

REQUEST FOR PROPOSALS GUARANTEED  
ENERGY SAVINGS CONTRACT

Ogle County  
Oregon, IL 61061

INTRODUCTION

The Board of Ogle County (the "County"), is requesting qualified providers to propose innovative solutions and Energy Conservation Measures through a guaranteed energy savings contract. These proposals shall include: (a) the implementation of a facility audit, data collection, and other related analyses preliminary to the undertaking of Energy Conservation Measures; (b) the evaluation and recommendation of Energy Conservation Measures; (c) the implementation of one or more Energy Conservation Measures; and (d) the implementation of project monitoring and data collection to verify post-installation energy consumption and energy related operating costs pursuant to (50 ILCS 515/) Local Government Energy Conservation Act.

This RFP is issued on the following date pursuant to (50 ILCS 515/) which provides for a negotiated procurement.

OpTerra Energy Services participated in the preparation of these specifications issued by the County pursuant to this Request for Proposal.

Date issued: March 11, 2015

Proposed Project Calendar

Issuance of RFP	March 11, 2015
Submission of Proposals and Opening	April 13, 2015 9AM
Selection of Qualified Provider	April 21, 2015

Upon selection of the Qualified Provider by the County, the County will negotiate and execute the Guaranteed Energy Savings Contract with the selected Qualified Provider.

Please provide 1 electronic copy of your response. All proposals shall be sealed and received in the following office no later than 9 AM on April 13, 2015:

Ogle County Clerk's Office  
105 South 5th Street, Suite 104  
Oregon, IL 61061

PLEASE NOTE THAT NO EXTENSIONS WILL BE GRANTED and *any contact with Board Members during the RFP process will be grounds for immediate disqualification of the firm.*

*If there are any requests for public information or site visitation, please contact Sheriff Brian E. VanVickle at 815-732-6666.*

### Minimum Requirements for Proposal

- A. Provide comprehensive energy services and innovative solutions for the County, 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 County's needs.
- B. 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 County's needs.
- C. The Qualified Provider will provide a financial package that will be customized to meet the financial requirements of the County.
- D. A savings guarantee will be offered as part of the Qualified Providers proposal in accordance with the Local Government Energy Conservation Act. The savings in energy and operating costs are guaranteed to cover the cost of the program.
- E. If actual savings fall short of the guaranteed savings, the Qualified Provider will reimburse the County for the difference.
- F. It is preferred that the Qualified Provider demonstrate successful implementation of at least twelve similar performance contracts within the last ten years, for Illinois public institutions. Please provide contacts for all projects in Illinois. This requirement can be found in Section A. Experience and Qualifications, item 2.
- G. 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. Respondent should be aware that the County is subject to the Illinois Freedom of Information Act and cannot guarantee that any document provided by a respondent will be considered as exempt from public disclosure under such Act.
- H. Qualified Provider shall provide evidence that it is a "qualified provider" as that term is defined in the Local Government Energy Conservation Act and shall provide evidence as to whether it is an accredited Energy Service Provider (ESP) by the National Association of Energy Service Companies (NAESCO) and provide documentation to this fact. This requirement can be found in Section A. Experience and Qualifications, item 7.
- I. Qualified Provider shall provide evidence that it has at least one full-time employee in the Illinois local office that is a LEED® AP (LEED® Accredited Professional) and provide documentation to this fact.
- J. 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 County property, if required under Illinois law.
- K. 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 the Local Government Energy Conservation Act.
- L. 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.

- M. 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.
- N. The successful proposer agrees to indemnify and hold harmless the County, 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.
- O. The County is very interested in working with a company whose focus is based primarily on Guaranteed Energy Projects. Indicate your firm's revenue as a percentage of the following:

Equipment manufacturing:	_____	⊘
Service and Maintenance:	— — — — —	%
Bid and Spec:	— — — — —	%
Other:	_____	⊘
Guaranteed Energy Projects:	— — — — —	%

## Proposal Format

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

At a minimum, each submitted proposal MUST contain the following information.

