
vhansen@sd88.org

Submission Information:

Due Date: Monday, May 2, 2022 at 10:00am local time **NO Extensions Will Be Granted**

Number of Copies: Three (3) hard copies and one (1) electronic copy

The sealed proposals will be publicly opened on the due date and the contents will be announced, on Monday, May 2, 2022 at 10:15am.

Disclosure

The District discloses that Energy Systems Group (ESG) assisted in the preparation of the Request for Proposal (RFP) document.

Procurement Process

The evaluation and selection of an ESCO, and the negotiation and procurement of services, will proceed as follows:

For any and all questions related to the ESCO conference and/or the RFP, contact Victoria Hansen 708.410.3000, vhansen@sd88.org. ESCOs, or any representatives thereof, **MAY NOT**, directly or indirectly, contact any other District employee, Administrator, Staff member or Board Member; **contact will result in your response being rejected.**

Submission of Written Proposals. ESCOs interested in providing the services requested must respond in writing by the date and time specified in the RFP. All submissions become the property of the District and will not be returned to the ESCO. All costs associated with submission and preparation will be borne by the submitting ESCO.

Response Review and Selection of ESCO. The District will review and evaluate the ESCOs' written responses to this RFP in accordance with the Evaluation Criteria identified in this document. The ESCOs' client references may also be contacted and evaluated.

The District reserves the right to reject any or all submissions and to waive informalities and minor irregularities in submissions received, and to accept any submissions if deemed in the best interest of the District to do so. The District will determine how well ESCOs meet the requirements and evaluation criteria. The District will rank responses, without consideration of price, from best to least qualified as an aid in conducting the evaluation. ESCOs that fail to meet minimum requirements will not be considered for an award.

Development of Guaranteed Energy Savings Contract. After the selection process, the District intends to negotiate a Guaranteed Energy Savings Contract (GESC). The District may elect to accomplish the work in one or more phases by entering into one or more GESCs based on the recommendations of the ESCO or determination by the District that it is in the District's best interest to do so.

To aid the ESCOs in their response to this RFP, the following information is attached:

1. INSTRUCTIONS TO ESCOS
2. EVALUATION CRITERIA

District Schedule to Award the Integrated Design Services

RFP Released	March 31, 2022
Mandatory Meeting/Walkthrough	April 4, 2022
Last Date to Submit Questions/Clarifications	April 19, 2022
RFP Due to District	May 2, 2022
Committee Recommends Firm for Board Approval	May 2, 2022
Award by the Board of Education	May 2, 2022

1. INSTRUCTIONS TO ESCOS

All the following information must be provided by the ESCO in order for this response to be properly completed. Failure to answer any question, provide requested information or comply with any directive contained in this RFP may be used by the District as grounds to find the ESCO ineligible. If a question or directive does not pertain to your company in any way, please indicate with the symbol "N/A."

A. Table of Contents

B. Executive Summary (2 pages)

C. Company Information

1. ESCO name with local address and corporate address.
2. Name and title of primary customer representative.
3. Present company information including, but not limited to the number of years ESCO has been in business, number of years ESCO has been operating in Illinois, parent company information, and financial information which must include at least five (5) years of annual gross revenue.
4. Identify ESCO's legal counsel for this project.
5. Certify that your company is not currently under suspension or debarment by any government entity, and that it does not owe any back taxes.
6. Certify that your company is currently in good standings with the State of Illinois.
7. Member of National Association of Energy Services Companies (NAESCO).
8. Show documentation your company is listed on the qualified US Department of Energy (DOE) list of ESCOs.
9. Show documentation your company is an energy service companies (ESCOs) holding a 2017 U.S. Department of Energy (DOE) indefinite-delivery, indefinite-quantity (IDIQ) energy savings performance contract (ESPC).
10. Licensed Design Firm in the State of Illinois.
11. The District is very interested in working with a company whose **focus is based primarily on Guaranteed Savings Projects**. Indicate your firm's revenue as a percentage of the following:
 - Guaranteed Savings Projects: __%
 - Equipment Manufacturing: __%
 - Controls Manufacturing __%
 - Service and Maintenance: __%
 - Other: __%
12. References: Provide project information on at least ten (10) Illinois k-12 projects where the contract was between your ESCO and a School District.
 - a. Ten (10) Customer references letters.
 - b. Include three (3) projects where your firm has assisted a school district with the development and installation of Indoor Air Quality systems throughout the entire district (all or majority of facilities). Include a primary reference and their contact information.
13. Approach to equipment, vendor, and service installation neutrality.
14. Demonstrate M/WBE participation in previous projects in Illinois.
15. Demonstrate your firm's use of local contractors.

