



**REQUEST FOR PROPOSAL (RFP)
FOR AN
ENERGY PERFORMANCE CONTRACTING PROJECT**

**ISSUED BY:
ARBOR PARK SCHOOL DISTRICT #145
17301 Central Ave
Oak Forest, Illinois 60452
(708) 687-8040
March 2015**

TABLE OF CONTENTS

| | <u>Page</u> |
|--|--------------------|
| 1. Table of Contents | 2 |
| 2. Energy Performance Contracting Timeline | 3 |
| 3. Notice of RFP for Energy Performance Contracting Project | 4 |
| 4. Proposal Format & Content | 5 |
| 5. Evaluation Criteria | 9 |
| 6. District Property Information | 10 |



ENERGY PERFORMANCE CONTRACTING TIMELINE

| <u>Date</u> | <u>Action Item</u> |
|--------------------|--|
| March 27, 2015 | RFP is Issued and posted on the Capital Development Board (CDB) website |
| April 7, 2015 | Mandatory Pre-Bid meeting (1:00PM – District Office) |
| May 4, 2015 | Proposals Due (11:00AM – District Office) |
| May 8, 2015 | Proposal Review & Selection of Finalists (<i>if more than one highly qualified proposal</i>) |
| May 13, 2015 | Finalist Interview (<i>if deemed necessary</i>) |
| May 27, 2015 | Board Approval of an Energy Performance Contracting Agreement |
| Summer 2015 | Project Start Date |

Notice of Request for Proposal for a Energy Performance Contracting Project

Notice is hereby given that The Board of Education of Arbor Park School District #145 (*hereinafter referred to as the **District/Buyer***) shall receive sealed proposals from Qualified Energy Services Companies for an Energy Savings Contracting Project until 11:00 a.m. on Monday, May 4, 2015 at the Arbor Park District Office, located at 17301 Central Ave., Oak Forest, Illinois 60452. It is at this time that the sealed proposals will be opened by an employee of the district and the contents of the proposal will be announced. **EXTENSIONS WILL NOT BE GRANTED**. The District requests 3 copies of the proposal which must include a proposal with the content and in the format described within the RFP.

These proposals should come from interested Qualified Energy Services Companies (**ESCO's**) who are trained in the design, implementation or installation of energy conservation measures and capable of providing comprehensive energy management and energy-related capital improvement services at all applicable buildings identified in the RFP.

Due to limited staff time, the **District/Buyer** will not be able to answer technical questions related to this Request for Proposal (RFP). For clarification on procedures regarding submitting a proposal, or potential RFP discrepancies, please contact Mr. Brian K. O'Keeffe, Assistant Superintendent of Finance/CSBO at bokeeffe@arbor145.org. Any interpretation of, or change made to the RFP will be made only by written addendum posted on the Illinois Capital Development Board website (<https://www.illinois.gov/cdb>). The **District/Buyer** will not be responsible for the accuracy of any oral explanations or oral representations.

A mandatory pre-bid meeting for all Qualified Providers has been scheduled for 1:00 p.m. on Tuesday, April 7, 2015 at the District Office (17301 Central Avenue, Oak Forest, Illinois 60452). Any provider looking to respond to this RFP **MUST** be present.

The District reserves the right to terminate this project prior to proposals being received, to cancel this RFP in part or in whole, reject any and all proposals and to be the sole judge of the value and merit of the proposals offered. The District reserves the right to negotiate with any bidder. 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.

Pursuant to 50 ILCS 515/25, the **District/Buyer** discloses that Performance Services, Inc. participated in the preparation of these specifications.

I. PROPOSAL CONTENT & FORMAT

Arbor Park School District #145 (**District/Buyer**) is interested in contracting for a range of energy services and energy-related capital improvements (*hereinafter referred to as the project*) and is seeking proposals for the implementation of such conservation measures, repairs and replacement services at Arbor Park School District #145 on a performance contracting basis.

