

GULF SHORES CITY SCHOOLS

**REQUEST FOR PROPOSAL ON QUALIFICATIONS
FOR A DISTRICT-WIDE ENERGY CONSERVATION SERVICES PROGRAM**

JUNE 29, 2020

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I. PURPOSE OF SOLICITATION

The intent of this Request for Proposal on Qualifications (RFP/Q) is to solicit qualification proposals from Energy Services Companies (ESCOs). For the purpose of this RFP/Q, “ESCO” refers to any company that is qualified to provide a turnkey energy conservation program that includes all services listed in this RFP/Q. Responses to this RFP/Q shall describe the ESCO’s capability to identify the need for, design, install, maintain, monitor, and arrange the financing of a large-scale, comprehensive energy-conservation program that includes the services listed herein. GULF SHORES CITY SCHOOLS intends to select an ESCO and award contract(s) to perform cost-effective energy conservation retrofits.

Please note that responses to this RFP/Q must be received on **July 17th at 2:00 pm** at the address below. One (1) paper copy and one (1) electronic copy of the response must be sealed and delivered to:

Gulf Shores City Schools
300 East 16th Ave.
Gulf Shores, AL 36542

Re: Proposal on Qualifications for a Comprehensive Energy Conservation Services Program
ATTN: Mrs. Sandi Harris, Assistant to the Superintendent, sharris@gsboe.org

GULF SHORES CITY SCHOOLS reserves the right to reject any and all responses resulting from this RFP/Q. Late responses will not be accepted and will be returned to the submitting company unopened. **GULF SHORES CITY SCHOOLS GULF SCHOOLS GULF SHORES CITY SCHOOLS is not liable for any cost incurred by any person or firm responding to this RFP/Q.**

GULF SHORES CITY SCHOOLS reserves the right to reject as non-responsive any proposals that do not contain the information requested in Section VII and Appendix A of this RFP/Q. Additionally, GULF SHORES CITY SCHOOLS reserves the right to reject as non-responsive any proposals which are not organized and formatted as described in this RFP/Q.

Any and all questions regarding this RFP/Q and the program it represents must be submitted in writing to:

Mr. Beau Roode, Director of School Operations
Email: broode@gsboe.org

All questions will be answered by email to all bidders.

Prospective respondents must limit their contact regarding this RFP/Q to Mr. Beau Roode, Director of School Operations. Communications by Firms, its agents, employees, and/or representatives with any employee, agent, or representative of GULF SHORES CITY SCHOOLS or GULF SHORES CITY SCHOOLS School Board, other than Mr. Beau Roode, Director of School Operations, regarding its proposal or intention to submit a proposal in response to this RFP will be considered inappropriate communications. If any such inappropriate communications are deemed to hinder, influence and/or alter the competitive proposal process, GULF SHORES CITY SCHOOLS, in an effort to ensure a fair and equitable review and selection process, reserves the right to decline consideration of the offender’s sealed proposal.

II. BACKGROUND

GULF SHORES CITY SCHOOLS has three (3) schools.

GULF SHORES CITY SCHOOLS proposes to address all gas, water, and electric utility uses in all of its facilities for this conservation program. Additionally, GULF SHORES CITY SCHOOLS intends to upgrade outdated and obsolete building equipment and perform property improvements through the program.

GULF SHORES CITY SCHOOLS anticipates a major reduction in annual utility and operational costs through the implementation of this energy conservation program. The ESCO will provide a written guarantee of all utility reduction and provide all financing for the project. The contract life of the program is expected not to exceed **20** years. GULF SHORES CITY SCHOOLS intends to structure the program's implementation schedule in a manner to minimize the programs financed capital needs.

Respondents to this Request for Qualifications (RFP/Q) shall identify their experience and qualification to design, install and manage a major energy conservation project that involves energy conservation measure (ECM) retrofits which address the following building components and applications: lighting, space heating, ventilation, air-conditioning, envelope, heat recovery, energy management systems, environmental system controls, motors, domestic water heating, fuel switching, air distribution systems and water consumption systems. GULF SHORES CITY SCHOOLS is also interested in the respondents' qualifications and experience related to programs designed to train building occupants and maintenance workers in energy conservation awareness.

III. SERVICES REQUESTED

For this RFP/Q, GULF SHORES CITY SCHOOLS is interested in Energy Services Companies for the identification, engineering, design, installation, training, maintenance and financing of approved ECMs for all of its facilities. GULF SHORES CITY SCHOOLS has the option to contract all or some of the services listed above.

