



Mobile County PUBLIC SCHOOLS

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SUPERINTENDENT Martha L. Peek

Purchasing Department
Phone (251)221-4473
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RFP No. 18-09

February 1, 2018

REQUEST FOR PROPOSAL OF QUALIFICATIONS FOR ENERGY SERVICE COMPANIES

Sealed proposals will be received by the Board of School Commissioners of Mobile County, Alabama at its Purchasing Department, 1 Magnum Pass, Mobile, Alabama 36618, until Thursday, February 22, 2018 @ 2:00 PM at which time they will be publicly opened and read aloud.

PLEASE PRINT OR TYPE BELOW

Legal Name of Vendor: _____

Mailing Address: _____

City, State, Zip Code: _____

(List Toll Free Number if Applicable)

Telephone Number: _____

Authorized Signature of Bidder

Authorized Name(Typed or Printed)

RUSSELL HUDSON
DIRECTOR OF PURCHASING

THIS COMPLETED FORM MUST APPEAR AS THE TOP SHEET FOR ALL BIDS SUBMITTED

The mission of Mobile County Public Schools is to graduate prepared and productive citizens.

BOARD OF SCHOOL COMMISSIONERS
MOBILE COUNTY PUBLIC SCHOOLS

VENDOR MINORITY QUESTIONNAIRE

VENDOR NAME: _____

ADDRESS: _____

PHONE #: _____

FAX #: _____

IS THE COMPANY MINORITY OWNED?: YES NO

IS THE COMPANY OWNED BY: MALE FEMALE BOTH

ETHNICITY OF OWNERSHIP:

- ASIAN AMERICAN
- AMERICAN INDIAN
- BLACK
- DISABLED
- HISPANIC
- OTHER (PLEASE SPECIFY): _____

SIGNATURE: _____

PRINT NAME: _____

TITLE: _____

DATE: _____

TABLE OF CONTENTS

- I. Purpose of Solicitation**
Guaranteed Energy Cost Savings Performance Contract
- II. Background**
- III. Services Requested**
- IV. Selection Process**
 - Qualification Evaluation
 - Engineering Proposal
 - Negotiating and Signing of Contract
- V. Schedule of Events**
- VI. Selection Criteria**
 - Business and Financial Qualifications
 - Personnel Qualification
 - Project Management Plan
 - Prior Project Experience
- VII. Response Format and Contents**
- Appendix A: Proposal Forms**
 - Form A: Proposal Checklist and Outline
 - Form B: Statement of Responsibility
 - Form C: Project Staffing Plan

I. PURPOSE OF SOLICITATION

The intent of this Request for Proposal of Qualifications (RFP/Q) is to solicit qualification proposals from Energy Services Companies (ESCOs) for a guaranteed energy cost savings contract based on Code of Alabama § 41-16-140, et seq.. For the purpose of this RFP/Q, "ESCO" refers to any company that is qualified to provide a turnkey energy conservation program and facility assessments including capital budgeting analysis. Responses to this RFP/Q shall describe the ESCO's capability to identify the need for capital improvements, energy efficiency measures, design, installation, maintenance, and monitoring of facilities including conducting facility assessments and long term capital planning utilizing digital platform(s) and arrange for financing of a large-scale, comprehensive energy-conservation program that includes the services listed herein. Mobile County Public School System (MCPSS) intends to select an ESCO and award contract(s) to perform cost-effective energy conservation retrofits.

RFP/Q proposals must be received on DATE: February 22, 2018, by 2:00 PM CST
Submissions shall be sent to:

MOBILE COUNTY PUPLIC SCHOOL SYSTEM
 Attn: Purchasing
 1 Magnum Pass
 Mobile, AL 36618

MCPSS reserves the right to reject any and all responses resulting from this RFP/Q. Late responses will not be accepted and will be returned to the submitting company unopened. **MCPSS is not liable for any cost incurred by any person or firm responding to this RFP/Q.**

MCPSS reserves the right to reject as non-responsive any proposals that do not contain the information requested in Section VII and Appendix A of this RFP/Q, any proposals which are not organized and formatted as described in this RFP/Q, and any responses received after the deadline

**All questions regarding this RFQ shall be submitted in writing and shall be submitted no later than:
 February 15, 2018 at 4:30 PM CST**

All questions regarding this RFP/Q and the program it represents must be submitted in writing to **both contacts** listed below:

Bill Hines, Contract Administrator/Facilities Email: whines@mcpss.com
 Russell Hudson, Director of Purchasing, Email: rhudson@mcpss.com

All questions and answers (Q&A) will be posted on the MCPSS website. Bidders are responsible for checking the website for the most current questions/answers.

