

**REQUEST FOR QUALIFICATIONS**  
Energy Savings Performance Contracting Services for  
***Browning Public School District***

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## **REQUEST FOR QUALIFICATIONS**

### **Energy Savings Performance Contracting Services for Browning Public School District**

#### **INTRODUCTION**

The Browning Public School District seeks qualifications from interested Energy Services Companies (ESCOs) to develop and potentially implement an Energy Savings Performance and infrastructure project. The project will be to plan, design, implement, and commission capital improvements to reduce energy and operational costs pursuant to Montana Code Annotated 90-4-1112. Through the RFQ process, the Browning Public School District intends to screen proposals and select a firm to potentially implement the Energy Savings Performance project at the school.

#### **OVERVIEW**

The Browning Public School District seeks to implement infrastructure upgrades to the outlined facilities as well as maximize energy cost savings and reduce operational costs in order to help fund the infrastructure upgrades and services.

Services and capital improvements will be financed through a number of different funding mechanisms including:

- 1) An Energy Savings Performance project which:
  - a. Will include but not limited to infrastructure improvements including HVAC, lighting, water and electrical systems.
  - b. Will produce long-term cost savings.
  - c. Will include a guarantee for utility savings.
  - d. Maintains consistent and reasonable levels of occupant comfort.
  - e. Maintains consistent levels of building functionality.
  - f. Captures additional benefits that may directly result from energy-related services and capital improvements, such as environmental protection, improved occupant comfort, reduced maintenance needs, improved indoor air quality, etc.

The Browning Public School District reserves the right to supplement energy cost savings with capital reserves from: Annual Capital Reserve Budget; Grant Funds; and/or General Obligation Bond or Building Reserve Levy proceeds or any means available. Such funds may or may not be made available for this project.

The RFQ and contracting process has four phases:

- RFQ Phase: Through this RFQ, an ESCO will be selected based on written proposals and a final reference check. Interviews may be optional.
- Project Development Phase: The project development contract will be developed with the selected contractor to define the project scope, cost and financial terms.
- Construction/Implementation/Financing Phase: Upon satisfactory results of the project development phase, an Energy Savings Performance Contract will be developed to implement the negotiated and recommended projects.
- Commissioning/Guarantee/Monitoring Phase: Upon completion of construction, the ESCO will offer a variety of services to ensure savings are met, including commissioning services, a savings guarantee, staff training, and follow-up monitoring services.

# RFQ for Energy Savings Performance Contracting Services

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## GENERAL INFORMATION

### Preparation of Proposal

It is not the responsibility of the Browning Public School District to deliver information that may be needed by the ESCO to complete its RFQ response, without receipt of a formal request in writing from the ESCO. When a request has been formally made and can be provided by the Browning Public School District, such information will be provided to all ESCO's on record that have indicated an interest in responding to the RFQ.

If Addendums have been issued and have been received by the ESCO prior to submittal of their proposal, such Addendums should be acknowledged in the response to the RFQ. Addendums received after the proposal has been submitted should be acknowledged by letter to the Browning Public School District immediately upon receipt.

The cost of preparing a response to this RFQ will not be reimbursed by the Browning Public School District.

### Submission of Proposal

Proposal responses must be submitted by the due date shown below, following the "ESCO Proposal" format as provided in Attachment C. All proposals shall provide a straight forward, concise description of the ESCO's capabilities to satisfy the requirements of this RFQ. All proposals become the property of the Browning Public School District and will not be returned to the ESCO. Proposal information is not publicly available until after the award of the contract.

Quantity: Four (4) printed and bound copies and one (1) electronic copy.

All questions or needed information pertaining to this RFQ should be directed to:

**Corrina Guardipee-Hall**  
**Superintendent**  
**129 1<sup>st</sup> Ave SE**  
**Browning, MT 59417**  
**Corrina Guardipee-Hall<corrinag@bps.k12.mt.us>**

All communication must be directed through Ms. Guardipee-Hall and any communication with District personnel without the approval of this individual is grounds for rejection of the ESCO's RFQ proposal. It is understood that the Browning Public School District reserves the right to reject any and all proposals as non-responsive and to waive any irregularities or informalities if doing so is deemed to be in the best interest of the Browning Public School District.

