

WOODLAND SCHOOL DISTRICT 50

**PERFORMANCE CONTRACT FACILITY  
IMPROVEMENT PROGRAM REQUEST FOR  
PROPOSAL (RFP)  
December 18, 2014**

Mr. Don Selzer, Director of Facilities & Operations  
Woodland School District 50  
1105 N. Hunt Club Rd. Gurnee, Illinois 60031  
(847) 596-5651

## **TABLE OF CONTENTS**

---

<b><u>Item</u></b>	<b><u>Page</u></b>
Notice of RFP	3
I. Content & Format	4 - 5
II. Evaluation Process	5
III. Evaluation Criteria	5 - 6
IV. Contract Requirements	6
V. Contract	6
VI. Appendices	6

## **Notice of RFP**

Notice is hereby given that Woodland School District 50 is requesting Qualified Providers to propose energy conservation measures through a guaranteed facility improvement contract on a performance contracting basis. Specifically, the School District is seeking proposals for modifications to the HVAC system. The contract shall follow the requirements of Article 19b of the School Code of the State of Illinois – “School Energy Conservation and Savings Measures.” (105 ILSC 5/19(b), et.seq.)

**Proposals will be received, opened and contents announced, no later than 9:00 a.m. On January 20, 2015** at the Educational Support Center located at 1105 N. Hunt Club Rd, Gurnee, IL 60031. **EXTENSIONS WILL NOT BE GRANTED.** The District is requesting 3 sealed hard copies and 3 electronic copies (flash drives preferred). Proposals will be time stamped upon arrival. For more information, contact Don Selzer, Director of Operations and Facilities at (847) 596-5651 / dselzer@dist50.net

A mandatory pre-proposal meeting is scheduled for **December 23, 2014 at 8:00 a.m.** at the Educational Support Center. This meeting will allow respondents to ask specific questions about the project, schedule site visits and receive copies of utility invoices. Any additional information requested should be directed to Mr. Don Selzer at this meeting or any time prior to the RFP due date. **NO site visits will be scheduled during this day. THE DISTRICT WILL ONLY CONSIDER RESPONSES FROM THOSE FIRMS PRESENT.**

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

1. Experience and Qualifications
2. Proposal Presentation and Technical Approach
3. Financial Consideration and Economic Impact
4. Ability to Implement Project
5. Ability to Provide Maintenance and Training
6. Best interests of the School District
7. The evaluation criteria set forth in Section 19b-2 of the Illinois School Code (105 ILCS 5/19b-2)
8. Compatibility with current HVAC system and controls, Siemens Apogee.
9. The provider that best meets the needs of the District.

Upon review of Proposals received in response to this RFP, the District will enter into a contract with the provider that is most responsible and responsive to requested criteria and which provides the best overall value to the District. The successful provider shall be required to submit a Bond for the installation and faithful performance of all the measures included in the contract, upon award of Contract along with a Certificate of Insurance satisfactory to the School District. **The District will only consider those companies who meet the following requirements of Section 1(A) Experience and Qualifications.**

The District may elect to implement additional facility improvements in a multi-phased approach with the selected Qualified Provider for work that may be documented on the District's Life Health Safety report or that contain an energy related component including, but not limited to, mechanical, electrical, plumbing (MEP) and building envelope projects 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. Notices of all final recommendations will be made public, posted and consistent with the requirements of the Illinois compiled statutes, 5 ILCS 120/2.02 (OPEN MEETINGS ACT). and 105 ILCS 5/196-1, *et seq.*(School Energy Conservation and Savings Measure).

## **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 of Local Branch and professional training facilities.
3. Organizational chart of the company.
4. The company's experience with guaranteed energy savings contracts (references)

**Qualified Providers MUST possess the following credentials: Failure to comply with the items shown below will be seen as UN-QUALIFIED and not be considered for award.**

- Demonstration of accreditation level as ESCO from National Association of Energy Services Companies (NAESCO)
- Minimum of ten (10) Illinois K-12 references with contracts (individual or as an aggregate of multiple phased work exceeding \$1 million)
- Consideration will only be given to those firms that have contracted directly with these customers per the requirements in Section 5, Article 19b of the Illinois School Code
- References must include the project cost, savings; scope of work and date work was completed. Include all multiple phases if applicable, school district name, address, contact person, telephone number, email address
- Resumes of all key project personnel
- Most recent Annual Report and Audited Financial Statement
- Prior experience with the Siemens Apogee Automation System

### **B. Scope of Work Description**

Section B should contain the following information about the respondent's technical approach to modifying the HVAC system.

1. Describe in detail the specific facility improvement measures the respondent proposes to implement.
2. Include additional facility improvement measures (FIM's) for future consideration that would allow the District to consider implementing over time in accordance to the Illinois School Code/
3. Include a section explaining the methodology used for calculating energy savings for each measure and a price to provide measurement and verification (M&V). If M&V is not the most appropriate method, respondents are allowed to use operational savings / capital offsets (Stipulated Savings) for the cash flow so long as the approach is specifically described in the response.
4. 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, and any and all other applicable federal, state and local laws.

### **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: Respondents must list the start date, payment amount and frequency (payment schedule) for the proposed scope of work
3. 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

### **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. Respondents shall describe in detail their training capabilities and the services to be provided for the new and existing equipment throughout the District's building(s). This detail is to include but not be limited to: illustrating a comprehensive preventative maintenance report that identifies specific tasks and corresponding schedules to address the District's maintenance requirements.

## **II. EVALUATION PROCESS**

Proposals will be evaluated in accordance with Section 19b-2 of the Illinois School Code and the terms of this RFP. It is the expectation of the School Board to award the FINAL contract at its February 12, 2015, meeting.

## **III. EVALUATION CRITERIA**

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

### **A. Experience and Qualifications (20%)**

1. Company history - structure of company, financial stability and longevity
2. Organizational chart of company
3. The company's experience with guaranteed energy savings contracts (references)
4. Resumes of all key project personnel
5. Most recent Annual Report and Audited Financial Statement

### **B. Proposal Preparation and Technical Approach (20%)**

Proposals should include a detailed and sound technical approach modifying the Districts HVAC system.

### **C. Financial Consideration and Net Economic Impact (20%)**

Demonstrate the net economic benefit and overall life cycle costs to the District, in connection with the proposed transaction. Respondents must use energy and operational savings within the cash flow that meet or exceed the overall cost of the project. Operational Savings or Capital Offsets are defined as monies that would normally be allocated for the specific improvements recommended by the respondent.

**D. Ability to Implement Project**

**(20%)**

Proposals should illustrate that a reliable and proven project team has been identified for the work. Timelines should be firmly established to prove the feasibility of the project and ensure a timely implementation.

**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. The District is not liable for any costs incurred by a respondent in preparing or submitting a proposal, or in preparing the contract.
2. 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. 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 State or Federal 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. 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:** The District discloses that Siemens Industry, Inc., assisted with development of this RFP.