If GULF SHORES CITY SCHOOLS contracts project financing through the ESCO, payment for the contracted services will be indexed to measure reductions in annual energy costs or consumption and will not begin until after the project is operational and generating savings. Financing shall be structured so that annual payments never exceed annual savings. Services will be required to provide the financing in such a manner as to ensure that all costs are paid for from only the utility and operational savings associated with the energy conservation program. Operational savings will be strictly scrutinized as part of annual savings. The ESCO must make available a program that guarantees the energy savings of the energy conservation services financed. The ESCO's demonstrated ability to provide this guarantee will be an evaluation criteria.

It is expected that, as a minimum, the following energy conservation techniques will be investigated on an individual basis or in combination with other techniques and implemented, if deemed cost effective by GULF SHORES CITY SCHOOLS and the ESCO:

- Energy management control system
- Large-scale lighting control
- Individual room lighting control (motion sensors)
- Optical reflectors for LED light fixtures
- Fluorescent lamp and ballast replacement to LED
- Incandescent to LED lighting conversion
- Conversion to LED
- Motion sensor control
- Day lighting control
- Exit sign conversion
- Security lighting
- Exterior Lighting
- Other lighting modifications
- Air conditioning unit replacement
- Chiller replacement
- Chiller optimization and control
- Economizer control
- Thermal storage for heating and cooling
- Environmental system control replacement
- Heating, ventilating and air conditioning system modifications
- Air handler replacement
- Variable speed/frequency drives
- Air compressor replacement/upgrade
- Fuel conversion
- Boiler/burner replacement
- Boiler heat recovery
- Boiler combustion controls

- Steam system modifications
- Domestic hot and cold water systems
- Air management systems
- Kitchen appliance conversion to gas or electric
- High efficiency motors
- Motor down-sizing
- IT system upgrades
- Facility communications upgrades
- Renewable energy systems
- Building envelope improvements
- Water system improvements
- Energy conservation awareness training
- Any unique and /or specialty ECMs proposed by ESCOs

Any other ECMs proposed by the ESCO will also be considered. All ECMs considered shall be proven, commercially available and result in verifiable energy savings.

All equipment provided by the ESCO for this program shall have a history of successful operating experience in similar installations and shall be in new and unused condition. This equipment shall be state-of-the-art with readily available replacement parts. All equipment used for this program shall be approved by GULF SHORES CITY SCHOOLS prior to installation.

IV. SELECTION PROCESS

Proposal Evaluation

Interested ESCOs responding to this RFP/Q with a proposal must provide the information required to complete the forms included in Appendix A. GULF SHORES CITY SCHOOLS will evaluate submittals and choose the most highly qualified ESCO.

Engineering Proposal

Upon completion of the proposal evaluation, GULF SHORES CITY SCHOOLS and the ESCO will design a Letter of Agreement which, when approved by GULF SHORES CITY SCHOOLS, will allow the ESCO to proceed with the energy analysis, feasibility study, conceptual engineering design and permitting plan for a district-wide energy conservation program.

Upon acceptance of the Letter of Agreement by the Board of Education, GULF SHORES CITY SCHOOLS and the ESCO will sign the agreement, thereby requiring the ESCO to proceed. If during this phase, it is determined that the program options identified by the ESCO do not fall within mutually agreed upon acceptable financing requirements and project scope, the Letter of Agreement will be terminated with no financial liability to GULF SHORES CITY SCHOOLS. Shall it be determined that the project's feasibility is within the agreed-upon financing parameters and project scope and GULF SHORES CITY SCHOOLS terminates the Letter of Agreement for any reason, then GULF SHORES CITY SCHOOLS agrees to compensate the ESCO a mutually-agreed upon amount for the engineering design and permitting effort incurred through termination. That amount will be stated in the Letter of Agreement.

Negotiating and Signing of Contract

Upon the determination that the project is feasible and acceptable to GULF SHORES CITY SCHOOLS, an Energy Services Agreement (ESA) will be drawn up between GULF SHORES CITY SCHOOLS and the ESCO. All engineering, design and permitting cost incurred by the ESCO under the Letter of Agreement will be incorporated into the ESA. Upon acceptance of the ESA by the School Board, the ESA will be signed and the program will commence. It is anticipated that the ESA will be presented to the School Board before or during Winter 2020.

V. SCHEDULE OF EVENTS

The following time frame is expected to be followed during the procurement period of this RFP/Q:

June 29th, 2020	Release of RFP/Q
July 17th, 2020	Proposal received – 2:00 PM
TBD	Vendor selected
TBD	Investment Grade Audit contract approved by School Board

This is a tentative schedule, and dates are subject to change.

