

# Lowndes County Schools Request for Qualifications

## For Upgrades to Lowndes County Schools through a Comprehensive Infrastructure Project Contract

### Introduction

Lowndes County Schools (hereinafter referred to as Owner) is seeking specific qualifications from interested Energy Service Companies (ESC) that are capable of providing comprehensive infrastructure upgrades for the purpose of entering into a Guaranteed Energy Services Contract pursuant to O.C.G.A. 20-2-506 for the following project:

Facility Upgrades to:

The Schools of Lowndes County School District

These services include energy audits, design engineering, construction, project management, ongoing support, and management of the installed systems. The ESC will be required to guarantee the design and installation to perform to specific parameters in regards to the environment and cost of operating the system. The ESC will be required to guarantee the following:

- All design & construction costs
- Performance of the systems
- Energy savings guarantee
- On-going support services

The successful contractor will provide the Owner the best combination of outstanding quality and value, local in-house capabilities, excellent energy capabilities, a proven record of finding unique solutions in mechanical and HVAC design, excellent financial offerings, and a guarantee.

All ESC's will be required to submit qualifications. The ESC's will be evaluated in part on their qualifications and experience with school districts in Georgia. If selected, the Owner will issue a Letter of Award.

### Purpose

This RFQ requests the services of an ESC Contractor to develop and implement improvements to the school facilities' environmental systems and infrastructures. To be included in the energy program (but not be limited to) are the heating, ventilating and air conditioning systems, lighting, water, controls, etc. The overriding concern in considering the upgrades to be offered is the design of the systems that offer the greatest benefits for the students, faculty, employees and taxpayers of Lowndes County School District.

The intent of this contract is to purchase upgrades to the facility that will provide the best environment for the students and employees while providing the best return on investment based on guaranteed installed costs, energy and operational savings.

## **Guaranteed Contracting**

The Owner is interested in contracting for a full range of energy services. These services may include but are not limited to:

1. Complete energy and engineering study of selected buildings
2. Design and installation of new HVAC, lighting, controls, and other energy conservation systems that meet all state & local codes as well as other standards outlined later in the RFQ
3. Self-perform on-going maintenance of new and existing systems
4. On-going auditing and support of energy conservation measures
5. Monitoring of energy costs
6. Financing for the project

**Improvements must result in a guaranteed minimum savings. The ESC will be required to provide financing options for the program. The yearly payments cannot exceed the guaranteed savings. The program cannot exceed fifteen years in length. The Owner will be required to pay no “Up-Front” costs, meaning no payments will be made by the owner until the project is finalized and installation is complete. Savings can be realized through:**

- Reduction in energy costs
- Reduction in maintenance costs due to new systems
- Reduction in cost of outside contracts due to new systems
- Maintenance of new and existing systems
- Other real, tangible, and measurable savings that result from the installation of new systems

The successful contractor must provide guarantees on the following:

- Project Costs
- Future Energy Savings

**No proposal shall exceed fifteen years in duration and payment is subject to annual appropriations.**

**Description of the Procurement Process:** It is anticipated that the process for the procurement of these Energy services will proceed in two stages.

1. **Submission of Written Qualifications:** Each ESC will review and evaluate the written requirements to this RFQ in accordance with the selection criteria identified in Attachment D and respond accordingly in a timely fashion.
2. **Selection of ESC to Develop Contract:** Owner will select the best qualified firm to perform their study. A Letter of Award will be issued to the best firm with the commitment by the Owner to implement a program if costs, savings and all other conditions outlined in this RFQ are met. Extensive engineering by the ESC will be required. The successful contractor(s) must submit to the owner proposed contract terms concerning proposed facility improvements, the timetable for completing engineering and construction work, a detailed description of services to be provided, specific financing arrangements and terms, and any special conditions offered by the ESC.

With project financial benefits dependent upon the scope of technical retrofits, respondents are encouraged to carefully review the evaluation criteria in the RFQ under Financial Approach and to respond as fully as possible.

**RFQ Submission:** Companies who wish to respond to this RFQ must submit two original RFQ responses to Attachments C by 2:00 p.m., September 8, 2016, to the following address:

Lowndes County Schools  
Mr. Wes Taylor, Superintendent  
1592 Norman Drive  
Valdosta, Georgia 31601  
Attention: Energy Services RFQ

All submissions become property of the Owner and will not be returned to the ESC.

All costs associated with the submission preparation will be borne by the submitting company.

# ATTACHMENT A

## General Information

### A) Purpose:

This RFQ requests the services of an ESC to develop and implement a comprehensive facility upgrade program for the owner.

The intent of this project is to provide the owner with the means to realize maximum utility and operational savings without the use of capital funds. Timely implementation of this project is of the essence.