Prospective respondents must limit their contact regarding this RFP/Q to: Director of Purchasing. Communications by Firms, its agents, employees, and/or representatives with any employee, agent, or representative of MCPSS other than Director of Purchasing regarding its proposal or intention to submit a proposal in response to this RFP/Q will be considered inappropriate communications. If any such inappropriate communications are deemed to have occurred, and believed to have the intent to hinder or influence the selection process, MCPSS, in an effort to ensure a fair and equitable review and selection process, reserves the right to decline consideration of the offender's sealed proposal.

The Board provides equal opportunities for all businesses and does not discriminate against any vendor regardless of race, color, creed, sex, national origin, or disability in consideration for an award.

Responses must be limited to no more than 35 pages formatted in Arial font size no smaller than 10. Note that each side of paper is considered 1 page. Attachments are only for resumes of appropriate staff personnel who will be directly involved in the projects.

II. BACKGROUND

OVERVIEW:

MCPSS is dedicated to meeting the ever-changing needs of the Students, Staff and the community while accelerating the need for an effective asset sustainment program. The School District is focused on impacting its energy spends as well as the deferred maintenance backlog that exists due to an aging infrastructure and is need of current and future life cycle capital investment. The School District is seeking a qualified partner to assist in the identification of facility condition indexes, life cycle cost modeling and the development and execution of a Guaranteed Energy Savings Project.

OBJECTIVE:

MCPSS intends to implement a thorough process that proposes to address long term facility needs in its facilities. MCPSS intends to upgrade outdated and obsolete building equipment and perform property improvements through the program. The improvements will be part of a District Wide energy and facility assessment and long term facility plan. The purpose of this project is to:

- Reduce overall energy consumption
- Provide an energy cost savings guarantee not to exceed 20 years
- Provide for reimbursement to MCPSS if savings guarantee not met
- Reduce the risk associated with management of the aging portfolio
- Reduce the overall deferred maintenance backlog
- Improve the overall facility condition index
- Enhance asset utilization through effective planning

- Improve facility performance
- Provide financial structuring and capital
- Enhance and expand community engagement and partnerships
- Upgrade the School District's assets with a view towards long term sustainability
- Provide implementation and effectively manage construction
- Provide ongoing Measurement and Verification Services to ensure performance
- Develop capital planning framework to aid in the capital spending criteria

MCPSS anticipates a major reduction in annual utility costs through the implementation of this energy conservation and facility improvement program and intends to structure the program's implementation schedule in a manner to minimize the program's financed capital needs.

Respondents to this RFP/Q shall identify their experience and qualification to provide a detailed, digital based facility assessment plan in addition to design, install and management of a major energy conservation project that involves energy conservation retrofits which address the following building components and applications including, but not limited to: lighting, space heating, ventilation, air-conditioning, envelope, heat recovery, energy management systems, environmental system controls, motors, domestic water heating, fuel switching, air distribution systems and water consumption systems.

MCPSS is currently under contract with a company for implantation of an energy savings conservation program and any successful proposal will need to adequately address that current contract.

III. SERVICES REQUESTED

MCPSS is interested in and has preference for a partnership with a NAESCO Accredited Energy Service Provider for the identification of energy conservation measures (ECMs), facility capital planning, engineering, design, installation, training, maintenance and financing of approved ECMs for all of its facilities.

MCPSS intends to work with the ESCO on the development of a financial plan for facility improvements and has preference for those firms with staffed personnel specializing in financing this type of project. The ESCO's demonstrated ability to provide guaranteed energy cost savings will be an evaluation criteria.

MCPSS will give preference to a qualified firm / organization that can demonstrate experience in developing a capital planning framework that will aid with capital spending and project decision making. The ESCO will also establish capital planning data to effectively quantify the life cycle/renewal needs and establish strategies/benchmarks

that reduce the renewal funding gap. An integrated, off the shelf software solution is required addressing the full spectrum of Capital Planning. Preference will be given to firms that demonstrate in house abilities to perform asset sustainability services and provide an off the shelf software solution.

Any contract or agreement entered into pursuant to this RFP/Q shall in every respect meet the criteria set forth in Code of Alabama §§ 41-16-140 through -144, and shall include provisions that the energy cost savings to MCPSS from the proposed EMCs will meet or exceed the cost of implementing the ECMs within the lesser of 20 years or the average useful life of the ECMs. Submission of a response to this RFP/Q shall constitute an acknowledgment that respondent has read, understands and accepts the requirements of the Alabama Guaranteed Energy Cost Savings Act.

