

SUMTER COUNTY SCHOOLS

**REQUEST FOR PROPOSAL ON QUALIFICATIONS
FOR A DISTRICT-WIDE ENERGY CONSERVATION SERVICES
PROGRAM**

JANUARY 2023

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I. PURPOSE OF SOLICITATION

The intent of this Request for Proposal on Qualifications (RFP/Q) is to solicit qualification proposals from Energy Services Companies (ESCOs). For the purpose of this RFP/Q, "ESCO" refers to any company that is qualified to provide a turnkey energy conservation program that includes all services listed in this RFP/Q. Responses to this RFP/Q shall describe the ESCO's capability to identify the need for, design, install, maintain, monitor, and arrange the financing of a large-scale, comprehensive energy-conservation program that includes the services listed herein. SUMTER COUNTY SCHOOLS intends to select an ESCO and award contract(s) to perform cost-effective energy conservation retrofits.

Please note that responses to this RFP/Q must be received on February 9, 2023, at the address below. One (1) paper copy of the response must be sealed and delivered to:

SUMTER COUNTY SCHOOLS

716 Country Club Rd

Livingston, AL 35470

Re: Proposal on Qualifications for a Comprehensive Energy Conservation Services Program

ATTN: Dr. Anthony Gardner, Superintendent

SUMTER COUNTY SCHOOLS is not liable for any cost incurred by any person of firm responding to this RFP/Q.

SUMTER COUNTY SCHOOLS 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.

Additionally, SUMTER COUNTY SCHOOLS reserves the right to reject as non-responsive any proposals which are not organized and formatted as described in this RFP/Q.

Any and all questions regarding this RFP/Q and the program it represents must be submitted in writing to:

Dr. Anthony Gardner

Email: agardner@Sumter.k12.al.us

All questions will be answered by email to all bidders.

Prospective respondents must limit their contact regarding this RFP/Q to DR. ANTHONY GARDNER. Communications by Firms, its agents, employees, and/or representatives with any employee, agent, or representative of SUMTER COUNTY SCHOOLS or SUMTER COUNTY SCHOOLS School Board, other than DR. ANTHONY GARDNER, regarding its proposal or intention to submit a proposal in response to this RFP will be considered inappropriate communications. If any such inappropriate communications are deemed to hinder, influence and/or alter the competitive proposal process, SUMTER COUNTY SCHOOLS, 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.

Environmental Impact

Your actions do make a difference! By submitting only one paper copy of your proposal response, you make the following contributions to the environment:



Waste

5.7 pounds of solid waste not generated



Tree

6% of a tree preserved



Water Conservation

46.78 gallons of waste water avoided



Lighting

97036.73 BTUs of energy not consumed



Greenhouse Gas

14.23 pounds of greenhouse gas prevented

Healthy forests filter water, remove air pollution, sequester carbon and provide homes for wildlife. To plant a tree in return for your paper usage, go to <http://www.americanforest.org/>.

**Calculations are for one 500 page proposal response printed on regular paper. It does not include binders and dividers.*

II. BACKGROUND

SUMTER COUNTY SCHOOLS has 6 facilities.

SUMTER COUNTY SCHOOLS proposes to address all gas, water, and electric utility uses in all its facilities for this conservation program. Additionally, SUMTER COUNTY SCHOOLS intends to upgrade outdated and obsolete building equipment and perform property improvements through the program.

SUMTER COUNTY SCHOOLS anticipates a major reduction in annual utility costs through the implementation of this energy conservation program. The ESCO will provide a written guarantee of all utility reduction and provide all financing for the project. The contract life of the program is expected not to exceed **20** years. SUMTER COUNTY SCHOOLS intends to structure the program's implementation schedule in a manner to minimize the programs financed capital needs.

Respondents to this Request for Qualifications (RFP/Q) shall identify their experience and qualification to design, install and manage a major energy conservation project that involve energy conservation measure (ECM) retrofits which address the following building components and applications: 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. SUMTER COUNTY SCHOOLS is also interested in the respondents' qualifications and experience related to programs designed to train building occupants and maintenance workers in energy conservation awareness.

III. SERVICES REQUESTED

For this RFP/Q, SUMTER COUNTY SCHOOLS is interested in Energy Services Companies for the identification, engineering, design, installation, training, maintenance, and financing of approved ECMs for all of its facilities. SUMTER COUNTY SCHOOLS has the option to contract all or some of the services listed above.

