

REQUEST FOR QUALIFICATIONS

Design-Build / Energy Savings Performance Contracting Services for
Box Elder Public School District

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REQUEST FOR QUALIFICATIONS

Design-Build Energy Savings Services for Box Elder Public School District

INTRODUCTION

The Box Elder Public School District seeks qualifications from interested Design Build (DB) / Energy Services Companies (ESCOs) to develop and potentially implement a Design-Build Energy Savings Performance and infrastructure project. The project will be to plan, design, and implement capital improvements to reduce energy and operational costs pursuant to Montana Code Annotated 90-4-1112 & 18-2-501. Through the RFQ process, the Box Elder Public School District intends to screen proposals and select a firm to potentially implement the Design-Build Energy Saving Performance project at multiple District facilities.

OVERVIEW

The Box Elder Public School District seeks to implement infrastructure upgrades to the outlined facilities as well as maximize energy cost savings and reduce operational costs in order to help fund the infrastructure upgrades and services.

Services and capital improvements will be financed through a number of different funding mechanisms including:

- 1) A Design-Build Energy Savings Performance project which:
 - a. Will include but not limited to infrastructure improvements including HVAC, lighting, water and electrical systems.
 - b. Will produce long-term cost savings.
 - c. Will include a guarantee for utility cost savings.
 - d. Maintains consistent and reasonable levels of occupant comfort.
 - e. Maintains consistent levels of building functionality.
 - f. Captures additional benefits that may directly result from energy-related services and capital improvements, such as environmental protection, improved occupant comfort, reduced maintenance needs, improved indoor air quality, etc.

The Box Elder Public School District reserves the right to supplement energy cost savings with capital reserves from: Annual Capital Reserve Budget; Grant Funds; and/or General Obligation Bond or Building Reserve Levy proceeds or any means available. Such funds may or may not be made available for this project.

The RFQ and contracting process has four phases:

- RFQ Phase: Through this RFQ, a DB/ESCO will be selected based on written proposals and a final reference check. Interviews may be optional.
- Project Development Phase: The project development contract will be developed with the selected contractor to define the project scope, cost and financial terms.
- Construction/Implementation/Financing Phase: Upon satisfactory results of the project development phase, a Design-Build Contract and/or Energy Savings Performance Contract will be developed to implement the negotiated and recommended projects.
- Commissioning/Guarantee/Monitoring Phase: Upon completion of construction, the ESCO will offer a variety of services to ensure savings are met, such as commissioning services, a savings guarantee, staff training, and follow-up monitoring services.

GENERAL INFORMATION

Preparation of Proposal

It is not the responsibility of the Box Elder Public School District to deliver information that may be needed by the ESCO to complete its RFQ response, without receipt of a formal request in writing from the ESCO. When a request has been formally made and can be provided by the Box Elder Public School District, such information will be provided to all ESCO's on record that have indicated an interest in responding to the RFQ.

If Addendums have been issued and have been received by the ESCO prior to submittal of their proposal, such Addendums should be acknowledged in the response to the RFQ. Addendums received after the proposal has been submitted should be acknowledged by letter to the Box Elder Public School District immediately upon receipt.

The cost of preparing a response to this RFQ will not be reimbursed by the Box Elder Public School District.

Submission of Proposal

Proposal responses must be submitted by the due date shown below, following the "ESCO Proposal" format as provided in Attachment C. All proposals shall provide a straight forward, concise description of the ESCO's capabilities to satisfy the requirements of this RFQ. All proposals become the property of the Box Elder Public School District and will not be returned to the ESCO. Proposal information is not publicly available until after the award of the contract.

Quantity: Four (4) printed and bound copies and one (1) electronic copy.

All questions or needed information pertaining to this RFQ should be directed to:

***Jeremy MacDonald
Superintendent
410 E. Main Street
Box Elder, MT 59521
jmacdonald@boxelder.k12.mt.us***

All communication must be directed through Mr. MacDonald and any communication with District personnel without the approval of this individual is grounds for rejection of the ESCO's RFQ proposal. It is understood that the Box Elder Public School District reserves the right to reject any and all proposals as non-responsive and to waive any irregularities or informalities if doing so is deemed to be in the best interest of the Box Elder Public School District.

Due Date

Proposals must be ***received*** at the address shown below on or before ***July 10, 2019 by 5:00 pm, Mountain Time***. Late proposals will not be accepted.

Delivery

To: ***The Box Elder Public School District***
Attention: ***Jeremy MacDonald
Superintendent
410 E. Main Street
Box Elder, MT 59521***

A response that is in the possession of the Box Elder Public School District may be altered by letter or email transmission bearing the signature of the representative of the ESCO that is authorized to make the alteration, provided it is received by the Box Elder Public School District prior to the proposal due date deadline. Responses may not be withdrawn after this time.