IV. SELECTION PROCESS

Proposal Evaluation

Interested respondents must provide the information required to complete the forms included in Appendix A. The MCPSS School Board Facilities Committee will evaluate responses and choose the most highly qualified ESCO with demonstrated experience in developing a capital planning framework that will aid with capital spending.

Engineering Proposal

Upon completion of the proposal evaluation, MCPSS and the selected ESCO will negotiate a project development agreement contract, which will allow the ESCO to proceed with the energy and facility audits, energy analysis, feasibility study, conceptual engineering design and permitting plan and the development of a long-term asset sustainability facility plan.

Negotiating and Signing of Contract

Upon the determination that the project is feasible and acceptable to MCPSS, a Guaranteed Energy Cost Savings Contract (GECSC) will be drawn up between MCPSS and the ESCO. All facility assessments, asset sustainability planning, engineering, design and permitting cost incurred by the ESCO under the project development agreement will be incorporated into the GECSC. Upon acceptance of the GECSC by MCPSS and ESCO the project shall commence. MCPSS anticipates the implementation of the system wide project to be multi-phased over the next 5 years.

V. SCHEDULE OF EVENTS

Following is a tentative schedule and dates are subject to change. The following time frame is expected to be followed during the procurement period of this RFP/Q:

February 1, 2018	Release of RFP/Q
February 22, 2018	Proposal received no later than 2:00 PM
TBD	ESCO Selection Committee Meeting

Please note responses to this RFP/Q must be received no later than February 22, 2018 at 2:00 PM at the address below. Eight (8) paper copy and Eight (8) electronic copies on a USB drive labeled with the ESCO's legal company name clearly legible on the USB, company initials will not be acceptable. **Responses must be sealed and delivered to:**

Mobile County Public School System
 ATTN: Purchasing Department
 1 Magnum Pass
 Mobile, AL 36618
 Re: MCPSS Energy Efficiency and Capital Improvements Qualification Proposal

MCPSS reserves the right to reject any and all responses for any reason. Late responses will not be accepted and will be returned to the respondent unopened. MCPSS is not liable for any cost incurred by any person or firm responding to this RFP/Q.

MCPSS reserves the right to reject, as non-responsive, any proposal that does not contain the information requested in Section VII of this RFP/Q and on the forms contained in Appendix A. Additionally, MCPSS reserves the right to reject, as non-responsive, any proposals which are not organized and formatted as described in this RFP/Q.

VI. SELECTION 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.

Business and Financial Qualifications

- Business unit dedicated to providing guaranteed energy savings programs.
- Business unit dedicated to ensuring project performance
- NAESCO Accredited Energy Services Provider
- Affiliation with energy and/or business organizations (including ISO certification and EPA or DOE affiliations)

- Demonstrated ability to provide guaranteed energy savings
- Financial viability of entity proposed to provide technical and financial guarantees
- Financing capability and lines of credit

Personnel Qualifications

Quality of personnel assigned to this project and degree of pertinent experience.

- Provide resumes of all key personnel who will be associated with the project

Project Management Plan

- Comprehensiveness and rationale of project management plan, based on:
 - Approach to project management, including staffing and contractor-oversight
 - Ability to successfully complete projects on time and to customer satisfaction.
- Method employed to establish baseline energy use in individual buildings and facility-wide
- Method of measurement and verification used to demonstrate energy use reduction and cost savings as guaranteed
- Demonstrate ability to provide acceptable staffing and project management oversight and project liaison and on-site management

Prior Project Performance

- Experience with guaranteed energy cost savings performance contracts of a similar size and type to that proposed for MCPSS.
- Experience taking responsibility for the full range of roles contemplated for this project (e.g. identification and analysis of ECMs, design, installation, operation, training, financing, savings verification, etc.)
- Performance on prior projects, including data on projecting, achieving, documenting, and verifying energy savings in order to ascertain accuracy of projections
- References from three (3) prior projects within five (5) years and/or current customers.

Asset Management Long Term Facility Capital Planning Capability

- Demonstrable experience developing an asset sustainability and capital planning program
- Software solution to manage, plan and report sustainability program
- Provide three (3) examples of similar projects of similar size
- Qualifications related to data development, strategy development, and implementation
- Methodology and approach to lifecycle and capital planning, data management and associated framework
- Strategy and solution for developing financial structure, innovation, and reporting capital needs

VII. RESPONSE FORMAT AND COMMENTS

The responses to this Request for Proposal on Qualifications will consist of nine (9) specific information subject areas which must be completed and returned in the order indicated below with each section divided and tabbed with the appropriate section title. Additional forms (as detailed below) are provided in Appendix A. For areas that do not require a form, the ESCO shall provide specific information directly addressing the information requested in that section. MCPSS may, during the course of the evaluation process, request additional information to supplement and/or clarify the information provided by any ESCO. Any additional information not specifically requested in this RFP/Q 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. Responses must be paginated, with page numbers appearing in the lower right hand corner of each page and must include a table of contents.

