

Pulaski Community School District - Request for Qualifications (RFQ)

Energy Performance Contracting Services (EPCS)

Solicitation Overview

The Pulaski Community School District (PCSD) is seeking proposals from Qualified Energy Services Providers to assist the District in using the Revenue Limit Energy Exemption, in conformance with requirements under s66.0133, Wisconsin Statutes, to make improvements throughout the district. PCSD is requesting Qualified Providers to respond to this RFQ and describe how they will assist the school in developing, designing, installing, and monitoring energy savings projects that maximize the District's value. The purpose of this RFQ is to identify a qualified provider that has the capabilities to provide project design and development, management, and close out services that are best suited for PCSD. The project will be developed in the spring of 2017 and completed within three years. PCSD estimates a total project size to not exceed \$6.0 million.

Potential Energy Conservation Measures

The PCSD is planning improvements in the following areas over the course of the next three years:

Energy Related:

Kitchen Upgrades

HVAC and DDC Control Upgrades

Windows

Electrical Service Upgrades

Hot Water Storage and Heater Replacement

Insulation

Upgrade to LED lighting

Energy and Operations Related:

Roofing

Pool Filtration System

Interior and Exterior Doors

Building Envelope

Life Safety Systems

Specific projects that will utilize performance contracting will be identified by the selected firm in collaboration with District staff. It is the expectation of PCSD that all projects be bid and PCSD along with the selected firm will recommend bids to be awarded with Board approval.

General Conditions

- This RFQ does not obligate PCSD to perform any work. This RFQ will be used to determine a qualifying firm that PCSD will enter into contract negotiations with.
- PCSD reserves the right to reject any proposal including proposals that do not contain the requested information in the RFQ.
- All RFQ responses will become the property of PCSD and be available to open records requests and the public.
- It is the responsibility of the respondent to examine the evaluation criteria to best frame their response to the needs of PCSD.
- Contractor must conduct a criminal background check and will not select employees to provide services to the District who have criminal convictions that are substantially related to the job, giving consideration to the intended provisions to the services to the District.
- Respondent understands that all contingency or monies available from being under budget will be held by PCSD. In addition, PCSD will approve all submittals and designs before implementation.

Remittal Requirements

Respondents shall submit 5 hard copies of their submission along with a thumb drive containing a digital copy of the RFQ submission in a sealed envelope or box to the address shown below.

Insurance Requirements

The respondent shall protect itself, its business, and the District against all applicable risks by maintaining appropriate insurance coverage and shall furnish proof thereof upon request. Adequate insurance shall include, at a minimum, comprehensive general liability insurance, including coverage for death, bodily or personal injury, property damage, including liability and automobile coverages, with limits of not less than \$10,000,000 aggregate and \$2,000,000 each occurrence, and professional liability with limits not less than \$5,000,000 as well as worker's compensation insurance to the extent required by law. Respondent shall include the District as an additional insured on such liability insurance policy(ies) upon contract execution.

Contact and Questions

Any communication or questions regarding this RFQ must be requested in writing via email to Bec Kurzynske – Superintendent at: kwbahr@pulaskischools.org.

Mail RFQ responses to:

Pulaski Community School District
ATTN: Kevin Bahr, Director of Facilities
143 W. Green Bay St.
PO Box 36
Pulaski, WI 54162

Timeline

March 17 - RFQ issued
March 21 – Provider walkthrough at District campus (optional)
March 23 – All questions must be submitted
March 24 – Answers to questions provided by 4PM
March 28 – Proposals due by 4PM
April 5 – Qualified provider is selected, recommended to Board of Education
April 26 - Update with Board, Board adopts initial resolution for debt issuance authority not to exceed \$6 million, begin 30 day petition period, publish notice to electors within 10 days.
May 3 - Present project details to the Board of Education, Public Hearing
May 17 - Board reviews draft of final resolution, approves project details
June 7 - Adopt Resolution to exceed revenue limit for energy efficiency, approves contract with Qualified Provider, award sale of general obligation debt

Acknowledgement of RFQ

Respondents should acknowledge their desire to bid by sending an email to Kevin Bahr with the subject line: "Acknowledgement of RFQ". Walkthrough information as well as any updates, changes, or answers to questions will be emailed to parties who respond.

Proposal Format

Please use the following number format and titles when you respond.

