

Request for Qualifications/Pricing

In Preparation for an Energy Savings Contract

Issued by:

Rising Sun-Ohio County CSC (RSCSC)
Board of Trustees
Rising Sun, Indiana

OVERVIEW

The Rising Sun-Ohio County CSC (RSCSC) Board of Trustees of Rising Sun, Indiana is seeking the submission of qualifications with pricing from qualified and interested firms capable of providing comprehensive energy management and energy-related capital improvement services for all of its buildings in the response of this Request for Qualifications/Pricing (RFQ/P). All energy and energy related capital improvements will be developed with a guaranteed savings plan to demonstrate and verify reductions in the operating budget for the buildings in accordance with the Indiana Code 36-1-12.5, Guaranteed Energy Savings Contracts and Energy Efficiency Programs.

PROJECT SCOPE

The goal of the RSCSC is to reduce energy consumption and costs, while improving the infrastructure, and minimizing the operational and maintenance costs across the entire energy and operations infrastructure. The RSCSC Board of School Trustees is considering energy-related capital improvement services for all of the RSCSC facilities.

It will be the responsibility of the selected firm to develop cost-effective energy efficiency projects for RSCSC at a later time. Potential energy efficiency measures are described in IC 36-1-12.5-1.

QUALIFICATIONS OF THE FIRM

The Board of Trustees will seek qualifications and pricing from interested parties from the selected energy services provider and may award a contract to the firm that, in its sole opinion, is most capable of providing the range of services described and anticipated by this RFQ/P, and in the long-term best interest of RSCSC. To be considered for this project, a Qualified Provider must demonstrate knowledge and experience in similar projects from the following:

- Adequate financial resources to support the range of project scopes anticipated.
- References that can attest to the quality of the Qualified Providers past work.
- A proven track record of completed projects by the responding firm. The Qualified Provider must demonstrate minimal proof of having completed a minimum of ten (10) Indiana Public K-12 School projects in the State of Indiana by the responding firm before May 1, 2018.
- An established record of technical performance on energy related projects. The responding firm must provide a resume of its internal engineer(s) for the RSCSC project. Provide the Registered Professional Engineer (P.E.) number in the State of Indiana.
- A proven record of on-time and on budget performance.
- Trained and knowledgeable staff.
- Competent management support at all levels.
- Ability to work in a dynamic, fluid and progressive environment.
- Ability to effectively communicate with the School and its representatives, as necessary.

The RSCSC reserves the right to investigate the qualifications of all Providers under consideration and to confirm any part of the information furnished by a Qualified Provider, or to require other evidence of managerial, financial or technical capabilities that are considered necessary for the successful performance of the contract.

The intent of this RFQ/P is to select a firm to develop future qualifying projects, negotiate scope and pricing, and implement a future Guaranteed Energy Savings Contract.

SUBMITTAL REQUIREMENTS

The submitting Providers must have demonstrated technical and managerial capability across a broad range of energy, design, construction, operations and maintenance areas. The School District will consider the following background and experience factors in the evaluation of all responses.

Response Format:

1. Cover Page

2. Table of Contents

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

3. Executive Summary

- Responses shall include a concise abstract of **no more** than two (2) pages.

4. General

Include the following information on the Qualified Provider:

- Name of Company
- Address
- Telephone Number
- Fax Number
- Contact Person for this Project

5. Firm's Qualifications and Management

- Number of Years Company Has Operated in Indiana
- Number of Years the Indiana-based office of the responding firm has performed guaranteed energy savings projects
- When was the responding firm's first energy project installed in the State of Indiana?
- Who was the customer? How big was the project? Details of Project?
- List the Lead Personnel employed by the responding firm involved in this project. Include a resume on each person listing education, experience, work history, and responsibilities on this project.
- An up to date Letter of Bondability showing the Company's aggregate project bonding amount.

- Include a copy of the certifications(s) from the Indiana Department of Public Works that proves the responding firm is a Certified Professional Services Provider.
- Include what percentages of a typical \$5,000,000.00 MEP energy project your company will self-perform in the categories shown below. Also, how do you contract for the following trades work:
 - Mechanical trades work
 - Electrical and lighting trades work
 - SCADA and building controls trades work
 - General and site construction work

6. Engineering

Each Qualified Provider shall provide the information requested below regarding the engineering services they will provide if selected to implement this project:

- In-house Engineering Staff: Provide resumes on all Professional Engineers registered in the State of Indiana who are direct employees of the Qualified Provider and reside in responding branch only who will perform engineering services on this project. In addition, list all other technical personnel who are direct employees of the Qualified Provider who will perform engineering services on this project. Specifically identify which engineers will be performing which engineering services.
- Engineering Approach: Include a detailed explanation of how engineering services will be implemented. This explanation should include the people, specific engineering services, timeline and external forces that could affect his approach.

7. Training and Support Services

- Explain Qualified Provider's plan for providing training and support services.
- Range of Services: Describe the range of services being offered by your firm, such as maintenance, training, follow-ups, auditing, etc.
- Explain how you (the responding firm) provide support services for the RSCSC (Not subcontracted services. Example: If a chiller is in need of emergency repair how would you support the RSCSC?).
- Provide an organizational chart and explain how you support and service your company's customer base with your service department.

