

WEST BRANCH AREA SCHOOL DISTRICT

Request for Qualifications-Based Proposal For a GUARANTEED ENERGY SAVINGS PERFORMANCE CONTRACT

I. PURPOSE OF SOLICITATION

This Request for Qualifications Based Proposal (RFQ) was advertised by **West Branch Area School District** (“the District”) as follows:

West Branch Area School District Request for Qualifications Based Proposal (RFQ)

Mr. Mark Mitchell, Superintendent

**516 Allport Cutoff
Morrisdale, PA 16858**

814-345-5615 x4000 - mmitchell@westbranch.org

At time of opening, the proposals will be acknowledged, but will not be read aloud nor any information disclosed. Submissions received after the receipt deadline will not be accepted. Proposals will be held in strict confidence until reviewed and a contractor is selected. Upon review of qualifications and award of contract, qualifications will become public knowledge to anyone who submits a request.

Proposals must be submitted in the format required by the RFP and must comply with all applicable minimum qualifications, laws, and regulations. All Proposals submitted are valid for acceptance by the District and may not be withdrawn for a period of ninety (90) days after the actual date of opening thereof.

Following receipt and review of the proposals, interviews may be conducted with the responsible offerors who submitted proposals. The District reserves the right to select for contract negotiations the

responsible offeror whose proposal is determined to be most advantageous to the District. The RFP may be canceled or any or all proposals may be rejected, in whole or in part, when the District determines that it is in their best interest to do so.

For all firms interested in submitting proposals, attention is directed to the Commonwealth of Pennsylvania Procurement Code (Title 62 Pa. CSA §§3751 et seq.) regarding Guaranteed Energy Savings Contracts. All considered energy performance contracts and financing arrangements proposed must be capable of being implemented under the laws and regulations of the Commonwealth of Pennsylvania.

This project is subject to the Pennsylvania Prevailing Wage Law, approved August 15, 1961 (Act No. 442), as amended, and reference is made to the prevailing minimum wage rates applicable to this project which has been promulgated by the Secretary of Labor and Industry.

The District reserves the right to reject any and all responses resulting from this RFP. Late responses will not be accepted and will be returned to the submitting company unopened. The District is not liable for any cost incurred by any person or firm responding to this RFP. The District reserves the right to reject as non-responsive any submissions that do not contain the information requested in this RFP. Additionally, the District reserves the right to reject as non-responsive any submissions that are not organized and formatted as described in this RFP.

Questions regarding this RFP and the program it represents must be submitted in writing to:

Mr. Mark Mitchell, Superintendent

**516 Allport Cutoff
Morrisdale, PA 16858**

814-345-5615 x 4000 - mmitchell@westbranch.org

All questions will be answered by email to all parties that have contacted the District with interest in responding. There will be no onsite meetings granted during the RFQ process. Respondents and their agents are not to contact any other administrators or the members of the Board of School Directors. Non-compliance will result in the proposal of the offending firm being rejected as non-responsive.

II. REQUESTED SERVICES

The purpose of this RFP is to identify and implement measures approved by the District that meet the guidelines for a guaranteed energy savings performance contract. All energy savings and sustainability measures will be considered for inclusion in a project such as, but not limited to mechanical, electrical, plumbing, and building envelope upgrades as well as sustainability measures as directed by the District.

The focus of this RFP is at the discretion of the District, including all buildings and assets owned by the District. This project may be combined with other non-energy-related projects to be delivered by other project delivery methods, including hybrid project delivery methods. Responders will need to show that they can coordinate between projects and provide value to the District with this project delivery method. The Energy Services Contractor (ESCO) may be limited to as few as one facility and narrowed project scopes, as directed by the District.

