



# **LAKE ZURICH CUSD 95**

## **REQUEST FOR PROPOSAL**

### **FOR A**

## **GUARANTEED ENERGY SAVINGS CONTRACT**

**Lake Zurich CUSD 95  
832 S. Rand Road  
Lake Zurich, IL 60047  
847-540-4958  
1/28/2022**



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LAKE ZURICH COMMUNITY UNIT  
**School District 95**

**GUARANTEED ENERGY SAVINGS CONTRACT**

**TIMELINE**

**Lake Zurich CUSD 95**

<b><u>Date</u></b>	<b><u>Action Item</u></b>
1/28/2022	Request for Proposal is posted on the Capital Development Board Procurement Bulletin
2/8/2022	Mandatory Pre-Bid meeting at 2:00 PM at Administration Office
3/8/2022	Proposals are received at 3:30 PM at Administration Office
4/7/2022	School Board approves the selection of the Qualified Provider



## **GUARANTEED ENERGY SAVINGS CONTRACT**

### **REQUEST FOR PROPOSAL ADVERTISEMENT**

Notice is hereby given that the Lake Zurich CUSD 95 (Owner) shall receive proposals for a Guaranteed Energy Savings Contract (GES) until 3:30 PM on March 8, 2022, at 832 S. Rand Road, Lake Zurich, IL 60047. **EXTENSIONS WILL NOT BE GRANTED.** The procurement process and a contract shall follow the requirements of Article 19b of the Illinois School Code – “School Energy Conservation and Saving Measures.” For more information contact Dr. Dean Romano, Assistant Superintendent for Business & Operations, at (847) 540-4958.

The Qualified Provider to whom the work is awarded shall conform to the local prevailing wage rates as determined for this project. The Owner requests three (3) copies of the proposal, which must be submitted with the content and in the format described within this Request for Proposal (RFP) as well as an unprotected electronic version in PDF format on a USB storage device.

A mandatory pre-bid meeting for all Qualified Providers has been scheduled for 2:00 pm on February 8, 2022, at the District Administration Building. Any provider looking to respond to the RFP **MUST** be present.

The Owner reserves the right to terminate this project prior to bids being received, to reject any and all proposals, and to be the sole judge of the value and merit of the proposals offered. Upon review of the proposals received in response to this RFP, the Owner may enter into a contract with the provider that best meets the needs of the Owner. The Owner will only consider those companies who meet all requirements listed in the RFP.

In accordance with the Article 19b of the Illinois School Code, we disclose that Performance Services, Inc. participated in the preparation of these specifications.



## I. PROPOSAL CONTENT & FORMAT

### A. Table of Contents

### B. Executive Summary (not to exceed 5 pages)

Provide a concise summary of your overall proposal and the proposed project. Project pricing/breakdown must be included in the summary.

### C. Company Profile

This section should include the following information on the Qualified Provider.

1. **Company Overview.** Provide a general overview of your company. Include information on your company's approach to customer satisfaction. Include information on your company's involvement with relevant customer associations. Provide answers to the specific questions below:
  - a. How many employees does your company have that live and work in the Chicagoland area and are dedicated to GESC projects?
  - b. How many employees does your company have that are licensed in Illinois as a Professional Engineer (P.E.)?
  - c. Is your company accredited by the National Association of Energy Service Companies (NAESCO) as an Energy Service Company (ESCO)?
  - d. Is your company a subsidiary to another company?
    - i. If yes, will your company's parent company be financially responsible for the energy savings guarantee on this project?
  - e. How many years has your company been implementing GESC projects in Illinois under Article 19b of the Illinois School Code?
  - f. How many GESC projects has your company implemented in Illinois under Article 19B of the Illinois School Code?
2. **Company Personnel.** Include resumes for all key personnel on the proposed project. Include the name of the engineer(s) or engineering firm providing the design engineering for the project including their PE numbers.
3. **Company References.** Provide a list of all GESC projects implemented by your company in the Chicagoland area under Article 19b of the Illinois School Code in the last 7 years. For each project, include the year the project was implemented and at least one reference contact (name, title, phone number).
4. **Litigation.** List any projects with which your company has entered into litigation or arbitration with K-12 public school districts during the past seven (7) years.



Provide a brief summary detailing the litigation / arbitration. Omission of any past litigation may result in disqualification.

#### **D. Technical Approach**

This section should include the following information on the Qualified Provider's technical approach to meet the District's energy efficiency, operating cost reduction and comfort objectives.

1. **Proposed Scope of Work.** Provide a detailed overview of the proposed scope of work.
2. **Scope Documentation.** Provide the following documentation for any work where the Qualified Provider is providing firm pricing.
  - a. **Engineering Drawings of Proposed Improvements Must Be Provided** (Failure to provide drawings may result in evaluation point deductions) where applicable
    - i. These may be included in the proposal binder, if possible, or provided as a separate drawing set (half size sets are preferable)
  - b. **As-Builts required upon project completion for all improvement measures.**
  - c. **Include proposed as well as future mechanical/electrical/energy/solar opportunities for the district.**
3. **Engineering Approach.** Provide an overview of your company's general engineering approach and capabilities. Include information on how your company completes design work and calculates energy savings.
4. **Building Controls Approach.** Provide an overview of your company's general approach to building automation/controls systems and capabilities. Include information on how your company designs, installs, programs, and commissions building automation/controls systems.

#### **E. Financial Aspects**

This section should include the following information on the financial elements of the Qualified Provider's proposed project.

1. **Project Cost and Savings.** Provide an "Improvement List" to clearly convey the cost, rebates, and savings of each proposed scope of work item.



2. **Project Cash Flow.** Provide a cash flow projection for the proposed project over the proposed guarantee term length.
3. **Project Pricing Approach.** Provide an overview of your company's general approach to pricing project work.
4. **Project Guarantees.** Provide an overview of your company's general approach to project guarantees. Include information on how your company monitors and reports energy savings. Include your written energy savings guarantee for the proposed project.

#### **F. Implementation Plan**

1. **Project Management Approach.** Provide an overview of your company's general approach to project management. Include information on your company's standard processes for implementing project work.
2. **Preliminary Project Schedule.** Provide a preliminary project schedule for the proposed scope of work. Include information on any specific scheduling considerations, if applicable.
3. **Post Installation Approach.** Provide an overview of your company's general approach to post installation support. Include information on project warranties and your company's process for identifying and addressing any project issues that occur after substantial completion of the project.



## **II. EVALUATION CRITERIA**

The Owner will likely reject any proposal that does not meet the minimum criteria described in this RFP and may at their discretion deduct points from the scoring rubric if the RFP format is not followed. For proposals meeting or exceeding the minimum criteria, the Owner will rate each proposal based on the scoring criteria shown below.

### **A. Qualifications and Experience (30 points)**

- a. Strength of past customer references
- b. Experience with implementing GESC projects under Article 19b of the Illinois School Code
- c. Past experience and performance on projects similar to that proposed
- d. Qualifications and experience of personnel assigned to project

### **B. Technical Solution and Implementation Plan (30 points)**

- a. Quality of technical approach and ability of proposed scope to meet Owner objectives
- b. Clarity and detail of project scope documentation
- c. Quality of implementation plan and project management approach

### **C. Project Cost and Savings (30 points)**

- a. Value of project in consideration of cost, savings, and scope
- b. Clarity of project costs and savings

### **D. Project Guarantees (10 points)**

- a. Strength of project guarantees
- b. Experience in delivering on past project guarantees