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Gulf Shores City Schools
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GULF SHORES CITY SCHOOLS reserves the right to reject, as non-responsive, any proposal that does not contain the information requested in Section VII of this RFP/Q and on the forms contained in Appendix A. Additionally, GULF SHORES CITY SCHOOLS reserves the right to reject, as non-responsive, any proposals which are not organized and formatted as described in this RFP/Q.

VI. SELECTION CRITERIA

Qualification of all business entities that respond to this solicitation, including any subcontractors to be used, will be evaluated using the following selection criteria. (Percentage weighting among categories of selection criteria is noted.)

Business and Financial Qualifications (20% maximum)

- Business unit dedicated to providing guaranteed energy savings programs.
- Business unit dedicated to ensuring project performance
- Years in business overall and the experience within the State of Alabama
- Affiliation with energy and/or business organizations (including NAESCO certification and EPA or DOE affiliations)
- Demonstrable ability to bond project through a third-party surety
- Financial viability of entity proposed to provide technical and financial guarantees
- Financing capability and lines of credit

ESCO will provide financial statements including income statement, balance sheets and statements of changes for three (3) most recently completed fiscal years.

The ESCOs will provide information documenting the source(s) of proposed financing.

Personnel Qualifications (20% maximum)

Quality of personnel assigned to this project and degree of pertinent experience on projects in the State of Alabama.

Project Management Plan (20% maximum)

- Comprehensiveness and rationale of project management plan, based on:
 - Approach to project management, including staffing and contractor-oversight
 - Ability to successfully complete projects on time and to GULF SHORES CITY SCHOOLS satisfaction.
- Method employed to establish baseline energy use
- Method of measurement and verification used to demonstrate energy use reduction and cost savings as guaranteed
- Quality of any proposed value-added services

Prior Project Performance (40% maximum)

- Experience with energy conservation projects in the state of Alabama of a similar size and type to that proposed for GULF SHORES CITY SCHOOLS.
- Experience taking responsibility for the full range of roles contemplated for this project (e.g. identification and analysis of ECMs, design, installation, operation, training, financing, savings verification, etc.)
- Performance on prior projects, including data on projecting, achieving, documenting, and verifying energy savings to ascertain accuracy of projections
- References from prior and current customers. Must submit at least seven Alabama references from the last fifteen years.
- All Alabama Project reference examples must state that the proper approvals were issued from the Authority Having Jurisdiction over the project . Any project that has not gone through appropriate building approvals will not be considered.
- Examples of value added services will be reviewed and included in this section.

VII. RESPONSE FORMAT AND COMMENTS

The responses to this Request for Proposal on Qualifications will consist of ten (10) specific information subject areas which must be completed and returned in the order indicated below with each section divided and tabbed with the appropriate section title. Additional forms (as detailed below) are provided in Appendix A. For areas that do not require a form, the ESCO shall provide specific information directly addressing the information requested in that section. GULF SHORES CITY SCHOOLS may, during the course of the evaluation process, request additional information to supplement and/or clarify the information provided by any ESCO. Any additional information not specifically requested in this RFP/Q must be put in a separate Appendix at the end of the response. Additionally, all supplemental materials (brochures, product information sheets, etc.) not specifically tailored to this response must be placed in the Appendix. Responses must be paginated and must include a table of contents.

Section 1: Cover Letter

The ESCO's proposal will include a cover letter at the beginning of the proposal. The cover letter shall provide a summary of the information presented in the proposal, names and telephone and emails of persons authorized to provide any clarification required, and a statement accepting the terms of this solicitation or noting specific exceptions taken to any of the terms and conditions specified in this document. This cover letter shall also include the name of the person(s) authorized to conduct final contract negotiations on behalf of the ESCO.

Section 2: Introduction

Table of Contents

The ESCO's proposal should include a Table of Contents referencing each information section of this RFP/Q. The Table of Contents should be further subdivided to describe information included within each section of the proposal.

Executive Summary

The ESCO will provide an Executive Summary highlighting the ESCO's unique qualifications and capabilities for this project.

Statement of Responsibility

The respondent must be the Prime Contractor. The Prime Contractor will be responsible for all work and subcontractors involved in the project. The Prime Contractor will submit a list of all participants in the project prior to the actual contract negotiations. If some or all of the participants are not known at this stage, a selection strategy shall be identified noting which participants have not been selected. A statement of responsibility must be provided, using **FORM B** in the Appendix.