Section 1: Cover Letter

The ESCO's proposal will include a cover letter at the beginning of the proposal which shall be considered as part of the total number of pages. The cover letter shall provide a summary of the information presented in the proposal, names and telephone numbers 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. This cover letter shall also include the name of the person(s) authorized to conduct final contract negotiations on behalf of the ESCO.

Section 2: Introduction

Table of Contents

The ESCO's proposal should include a Table of Contents referencing each information section of this RFP/Q. The Table of Contents should be further subdivided to describe information included within each section of the proposal.

Executive Summary

The ESCO will provide an Executive Summary highlighting the ESCO's unique qualifications and capabilities for this project.

Statement of Responsibility

The respondent must be the Prime Contractor. The Prime Contractor will be responsible for all work and subcontractors involved in the project. The Prime Contractor will submit a list of all participants in the project prior to the actual contract negotiations. If some or all of the participants are not known at this stage, a selection strategy shall be identified noting which participants have not been selected. A statement of responsibility must be provided, using **FORM B** in the Appendix.

Section 3: Personnel

Each ESCO will attach a Project Staffing Plan, as shown in **FORM C** in the Appendix. The proposed plan will 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.

Section 4: Project Management

Describe respondent's approach to project management, including: coordination with subcontractors, division of responsibility among project staff, and interaction with MCPSS representatives.

Section 5: Energy Savings

Provide a description of the normal method used to establish baseline energy use in individual buildings and facility-wide. Describe the method used to justify variances between the baseline consumption and actual annual consumption. Describe and justify the methods used in measurement and verification of project savings.

Section 6: References

Provide information on previous performance contracts that the respondent has successfully implemented within the last five years.

References shall include:

- Customer Name
- Name and Telephone Number of Contact
- Brief Description of the Project
- Project Beginning and Ending Dates
- Specific ECMs installed
- Project Cost and Savings

Section 7: Equipment & Training

The ESCO shall describe any relationships with manufacturers of energy equipment, including those manufactured by the respondent or listed subcontractors. The ESCO must also demonstrate willingness to propose and ability to work with different makes of equipment to provide the most efficient and cost effective project for MCPSS.

Section 8: Project Non-Performance

Provide a complete list of any projects that in the last 10 years:

Have canceled or non-appropriated a performance contract with the respondent (list reason); or

Have past or pending lawsuits or litigation regarding a performance contract with a customer (list reasons); or

Have been reimbursed for non-performance on guaranteed savings.

In addition to litigation, please provide a complete list of all projects nationwide where there was either a criminal indictment or a conviction relating to the conduct of a performance contract. This includes officers and representatives of the company, as well as public officials connected with the project.

If any of the above does not apply, provide an acknowledgment letter stating each that does not apply, signed by an officer of the respondent company. (Please include title of company officer). Failure to provide accurate and complete information as requested is grounds for disqualification.

Section 9: Financial Information

The ESCO shall include the company's annual report, audited financial statements or equivalent showing information for the past three (3) complete financial year periods (electronic copy only).

APPENDIX A: PROPOSAL FORMS

FORM A: PROPOSAL CHECKLIST AND OUTLINE

Section 1: Cover Letter

Section 2: Introduction

- Proposal Table of Contents
- Executive Summary
- Statement of Responsibility

Section 3: Personnel

- Project Staffing Plan
- Project Personnel Resumes
- Project Team Organizational Chart

Section 4: Project Management

Section 5: Energy Savings

- Baseline and Energy Calculations
- Sample Guarantee Contract*

Section 6: References

Section 7: Equipment and Training

- Relationship with Manufacturers
- Training
- Customer Support

Section 8: Project Non-Performance

Section 9: Financial Information

- Appendix

*Regardless of any language in a proposal to the contrary, MCPSS shall not be obligated to accept any particular contract form or provision submitted by any respondent to this RFP/Q and reserves the right to renegotiate and/or reject any such form or provision.

FORM B: STATEMENT OF RESPONSIBILIITY

Prime Contractor (ESCO or Contractor);

Name: _____

Address _____

(Please note possession of any license or registration pertinent to this project.)

Area of Responsibility: (Describe in detail duties and responsibilities applicable to this project.)