Upon award of an Energy Audit Agreement, the ESCo will complete work on the facilities as directed by the District. The ESCo will provide a building energy audit with focus on IAQ measures and energy savings opportunities, including savings and cost estimates, and recommended measurement and verification (M&V) methods. The audit may include benchmarking of facilities, analysis of utility rates, on-site observations, data logging, energy modeling, energy efficiency measure development and analysis, energy savings calculations, recommendations, and M&V methods. The District may anticipate a reduction in annual utility and/or allowable operational costs through the implementation of the energy efficiency measures identified in the audit.

The ESCo is responsible for all certification and documentation of personnel necessary to comply with the laws to perform work in the District and in the Commonwealth of Pennsylvania.

III. SELECTION PROCESS

1) Qualification Evaluation

Interested ESCos must provide the information required to complete the RFP response. The District will evaluate responses and choose the most highly qualified ESCo. Interviews of one or more respondents may be held at the sole discretion of the District. The determination and selection of the most qualified ESCo will be at the sole discretion of the District.

2) Final Contract

Upon selection, the ESCo will negotiate specific scope and competitive industry rates for execution of an Investment Grade Audit (IGA) and potentially a Guaranteed Energy Savings Contract on the facilities as directed by the District.

IV. SCHEDULE

The anticipated schedule below is expected to be followed during the procurement period of this RFP:

Release of RFP:	October 13, 2023
Receive Proposals:	October 24, 2023
Approval of Selected Vendor:	November 21, 2023

This is a tentative schedule, and dates are subject to change. Time is of the essence. Late responses will not be accepted and will be returned to the submitting company unopened. The District reserves the right to reject, as non-responsive, any qualifications that do not contain the information requested.

The District is not liable for any cost or expenses incurred by proposing firms in the preparation of their written responses or for attendance at any conferences and meetings related to this RFP. If it becomes necessary to revise any part of this RFP, an amendment will be issued to all proposers who notify the District that they have received the RFP and are interested in submitting qualifications. To the extent allowed by law, qualifications will be held in confidence by the District.

V. PROPOSAL EVALUATION CRITERIA

Qualification of all business entities that respond to this solicitation, including any subcontractors to be used, will be evaluated using the following selection criteria.

1) Experience and Qualifications – 20 points

- a) Preference will be given to respondents demonstrating strong capabilities, experience, and reputation in undertakings similar to those described in this RFP and providing authoritative documentation of the respondent's financial condition and stability.
- b) Experience taking responsibility for the range of roles contemplated for this project. Similar experience will be understood to include development of performance contracts in public schools or institutional facilities of similar size and use, and overall experience with public school and institutional construction and construction methods.
- c) Quality of personnel assigned to this project and degree of pertinent experience.

2) Technical Approach – 45 points

- a) Preference will be given to respondents demonstrating practicality, soundness and costeffectiveness in their approach to energy conservation projects.
- b) The range of services offered will also be an important consideration, including alternative project delivery methods and the ability to coordinate projects using different project delivery methods.
- c) Methodologies and technical approach to developing energy efficiency measures and demonstrating the tangible and intangible benefits to those measures.

3) Financial Terms/Pricing Structure – 25 points

- d) Fee structures and pricing methods that demonstrate the ability to deliver the best project at a fair and reasonable price while minimizing the financial risk to the District.
- e) Methods for determining realistic and achievable energy savings, including measurement and verification of savings.

4) Other Considerations – 10 points

- f) Breadth of independent services provided to Pennsylvania Public Schools, Municipal Government, and State Government facilities.
- g) Demonstrated ability to develop and manage a construction schedule, implement projects promptly, and minimize impact to school operations.
- h) Local experience with references.
- i) Legal action information.
- j) Other unique qualifications.

VI. FORMAT OF RESPONSE

The responses to this RFP must be completed and returned in the order indicated below with each section divided and tabbed with the appropriate section title. The District may, during the evaluation process, request additional information to supplement and/or clarify the information provided by any respondent.

Any additional information not specifically requested in this RFP must be put in a separate Appendix at the end of the response. Additionally, all supplemental materials (brochures, product information sheets, etc.) not specifically tailored to this response must be placed in the Appendix.