### Due Date

Proposals must be **received** at the address shown below on or before **July 20, 2018** by **5:00 pm, Mountain Time**. Late proposals will not be accepted.

### Delivery

To: **Browning Public School District**  
Attention: **Corrina Guardipee-Hall**  
**Superintendent**  
**129 1<sup>st</sup> Ave SE**  
**Browning, MT 59417**

A response that is in the possession of the Browning Public School District may be altered by letter or email transmission bearing the signature of the representative of the ESCO that is authorized to make the alteration, provided it is received by the Browning Public School District prior to the proposal due date deadline. Responses may not be withdrawn after this time.

## STATEMENT OF WORK

### ESCO Services

ESCO must have the demonstrated capability in engineering and management to provide a broad range of services. Services must include but are not limited to the following:

#### Project Development Phase

- Project Development to evaluate costs and energy savings of a variety of energy-saving measures and general construction projects.
- Project development plan including financial analysis

#### Construction/Implementation/Financing Phase

- Design and Engineering services
- Material and Equipment procurement and purchasing
- Construction management
- Financing capability or ability to help find financing

#### Commissioning/Guarantee/Monitoring Phase

- Commissioning/Retro-Commissioning of new and existing facilities and equipment
- Continuing operations and maintenance for all improvements
- Staff training on routine maintenance and operation of systems
- Training of occupants
- Performance and cost guarantee of savings
- Monitoring and verification for measurement and reporting of the performance and savings from improvements
- Assisting with plan development to maintain long-term, high-efficiency performance of buildings

ESCO must have technical capability to address a broad range of systems including, but not limited to:

- Mechanical Systems. Heating, ventilating and air conditioning (HVAC) systems, energy management and control systems, domestic hot water systems, distribution systems, etc.
- Physical Plants. Distribution systems, cogeneration systems, etc.
- Lighting systems. Indoor and outdoor lighting systems and controls, day-lighting strategies.
- Building envelope systems. Windows, insulation, weatherization, etc.
- Specialty Systems: Laundry equipment, kitchen equipment, pool systems, renewable energy systems.
- Water and Sewage Systems. Automatic controls, low-flow faucet aerators, low-flow toilets, cooling tower modifications, pool covers, and irrigation system controls or modifications.

### Buildings and Facilities

Facilities identified for this work are listed in **Attachment A: Facility Profile**. The Browning Public School District reserves the right to increase or reduce the scope of work or conduct work in phases. Additional buildings and facilities, as also listed, may be included in the future under the same contract.

## ADMINISTRATIVE INFORMATION

### RFQ Phase

#### **Review of Written Proposals.**

Proposals must be prepared as described in **Attachment C: Response**. An evaluation team will review and score written proposals based on the evaluation criteria identified in this attachment. Based on the overall score, proposals within the competitive range will be identified.

#### **Interviews.**

ESCOs with proposal scores in the competitive range may be interviewed by the project evaluation team. The Browning Public School District reserves the right to make a selection of the winning ESCO without completing the interview phase.

#### **Final Selection.**

The contract will be awarded to the ESCO submitting the best responsible proposal, provided the proposal is in the best interest of the Browning Public School District to accept. The acceptability of any proposals shall be determined by the Browning Public School District who will notify the winning ESCO of their selection and will notify other ESCOs participating in the RFQ process of the status of their selection when known.

### Project Development Phase

The selected ESCO will work with the District to develop a proposal for an Investment Grade Audit (IGA). If the IGA proposal is accepted, project development work will be performed to finalize project costs and establish all guaranteed cost savings resulting from an Energy Savings Performance Contract and/or an Infrastructure Project. An Energy Performance Contract may be developed as part of this effort.

