

**Notice of Request for Proposal  
For  
Guaranteed Energy Saving Contracts**

Notice is hereby given that Homer Community Consolidated School District 33C shall receive proposals for a Guaranteed Energy Saving Contracts until 10:00 a.m. on May 5, 2015 at the Administrative Office located at 15733 Bell Road, Homer Glen, IL 60491. At this time all proposals will be opened & read publically. **EXTENSIONS WILL NOT BE GRANTED.** The contract shall follow the requirements of Article 19b of the Illinois School Code – “School Energy Conservation Measures.” For more information contact Glen Wysong, Director of Buildings and Grounds, (708) 226-7600.

The Qualified Provider to whom the work is awarded shall pay prevailing wage. The District requests 3 copies of the proposal which must include a proposal with the content and in the format described within the RFP.

A mandatory pre-bid meeting for all Qualified Providers has been scheduled for 10:00 am on April 9, 2015 at the Administration Building. Any provider looking to respond to the RFP **MUST** be present.

The District 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 District may enter into a contract with the provider that best meets the needs of the District. The District will only consider those companies who meet all requirements listed in the RFP.

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



**HOMER COMMUNITY CONSOLIDATED  
SCHOOL DISTRICT 33C**

**REQUEST FOR PROPOSAL (RFP)  
FOR A  
GUARANTEED ENERGY SAVINGS CONTRACT  
PROJECT**

**Homer CCSD 33C  
15733 Bell Road  
Homer Glen, IL 60491  
(708) 226-7600  
3/31/15**

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## GUARANTEED ENERGY SAVINGS CONTRACT

### TIMELINE

(Homer CCSD 33C)

<u>Date</u>	<u>Action Item</u>
Apr 2, 2015	RFP is posted on the Capital Development Board website
Apr 9, 2015	Mandatory Pre-Bid meeting (10:00 am Administration Office)
May 5, 2015	Proposals are received and opened by 10:00 am at the Administration Building located at 15733 Bell Road, Homer Glen, IL 60491
May 12, 2015	Board approves the selection of Qualified Provider recommended by Administration at a special board meeting located at the Board room in the Administration Building listed above.

### SCOPE

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The areas in need of immediate solutions include the Hadley Middle School Library and MDF room located at 15733 Bell Road as well as the Administration center, located at 15733 Bell Road, Homer Glen, IL 60491. These areas both have HVAC equipment in disrepair and likely in need of replacement. It is the districts desire to achieve heating and cooling in these spaces with a solution proposed through this RFP process.

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## **I. PROPOSAL CONTENT & FORMAT**

Homer School District 33C (the District) requests proposals for the implementation of energy conservation measures, repairs and replacement services at Homer School District 33C on a performance contracting basis. The District's objectives in issuing this request for proposal are to provide a competitive means in which to select a single qualified provider (state certified guaranteed energy savings company) to perform the implementation of a guaranteed savings contract. The contract shall follow the Illinois School Code and the following RFP format. Qualified Providers must submit three (3) copies of their proposals.

Proposals must be submitted in the format outlined in this section. For each proposal a checklist will be used in reviewing the proposal 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. Table of Contents**

Responses shall include a table of contents properly indicating the section and page numbers of the requested information.

### **B. Executive Summary**

Responses shall include a concise abstract stating the respondent's overview of the 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 Qualifications- Qualified provider is defined in the Illinois School Code 105 ILCS 5/196-1.3.
2. Location of Northern Illinois Office and Corporate Headquarters.
3. Resumes of all key project personnel. Include the name of the engineer(s) or engineering firm providing the design engineering for the project including their PE numbers as well as the PE numbers of all full time employees of the Qualified Provider who are professional engineers registered in the State of Illinois and who will be working on this project.
4. References- List completed Guaranteed Energy Savings Contracts (GESCs) with dates, where similar solutions to those proposed for this project have been implemented within the last 3 years.
5. Litigation- List any projects with schools with which the Provider has entered into litigation or arbitration during the past 5 years. Provide a brief summary detailing the litigation/arbitration. Omission of any past litigation will result in disqualification.