STATEMENT OF WORK

ESCO Services

ESCO must have the demonstrated capability in engineering and management to provide a broad range of services. Services may include but are not limited to the following:

Project Development Phase

- Project Development to evaluate costs and energy savings of a variety of energy-saving measures and general construction projects.
- Project development plan including financial analysis

Construction/Implementation/Financing Phase

- Design and Engineering services
- Material and Equipment procurement and purchasing
- Construction management
- Financing capability or ability to help find financing

Commissioning/Guarantee/Monitoring Phase

- Commissioning
- Continuing operations and maintenance for all improvements
- Staff training on routine maintenance and operation of systems
- Training of occupants
- Performance and cost guarantee of savings
- Monitoring and verification for measurement and reporting of the performance and savings from improvements
- Maintaining long-term, high-efficiency performance of buildings

ESCO must have technical capability to address a broad range of systems including, but not limited to:

- Mechanical Systems. Heating, ventilating and air conditioning (HVAC) systems, energy management and control systems, domestic hot water systems, distribution systems, etc.
- Physical Plants. Distribution systems, cogeneration systems, etc.
- Lighting systems. Indoor and outdoor lighting systems and controls, day-lighting strategies.
- Building envelope systems. Windows, insulation, weatherization, etc.
- Specialty Systems: Laundry equipment, kitchen equipment, pool systems, renewable energy systems.
- Water and Sewage Systems. Automatic controls, low-flow faucet aerators, low-flow toilets, cooling tower modifications, pool covers, and irrigation system controls or modifications.

Buildings and Facilities

Facilities identified for this work are listed in **Attachment A: Facility Profile**. The Box Elder Public School District reserves the right to increase or reduce the scope of work or conduct work in phases. Additional buildings and facilities, as also listed, may be included in the future under the same contract.

ADMINISTRATIVE INFORMATION

RFQ Phase

Review of Written Proposals.

Proposals must be prepared as described in **Attachment C: Response**. An evaluation team will review and score written proposals based on the evaluation criteria identified in this attachment. Based on the overall score, proposals within the competitive range will be identified.

Interviews.

ESCOs with proposal scores in the competitive range may be interviewed by the project evaluation team. The Box Elder Public School District reserves the right to make a selection of the winning ESCO without completing the interview phase.

Final Selection.

The contract will be awarded to the ESCO submitting the best responsible proposal, provided the proposal is in the best interest of the Box Elder Public School District to accept. The acceptability of any proposals shall be determined by the Box Elder Public School District who will notify the winning ESCO of their selection and will notify other ESCOs participating in the RFQ process of the status of their selection when known.

Project Development Phase

The selected ESCO will work with the District to develop a proposal for an Investment Grade Audit (IGA). If the IGA proposal is accepted, project development work will be performed to finalize project costs and establish all guaranteed cost savings resulting from an Energy Savings Performance Contract and/or a Design-Build Infrastructure Project. An Energy Performance Contract and/or Design-Build Infrastructure Project may be developed as part of this effort.

Construction/Implementation/Financing Phase

The Energy Savings Performance Contract and/or Design-Build Infrastructure Project will define the energy conservation measures to be implemented for this project, with fixed cost and savings guarantee. Financing may be provided as part of this phase to supplement any capital outlay from the client.

Measure and Verification of Savings/Maintenance Phase

The Measurement and Verification Phase will be used to verify that energy savings is accruing as guaranteed and will span a minimum of three years. If the actual cost savings is less than the guarantee amount (reconciled annually), the ESCO will pay the Box Elder Public School District the shortfall difference.

ATTACHMENT A: FACILITY PROFILE

Facility List

Facilities identified for this work are listed in the table below. The Box Elder Public School District reserves the right to reduce the scope of work or conduct work in phases. Additional buildings and facilities, as also listed, may be included in the future under the same contract.

Facility Name	Area (sqft)			
High School				
Junior High School				
Elementary School				

ATTACHMENT B: PROPOSED PROJECT SCHEDULE

The following schedule is the proposed schedule, and may change during the project.

RFQ Phase

Issue RFQ & Advertise in local papers

June 14, 2019

Proposals Due

July 10, 2019

Selection and Award

July 15, 2019

ATTACHMENT C: RFQ RESPONSE & EVALUATION CRITERIA

ESCO PROPOSAL

The criteria listed below will be used to evaluate written proposals and subsequent interviews (optional). The scoring weight is listed for each criterion. These criteria will be applied and interpreted solely at the discretion of the Box Elder Public School District. Proposals should include all necessary information that is pertinent to these evaluation criteria. The sub-criteria are of approximate equal weight.