### Construction/Implementation/Financing Phase

The Energy Savings Performance Contract Project will define the energy conservation measures to be implemented for this project, with fixed cost and savings guarantee. Financing may be provided as part of this phase to supplement any capital outlay from the client.

### Commissioning/Retro-Commissioning Phase

The Commissioning/Retro-Commissioning Phase will be used to verify that all measures implemented during the project are operating correctly and meet the performance metrics established during the Project Development Phase. The selected ESCO will ensure through industry standard commissioning methods and practices any new systems or changes to existing systems transition smoothly and efficiently to steady-state operation. The selected ESCO may assist the District with writing emergency and operations procedures, identifying best maintenance practices, setting up maintenance programs, conducting training, qualifying service vendors, and managing construction documentation as well as offer continuous monitoring of pre-defined critical systems.

### Measure and Verification of Savings/Maintenance Phase

The Measurement and Verification Phase will be used to verify that energy savings is accruing as guaranteed and will span a minimum of three years. If the actual cost savings is less than the guarantee amount (reconciled annually), the ESCO will pay the Browning Public School District the shortfall difference or work with the District to implement an agreed upon resolution.

**ATTACHMENT A: FACILITY PROFILE**

**Facility List**

Facilities identified for this work are listed in the table below. The Browning Public School District reserves the right to reduce the scope of work or conduct work in phases. Additional buildings and facilities, as also listed, may be included in the future under the same contract.

<b>Facility Name</b>	<b>Area (sqft)</b>			
Browning High School				
Browning Elementary School				
Browning Middle School				
Babb Elementary				
Napi Elementary				
Vina Chattin Elementary				
KW Bergen Elementary				
WM Buffalo Hide Academy				
Administration				
Child Care (Annex)				
Maintenance/Facilities				
Central Supply				
Transportation				
Special Education/Technology Services				
Bus Complex				

**ATTACHMENT B: PROPOSED PROJECT SCHEDULE**

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

**RFQ Phase**

**Issue RFQ**

**July 9, 2018**

**Proposals Due**

**July 20, 2018**

**Selection and Award**

**August 1, 2018**



## ATTACHMENT C: RFQ RESPONSE & EVALUATION CRITERIA

### ESCO PROPOSAL

The criteria listed below will be used to evaluate written proposals and subsequent interviews (optional). The scoring weight is listed for each criterion. These criteria will be applied and interpreted solely at the discretion of the Browning Public School District. Proposals should include all necessary information that is pertinent to these evaluation criteria. The sub-criteria are of approximate equal weight.

- **Answer all questions or state “N/A” if not applicable.**
- **Please prepare proposal in the same order as topics are listed below.**

#### 1. Qualifications and Capability

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##### a. General Firm Information

- (1) Type of Firm (corporation, partnership, sole proprietorship, joint venture)
- (2) Business Culture. State core business purpose of main parent company or corporation (manufacturer, utility company, engineering firm, etc.)
- (3) Years in Business as an Energy Services Company. State the number of years your firm has been involved in the energy-efficiency related business. State the number of years your firm has offered performance contracting services.
- (4) Professional Licensure: Do members of your firm have a professional engineering licenses in the State of Montana? Please provide license numbers.

##### b. Scope of Services

- (1) Types of Services. Summarize the scope of services (auditing, design, construction, commissioning, monitoring, operations, maintenance, training, financing, etc.) available from your firm.
- (2) Provision of Financing. Describe general ability and approach to help with financing. Describe ability to ensure low rates.
- (3) Provision of Insurance. Generally describe your capability to secure professional liability and general liability insurance policies. Certificate of insurance shall be required upon execution of Project Development Phase.

##### c. Financial Soundness

- (1) Sources of Financing. Describe the financial resources you have that can potentially be used to finance the energy project.
- (2) Banking Reference. State the revolving credit available to your firm, and list banking contact information to supply reference for additional financial questions.
- (3) Market Financials. Discuss your company’s annual revenue and Municipality Energy Performance Contract construction revenue for the previous (3) years.

