

***WEST HARVEY-DIXMOOR  
SCHOOL DISTRICT #147***

**PERFORMANCE CONTRACTING  
REQUEST FOR PROPOSALS (RFP)**

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West Harvey-Dixmoor SD #147  
191 W. 155<sup>th</sup> Place  
Harvey, Illinois 60426-3426**

**DATE April 4th, 2012**

**REQUEST FOR PROPOSALS  
FOR A  
GUARANTEED FACILITY IMPROVEMENT PROGRAM**

"Notice is hereby given that West Harvey-Dixmoor School District #147 ("the District") is requesting Qualified Providers to propose energy conservation measures through a guaranteed facility improvement contract on a performance contracting basis. The District's objective in issuing this Request for Proposal (RFP) is to provide a competitive means in which to select a single qualified provider of a Guaranteed Savings Contract. The contract shall follow the requirements of Article 19b of the School Code of the State of Illinois – "School Energy Conservation and Savings Measures."

Proposals will be received no later than **2:00pm** on May 4th, 2012 at West Harvey-Dixmoor SD #147 191 W. 155<sup>th</sup> Place – Harvey, IL 60426. **EXTENSIONS WILL NOT BE GRANTED.** The District is requesting 3 sealed copies of the proposals which will be publicly opened and announced immediately following the proposal due date and time. Proposals will be in accordance with said Article 19b of the School Code and the RFP guidelines.

All correspondence relating to the RFP, Walkthroughs, or Mandatory Meeting must be emailed to the Business Manager, Tonisha Sibley at [tsibley@whd147.org](mailto:tsibley@whd147.org). Phone calls will not be accepted relative to questions pertaining to this RFP.

The District will base its qualified provider selection on the following criteria:

1. Experience and Qualifications
2. Technical Approach
3. Financial Consideration and Economic Impact
4. Ability to Implement Project
5. Ability to Provide Comprehensive Maintenance Services and training of District Staff

Upon review of Proposals received in response to this RFP, the District will enter into a contract with the provider that is responsible and responsive to requested criteria and which provides the best overall value. The successful provider shall be required to submit a 100% Performance and Material Payment Bond upon award of Contract along with a Certificate of Insurance.

*The District will only consider companies who meet all requirements in Section I.A.4. (Experience and Qualifications) of this RFP. A Mandatory Meeting will be held on April 17<sup>th</sup> at the District Office at 10:00am, You Must Attend to be considered. Walkthroughs will be held on April 17<sup>th</sup> and 18<sup>th</sup> from 8:00am-3:00pm only. No additional walkthroughs or site visits will be permitted. A maximum of two (2) representatives per firm will be allowed during this walkthrough.*

The District may elect to implement similar facility improvements throughout the district in a multi-phased approach with the selected Qualified Provider pursuant to the contract.

The District reserves the right to reject any and all proposals and to be the sole judge of the value and merit of the proposals offered. Such decisions shall be final.

By order of the Board of Education of West Harvey-Dixmoor Harvey, Illinois.

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**I. PROPOSAL CONTENT & FORMAT**

Proposal must be submitted in the format outlined in this section. Each proposal will be reviewed to determine if it is complete prior to actual evaluation. The District reserves the right to eliminate from further consideration any proposal deemed to be substantially or materially unresponsive to the requests for information contained herein.

**A. Experience and Qualifications**

1. Company history - structure of company, financial stability and longevity.
2. Location and Description (function of office, number of employees at location, etc.) of Local Branch and Professional Training Facilities.
3. Organizational chart of company.
4. The company's experience with guaranteed energy savings contracts (references).
  - a. The ESCO must list five (5) K-12 references, who have contracted directly with the company responding and completed similar projects in excess value of at least one million dollars (\$1,000,000.00).
  - b. The ESCO must have and provide a listing of at least 10 guaranteed energy savings projects currently under contract.
  - c. The ESCO must be able to provide references of K-12 guarantee energy contracts, that have been in existence for 10 years or more.
  - d. For all projects required above, list the following information:
    - i. Project cost, savings, scope of work, date work was completed.
    - ii. School district name, address, contact person, telephone number, email address.
5. Resumes of all key project personnel.
6. Sample Performance Contract to be considered for the project.
7. \*Most recent Annual Report and Audited Financial Statement. ***MUST BE PROVIDED WITH RFP RESPONSE OR RESPONSE WILL NOT BE CONSIDERED.***

**B. Scope of Work Description**

Section B should contain the following information about the respondent's technical approach to meeting the District's comfort, energy efficiency and operating cost reduction objectives.

1. List specific conservation measures the respondent proposes to implement.
2. Include a section explaining each of the conservation measures and provide a detailed equipment listing for each component the qualified provider intends to provide as part of their proposal.
  - a. The District reserves the right to review and modify all equipment manufacturers and proposed products.
  - b. The District reserves the right to review and approve a list of all subcontractors from which the contractor will be soliciting bids.

3. List all potential energy conservation projects - even those that will not be included in your final recommended list.
4. Any additional information about the respondent's technical approach to the project may be included in the proposal.
5. The qualified provider must prepare and submit to the Regional Office of Education all necessary drawings and specifications for the project and obtain all necessary construction permits for all work.
6. All work must fully comply with all requirements in 23 Illinois Administrative Code Part 180 and all current editions of the International Building Code, the International Energy Conservation Code, the Illinois Plumbing Code, the Illinois Accessibility Code, and the Americans with Disabilities Act.
7. All drawings and specifications must be reviewed and approved by the village or city fire department prior to commencing any work.

