

REQUEST FOR QUALIFICATIONS

**Issued by
Union Public School District
For Energy Savings Performance Contracting Services**

INTRODUCTION

The Union Public School District (hereinafter referred to as “Customer”) seeks specific qualifications from interested Energy Services Companies (ESCOs) that can provide comprehensive energy management for facilities owned or managed by the Customer.

ESCO RESPONSE REQUIREMENTS

The Customer seeks an open and transparent form of procurement when selecting an ESCO to perform energy conservation services. Only NAESCO accredited firms with approval from MDA Energy Division to perform such services will be considered. Proof of NAESCO accreditation is required in the qualifications submission and must be included as a separate tab in the response for easy access by the Customer. All aspects of this RFQ and approach shall be conducted in accordance with Section 31-7-14 of the Mississippi Code, the Mississippi Development Authority-Energy Division’s Policy and Procedures for Energy Performance Contracting and the Request for Qualifications.

Proposals may not be withdrawn for a period of one hundred twenty (120) days from the date of the submission deadline.

The Customer reserves the right to accept or reject any proposal or item listed therein. The Customer further reserves the right to waive any informality in proposals received.

Objective

The objective in issuing this Request for Qualifications is to solicit proposals and qualifications from companies that have the experience, capability, and track record to provide guaranteed, paid-from-savings upgrades to existing facilities and infrastructure through a performance-based contracting methodology.

The selected performance-based contractor shall develop and implement utility savings measures, develop cost reduction strategies, and identify any available funding opportunities for the Customer. The funding generated from such strategies shall be utilized to provide infrastructure improvements and upgrades. The selected firm shall:

- A. Design and implement infrastructure improvements that utilize proven technologies to provide a state-of-the-art environment that will serve the Customer’s present and future needs;
- B. Provide training of personnel in the operation and maintenance of installed systems;
- C. If requested, assist with securing a viable financing mechanism acceptable to the Customer;
- D. Be able to provide a written guarantee that total program costs shall be one hundred percent (100%) covered by the performance enhancements of the system and operating cost reductions based on utility unit reductions, equipment accuracy, funding opportunities, and agreed upon operational savings.
- E. Provide a contract that includes a provision for measuring and verification of any guaranteed savings or funding. Provide a contract life of the program not to exceed twenty (20) years. The Customer intends to structure the program’s implementation schedule in a manner to minimize capital needs.

All utility conservation measurements or infrastructure enhancements proposed by qualified performance-based contracting service provider shall be proven, commercially available, and verifiable.

Proposal Content

Proposal submissions should contain the following information and be limited to no more than fifty (50) pages with a minimum font size of 12. Restate the question before your response to each item. Provide the following in three (3) written copies and one (1) electronic copy on a USB flash drive:

- Firm Profile to include structure and evolution of the firm, years in the energy business.
- The official name and official address of the performance-based contracting service provider. (Provide a web-link/address to the contracting service provider's website.)
- Evidence of financial stability (financial statements may be provided in an appendix and do not count toward the page limit). Include current bonding rating, capacity, percentage of bonding currently obligated and licensed surety as evidence of ability to bond for payment and performance.
- Firm's performance-based contracting experience:
 - Firm must provide a review of the firm's overall performance-based contracting experience.
 - Firm must provide pertinent team member expertise/experience in school districts.
 - Firm must provide five (5) k-12 school performance-based contracting references, including contact information, that have used the performance-based contracting vehicle on projects that were substantially completed at least two (2) years prior to the date of submission of this response. Address the quality of technical skills and reliability of equipment performance to include documented savings performance of past projects.
 - Firm must make evident its ability to effectively manage past project construction, and the capacity to manage challenges and emergencies effectively on past projects.
 - Firm will provide verification of accreditations and general scope of services.
 - Firm will briefly summarize its approach to auditing, measurement & verification, commissioning, operations and maintenance, and handling of savings shortfalls.
 - Firm will describe its cost and pricing methodology, markups and fees and how best value is achieved.
 - Firm must provide a sample cash flow from a recent, similar project.
 - Firm must provide a list of all (if any) customers, with contact information, that have past or pending lawsuits, arbitration, or litigation regarding a performance-based contract savings guarantee (list reason).
- Project team qualifications and experience.
- The Customer is interested in benefiting from an unbiased, value-based program to address its needs through a vendor-neutral performance-based contractor. Therefore, the performance-based contractor must demonstrate its willingness and past experience in implementing projects that deploy solutions incorporating equipment, controls, and related products and field services independent of its own specific business portfolio or brand.

Contract Award

The Contract will be awarded to the firm which, in the Customer's opinion, has submitted the best overall proposal. Criteria to be used in the evaluation process will include, but not be limited to, qualifications and experience of the firm, as well as, specific team members to be assigned to the project; financial stability, financing options, and resources of the firm. The Customer reserves the right during the solicitation process to request additional information or seek clarification for any aspect of the proposal from any and all firms.

- When services and fees are agreed upon, the selected firm shall be offered a contract subject to the Customer's approval.
- Should negotiations be unsuccessful, the Customer may enter negotiations with the next highest ranked firm. The process may continue until an agreement is reached with a qualified firm.
- This RFQ does not commit the Customer to pay for any direct and/or indirect costs incurred in the preparation of a response.

Submission of Proposals

All proposals responding to this solicitation should be mailed/shipped in a sealed envelope and marked **ENERGY RFQ**, to the following address no later than 12:00 PM CST, Friday, April 9, 2021:

Union Public School District
Attn: Abby Winstead, Director of Finance
417 South Decatur Street
Union, MS 39365

PLEASE NOTE: In-person delivery of proposals will not be accepted or considered.

THE “RESTRICTED PERIOD”

During the “restricted period” (defined below), prospective firms, (including any representative, lobbyist, or any of the firm’s customers) are **PROHIBITED** from attempting to influence the governmental procurement by contacting anyone other than the designated customer contact, Neal Booker at bookern@unionyellowjackets.org, without Mr. Booker’s knowledge and consent. The “restricted period” is essentially a blackout period which begins with the earliest written notice of the District’s solicitation of RFQ and ends upon approval and public disclosure of the most qualified firm for the Customer.

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 above 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 requests received via email communication will be responded to and all information provided will be provided to each firm who requested 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.

PROPOSED PROJECT SCHEDULE

The following is the proposed schedule and may change during the project.

Activity	Dates
Advertise/Issue RFQ	March 17 & 24, 2021
Written Qualifications Due	April 9, 2021
Approval of ESCO Selection	April 12, 2021
Preliminary Contract Negotiations	April-May 2021
Technical Energy Audit Executed	April-May 2021
Audit Report Submitted	August 2021
Negotiations and Execution of Energy Services Agreement	August 2021