The response is limited to forty (40) total single-sided pages or twenty (20) double-sided pages. Divider tabs are not included in the total page count. Additionally, the financial Information is not included in this limit.

Provide one (1) original and three (3) copies of the response. A single digital/PDF submission will be accepted in lieu of hard copies.

Section 1: Cover Letter

Include a cover letter at the beginning of the submission summarizing the information presented in the qualifications; names, telephone and email addresses of persons authorized to provide any clarification required; and a statement accepting the terms of this solicitation or noting specific exceptions taken to any of the terms and conditions specified in this document. Include the name and title of the person(s) authorized to conduct final contract negotiations on behalf of the ESCo.

Section 2: Introduction

- Table of Contents: Include a table of contents referencing each section of this RFP, along with the contents further subdivided to describe information included within each section of the submission.
- Executive Summary: Provide an executive summary highlighting the ESCo's unique qualifications and capabilities for this project.

Section 3: Personnel

- Attach a project staffing plan and include a description of proposed staffing showing the project organization, supervisory responsibilities, and lines of authority. Identify the corporate affiliation for each staff member listed in the project staffing plan. Attach resumes of all individuals who will have a role in the project.
- Provide an organizational chart of the participants listed in the ESCo's qualifications and their responsibilities in the program. Highlight the company and personnel responsible for each phase of the project, lines of authority and relationships between prime contractor and subcontractors.

Section 4: Services and Approach

Provide an overview of the ESCo's approach to energy conservation projects and range of services provided directly by the ESCo. Specifically address the following areas:

- Services, Approach and Measure Experience - Describe energy efficiency improvements and identify specific measures that improve indoor air quality and/or reduce the spread of airborne pathogens that the ESCo has implemented, including design and M&V. List all types of services provided.
- Benchmarking and Energy Savings Verification - Describe the normal method used to establish benchmarks, baseline energy use and verification methods. Describe the method used to justify variances between the baseline and actual energy consumption. Describe and justify the methods used in M&V of project savings.

- Cost and Savings Estimating and Bid Procurement Experience - Describe experience and accuracy of cost and savings estimating, and provide examples of cost estimates, bid procurement experience and accuracy.
- Building Commissioning Experience - Describe approach to building commissioning and/or existing building commissioning, including in-house expertise and/or use of consultants.
- Training Information - Outline any training proposed as part of the project, including the subject, duration and location of training. Also describe the relationship with the organization providing training, if not provided by the ESCo.
- Project/Construction Management - Describe experience and approach to project management, including coordination with subcontractors, division of responsibility among project staff and interaction with District representatives.

Section 5: Project References

Provide references on at least three (3) energy-related projects (specifically public projects) that the respondent has successfully implemented within the last five (5) years.

References should include the following:

- Customer name including name and telephone number of contact
- Brief description of the project
- Project beginning and ending dates □ Project cost and savings estimates

Section 6: Pricing / Fee Structure

- Provide a fee for completion of the Investment Grade Audit phase of the project. (Submission of a fee of \$0 will be viewed as non-responsive.)
- Describe and demonstrate how the respondent will assure that the District will receive fair and reasonable pricing for the resultant scope of work through description of the respondent's fee structure as well as equipment and subcontractor procurement methods.

Section 7: Financial Information (Excluded from Page Limit of 40 Pages/20 Double Sides)

Include the ESCo's annual report, audited financial statements or equivalent showing information for the past three (3) complete financial year periods. If a bound document (such as an annual report) is included, it must be placed in the response's appendix section. Only one original of financial services is required, and it may be placed in a separate sealed envelope. Electronic PDFs will be accepted.

Section 8: Additional Information

- Attach Investment Grade Audit agreement that would be anticipated to be executed with the District.
- Attach any supplemental information that is not requested by the RFP and not subject to the 40 total page limit (20 double-sided).