SCHUYLKILL INTERMEDIATE UNIT 29

REQUEST FOR QUALIFICATIONS
FOR A GUARANTEED ENERGY SAVINGS PERFORMANCE CONTRACT

IN ACCORDANCE WITH THE PROVISIONS OF PENNSYLVANIA ACTS 163, 57, 77 AND 39, TITLE 62

MARCH 6, 2026

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I. PURPOSE OF SOLICITATION

The intent of this Request for Qualifications (RFQ) is to solicit qualifications from Energy Services Providers (ESP). For the purpose of this RFQ, "ESP" refers to any company that is qualified to provide a guaranteed energy savings performance contract in accordance with Pennsylvania Acts 163, 57, 77 And 39, Title 62. Responses to this RFQ shall describe the ESP's capability to benchmark facilities, develop baseline performance data, identify energy efficiency measures, perform savings calculations, cost estimating, construction management, and all other services listed herein. Schuylkill Intermediate Unit 29 intends to select an ESP and award contract(s) to perform a guaranteed energy savings performance contract.

Please note that responses to this RFQ must be received electronically by March 27, 2026, at 2:00 PM Local Prevailing Time to Dr. Anthony Serafini at the following email address: aserafini@iu29.org No hard copies are required.

Schuylkill Intermediate Unit 29 reserves the right to reject any and all responses resulting from this RFQ. Late responses will not be accepted and will be returned to the submitting company unopened. Schuylkill Intermediate Unit 29 is not liable for any cost incurred by any person or firm responding to this RFQ.

Schuylkill Intermediate Unit 29 reserves the right to reject as non-responsive any submissions that do not contain the information requested in this RFQ. Additionally, Schuylkill Intermediate Unit 29 reserves the right to reject as non-responsive any submissions which are not organized and formatted as described in this RFQ.

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

Dr. Anthony Serafini, Executive Director
Email to: aserafini@iu29.org

All questions will be answered by email to all responders.

II. REQUESTED SERVICES

Schuylkill Intermediate Unit 29 proposes to address energy and utility conservation upgrades, indoor air quality improvements, and building system updates for the Schuylkill Intermediate Building. For the purposes of flexibility for the board of directors, the inclusive building list for this RFQ is: Schuylkill Intermediate Unit 29. Other ancillary buildings owned by the Intermediate Unit are hereby incorporated into this RFQ. This project may be combined with other non-energy-related projects to be delivered by other project delivery methods, including hybrid project delivery methods. Non-energy related projects may be procured separately through public bidding or other approved procurement methods. Schuylkill Intermediate Unit 29 shall direct the selected ESP regarding buildings and systems to consider within any Investment Grade Audit or project.

The ESP will provide a comprehensive building energy audit including all aspects of energy efficiency being considered, accurate savings and cost estimates, and recommended measurement and verification methods, or a directed effort on select buildings and systems as directed by Schuylkill Intermediate Unit 29. The audit shall include benchmarking of facilities, analysis of utility rates, on-site observations, data logging, energy modeling, energy efficiency measure development and analysis, energy savings calculations, recommendations, and measurement and verification methods. Schuylkill Intermediate Unit 29 anticipates a reduction in annual utility costs through the implementation of the energy efficiency measures identified in the audit.

Respondents to this Request for Qualifications (RFQ) shall identify their experience and qualification to design and construct an energy conservation project and comprehensive facility renovation that involves energy efficiency measure (EEM) which address any of the following building components: lighting, space heating, ventilation, air conditioning, building envelope, direct digital controls and management systems, domestic water heating, air distribution systems, electrical systems and water consumption systems. Schuylkill Intermediate Unit 29 is also interested in the respondents' qualifications and experience related to facilities addition/renovation planning and construction management services, as well as the ability to manage/construct architectural scopes of work, as allowable.

The ESP is responsible for all certification and documentation of personnel necessary to comply with the laws to perform work in the state of Pennsylvania.

The Schuylkill Intermediate Unit 29 may use other alternative funding for selected work.

III. SELECTION PROCESS

Submission Evaluation
Interested ESPs responding to this RFQ must provide the information required. Schuylkill Intermediate Unit 29 will evaluate submittals and choose the most highly qualified ESP. Schuylkill Intermediate Unit 29 may require oral presentations of the responses by the most qualified responders as determined by Schuylkill Intermediate Unit 29. The determination and selection of the most qualified ESP shall be the sole discretion of Schuylkill Intermediate Unit 29.

Final Contract
Upon selection the ESP will design and develop specific scopes of work to meet the Schuylkill Intermediate Unit 29's intent for this facility modernization project. The selected ESP shall competitively bid all scopes of work in coordination with the Owner's preferred vendors. Schuylkill Intermediate Unit 29 reserves the right to terminate the process after completion of the Investment Grade Audit without proceeding with implementation of the recommended measures and without obligation to enter into a performance contract.

