

Tate County School District

REQUEST FOR PROPOSAL / QUALIFICATIONS

FOR EFFICIENCY SERVICES PROGRAM

RFP SUBMITTAL DEADLINE:

**December 20, 2018
10:00 am local time**

**at
574 Parkway Street
Coldwater, MS 38618
Attn: Sandy Patton**

Tate County School District

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Request For Proposal / Qualifications

SOLICITATION ADVERTISEMENT

Sealed proposals will be received by, on and in behalf of the Tate County School Board until 10:00 am on December 20, 2018 at 574 Parkway Street, Coldwater, MS 38618

Request for Proposals as follows: **EFFICIENCY SERVICES PROGRAM**

Terms and specifications may be obtained at the 574 Parkway Street, Coldwater, MS 38618. ATTN: Sandy Patton

Proposals should be marked "RFP Efficiency Services Program" on outside of envelope.

The Tate County School Board has the right to accept or reject any or all bids, and to waive informalities therein and to determine which is the best proposal.

By order of the Tate County School Board, Regular Meeting, November 15, 2018.

Tate County School District

Sandy Patton, Business Manager

Section I - General Information

1. Purpose

The Tate County School Board seeks specific qualifications from certified Energy Services Companies (ESCOs) that are capable of providing a comprehensive district wide energy management program for all facilities owned and/or managed by the TATE COUNTY SCHOOL BOARD pursuant to Mississippi laws. The TATE COUNTY SCHOOL BOARD shall negotiate and execute a professional services agreement with the selected firm for the conduct of an investment grade energy audit. In the event that a guaranteed energy savings contract is not implemented, the TATE COUNTY SCHOOL BOARD shall pay for the cost of the work completed according to the terms of the professional services contract.

2. Performance Contracting

For the purposes of this document, "performance contracting" is defined as a contract for the design and implementation of energy efficiency measures including services, equipment, and maintenance for which the payment obligation is directly related to the energy and operational cost savings (avoidance) attributable to the scope of services (and equipment) provided under the contract for the term of the agreement.

3. Project Funding

Respondents shall be willing and able to assist with the necessary information required to obtain the financing for this project in accordance with applicable federal, state and local laws. Due to limited budgets for this upgrade, the TATE COUNTY SCHOOL BOARD has a special interest in ascertaining modern and innovative proposals that provide turn-key solutions, installation and long-term warranty for the length of the contract term.

4. Savings Guarantee

The ESCO shall provide a written energy savings guarantee, clearly stated in units of energy to be saved. Annual cost savings derived from such improvements beyond the guaranteed minimum savings will be held by the Customer, and will not be allocated to future annual savings guarantees or shortfalls in other years. Any O&M cost savings proposed by the selected ESCO will be rigorously reviewed and, if agreed to, will be limited to those that can be thoroughly documented and approved by the Customer. NOTE: The Customer also reserves the right to enter into an Energy Services Agreement, as defined, under MS Code 31-7-14 with selected ESCO for this RFQ should they decide to that is the best course of action.

5. Proposal Format

Proposals must be submitted in the format outlined in this document. Each proposal will be reviewed to determine if it is complete prior to actual evaluation. Proposals not containing the information requested will not be considered. Respondents shall use the prescribed format to indicate their experience and qualifications, describe their approach to the project and explain their proposed contract. In addition, the TATE COUNTY SCHOOL BOARD reserves the right to waive any irregularities and formalities in the selection of the ESCO for this project.

6. Contract Responsibility

The selected ESCO will be required to assume total responsibility of the project. The selected ESCO will be considered the prime contractor and the sole point of contact with regard to all contractual matters.

7. Required Insurance

The successful respondent shall procure and maintain in effect during the life of the agreement commercial general liability insurance and workers compensation insurance as required by State law. Evidence of required insurance shall be presented prior to contract execution.

8. Taxes, Fees, Code Compliance, Licensing

The ESCO shall be responsible for payment of any required permits, sales and/or use taxes or fees associated with the execution of the performance contract. The ESCO shall be responsible for compliance with all applicable codes and laws.

9. References and Proprietary Information

Submission of a response constitutes permission to make inquiries concerning the respondent to any persons or firms deemed appropriate by the TATE COUNTY SCHOOL BOARD. Any proprietary information that the submitting contractor does not want disclosed to the public shall be so identified on each page on which it is found. Data or information so identified will be used by the TATE COUNTY SCHOOL BOARD solely for the purpose of evaluation and contract negotiations for the project as stated herein. Disclosure of any proprietary information by the TATE COUNTY SCHOOL BOARD shall be in strict accordance with the laws and regulations regarding disclosure in the State of Mississippi.