- **Answer all questions or state "N/A" if not applicable.**
- **Please prepare proposal in the same order as topics are listed below.**

1. Qualifications and Capability

a. General Firm Information

- (1) Type of Firm (corporation, partnership, sole proprietorship, joint venture)
- (2) Business Culture. State core business purpose of main parent company or corporation (manufacturer, utility company, engineering firm, etc.)
- (3) Years in Business as an Energy Services Company. State the number of years your firm has been involved in the energy-efficiency related business. State the number of years your firm has offered performance contracting services.
- (4) Professional Licensure: Do members of your firm have a professional engineering licenses in the State of Montana? Please provide license number.

b. Scope of Services

- (1) Types of Services. Summarize the scope of services (auditing, design, construction, monitoring, operations, maintenance, training, financing, etc.) available from your firm.
- (2) Provision of Financing. Describe general ability and approach to help with financing. Describe ability to ensure low rates.
- (3) Provision of Insurance. Generally describe your capability to secure professional liability and general liability insurance policies. Certificate of insurance shall be required upon execution of Project Development Phase.

c. Financial Soundness

- (1) Sources of Financing. Describe the financial resources you have that can potentially be used to finance the energy project.
- (2) Banking Reference. State the revolving credit available to your firm, and list banking contact information to supply reference for additional financial questions.
- (3) Market Financials. Discuss your company's annual revenue and Municipality Energy Performance Contract construction revenue for the previous (3) years.

2. Experience and Expertise

a. Project History.

RFQ for Energy Savings Performance Contracting Services

Provide a list of all energy savings performance contracts or related projects that *your* firm has completed that are similar in type, size or scope to the building(s) described in the Facility Profile for this RFQ and in School Districts, Municipalities, Counties, and Government buildings.

If this response is from a branch office or division of a parent company, provide only those project histories that have been managed directly by the specific branch or division. You **may not** include projects/contracts managed by team members or subcontractors while employed by other firms. Include the following information on each project (*no preferred format*):

- **Project Identification.** Name of project owner, type of project (hospital, k-12 school, university, office building, etc.), location (city, state).
- **Project Size.** Dollar amount.
- **Contract Type.** Type of contract (shared-savings, lease purchase, guaranteed savings), contract term, and financing arrangement.
- **Source of Funds.** Source of funds used for the project. If applicable, describe your firm's role in securing funds.
- **List of Improvements.** Type of retrofits and operational improvements related to energy, water and other cost savings.
- **References.** Contact information of owner(s) representatives who can serve as references.

Provide a separate Project Experience Summary (Case Study) for no less than 3 projects completed within the last 10 years by the branch office or division.

b. Personnel Information.

- (1) Qualifications and Experience. Include brief biography information of personnel within your firm that will be assigned to this project. Indicate years of experience in related fields and any pertinent experience and credentials related to this project.
- (2) Subcontractors. Describe the method of selecting contractors whether local to the project or through national agreements, and describe general bid solicitation methods to be used in selecting contractors to install measures identified within this project.

3. Technical Approach

a. Energy Savings Performance Contract Methodology

- (1) Technical Site Analysis. Describe your general approach to auditing a facility. What is involved? How is the Box Elder Public School District involved? Methodical approach? Level of expertise involved? Information and resources needed from the Box Elder Public School District?
- (2) Cost Savings Guarantee Calculations. Describe your firm's procedures and schedule for measuring financial performance of projects. Describe how the guarantee provisions work in the event that project results vary from projections. Also describe provisions for excess energy cost savings.

b. Site Specific Approach

Describe any improvements you recommend based on your firm's evaluation of the Box Elder Public School District facilities. Include estimated costs and savings for recommendations.

RFQ for Energy Savings Performance Contracting Services

c. **Proposed Project Schedule**

Describe your company's proposed schedule for the project including major milestones, funding decisions and project implementation.

4. **Company**

a. **Company Differentiators**

Describe unique characteristics of your firm and how these characteristics translate into a real benefit to the Box Elder Public School District.

b. **Other Services**

- (1) Training Provisions. Describe your firm's capabilities in providing technical training for facility personnel and experience on past projects. Describe your firm's involvement in developing training manuals for facility staff.
- (2) Performance Guarantee. Describe your firm's approach to the performance guarantee. What services are required in order for your firm to offer its performance guarantee?
- (3) Monitoring and Verification. 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.

5. **Cost and Pricing**

a. **Cost of Project Development.**

The selected ESCO will work with the District to develop a proposal for an Investment Grade Audit (IGA). If the IGA proposal is accepted, project development work will be performed to finalize project costs and establish all guaranteed cost savings resulting from an Energy Savings Performance Contract and/or a Design-Build Infrastructure Project. An Energy Performance Contract and/or Design-Build Infrastructure Project may be developed as part of this effort.