## D. Technical Approach

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

1. **Needs & Solutions:** Include a "Needs & Solutions" section explaining facility needs and solutions the Provider recommends for all proposed improvements.
2. **Detailed Scope of Work:** Proposals may include any and all improvements that the provider feels would be of benefit to the District as part of this RFP. Provider must provide clear and detailed information on the proposed solutions. Improvements should be broken out and separated as applicable, and described independently within this section.
3. **Documentation:** For any work where the provider will be providing pricing, provide the following documentation for the scope of work being proposed.
  - a. **Detailed engineering drawings MUST be provided for improvements involving HVAC scope items** (failure to provide sufficient drawings may result in evaluation point deductions or complete disqualification).
  - b. Separate from the detailed drawings, provide in Section D of the proposal an **Equipment & Material List**, which includes: quantities, manufacturers, model numbers, and relevant characteristics for ALL equipment provided in the proposal.
4. **Engineering Approach:** Describe your firm's approach to the technical design of this project.
5. **Energy Engineering:** Provide a detailed explanation of how the Provider intends to calculate energy savings and what types of guarantees will be offered (utility bill analysis, actual measurements and stipulated savings and the cost of each option). Show the actual energy savings calculations for the proposed improvements, as well as an energy savings contract associated with a Provider's recent project.
6. **Contractor Selection:** Describe the process that the Provider utilizes to obtain their contractors and what criteria will be used to make the contractor selections.
7. **Equipment Selection:** Describe the process that the Provider utilizes to obtain the equipment to be used on the project and specifically what criteria will be used to make equipment selections.
8. **Installation Approach:** Describe how the Provider intends to implement the installation phase of the project in terms of approach, priorities, philosophies, timelines, change-orders and commissioning.
9. **Commissioning:** Described in detail the commissioning processes that the Provider intends to utilize to commission the building for the learning environment and energy efficiency. Provide actual documents for past projects where this same approach was utilized.

10. **Performance Assurance:** Described in detail the performance assurance processes that the Provider intends to utilize to ensure that the building operates at peak performance both at the completion of the installation phase and throughout the contract term. Provide actual guaranteed savings reports from past projects where this same approach was utilized showing how both energy and operational savings were calculated.
11. **Additional Information:** Supply any additional information about the Provider's technical approach to the project may be included in the proposal.

## E. Financial Aspects

Section E should contain the financial components of the proposed work as identified below.

1. **Pricing:** Describe in detail the process that the Provider intends to utilize to obtain the best prices for the District both initially and if additional work is required. Explain why this is the best approach.
  - a. Include the firm cost and guaranteed energy savings amount for all proposed improvements for each facility.
  - b. Provide the pricing process for any future work including percentage markup for expected general conditions/internal costs, engineering labor, project management labor and profit markup.
2. **Energy Savings:** Explain how the Provider intends to maximize energy savings and the advantage to the Provider's approach. Include in this proposal the provider's actual Guarantee Energy Savings Contract for the priced improvements along with all corresponding calculations. Break out actual (real dollar) energy and operational savings in the RFP response.
3. **Energy Savings Results**
  - a. Provide an annual energy savings report (M&V) to the district. Detail how the report is generated. Include any information with regards to cost and timing of the report.
  - b. Shortfalls
    - ◆ The Provider must include a summary of the reported annual savings for all completed projects. Any projects that did not meet the annual energy guarantee must be listed with an explanation for the shortfall.
4. **Project Funding:** Project funding will be developed by the school after selection of the provider.

**F. Implementation Plan**

1. Include in your proposal an implementation plan including dates describing how the qualified provider intends to execute the project that meets the timelines set forth in these specifications.
2. Describe in detail your approach to project management for this energy conservation program.
3. Provide an implementation timetable as well as a staffing plan identifying key project management personnel.