### B) Guaranteed Contracting:

The Owner has chosen to procure the required services through a Guaranteed Contract. This means the ESC will provide single source accountability from design and installation through guaranteeing energy costs, energy and operational savings, and the performance of the systems. The ESC will also provide financing for the program structured so that yearly payments are less than the yearly guaranteed savings. ESC will also provide on-going support services. Owner may, at his option, elect to fund this project by means other than those provided by ESC.

### C) Technical Requirements: (once an ESC is selected)

1. Engineering Study: The ESC will perform an engineering study of the existing buildings, develop recommendations for upgrades to the facility, and outline associated savings. The ESC must be willing to guarantee these savings. Based on these, the ESC should develop a financial model of the proposed program no more than fifteen years in length.
2. Buildings with existing controls: The ESC shall provide controls that integrate with existing systems throughout the school district or outline other alternatives.
3. The new systems must be capable of meeting and maintaining the following standards in the school district:
  - 68 – 72 degrees during occupied periods in heating
  - 72 – 76 degrees during occupied periods in cooling
  - 50% - 55% RH at all times
  - ASHRAE Standards 62-1989 (ventilation)
  - Minimum 15 CFM fresh air per occupant
4. A registered Professional Engineer must serve as Engineer of Record.
5. The ESC will be required to work with current building management and maintenance personnel to coordinate construction and provide appropriate training for the operation of the new systems.

### D) Project Funding:

Respondents shall be willing and able to provide financing options for investment required to fund this project. The cost of the proposal generation, system design and all other “up front” costs shall be borne by the respondent with no obligation to the owner.

The financial goal of this program is twofold:

1. Self-fund the upgrades to the school district through energy and operational savings
2. Provide financing for the proposed projects with terms not to exceed fifteen years and subject to yearly appropriation

The proposed agreement shall not constitute a debt, liability, or obligation nor will it be a pledge of faith and credit of the Owner.

#### **E) Savings Guarantee:**

The ESC shall provide a written savings guarantee. The guarantee shall be reconciled on an annual basis, commencing one year from the date of completion of installation. In the event that the actual savings are less than the guaranteed savings, the ESC shall provide a cash reconciliation of the difference.

The guarantees should be based on the ESC's experience, references and overall confidence in the design. The ESC shall provide the guarantee through its own organization. Guarantees through insurance companies will not be accepted.

#### **F) Eligible Bidders:**

Eligible bidders are limited solely to companies who have a proven record of energy reduction experience and are willing and able to guarantee the cost, performance and savings associated with the proposed projects. Eligible bidders must have a minimum of all the following (any bidder not meeting the minimum requirements below will not be considered):

1. To be eligible, the respondent / bidder must have been a prime contractor on a minimum of five guaranteed energy projects in the last 5 years. Being a subcontractor of a prime contractor on a guaranteed energy project is not eligible experience and will not be considered.
2. Must have at least five proven guaranteed energy projects performed in Georgia schools over the past five years.

#### **G) RFQ Response Format:**

RFQ responses must be submitted in the format outlined in this document. Prior to the actual evaluation, each RFQ response will be reviewed to determine whether or not it is complete. RFQ responses that do not contain the information requested will not be considered.

Respondents shall use the prescribed format to clearly indicate their experience and qualifications, and fully describe their guaranteed energy savings contract. RFQ responses will be evaluated in light of the material and substantiating evidence presented in the response and not on the basis of what is inferred.

#### **H) Contractor Responsibility:**

The selected ESC will be required to assume total responsibility for all the services offered in their RFQ response. The selected ESC(s) will be considered the prime contractor and the sole point of contact with regard to all contractual matters.

#### **I) Payments:**

Payments shall not exceed the total savings realized under this program for the terms of this agreement. The Owner will not make monthly payments until the project is complete.

**J) Required Bonds and Insurance:**

Prior to the award of a guaranteed Energy contract, the ESC shall provide the Owner with a 100% project value performance bond.

To adequately protect the interests of the Owner, the successful respondent shall procure, and maintain in effect during the life of the agreement, the following insurance coverage:

1. Commercial General Liability insurance in the amount of not less than \$1,750,000 each occurrence.
2. Comprehensive Automotive Liability insurance in the amount of not less than \$1,750,000.
3. Workers Compensation insurance in the amount of not less than \$1,000,000 each accident.

In addition, Professional Liability insurance coverage shall be in force according to the requirements for engineering design work in Georgia. Evidence of required bonds and insurance shall be presented prior to the execution of the contract. Insurance policies to be carried under the agreement shall not be changed or canceled without prior written notification to the Owner.

**K) Taxes, Fees, Code Compliance and Licensing:**

The ESC shall be responsible for the payment of any required taxes or fees associated with the execution of this contract. The ESC shall also be responsible for compliance with all applicable codes and statutes. All engineering, design, installation and construction work shall be done by contractors licensed in Georgia.