## RFQ for Energy Savings Performance Contracting Services

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### 2. Experience and Expertise

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#### a. Project History.

Provide a list of all energy savings performance contracts or related projects that your firm has completed that are similar in type, size or scope to the building(s) described in the Facility Profile for this RFQ and in School Districts, Municipalities, Counties, and Government buildings.

If this response is from a branch office or division of a parent company, provide only those project histories that have been managed directly by the specific branch or division. You **may not** include projects/contracts managed by team members or subcontractors while employed by other firms. Include the following information on each project (*no preferred format*):

- **Project Identification.** Name of project owner, type of project (hospital, k-12 school, university, office building, etc.), location (city, state).
- **Project Size.** Dollar amount.
- **Contract Type.** Type of contract (shared-savings, lease purchase, guaranteed savings), contract term, and financing arrangement.
- **Source of Funds.** Source of funds used for the project. If applicable, describe your firm's role in securing funds.
- **List of Improvements.** Type of retrofits, operational improvements, and retro-commissioning activities related to energy, water and other cost savings.
- **References.** Contact information of owner(s) representatives who can serve as references.

Provide a separate Project Experience Summary (Case Study) for no less than 3 projects completed within the last 10 years by the branch office or division.

#### b. Personnel Information.

- (1) Qualifications and Experience. Include brief biography information of personnel within your firm that will be assigned to this project. Indicate years of experience in construction, energy, and commissioning projects or related fields and any pertinent experience and credentials related to this project.
- (2) Subcontractors. Describe the method of selecting contractors whether local to the project or through national agreements, and describe general bid solicitation methods to be used in selecting contractors to install measures identified within this project.

### 3. Technical Approach

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#### a. Energy Savings Performance Contract Methodology

- (1) Technical Site Analysis. Describe your general approach to auditing a facility. What is involved? How is the Browning Public School District involved? Methodical approach? Level of expertise involved? Information and resources needed from the Browning Public School District?
- (2) Cost Savings Guarantee Calculations. Describe your firm's procedures and schedule for measuring financial performance of projects. Describe how the guarantee provisions work in the event that project results vary from projections. Also describe provisions for excess energy cost savings.

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### b. Site Specific Approach

Describe any improvements you recommend based on your firm's evaluation of the Browning Public School District facilities. Include estimated costs and savings for recommendations.

### c. Proposed Project Schedule

Describe your company's proposed schedule for the project including major milestones, funding decisions and project implementation.

## 4. Company

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### a. Company Differentiators

Describe unique characteristics of your firm and how these characteristics translate into a real benefit to the Browning Public School District.

### b. Other Services

- (1) Training Provisions. Describe your firm's capabilities in providing technical training for facility personnel and experience on past projects. Describe your firm's involvement in developing training manuals for facility staff.
- (2) Performance Guarantee. Describe your firm's approach to the performance guarantee. What services are required in order for your firm to offer its performance guarantee?
- (3) Monitoring and Verification. Describe the methodology proposed for ongoing monitoring and savings verification of each recommended project's performance, including the frequency of such efforts. Note: if an industry standard such as the International Monitoring and Verification Protocol is used your firm should describe the preferred method.
- (4) Commissioning. Describe your firm's capabilities and resources for internally performing commissioning of applied measures. This should include incorporating a facility's existing building management system to evaluate system operations and ensure that a facility operates as designed. Describe your firm's approach used on other projects of similar size and scope.

## 5. Cost and Pricing

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### a. Cost of Project Development.

The selected ESCO will work with the District to negotiate a scope and cost for an Investment Grade Audit (IGA). If the IGA proposal is accepted, project development work will be performed to finalize project costs and establish all guaranteed cost savings resulting from an Energy Savings Performance Contract. If the District and ESCO cannot reach an agreement, the District has the right to negotiate with another ESCO.