**G. Other Requirements for Consideration**

1. Provide comprehensive energy services and innovative solutions for the District, which may include the installation of energy savings equipment and material. The specific nature of this equipment and material will be left up to the Qualified Provider and may be based upon the Qualified Provider's understanding of the District's needs.
2. Provide a more comfortable environment for building occupants. This may include repair or modernization of mechanical, electrical, plumbing, building envelope, environmental systems and classroom, office and/or administrative areas to maximize energy and operational efficiencies. The specific nature of repair or modernization will be left up to the Qualified Provider and may be based upon the Qualified Provider's understanding of the District's needs.
3. If a proposal includes any proprietary data or information that the respondent does not want disclosed to the public, such data or information must be specifically identified as such on every page where it is found. Data or information so identified will be used by the school solely for the purpose of evaluating proposals and conducting contract negotiations. Respondent should be aware that the District is subject to the Illinois Freedom of Information Act (FOIA) and cannot guarantee that any document provided by a respondent will be considered as exempt from public disclosure under such Act.
4. By submitting a proposal, each Qualified Provider agrees, that if awarded the contract, the Qualified Provider shall comply with criminal history background requirements on its employees who are working on District property, if required under Illinois law.
5. By submitting a proposal, each Qualified Provider agrees that, if awarded the contract, it shall comply with the provisions of the Prevailing Wage Act (820 ILCS 130/0.01 et seq.) and each law identified in 105 ILCS 5/19b-1 et seq. Qualified Provider's subcontractors must also comply with the local prevailing wage rates as established by the Illinois Department of Labor.
6. By submitting a proposal, each Qualified Provider agrees to furnish a Performance Bond and Payment Bond in the amount of one hundred percent (100%) of the Contract Sum. Owner requires that the bond surety must carry an A.M. BEST rating of A.
7. The successful proposer agrees to furnish and maintain, for the duration of the contract, insurance for claims against injuries to persons and damage to property which may arise from or in connection with any work under the contract, including, without limitation, workers' compensation insurance, employers' liability insurance and commercial general liability insurance with a limitation of \$1,000,000. All insurers shall be licensed by the State of Illinois and rated B+:VIII or better by A.M. Best.

8. The successful proposer agrees to indemnify and hold harmless the District, its Board Members, employees, officers and officials, from and against all suits, actions or claims arising out of damages to property or persons due to the negligent acts or omissions of the Qualified Provider or its subcontractors related to the performance of the work.
9. Please indicate whether the company will provide a full-time Project Manager.

## II. EVALUATION CRITERIA

The District 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 District will rate each proposal based on the weighted scoring criteria shown below. The District intends to award a contract to the Provider offering the best value proposal. The best value proposal will be the proposal with the highest score based on 100 total points.

### A. Ability of the team to successfully implement Program (35 points)

1. Reputation of the Provider for successfully implementing energy savings projects and providing proven energy savings with scopes of work similar to those being considered for this project.
2. Background and Proposals of the people responsible for implementing the proposed GESC. This includes in-house engineers, project managers, and technicians responsible for the design, implementation, programming and commissioning of the project.
3. References of the company and people responsible for implementing the project.

Preference will be given to respondents demonstrating strong in-house capabilities, experience, and reputation on guaranteed savings contracts.

### B. Technical Approach (35 points)

1. Design and quality of the proposed solutions.
2. Depth, breadth, quality, creativity and detail of the engineering.
3. Effectiveness of the proposed solutions related to energy savings, operational / maintenance savings and learning environment considerations.

Preference will be given to proposals that include a detailed and sound technical approach to meeting the District's objectives.

### C. Financial Consideration (15 points)

1. Pricing structure and process to be utilized to price current and future work.
2. Energy savings generated by the proposed solutions.
3. Energy savings approach and company's past performance related to energy savings guarantees

**D. Performance Guarantees (15 points)**

1. Strength of the Provider's energy guarantee.
2. Strength of any other Provider guarantees.