The District's objective in issuing this RFP is to provide a competitive means in which to select a single Qualified Provider (as defined and required in Section 19b-1.3 of the Illinois School Code) to perform the implementation of a guaranteed savings contract. The contract shall follow the all applicable State and Federal laws and should be submitted using the below format. No contract shall exceed 20 years. In addition, the District prefers that the Qualified Provider be accredited by the National Association of Energy Services Companies (NAESCO).

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. ESCO Profile

This section should include the following information on the Qualified Provider.

1. General Firm Information – Current and former firm names, year firm was established, type of firm, mailing address & phone number. List any division or Branch Offices that will participate materially in the development of the proposal, in its evaluation process, and/or in the conduct of any services provided.
2. Performance Contracting - How many years has your firm offered performance contracting services and is your firm a member of NAESCO?
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. **Project Summary:** Summarize the scope of services that would be offered for this project along with facility needs and solutions the Provider recommends for all proposed improvements, using available district monetary resources as a guideline for recommendations.
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. All solutions must include a base project of **new** equipment including all piping and ductwork. Repair-Rebuild solutions may be submitted, but clearly identified as such. Improvements should be listed for any school where the Provider identifies needs and appropriate solutions, broken into specific and separate components. These separate components should be described independently within each section of the proposal.
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 of Proposed Improvements Must Be Provided. (Failure to provide drawings may result in evaluation point deductions)
 - b. Separate from the drawings provide in Section D of the proposal an Equipment/Material Table providing: manufacturer, type, model, size, and quantity for all equipment provided.
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 and an energy savings contract of the 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:** Described 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: (4) Four Season Optimization:** Describe 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:** Describe in detail the performance assurance processes that the Provider intends to utilize to ensure 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:** Funding has been identified by the District and a specific budget has been set aside for this project. Details of the budget will be discussed at the mandatory pre-bid meeting.

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.

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 overall proposal as it relates to the District's needs. The highest score attainable will be **100** total points.

A. Ability of the team to successfully implement Program (20 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 GES. This includes in-house engineers and technicians responsible for the designing, programming and commissioning of the project.
3. References of the company and people responsible for implementing the project.

B. Technical Approach (40 points)

1. Refer to section I-D for criteria

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

C. Financial Consideration & Net Economic Impact (30 points)

1. Refer to section I-E for criteria

D. Performance Guarantees (10 points) *

1. Value offered by the energy savings guarantee
2. Methodology and value of proposed measurement and verification plan

** The District intends to hire a licensed architect or registered professional engineer to assess the proposed energy savings in each submitted proposal.*



III. ARBOR PARK SCHOOL DISTRICT PROPERTY INFORMATION

1. Arbor Park #145 District Office (*attached to Arbor Park Middle School*)
Built 2005 - Office Space Only
17301 Central Avenue
Oak Forest, Il 60452
2. Arbor Park Transportation Facility
Built 1997 – 6,192 square feet
Office and Maintenance Space, adjacent parking lot for school buses
16866 Forest Avenue
Oak Forest, Illinois 60452
3. Arbor Park Middle School (*Grades 5-8*)
Built 2005 – 134,546 total square feet
Office (1st and 2nd Floor), Classrooms, Library, Gyms (2) & Cafeteria
17303 Central Avenue
Oak Forest, Illinois 60452
4. Kimberly Heights School (*Grades – EC/Pre-K & K*)
Built 1958 – 21,007 square feet
Office, Classrooms and Gym
6141 Kimberly Drive
Tinley Park, Illinois 60477
5. Morton Gingerwood School (*Grades 1-2*)
Built 1970 – 26,730 square feet
Office, Classrooms and Gym
16936 Forest Avenue
Oak Forest, Illinois 60452
6. Scarlet Oak School (*Grades 3-4*)
Built 1964 – 26,022 square feet
Office, Classrooms and Gym
5731 Albert Drive
Oak Forest, Illinois 60452