
MANDATORY PRE-PROSAL MEETING FOR RFP
REQUEST FOR PROPOSAL (RFP)
FOR AN
ENERGY PERFORMANCE CONTRACTING PROJECT

Issued by: Dixon Public Schools #170

Dixon Public Schools #170 (hereinafter referred to as District) is seeking specific proposals from Qualified Energy Services Companies (ESCOs) which are capable of providing comprehensive infrastructure and energy-related capital improvement services.

PROJECT OVERVIEW

District is interested in contracting for a full range of energy and water service and energy-related capital improvements at several district buildings (hereinafter referred to as project). These services and improvements are to be delivered on a performance contracting basis with guaranteed savings.

The District's objective in issuing this Request for Proposals is to provide a competitive means in which to select a single provider to fulfill all aspects of this project. The Board of Education may elect to implement further improvement measures in phases pursuant to the final contract. The work to be included in the contract may include upgrades to or replacement of equipment included in, but would not be limited to, the following systems: Electrical, lighting, heating, air conditioning, building automation, temperature control, facility management, bathroom renovations including domestic water and sewer, security, fire alarm, doors, insulation, flooring, weather stripping, caulking, windows, roofing, energy recovery systems, or other energy conservation measures that provide long term operating cost reductions.

QUALIFIED PROVIDER

A Qualified Provider is a person or business experienced in the design, implementation and installation of energy cost savings measures. As required by Section 19b-1.3 of the School Code, the minimum training required for any person or employee under shall include the satisfactory completion of at least 40 hours of course instruction dealing with energy conservation measures. In addition, the District is requiring that the Qualified Provider have at least 5 years of experience in performance contracting or be accredited by the National Association of Energy Service Companies (NAESCO).

REQUIRED CAPABILITIES

The ESCO must have the demonstrated technical and managerial capabilities to provide a comprehensive set of energy and water services including, but not limited to design, acquisition, installation, training and commissioning of new and/or existing energy systems as well as project monitoring and savings measurement and verification. Additional services may include operation and maintenance for all improvements and/or training of District's staff on routine maintenance and operation of systems. Monitoring and verification services shall include appropriate measurement and timely reporting of the performance and savings from project.

OVERVIEW OF TERMS AND CONDITIONS

1. **Contract Term.** The duration of the contract will be mutually determined between the ESCO and the District based on authorizing legislation, final project scope and financial factors. No contract shall exceed 20 years in duration.
2. **Guarantee.** The project must result in a guaranteed minimum **annual** energy, water and O&M savings guarantee, as well as defined levels of occupant comfort; maintenance, monitoring, training or other services.
3. **Execution of Guaranteed Energy Savings Contract and Financing Documents.** The District will negotiate and execute the Guaranteed Energy Savings Contract with the selected ESCO and all financing documents required by the selected financing source. The ESCO to whom the contract is awarded shall give a sufficient bond to the District for its faithful performance. The ESCO shall also provide a written guarantee that either the energy or operational cost savings, or both, will meet or exceed within 20 years the costs of the energy conservation measures. The ESCO shall reimburse the District for any shortfall of guaranteed energy savings projected in the contract.

PROCUREMENT PROCESS

The District expects to undertake the selection process described below according to the following schedule:

	<u>Dates</u>
Advertisement and Issue RFP	<i>September 20th, 2012</i>
Mandatory Pre-Proposal Conference	October 8th, 2012 8:00 am.
Walk through of facilities available	October 8th after the meeting
Site Visits	October 9th - November 9th
Submissions of Proposals	November 28th, 2012 2:00 pm.
Interviews with Finalist	TBD
Selection of ESCO	December or January BOE meeting
Investment Grade Audit / Final Design Development	January-February 2013
Review by Consultant	January-February 2013
Award Contract	February–March 2013
Preferred Project Completion	<i>August 2013</i>

Submission of Written Proposals. ESCO's interested in providing the services requested, must respond in writing. All submissions become the property of District and will not be returned to the ESCO. **All costs associated with submission preparation will be borne by the submitting ESCO.**

District reserves the right to reject any or all submissions and to waive informalities and minor irregularities in submissions received and to be the sole judge of the value and merit of the proposals offered.

INSTRUCTIONS TO PROPOSERS

Failure to complete any question in whole or in part, or any deliberate attempt by the proposer to mislead District, may be used as grounds to find the proposing ESCO ineligible.

1. Pre-Proposal Conference

A pre-proposal conference will be held on **October 8th**, promptly at 8:00am. at the **Dixon Public Schools District Office 1335 Franklin Grove Rd. Dixon IL.** **Attendance at the pre-proposal conference is mandatory.** **Attendees must submit attached Company Profile form within 5 days of the conference to be considered. Proposals from those who do not send an authorized representative to the conference will not be considered.** *The District will allow walk-through site visits of the buildings included in this RFP by appointment. The District representatives will be available to answer questions regarding the RFP and the project.*

Information will be provided (at the pre-proposal conference) that will include:

1. Facility square footage (by building)
2. Construction dates of buildings
3. Hours of operation (District to stipulate hours of operation to be utilized in energy calculations).
4. Utility history (26 months).
5. Reduced scale floor plans.

Additional information will be provided as requested to all ESCOs equally.

2. Site Visits

Prior to the submission of proposals and upon request, District will arrange access to the buildings included within the RFP. Knowledgeable representatives will be available to answer questions about the operation of the facilities. To make arrangements for a walk-through inspection, please contact the following person:

Mr. Kevin Schultz, Director of Buildings and Grounds
Dixon Public Schools
815-284-7722 ext 5122
815-849-5145 cell

The **Dixon Public Schools # 170** requires that interested respondents complete the attached Company Profile Form

**QUALIFIED PROVIDER
PROFILE FORM**

The District requests that submittal of this form be mandatory within five days of the pre-proposal conference. In submitting this form, it is understood by the respondent that the right is reserved by the District to reject any and all proposals of respondents that do not meet the specified minimum requirements of a Qualified Provider (see below).

1. **FIRM NAME:** _____

ADDRESS OF PROJECT EXECUTION OFFICE

2. **NAMES AND TITLE OF TWO CONTACT PEOPLE**

1) _____ Phone _____

2) _____ Phone _____

3. **YEAR FIRM WAS ESTABLISHED** (Minimum requirement of **5 years** of operation)

4. **YEARS OF PERFORMANCE CONTRACTING EXPERIENCE UNDER PRESENT COMPANY NAME:**

(Minimum requirement of **5 years**): _____

5. **PROVIDE A COPY OF YOUR FIRMS NAESCO ACCREDITATION IF AVAILABLE.**

6. **FIVE YEAR SUMMARY OF CONTRACT VALUES FOR ENERGY PERFORMANCE CONTRACTING PROJECTS WHERE YOUR FIRM WAS THE PRIME CONTRACTOR WITH A FIRST PARTY WRITTEN SAVINGS GUARANTEE TO THE DISTRICT:** (Note: If you are a branch office of a larger firm indicate only those contract values associated with that specific branch.)

2011: \$ _____
2010: \$ _____
2009: \$ _____
2008: \$ _____
2007: \$ _____

7. **ATTACH WITH THIS FORM, PROJECT SUMMARIES OF AT LEAST TEN (10) REFERENCES THAT HAVE PREVIOUSLY ENTERED INTO GUARANTEED ENERGY SAVINGS CONTRACTS WITH THE ESCO.** List only references that Provide information on at least Ten (10) similar projects in the Illinois K-12 market completed by your firm. **List only references where your company was the prime Energy Service Company that provided a energy guarantee and not a subcontractor.**