**C. Financial Approach**

Section C should contain the following information about the financial terms of the proposed transaction:

1. Cash Flow Analysis: Include a cash flow analysis with energy savings, operational savings, annual program cost and net cash flow. List energy and operational savings separately.
2. Payments: List the start date, payment amount and frequency of each payment during the program term.
3. Performance and Material Payment Bonds: The qualified provider must submit to the District a performance bond and material payment bond in the amount of 100% of the construction costs.
4. Guarantee: Provide an explicitly written guarantee of the savings on an annual basis throughout the term of the agreement. Also provide a complete description of the guarantee methodology of measurement and verification that will be used for each facility improvement proposed.
  - a. \*Provide any examples of Guarantees that have not been met and payment has been issued to cover short fall.

**D. Implementation Plan**

1. Include in your proposal an implementation plan and timetable including completion dates describing how the qualified provider intends to execute the project.
2. Describe in detail your approach to project management for this energy conservation Program.

**E. Maintenance and Training Services**

1. Each qualified provider shall describe in detail the maintenance program that is contained in their proposal. Include the following in your description:
  - a. Scope of services – Preventative maintenance, predictive maintenance and repairs.
  - b. Response time for regular and emergency repairs.
  - c. Name of Company providing the maintenance and training services.
  - d. ESCO’s responsibility for managing the term of the maintenance services.
  
2. Each qualified provider shall describe in detail their training capabilities and the services that will be provided on new and existing equipment throughout the District’s buildings. Include the following in your description.
  - a. Description and location of remote training facility.
  - b. Type of on-site training that will be provided.

**II. EVALUATION PROCESS**

The District’s evaluation team is internal and will consist of administrative personnel. The evaluation team members will read and evaluate the proposals and presentations and promptly make a recommendation to the School Board. A Letter of Intent will be issued by the Board to the successful respondent at this time. The negotiation process, i.e., determination of final project scope, terms and conditions, and financial and legal issues, will begin immediately following the issuance of the Letter of Intent.

**III. EVALUATION CRITERIA**

Contract Award may be considered for the qualified provider who rates the highest in the categories outlined below and who best matches the needs of the District. The maximum number of points is 100. Responders must meet the criteria

**A. Experience and Qualifications 20%**

1. Company history - structure of company, financial stability and longevity.
2. Location of Local Branch
3. Organizational chart of company.
4. The company’s experience with guaranteed energy savings contracts (references).
5. Resumes of all key project personnel.
6. Sampel Contract
7. Most recent Annual Report and Audited Financial Statement. *Must be provided to be eligible.*

Preference will be given to respondents demonstrating strong capacities, experience and reputation in projects similar to those described in this RFP and providing authoritative documentation of the respondent's financial condition and stability.

**B. Proposal Preparation and Technical Approach 20%**

Proposals should include a detailed and sound technical approach to meeting the District’s comfort, energy and operating efficiency objectives. It must also follow the format described herein.

**C. Financial Consideration and Net Economic Impact 20%**

Preference will be given to the proposals that responsibly maximize the net economic benefit to the District, in connection with the proposed transaction. The energy, operational and capital savings are guaranteed to cover the cost of the payments for the measures.

**D. Ability to Implement Project 20%**

Proposals should illustrate that a reliable and proven project team has been identified for the work. Also timelines should be established to prove the feasibility of the project.

**E. Provide Comprehensive Maintenance Services 20%**

Proposals should outline the respondent's specific ability to maintain and repair equipment and systems following installation (including the District's existing equipment).

**IV. CONTRACT REQUIREMENTS**

**A. General**

1. Cost for Proposal Preparation. The District is not liable for any costs incurred by a respondent in preparing or submitting a proposal, or in preparing the contract or for any finder's fee.
2. Right to Submitted Material. All responses, inquiries, or correspondence relating to or in reference to the RFP, and all other reports, charts, displays, schedules, exhibits and other material submitted as part of a proposal will become the property of the District when received.
3. Competitive Offer. Pursuant to State law, and under penalty of perjury, the signer of any proposal submitted in response to the RFP thereby certifies that this proposal has not been arrived at collusively or otherwise in violation of either federal or State antitrust laws.

**B. Warrantees**

The District expects that all projects recommended and equipment replaced will have a minimum of one year manufacturer's or construction warrantees appropriate to the project.

**C. Insurance**

The District's insurance requirements will be available for the successful respondent.

**V. CONTRACT**

**A. Type of Contract.**

The District is authorized to enter into an installment payment contract, a lease purchase contract, or a financing arrangement using currently existing funds. The choice of debt instrument should attempt to best meet the requirements of the District's overall program needs.

- B.**
- C.**

**D. Terms of Contract.**

The Qualified Provider will review and/or prepare all contract documents and must submit a copy of any contract which it requests the Board consider. The final contract must comply with the provisions of Article 19b of the School Code of Illinois and the requirements outlined above.

**VI. APPENDICES**

**A. Disclosure:**

- a. In accordance with the Illinois School Code Article 19B-3, West Harvey-Dixmoor School District #147 discloses that Siemens Industry participated in the preparation of this RFP.
- b. West Harvey-Dixmoor School District #147 further discloses that Constellation Energy did perform a preliminary review of the buildings.

**B. Proposed Project Calendar**

- |                                    |  |
|------------------------------------|--|
| a. Issuance of RFP                 | April 4th, 2012                                |
| b. Mandatory Meeting               | April 17th, 2012                               |
| c. Walkthroughs                    | April 17 <sup>th</sup> & 18 <sup>th</sup> 2012 |
| d. Proposals Due                   | May 4th, 2012 (2:00pm CST)                     |
| e. Selection of ESCO               | May 10 <sup>th</sup> , 2012                    |
| f. Contractual Agreement Finalized | June 1 <sup>st</sup> , 2012                    |
| g. Project Executed                | Summer 2012 & 2013                             |