8. Performance Assurance

- Explain how the Qualified Provider plans to address performance assurance.
- In-house Personnel: Include resumes on any Measurement and Verification Specialist and Measurement and Verification Supervisor in direct employment of the Qualified Provider. Measurement and Verification Specialists responsible for this project must

reside in responding office, branch or facility. Please list address and location of these specialists.

- Contracted Personnel: Include resumes on all Personnel not employed by the responding company that will be responsible implementation. I.E. Subcontractors of any work not performed by the responding company.
- Please list all Installation Disciplines the responding company will self-perform for this project and demonstrate your expertise in these areas.
- Organization: Describe the organization the Qualified Provider has in place to ensure successful performance over the twenty (20) year guarantee term.
- Baseline Methodology: Describe the methodology used to compute the energy baseline.
- Discuss energy measurement, verification protocol being used and conformance with International Performance Measurement and Verification Protocol (IPMVP).
- Past Guarantees: Provide a reference list identifying the following for ten (10) Indiana customers that falls within IC36-1-12.5 with which the Qualified Provider has a performance guarantee.
- Performance and Payment Bonds: Performance and Payment bonds will be required per IC36-1-12.5 to insure the faithful execution of the proposed guaranteed savings construction project. All Qualified Providers must provide Proof of Bondability with their RFQ/P response from the surety from whom they intend to purchase performance bonds. These bonds must have a minimum rating of A from Best rating service. RFQ/P responses failing to provide a Letter of Bondability as described herein will be rejected.
- The selected Qualified Provider must provide a commitment from its surety company to provide a bond covering 100% of the estimated and non-stipulated guaranteed energy savings amount over the term of the guarantee.

9. Names and telephone numbers of at least three guaranteed energy savings project references for in which the installing and responding firm has been contracted to install projects with a brief description of the work that was performed. These references will have been in operation for more than one (1) year.

10. Appendix and Budget Pricing for energy conservation measures for RSCSC. Include any energy conservation measures that RSCSC should consider with budget pricing, energy savings, simple payback and a project cash flow summary. Note that operational savings and cost avoidance savings will not be accepted and will not be considered in the RSCSC analysis.

Upon review of all responses to this RFQ/P, the RSCSC intends to enter into a contract with the most Qualified Provider. The RSCSC Board of School Trustees reserves the right to reject any and all RFQ/P responses.

QUALIFICATIONS EVALUATION PROCESS

The School Corporation's evaluation and selection process requires that the appropriate specifications and terms of the RFQ/P be included in the Qualified Providers submission.

The RSCSC may:

- Reject any or all Requests for Qualifications.
- Cancel the Request for Qualifications.
- Approve or disapprove the use of a particular subcontractor.
- Modify any requirements contained within the RFQ/P and request a revised submission from all Qualified Providers.
- Negotiate with any, all or none of the Qualified Providers.
- Establish a short list of Qualified Providers eligible for interview after review of written qualifications.
- Accept the written qualification and seek a proposal for a specific scope of Work, without negotiation, and issue a notice to proceed.
- Establish an added value point system.
- Establish other evaluation criteria determined to be in the best interest of the UCCC Board of School Trustees.

Note: This RFQ/P does not commit RSCSC to negotiate a contract, nor does it obligate the above mentioned to pay for any cost incurred in the preparation and submission of the qualifications or in anticipation of a contract. RSCSC reserves the right to contract with any of the firms responding to this RFQ/P based solely upon its judgment of the qualifications and capabilities of the firm.

SUBMISSION DEADLINE

An original and three (3) copies of this Request for Qualifications/Pricing must be received no later than 2:00 pm on June 11, 2018 to the following:

Mr. Branden Roeder, Superintendent
Rising Sun-Ohio County CSC
110 Henrietta Street
Rising Sun, IN 47040-1018
(812) 438-2655

Request for Qualifications/Pricing may be either mailed or hand delivered. The RSCSC Board of School Trustees is not responsible for late delivery caused by the Postal Service or private

carriers. Any Request for Qualifications/Pricing received after the deadline will **not** be evaluated.

All submittals become the sole and unrestricted property of the RSCSC Board of School Trustees. The content of all submittals will be held confidential until the selection of a Qualified Provider is made. **Any “proprietary material” must be clearly marked.**

REQUESTS FOR INFORMATION

Any requests for clarification or additional information regarding this RFQ/P shall be submitted by email only to Mr. Branden Roeder, Superintendent at broeder@risingsun.k12.in.us

ECONOMY OF QUALIFICATIONS

Qualifications should be prepared simply and economically and give a straightforward and concise description of the Qualified Providers capabilities to satisfy the requirements of the project. Special bindings, colored displays, etc. are not necessary. Emphasis should be placed on completeness and clarity of content.

PROPRIETARY MATERIAL

Any proprietary information in a submittal must be designated clearly and should be bound separately and labeled with the words “PROPRIETARY INFORMATION”. Appropriate references to this information must appear in the body of the qualifications. An entire submittal marked “PROPRIETARY INFORMATION” will not be accepted.

Qualified Providers should be aware that the UCCC Board of School Trustees is required by law to make its records available for public inspection with certain exceptions. It is the School Board’s belief that this legal obligation would not require the disclosure of proprietary, descriptive literature that contains valuable designs, drawings or documentation. However, the Qualified Provider, by submission of materials marked “PROPRIETARY INFORMATION”, acknowledges that the RSCSC Board of School Trustees will have no obligation or liability to the Qualified Provider in the event that either must disclose these materials.