D. Technical Approach

Provide detailed summary of your firm's technical approach to meet the needs and objectives of the District. This section should include, but not be limited to the following:

1. Development – Provide technical overview of your approach in conducting existing facility energy analysis. Show methods of analysis and understanding of how existing building systems and conditions are impacting the District's current energy consumption.

2. Design – Describe the design process that your company utilizes to assure that the technical approach will meet the District’s needs.
3. Commissioning – describe how your firm intends to provide commissioning for the project. Include in-house commissioning approach.
4. The District is interested in solutions and recommendations for the following Energy Conservation Measures (ECM’s):
 - a. District wide lighting improvements
 - b. District wide indoor air quality improvements
 - c. District wide building envelope improvements
 - d. District wide HVAC & Mechanical improvements
 - e. District wide DDC controls
 - f. District wide air & water balancing
 - g. District wide plumbing improvements
 - h. District wide water conservation
 - i. District wide electrical infrastructure and distribution improvements
 - j. District wide fire alarm and security improvements
 - k. District wide safety and security
 - l. District wide roof analysis and report
 - m. Create district wide asbestos analysis and report.
 - n. Asbestos abatement for ECM’s where required.
 - o. Provide any Energy Conservation Measures (ECM’s) that will improve the learning environment throughout the district not listed above
 - p. District wide kitchen equipment monitoring and improvements
 - q. Provide any ECM that incorporates renewable energy distribution including but not limited to solar photovoltaic, solar thermal, wind, geothermal, etc.
 - r. Provide any ECM recommendation for additions or comprehensive renovations
 - i. Describe any major changes in operations or maintenance that may occur as a result of implementing an Energy Performance Contract. This includes changes to maintenance on existing equipment and define added maintenance for new equipment and systems. Define the frequency of performing these tasks.
5. Describe Owner training process including but not limited to the following:
 - a. Describe your company’s proposed approach to providing technical training for facility personnel.
 - b. Indicate the type and frequency of training that may be provided for the duration of the contract.
 - c. Indicate how your company will address any turnover of key facility personnel as it relates to project performance.

E. Personnel Qualifications (Please provide documentation to support required qualifications)

1. Brief Bio of key personnel for this project
 - a. Include: Name, job title, number of years in industry, job description, and educational background.

F. Financial Aspects of the Proposal

1. Provide a copy of your company’s most recent annual report.
2. Enclose banking references including financial institution, address, contact person, telephone number, and specific information on your company’s credit that may be used to fund construction for large-scale projects.
3. Enclose bonding references including company name, address, contact person, telephone number and information on your company’s maximum bonding capability.
4. Describe your company’s approach to providing or arranging financing for this project, if required by the District.

G. Project Management

1. Describe how you see your approach to all phases of construction regarding the project from bid process through project punch list and Owner training.
2. Describe how your company will work with current building management and maintenance personnel to coordinate construction and avoid conflicts with the building's operation and use.
3. Clear assignment of responsibility for various project tasks to specific individuals.
4. Relationships to work with local subcontractors.
5. Describe your company's approach to managing "change orders" from potential unknowns.