If SUMTER COUNTY SCHOOLS contracts project financing through the ESCO, payment for the contracted services will be indexed to measure reductions in annual energy costs or consumption and will not begin until after the project is operational and generating savings. Financing shall be structured so that annual payments never exceed annual savings. Services will be required to provide the financing in such a manner as to ensure that all costs are paid for from only the utility savings associated with the energy conservation program. Operational savings will be strictly scrutinized as part of annual savings. The ESCO must make available a program that guarantees the energy savings of the energy conservation services financed. The ESCO's demonstrated ability to provide this guarantee will be an evaluation criterion.

It is expected that, as a minimum, the following energy conservation techniques will be investigated on an individual basis or in combination with other techniques and implemented, if deemed cost effective by SUMTER COUNTY SCHOOLS and the ESCO:

- Energy management control system
- Large-scale lighting control
- Individual room lighting control (motion sensors)
- Optical reflectors for fluorescent light fixtures
- Fluorescent lamp and ballast replacement
- Incandescent to florescent lighting conversion
- Conversion to HID
- Motion sensor control
- Day lighting control
- Exit sign conversion
- Other lighting modifications
- Air conditioning unit replacement
- Economizer control
- Thermal storage for heating and cooling
- Environmental system control replacement
- Heating, ventilating and air conditioning system modifications
- Variable speed/frequency drives
- Air compressor replacement/upgrade
- Fuel conversion
- Building envelope improvements
- Domestic hot and cold-water systems
- Air management systems
- Kitchen appliance conversion to gas
- High efficiency motors
- Motor down-sizing
- Energy conservation awareness training

Any other ECMs proposed by the ESCO will also be considered. All ECMs considered shall be proven, commercially available and result in verifiable energy savings.

All equipment provided by the ESCO for this program shall have a history of successful operating experience in similar installations and shall be in new and unused condition. This equipment shall be state-of-the-art with readily available replacement parts. All equipment used for this program shall be approved by SUMTER COUNTY SCHOOLS prior to installation.

IV. SELECTION PROCESS

Proposal Evaluation

Interested ESCOs responding to this RFP/Q with a proposal must provide the information required to complete the forms included in Appendix A. SUMTER COUNTY SCHOOLS will evaluate submittals and choose the most highly qualified ESCO.

Engineering Proposal

Upon completion of the proposal evaluation, SUMTER COUNTY SCHOOLS and the ESCO will design a Letter of Agreement which, when approved by SUMTER COUNTY SCHOOLS, will allow the ESCO to proceed with the energy analysis, feasibility study, conceptual engineering design and permitting plan for a district-wide energy conservation program.

Upon acceptance of the Letter of Agreement by the Board of Education, SUMTER COUNTY SCHOOLS and the ESCO will sign the agreement, thereby requiring the ESCO to proceed. If during this phase, it is determined that the program options identified by the ESCO do not fall within mutually agreed upon acceptable financing requirements and project scope, the Letter of Agreement will be terminated with no financial liability to SUMTER COUNTY SCHOOLS. Shall it be determined that the project's feasibility is within the agreed-upon financing parameters and project scope and SUMTER COUNTY SCHOOLS terminates the Letter of Agreement for any reason, then SUMTER COUNTY SCHOOLS agrees to compensate the ESCO a mutually-agreed upon amount for the engineering design and permitting effort incurred through termination. That amount will be stated in the Letter of Agreement.

Negotiating and Signing of Contract

Upon the determination that the project is feasible and acceptable to SUMTER COUNTY SCHOOLS, an Energy Services Agreement (ESA) will be drawn up between SUMTER COUNTY SCHOOLS and the ESCO. All engineering, design and permitting cost incurred by the ESCO under the Letter of Agreement will be incorporated into the ESA. Upon acceptance of the ESA by the School Board, the ESA will be signed, and the program will commence. It is anticipated that the ESA will be presented to the School Board on or before January 31, 2024.

V. SCHEDULE OF EVENTS

The following time frame is expected to be followed during the procurement period of this RFP/Q:

January 24, 2023	Release of RFP/Q
February 9, 2023	Proposal received – 2:00 PM
TBD	Vendor selected
TBD	Investment Grade Audit contract approved by School Board

This is a tentative schedule, and dates are subject to change.

Please note that responses to this RFP/Q must be received on February 9, 2023, by 2:00 PM. at the address below. One (1) paper copy of the response must be sealed and delivered to:

SUMTER COUNTY SCHOOLS

716 Country Club Rd
Livingston, AL 35470

Re: Proposal on Qualifications for a Comprehensive Energy Conservation Services Program
ATTN: Dr. Anthony Gardner

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

SUMTER COUNTY SCHOOLS 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, SUMTER COUNTY SCHOOLS 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. (Percentage weighting among categories of selection criteria is noted.)