- ./ Executive Overview
- ./ Experience and Qualifications of the Qualified Provider
- ./ Annual Financials of the Qualified Provider
- ./ Resumes of Key Personnel
- ./ Proposed Scope of Work
- ./ Proposed Project Cost and Savings
- ./ Project Management Capabilities

### A. EXPERIENCE AND QUALIFICATIONS

Provide a description of the Qualified Provider including the following:

1. The Qualified Provider's experience with energy and energy related services.
2. It is preferred that the Qualified Provider demonstrate successful implementation of at least twelve similar performance contracts within the last ten years, for Illinois public institutions. Please provide contacts for all projects in Illinois.
3. Resumes of all key project personnel, including projects in which they have participated throughout their career at the current company.
4. A description of how the Qualified Provider would manage the project.
5. Include the most recent annual audited financials for the Qualified Provider (may be included in the appendix)
6. Description of how the Qualified Provider will insure and bond the project.
7. Provide evidence as to whether the Qualified Provider is an accredited Energy Service Provider (ESP) by the National Association of Energy Service Companies (NAESCO) and provide documentation to this fact.

## 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 & operating cost reduction objectives:

1. List of specific innovative conservation measures the respondent proposes to implement.
2. Include a section explaining each of the innovative conservation measures in some level of detail.
3. Additional information about the respondent's technical approach to the project may be included in this section.
4. Proposals must include a schedule indicating how the project will be completed on a timely basis.
5. Describe "on-site" construction management services.
6. Describe project management methodology

## C. PROJECT COST AND SAVINGS

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

1. Information about the Qualified Provider's projections as to total annual savings, payments to the respondent, and the net benefit to the County from the proposed transaction (cash flow analysis).
2. A description of important financial terms should be included in the proposal. This section must include:
  - a) Type and source of financing.
  - b) Interest rate (including any associated annual fees) estimated at the time of submittal.
  - c) The frequency of these payments.
  - d) The term of the proposed agreement.
  - e) A guarantee of energy savings on an annual basis.
  - f) Any other terms or information relevant to the financial aspects of the proposed transactions.
3. A description of the method to be used to measure energy savings achieved in the building through the efforts of the Qualified Provider should be included within this section.
4. The Total Guaranteed Project Cost for the Implementation of the Improvements should be included within this section.

## Evaluation Criteria

Each proposal will be evaluated by the following criteria:

- A. Experience and Qualifications 40%
- B. Scope of Work 35%:
  - 1. Technical Approach 15%
  - 2. Project Management Approach 10%
  - 3. Construction Management Approach 10%
- C. Project Cost and Savings 25%:
  - 1. Financial Approach and Guarantee 10%
  - 2. Financial Strength of Qualified Provider 15%

The County reserves the right to reject any and all proposals and/or waive any informality, irregularity or defect in any or all proposals and to accept that proposal which in its opinion is in the best interest of the County. Any such decision will be final.

All proposals shall be deemed final, conclusive and irrevocable. Once opened, no proposal shall be subject to correction or amendment for any error or miscalculation. No proposal shall be withdrawn without the consent of the County after the date and time established for their receipt. All proposals shall be valid for a minimum of 60 days after the date established for their receipt. Providers must satisfy themselves, upon examination of these requirements, as to the intent of these requirements. After the submission of the proposal, no complaint or claim that there was any misunderstanding in regard to the proposal will be entertained from any party.

## Attachments to this RFP

- Copy of floor plan for each building
- Copy of one recent gas, electric and water bill for each building
- No energy audit was conducted

Facility Owned by Ogle County	Building Age	Building Area (Sq. Ft.)	Building Address (Oregon, IL unless otherwise indicated)
Ogle County Courthouse	1890, renovated 2010	36,000	100/105 S. Fifth Street
Rochelle Focus House (Main Office/Classrooms)	1995, renovated 2004	7,595	3279 Highway 251, Rochelle, IL
Judicial Center	2004	80,000	106 S. Fifth Street
Health & Administration Services (Includes Pines Road Annex)	2000	16,392	907 W. Pines Road