10. Site Information:

Due to the limited availability of staff by the Customer, site visits will not be made until after the selection of the ESCO to ensure minimal disruption to the operations of the facilities. Any information about the size, conditions, etc. of the facilities can be requested by an email request to the below point of contact. The Customer will attempt to supply information requested to the proposing ESCO's to assist in the response to the solicitation, however, only request received via email communication will be responded to and all information provided will be provided to each firm who request a copy of the solicitation. The Customer during this phase of the solicitation is more concerned with each ESCO's general approach to developing projects.

11. Restriction of Contact:

From the issue date of this RFQ until the Customer selects a respondent for award, the contact person listed below is the sole point of contact concerning this RFQ. Any violation of this condition may be cause to reject the offending ESCO's submission. If it is discovered that ESCO has engaged in any violations of this condition, the offending ESCO's response may be rejected or contract award rescinded. ESCOs must agree not to distribute any part of their submissions. An ESCO that shares information contained in its submission with other Customer personnel and/or competing ESCO personnel may be disqualified.

Direct all inquiries concerning this RFQ in writing to:

Sandy Patton

574 Parkway Street, Coldwater, MS 38618

Section II – Statement of Qualifications Format and Preparation Instructions

RESPONSE FORMAT AND PREPARATION INSTRUCTIONS

Responses must be submitted in the format outlined in this section. Proposals should be limited to twenty-five (25) pages. TATE COUNTY SCHOOL BOARD reserves the right to eliminate from further consideration any response that is deemed to be substantially, or materially, unresponsive to the requests for information contained in this document. The intent of TATE COUNTY SCHOOL BOARD is that all responses follow the same format and protocol, in order to evaluate each response fairly. Responses will be evaluated in light of the material and substantiating evidence presented therein, and not on the basis of what is inferred.

Table of Contents

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

1. Executive Summary

Responses shall include a summary overview of the Respondent's qualifications, approach and other pertinent information. The Executive Summary should be no more than two (2) pages in length.

2. Background and Experience

A. Firm Profile

The firm shall provide the following information:

- Firm name.
- Federal Employer Identification Number.
- Corporate office address.
- Names and titles of two (2) contact people within the firm: one for questions regarding this submission and one with responsibility for contract negotiations.
- Does your firm manufacture products/equipment that are used in energy efficiency projects?
- Provide evidence of insurance coverage.

B. Project Team and Support

Provide a list of the personnel to be used on this project, with their specific roles and qualifications. Concise resumes including education, experience, where the employee is based and other pertinent information shall be included in an appendix for each team member assigned to the project.

3. Technical Approach

A. Performance Contracting Approach

In two (2) pages or less, summarize how your firm will perform the scope of work outlined in this RFQ, and to what extent the owner is involved in these activities.

B. Facility Audits and Project Development

Indicate your firm's approach to performing detailed energy audits, identifying and designing facility improvement measures, and your process for recommending which measures should be included in the performance contracting project.

C. Project Management

Indicate your firm's approach to managing the installation phase. Describe the various responsibilities of your team members during construction, and how they will keep the owner's personnel informed of the project's progress. What is the Respondent's approach to ensuring safety during the installation phase? Indicate your understanding of applicable codes and construction practices for this project.

D. Scope of Services

Which of the services outlined in this RFQ are typically performed by your firm and which services are typically performed by subcontractors? Describe your process for managing the work of subcontractors.

E. Training

Address your firm's approach to training the owner's personnel on the newly installed equipment. Does your firm offer additional training services to enhance the skills of facility operations personnel?

4. Financial Approach

A. Financing Source

Discuss the Respondent's ability to provide or arrange project financing.

B. Savings Guarantee

Describe your firm's approach to proving that the energy savings associated with this project have been achieved, including the monitoring, verification and reporting of results. How does your firm handle situations in which the actual energy savings fall short of the guaranteed energy savings amount? Describe all events that may lead to guarantee modification or termination.

C. Best Value

Describe ESCO's approach to providing the greatest financial value for the Tate County School Board.

EVALUATION CRITERIA

The TATE COUNTY SCHOOL BOARD'S evaluation team will consider the following criteria in evaluating responses; these categories will be weighted on importance and significance to this project. The TATE COUNTY SCHOOL BOARD will select the responding firm that is deemed most qualified for the project, and that the TATE COUNTY SCHOOL BOARD determines provides the greatest value for this Energy Performance Contracting program.

Evaluation Criteria: 100 Maximum Points

Capabilities of Firm:	25
Project Team:	25
Technical Approach:	25
Financial Approach:	25

Total points to be earned are on a scale of 1 to 100, with 1 point being the lowest score and 100 points being the highest score. Points may be deducted if ESCO response varies from requested format and number of pages.

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