**L) References and Proprietary Information:**

Submission of a response authorizes the Owner to make inquiries concerning the respondent and its officers to any persons or firms deemed appropriate by the Owner. Any proprietary information that the contractor does not want disclosed to the public shall be so identified on each page in which it is found. Data or information so identified will be used by the Owner solely for the purpose of evaluation and contract negotiations only.

**M) Illegal Immigration Reform and Enforcement Act of 2011:**

By providing a proposal or bid, proposer/bidder certifies that he/she is in compliance with O.C.G.A. § 13-10-90, et seq. No proposal or bid will be considered by the BOE unless it is accompanied with a signed, notarized affidavit from the proposer/bidder attesting to the following:

- (a) The affiant has registered with and is authorized to use and uses the federal work authorization program
- (b) The user identification number and date of authorization for the affiant; and
- (c) The affiant will continue to use the federal work authorization program throughout the contract period; and
- (d) The affiant will contract for the physical performance of services in satisfaction of such contract only with subcontractors who present an affidavit to the contractor with the same information required in subparagraphs (a), (b) and (c) of this paragraph.

**N) Inquiries:**

Questions that arise shall be submitted in writing to the Owner. The point of contact for this project is:

Lowndes County Schools  
Attn: Mr. Wes Taylor, Superintendent  
1592 Norman Drive  
Valdosta, Georgia 31601

**ATTACHMENT B**  
**Lowndes County Schools**  
**Proposed Project Schedule**

| <b><u>ACTIVITY</u></b>            | <b><u>DATE</u></b>              |
|-----------------------------------|---------------------------------|
| RFQ Invitation                    | August 9, 2016                  |
| Responses Due                     | 2:00 p.m., September 8, 2016    |
| Award Announcement and LOI        | September 19, 2016              |
| Detailed Engineering Study        | TBA                             |
| Detailed Engineering Presentation | TBA                             |
| Contract Award                    | TBA                             |
| Begin Project                     | TBA                             |
| Project Complete                  | TBA                             |
| 1 <sup>st</sup> Payment           | Only after Project is completed |

# ATTACHMENT C

## Response Format and Preparation Instructions

Responses must be submitted in the format outlined in this section. Each response will be reviewed to determine if it is complete prior to actual evaluation. The Owner reserves the right to eliminate from further consideration any proposal which is deemed to be substantially or materially unresponsive to the requests for information contained in this section. The intent of the Owner is that all responses follow the same format in order to evaluate each respondent fairly.

Each Respondent will provide the Owner with two copies of the RFQ response.

### A) TABLE OF CONTENTS:

- Responses shall include a Table of Contents properly indicating the appropriate sections.

### B) EXECUTIVE SUMMARY:

- Responses shall include a concise abstract of no more than two pages stating the respondent's overview of the project.

### C) COMPANY BACKGROUND:

1. Company Information / History of Organization
2. Project Organization Chart
  - The Owner is interested in the ESC's ability to provide outstanding project management and their ability to deliver the project on-time. The owner is interested in a thorough description of the ESC's local, in-house ability to install mechanical and electrical systems. The respondent should focus on explaining in-house capabilities that they can directly control as opposed to subcontracted agreements. The respondents should also focus on describing in-house capabilities that allow them to quickly respond and resolve installation issues that could affect the critical path of the installation.
3. Resumes of Individuals that will be working on the Owner's upgrades
4. Contractor Profile Form – Attachment A

### D) COMPANY EXPERIENCE:

1. Provide a minimum of at least five references of energy savings programs your organization has completed in the past five years. All references will be contacted. **References outside Georgia will not be accepted.** Provide the owner's name, address, telephone number and contact person for each reference. References for projects where the responding firm subcontracted the major mechanical installation are not acceptable. Only references for projects which are complete through the installation of all equipment and systems are acceptable.
2. Provide Case Studies of at least three other school districts you have completed in Georgia – examples for school districts in other states will not be considered. Case Study information shall include project costs, scope of work, and savings associated with the project.

### E) FINANCIAL APPROACH

1. Provide a detailed description of your firm's possible arrangements for financing of this project – what bank(s) are involved, responsibilities of each party and any special conditions associated with financing this project.
2. Provide a detailed description of the type of financial guarantees that can be offered through your organization and what is typically used by your organization. Specifically, what methodologies, technologies, etc. are used to create baselines and overall savings objectives and reporting of the guarantee?

#### **F) LEGAL DESCRIPTION**

- Provide a sample contract for both the project and the annual guarantee.

#### **G) ON-GOING SUPPORT AND SERVICES**

1. **Mechanical Service and Repair:** List five references to indicate the service quality of the responding firm. Each reference shall demonstrate local mechanical service and repair experience. The scope of mechanical service work and the dates of services shall be indicated for each reference. Provide the owners name, address, telephone number, and contact person for each reference.
2. **Environmental Services:** Describe your ability to provide professional environmental services, specifically in regard to Indoor Air Quality and Energy Star Certification.
3. **Training:** Describe the type of training available to the Owner in regards to the systems you will be installing.
4. **Energy Auditing Services:** Describe how you would perform an energy audit.
  - Provide an actual Annual Energy Guarantee Audit that has been done for a project in Georgia.