IV. SCHEDULE

The following time frame is anticipated for the procurement period within this RFQ:

March 6, 2026	Release of RFQ
March 27, 2026	Submission Due by 2:00 PM Local Prevailing Time
April 13, 2026	Administration Presents Recommendation/Board Approval

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

Schuylkill Intermediate Unit 29 reserves the right to reject any and all responses resulting from this RFQ. Late responses will not be accepted and will be returned to the submitting company unopened.

Schuylkill Intermediate Unit 29 reserves the right to reject, as non-responsive, any submission that does not contain the information. Additionally, Schuylkill Intermediate Unit 29 reserves the right to reject, as non-responsive, any submissions which are not organized and formatted as described in this RFQ.

V. EVALUATION 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.

Submission Presentation
Preferences will be given to respondents demonstrating strong capabilities, experience, and reputation in undertakings similar to those described in this RFQ and providing authoritative documentation of the respondent's financial condition and stability.

Personnel Qualifications
Quality of personnel assigned to this project and degree of pertinent experience.

Services and Approach
- The respondent's approach to energy conservation projects shall be significant criteria for selection, respondents demonstrating innovative and cost-effective approaches shall be strongly considered.
- The range of services offered shall also be an important consideration.
- Methodologies and technical approach will be evaluated for practicality and soundness.

Project Experience
- Experience with energy conservation projects of a similar size and type to that proposed for Schuylkill Intermediate Unit 29
- Experience taking responsibility for the full range of roles contemplated for this project (e.g. Energy Efficiency Measures, Program Management Services, Design Methodology, Construction Installation capabilities, estimating and scheduling services, and Construction Management.)
- References

Business and Financial Qualifications
- Business unit dedicated to providing energy savings programs.
- Affiliation with energy and/or business organizations
- Financial viability

VI. FORMAT OF RESPONSE

The responses to this Request for Qualifications will consist of six (6) 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. Schuylkill Intermediate Unit 29 may, during the evaluation process, request additional information to supplement and/or clarify the information provided by any ESP. Any additional information not specifically requested in this RFQ 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.

- **Section 1: Cover Letter**

  The ESP's submission will include a cover letter at the beginning of the qualifications. The cover letter shall provide a summary of the information presented in the qualifications, names and telephone/email 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 and title of the person(s) authorized to conduct final contract negotiations on behalf of the ESP.

- **Section 2: Executive Summary**

  The ESP will provide an Executive Summary highlighting the ESP's unique qualifications and capabilities for this project. Confirm membership of NAESCO or equivalent professional organizations related to energy services. Additionally, please confirm if your

firm is prequalified by the PA Department of General Services for services such as Contractor for the Commonwealth's Guaranteed Energy Savings Program, Statewide Construction Management and/or Statewide Commissioning Agent, etc.

- **Section 3: Personnel**

  Each ESP will attach a Project Staffing Plan, the proposed plan will include a description of proposed staffing showing the project organization, supervisory responsibilities, and lines of authority. Identify the corporate affiliation for each staff member listed in the Project Staffing Plan. Attach resumes of all individuals who will have a role in the project.

  Provide a graphical representation (organizational chart) of the participants listed in the ESP's qualifications 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.

- **Section 4: Services and Approach**

  Provide an overview of the ESP's approach to energy conservation projects and program management and the range of services provided directly by the ESP. Specifically address the following areas:

  - *Services, Approach and EEM Experience*
    Provide a description of the ESP's approach to energy efficiency improvements and identify specific energy efficiency measures that the ESP has had responsibility over including, design, implementation and measurement and verification. List all types of services provided by your firm.

  - *Benchmarking and Energy Savings Verification*
    Provide a description of the normal method used to establish benchmarks, baseline energy use and verification methods. Describe the method used to justify variances between the baseline consumption and actual annual consumption. Describe and justify the methods used in measurement and verification of project savings.

  - *Cost and Savings Estimating and Bid Procurement Experience*
    The ESP shall describe experience and accuracy of cost and savings estimating; provide examples of cost estimates, bid procurement experience and accuracy.

  - *Building Commissioning Experience*
    Describe respondent's experience and approach to building commissioning and/or retro-commissioning, including in-house expertise and project experience.

  - *Training*
    The ESP shall outline any training proposed as part of the project, including the subject, duration, and location of training. Respondent shall also describe the relationship with the organization providing training, if not provided by the ESP.

  - *Program/Construction Management*
    Describe respondent's experience and approach to project management including: coordination with subcontractors, division of responsibility among project staff, and interaction with Schuylkill Intermediate Unit 29 representatives.

- **Section 5: Project References**

  - *Project References*
    Provide information on five (5) related projects that the respondent has successfully implemented within the last five years. References shall include:

- Customer Name
- Name and Telephone Number of Contact
- Brief Description of the Project
- Project Beginning and Ending Dates
- Specific EEM's recommended

- **Section 6: Financial Information**

  The ESP shall include the company's annual report, audited financial statements or equivalent showing information for the past three (3) complete financial year periods. If a bound document (such as an annual report) is included, it must be placed in the response's Appendix section.

- **Appendix: Additional Information**

  Respondents may attach any additional information that is not contained within the RFQ.

END OF REQUEST FOR QUALIFICATIONS