Business and Financial Qualifications (20% maximum)

- Business unit dedicated to providing guaranteed energy savings programs.
- Business unit dedicated to ensuring project performance
- Years in business
- Affiliation with energy and/or business organizations (including EPA or DOE affiliations)
- Demonstrable ability to bond savings through a third-party surety
- Financial viability of entity proposed to provide technical and financial guarantees
- Financing capability

ESCO will provide financial statements including income statement, balance sheets and statements of changes for three (3) most recently completed fiscal years.

Personnel Qualifications (20% maximum)

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

Project Management Plan (20% maximum)

- 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 Sumter County Schools satisfaction.
- Method employed to establish baseline energy use
- Method of measurement and verification used to demonstrate energy use reduction and cost savings as guaranteed
- Quality of any proposed value-added services

Prior Project Performance (40% maximum)

- Experience with energy conservation projects in the southeast of a similar size and type to that proposed for SUMTER COUNTY SCHOOLS.
- 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 to ascertain accuracy of projections
- References from prior and current customers. Must submit at least five Alabama K-12 references from the last five years

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. SUMTER COUNTY SCHOOLS 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 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. The cover letter shall provide a summary of the information presented in the proposal, names and telephone and fax 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 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

- Provide a graphical representation (organizational chart) of the participants listed in the ESCO's proposal and their responsibilities in the program. The chart is to be used to show the company and personnel responsible for each phase of the project, lines of authority, and relationships between prime contractor and subcontractors. Attach resumes of all individuals who will have a role in the project.
- A list of key personnel and their responsibilities for the duration of the project contract terms should be listed. Include in this list the number of years each individual has been in the industry. Attach resumes of 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 SUMTER COUNTY SCHOOLS representatives. Include a sample of any contracts and/or agreements

between the respondent and subcontractor(s) that would be used in this project in an appendix.

Section 5: Energy Savings

- Describe the method used to establish projected savings.
- Describe how you adapt your analysis to specific projects.
- Describe the method used to calculate cost savings.
- Describe the methods used in measurement and verification (M&V) of project savings.
- Describe monitoring and support methods used after installation to guarantee ongoing savings.

Include a sample guarantee contract in the Appendix to this response. Failure to include a sample contract will be viewed as unresponsive.

Section 6: References

Provide information on at least 7 performance contracts, similar in size and scope to the project proposed for SUMTER COUNTY SCHOOLS that the respondent has successfully implemented within the last five years within the state of Alabama.

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
- Percent of Project Savings Resulting from Deemed or Stipulated Savings (Separate energy and non-energy savings. If savings other than energy were used, specify what these savings were, how they were calculated, and how they were guaranteed.)

Section 7: Equipment, Maintenance and Training

- Describe any relationships with manufacturers of energy equipment, including those manufactured by the respondent or listed subcontractors. Respondent should also demonstrate willingness to propose and ability to work with different makes of equipment should such equipment prove to be the optimal choice for SUMTER COUNTY SCHOOLS.
- Outline any training proposed as part of the project, including the subject, duration, and location of training. Respondent should also describe the relationship with the organization providing training, if not provided by the prime contractor.

Section 8: Financial Information

- Describe the financial soundness and stability of the ESCO and its ability to support the performance guarantee.
- Provide financial statements for the two most recently completed fiscal years in an appendix. Owner may, during the course of the evaluation process, request additional financial information to supplement and clarify the information provided.
- Describe your firm's capacity to issue payment and performance bonds. Provide a letter from surety company demonstrating the bonding capacity of the ESCO.
- Describe what resources your firm has available to assist the Sumter County Schools with financing and funding solutions. Provide three bank references that have provided financing for past projects.

- Provide a letter of recommendation from a financial institution.

Section 9: Value-Added Services

Describe any additional services the ESCO may provide, that would bring value to the Sumter County Schools but do not fall in any prior categories.

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 Personnel Resumes
- Project Team Organizational Chart

Section 4: Project Management

Section 5: Energy Savings

- Sample Guarantee Contract

Section 6: References

Section 7: Equipment, Maintenance and Training

Section 8: Financial Information

Section 9: Value-Added Services

- Appendix

FORM B: STATEMENT OF RESPONSIBILITY

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.)