H. Measurement and Verification of Energy Savings

1. 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.
2. Describe the methods you expect to use to compute baseline energy use for this project.
3. Describe any computerized modeling programs used by your company to establish baseline consumption.
4. Describe factors that would necessitate a baseline adjustment.
5. Describe your company's proposed approach to the treatment of savings achieved and how those savings will be documented and verified.

I. Supporting Documents

1. Include any supporting documents you deem appropriate.

J. Official Statement by Respondent

Include the following document in your response; this should be signed by an authorized individual and notarized.

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 _____ 2022

Name of ESCO:

By:

Title:

Signature:

2. EVALUATION CRITERIA

A. Evaluation of Responses (10%)

1. 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 responses.

B. Experience and Qualifications (30%)

1. Qualifications, expertise and experience of ESCOs' personnel with guaranteed energy savings contracts.
2. The District is very interested in working with a company whose **focus is based primarily on Guaranteed Savings Projects**. Indicate your firm's revenue as a percentage of the following:

Guaranteed Savings Projects: _____%

Equipment Manufacturing: _____%

Controls Manufacturing _____%

Service and Maintenance: _____%

Other: _____%

3. National Association of Energy Service Companies (NAESCO) accreditation.
4. Qualified Provider shall provide evidence that it is a "qualified provider" as that term is defined by the Department of Energy (DOE). This includes (a) evidence that the firm is currently included in the **DOE Qualified** List of Energy Service Companies and (b) how long the firm has consistently been DOE Qualified.
5. Qualified Provider shall provide evidence their company is an energy service companies (ESCOs) holding a 2017 U.S. Department of Energy (DOE) indefinite-delivery, indefinite-quantity (IDIQ) energy savings performance contract (ESPC).
6. Ten (10) customer references letters.
7. Overview of past projects. Must present at least ten (10) GESC projects that have been completed with Illinois K-12 districts.
8. Include three (3) projects where your firm has assisted a school district with the complete installation of an Indoor Air Quality system including a primary reference and their contact information.
9. Clarity, organization, and level of detail in written response.
10. Approach to equipment, vendor and service installation neutrality.
11. Demonstrate M/WBE participation in previous projects in Illinois.
12. Demonstrate your firm's use of local contractors.

C. Technical (30%)

1. Quality of a proposed technical approach to conducting a facility energy review, including methods of analysis and understanding of existing building systems and conditions.
2. The District is interested in solutions and recommendations for the following Energy Conservation Measures (ECM's):
 - a. District wide lighting improvements
 - b. District wide indoor air quality improvements
 - c. District wide building envelope improvements
 - d. District wide HVAC & Mechanical improvements
 - e. District wide DDC controls
 - f. District wide air & water balancing
 - g. District wide plumbing improvements
 - h. District wide water conservation
 - i. District wide electrical infrastructure and distribution improvements
 - j. District wide fire alarm and security improvements

- k. District wide safety and security
 - l. District wide roof analysis and report
 - m. Create district wide asbestos analysis and report.
 - n. Asbestos abatement for ECM's where required.
 - o. Provide any Energy Conservation Measures (ECM's) that will improve the learning environment throughout the district not listed above
 - p. District wide kitchen equipment monitoring and improvements
 - q. Provide any ECM that incorporates renewable energy distribution including but not limited to solar photovoltaic, solar thermal, wind, geothermal, etc.
 - r. Provide any ECM recommendation for additions or comprehensive renovations
- 3. A proven track record of performing all necessary project work (including asbestos abatement) as part of the turnkey project solution.
 - 4. Quality of proposed training for facility staff.
 - 5. Quality of approach to savings measurement and verification.
 - 6. Quality of approach to project commissioning.

D. Project Management (20%)

- 1. Ability to effectively manage project construction and complete projects on schedule.
- 2. Clear assignment of responsibility for various project tasks to specific individuals.
- 3. Relationships to work with local subcontractors.

E. Financial Standing (10%)

- 1. Financial soundness and stability of the ESCO.
- 2. Demonstrated ability to provide or arrange project financing.
- 3. Adequate bonding capability.

F. Official Statement by Respondent