#### **H) ENGINEERING STUDY:**

- If the school district chooses not to proceed with the project once the engineering study is complete, please indicate how much will be charged to the district for the engineering study.

#### **I) ON-GOING SUPPORT AND ADDITIONAL SERVICES (Not to exceed 4 pages)**

1. **Facility Services including Mechanical and Electrical Service and Repair:** Describe your ability to provide facility services for Lowndes County School District. Briefly describe the synergies and cost benefits obtainable by combining these services with the Guaranteed Energy Services Contract. List five references to indicate the service quality of the responding firm. Provide the owners name, address, telephone number, and contact person for each reference.

# ATTACHMENT C

## Energy Contractor Qualification Form

*In paragraph format, please include the following information in the order it is requested (this attachment is not intended to be used as a form).*

### A. OVERVIEW OF FIRM

1. **Firm Name, Business Address, City, State, County, Zip Code**
2. **Names, Titles and Addresses of two contact people associated with this contract**
3. **Outline your Company History including how long your company has provided guaranteed energy services contracts in Georgia**
4. **Date Prepared**
5. **What is your Core Business? (As described in Business Journals).**
6. **Provide a minimum of at least five K-12 references of energy savings programs your organization has completed in the past five years. All references will be contacted. References outside Georgia will not be accepted. Provide the owner's name, address, telephone number and contact person for each reference. References for projects where the responding firm subcontracted the major mechanical installation are not acceptable. Only references for projects which are complete through the installation of all equipment and systems are acceptable.**
7. **Does your firm, or any Branch or Division of your firm, manufacture equipment or product?**
8. **If your firm manufactures equipment or product, how is the cost of the following recovered?**
  - Research and Development, and what is the dollar amount your firm spends yearly?
  - Product Liability
  - Factory Overhead (cost of personnel, equipment, buildings, etc.)
  - Home Office and Area Fees
  - Marketing and Sales
9. **Are the overhead costs described above applied to the installation costs of this project?**
10. **If your firm manufactures a product (such as chillers, HVAC, controls, etc.) and such a product is required on this job, will you consider other manufacturers?**
11. **Federal Employee Identification Number**
12. **Has your company ever been in litigation as a result of a guaranteed energy services contract? If so, list all such instances and the result of the litigation.**
13. **Outline and Detail all products that your company manufactures that you will include in this project**
14. **Please provide a detailed organizational chart of your firm in Georgia.**

**15. Project Manager for this Project**

- Identify the Project Manager for this project (with contacts to verify ability and quality of work in school districts)
- Is he/she employed by your firm?
- What is his/her understanding of mechanical systems and design of HVAC systems?
- Provide a detailed resume of his/her proposals with references of similar guaranteed savings projects in Georgia
- Describe the local resources and support available to support this person
- Detail of guaranteed savings school district projects completed over the last five years in Georgia.

**16. Chief Estimator for this Project**

- Identify the Chief Estimator for this project
- Is he/she employed by your firm?
- What is his/her understanding of mechanical systems and design of HVAC systems?
- Provide a detailed resume of his/her proposals
- Describe the local resources and support available to support this person

# ATTACHMENT D

## Selection Criteria

### A) Completeness:

Each response will be reviewed prior to the selection process for the completeness and adherence to the prescribed format. A response will be considered complete if all requested sections are included and in the proper order.

### B) Selection:

#### ▪ **Grading System**

The executive summary of each respondent will be read to give an overview of the response. Each section of the response will then be graded on a pass/fail basis. A passing grade shall be given if the section:

- Provides the requested information
- Demonstrates the respondent has adequate capability and/or experience to provide value, quality, unique engineering solutions and strong installation capabilities in developing and delivering mechanical upgrades to school district facilities in Georgia.
- Demonstrates strong, local, in-house capabilities

### C) Formal Evaluation:

#### ▪ **Evaluation Process**

The Owner will appoint a selection committee to formally evaluate each response. The evaluation process will objectively grade the responses based on their merit and completeness. Responses will be evaluated in light of the material and substantiating evidence presented in the response, and not on the basis of what is inferred. The evaluation process will include verification of references, verification of project team resumes, and may also include customer site visits or other information as directed by the Owner.

#### ▪ **Grading Format**

Each section or subsection of the RFQ responses will be considered a separate criterion and will be graded individually.

### D) Final Selection

A Letter of Award will be issued to the Contractor.

### E) Notification

The Owner will notify the successful respondent by either e-mail, letter, or telephone call.