Section 3: Personnel

- Provide a graphical representation (organizational chart) of the participants listed in the ESCO's proposal and their responsibilities in the program. The chart is to be used to show the company and personnel responsible for each phase of the project, lines of authority, and relationships between prime contractor and subcontractors. Attach resumes of all individuals who will have a role in the project.
- A list of key personnel and their responsibilities for the duration of the project contract terms should be listed. Include in this list the number of years each individual has been in the industry. Attach resumes of individuals who will have a role in the project.

Section 4: Project Management

- Describe respondent's approach to project management, including: coordination with subcontractors, division of responsibility among project staff, and interaction with GULF SHORES CITY SCHOOLS representatives. Include a sample of any contracts and/or agreements between the respondent and subcontractor(s) that would be used in this project in an appendix.

Section 5: Energy Savings

Provide a textual and numerical description of the normal method used to establish baseline energy use in individual buildings and facility-wide. Describe the method used to justify variances between the baseline consumption and actual annual consumption. Variances between baseline energy consumption/cost and actual energy consumption/cost can be attributed to changes in the unit price of energy, rate schedules, weather, occupancy, building utilization and building size, to name a few. Describe and justify the methods used in measurement and verification of project savings.

Include a sample guarantee contract and sample savings reports or tools used for M&V in the Appendix to this response. Failure to include a sample contract will be viewed as unresponsive.

Respondents must show calculations and formulas in this section **and** document where those calculations are to be found in the sample contract.

Section 6: References

Provide information on at least five (5) performance contracts, similar in size and scope to the project proposed for GULF SHORES CITY SCHOOLS that the respondent has successfully implemented within the last ten years within the state of Alabama.

References shall include:

- Client Name
- Name and Telephone Number of Contact
- Brief Description of the Project
- Project Beginning and Ending Dates
- Specific ECMs installed
- Project Cost and Savings
- Stated Performance of Project to date – sample savings report

Section 7: Equipment, Maintenance and Training

- Describe any relationships with manufacturers of energy equipment, including those manufactured by the respondent or listed subcontractors. Respondent should also demonstrate willingness to propose and ability to work with different makes of equipment should such equipment prove to be the optimal choice for GULF SHORES CITY SCHOOLS.
- Outline any training proposed as part of the project, including the subject, duration, and location of training. Respondent should also describe the relationship with the organization providing training, if not provided by the prime contractor.

Section 8: Project Non-Performance

Provide a complete list of **all** projects that in the last ten (10) years:

Have canceled or non-appropriated a performance contract with the respondent (list reason); or

Have past or pending lawsuits or litigation regarding a performance contract with a client (list reasons); or

Have been reimbursed for non-performance on guaranteed savings.

Have past “out of court” settlements regarding a performance contract (list reasons).

If any of the above does not apply, provide an acknowledgment letter stating each that does not apply, signed by an officer of the respondent company. (Please include title of company officer). Failure to provide accurate and complete information as requested is grounds for disqualification.

Section 9: Financial Information

- Describe the financial soundness and stability of the ESCO and its ability to support the performance guarantee.
- Provide financial statements for the three most recently completed fiscal years in an appendix. Owner may, during the course of the evaluation process, request additional financial information to supplement and clarify the information provided.
- Describe your firm’s capacity to issue payment and performance bonds. Provide a letter from surety company demonstrating the bonding capacity of the ESCO.
- Describe what resources your firm has available to assist the Gulf Shores City Schools with financing and funding solutions. Provide three bank references that have provided financing for past projects.
- Provide a letter of recommendation from a financial institution.

Section 10: Value-Added Services

The ESCO may choose to include explanations of value-added services that help serve their clients to meet the established mission and vision of said projects.

APPENDIX A: PROPOSAL FORMS

FORM A: PROPOSAL CHECKLIST AND OUTLINE

Section 1: Cover Letter

Section 2: Introduction

- Proposal Table of Contents
- Executive Summary
- Statement of Responsibility

Section 3: Personnel

- Project Personnel Resumes
- Project Team Organizational Chart

Section 4: Project Management

Section 5: Energy Savings

- Sample Guarantee Contract

Section 6: References

Section 7: Equipment, Maintenance and Training

Section 8: Project Non-Performance

Section 9: Financial Information

Section 10: Value Added Services

- Appendix

FORM B: STATEMENT OF RESPONSIBILITY

Prime Contractor (ESCO or Contractor);

Name: _____

Address _____

(Please note possession of any license or registration pertinent to this project.)

Area of Responsibility: (Describe in detail duties and responsibilities applicable to this project.)