1. Executive Summary (limit to 2 page)
Use this page to introduce your company and proposal.

2. Proposed Services and Capabilities (limit to 5 pages)
Provide a description of your company, services offered noting which services are not provided in-house, and capabilities. Note any partnerships you will need to call upon to complete the tasks mentioned within this RFQ. Respondents should provide basic information on the first page which includes the following:
 - Company Name
 - Address & primary contact information
 - Website address
3. Project Approach and elements (limit to 4 pages)
Describe your proposed services and processes, including a listing of proposed project elements as it pertains to phase 1 and 2 and a summary timeline of your activities.
4. Team Overview (limit to 3 pages)
Provide a team overview and organization chart depicting all key personnel and supporting personnel that will be involved in the project. List each person's basic task responsibilities and experience with Energy Service Performance Contracting. One page bios may be attached as appendix material.
5. References (limit to 5 pages)
Provide 5 references. For each reference, provide an overview and description of the project work along with contact information. Please provide relevant experience information of ESPC contracts within the state of Wisconsin public school districts during the past 5 years. Project information should include: year completed, project contract amount, high-level scope description, guaranteed energy savings, and client contact information. Please limit each project description to a single page.
6. Cost of Services
Insert the following fee table and information into your response. Please note, the following tasks items are not to be subcontracted out to other firms or entities not listed within the RFQ response. For guidance on the ASHRAE levels, see Appendix A. Engineering services for chosen project work will either be bid out or negotiated later by PCSD.

Service	Fee (\$/square foot)	Task Notes
ASHRAE Level 1 Audit & Report		
ASHRAE Level 2 Audit & Report		
ASHRAE Level 3 Audit & Report		Please note that engineering costs are not to be included here.

Provide proposed cost schedules, conditions and payment criteria for the following:

- A. *Markup Costs and Fees. Provide markups for each category you use in your pricing structure (categories may include but are not limited to: overhead, profit, markups on subcontractors/consultants, equipment/supplies/rentals, self-performed work, design, construction management, warranty, commissioning, monitoring and verification, contingency, on-site training, project closeout documentation, bonding, or any other markup category used.)*
 - a. *To clarify the use of these markups, describe how each markup is applied, when it is used, etc.*
 - b. *Include two hypothetical examples to show how each of the markups are applied:*
 - i. *standard lighting upgrade*
 - ii. *typical large roof equipment replacement*
 - c. *If contingency is a category, describe how excess contingency dollars will be used.*
 - d. *Travel, lodging, per diem, drawings, blueprints and any other expenses necessary to manage the project.*
- B. *District Managed Projects: The District will manage life safety system projects and no further development or construction management services are necessary. Your fee must be an all-inclusive percentage that includes the following in-house services for the life safety system upgrade projects:*
 - a. *Any overhead and profit*
 - b. *Project closeout and documentations*
 - c. *Cost of bonding project*
 - d. *Measurement and verification services*

- C. *Maintenance and Monitoring Costs. Describe costs such as maintenance and monitoring expenses and describe if or how they may be applied. Indicate if these are annual costs and if they are required each year of the contract. Changes in maintenance costs or staffing needs may not be considered in the energy payback calculation.*
- D. *Describe your approach to obtaining and handling utility rebates, Focus on Energy incentives or other incentives that you can potentially provide and/or facilitate. All Focus on Energy incentives will be returned to the Pulaski Community School District via direct payment or overall reduction of project cost.*
- E. *Open Book Pricing. Describe your firm’s approach and experience in providing open-book pricing. Note that open book pricing is required, including open book pricing of itemized costs from subcontractors and vendors.*
- F. *Realized Savings. Describe your firm’s approach to reimburse customers under performance contract if costs are greater than the amount of the savings realized within the period specified.*

7. Added Value Services

Describe how your approach to performance contracting delivers best value for the investment. This is an opportunity to point out how your company may be able to deliver a more cost-effective overall project due to corporate structure, relationships with vendors, depth of experience and expertise, local relationships and experience, experience in similar types of facilities, openness to working with student workers, projects you may be willing to provide or assist with, knowledge of particular retrofits, etc.

Evaluation Criteria

Criteria	Description	Percent Scale
Company Overview	EPCS experience in Wisconsin. Preference is given to Wisconsin firms with both energy efficiency and renewable energy design and installation experience, and EPCS management experience. Preference will also be given to firms with in-house engineering and construction management skills.	25%
References	Quality of Wisconsin school district references. Comparable school references are encouraged.	20%
Team Experience	Experience of team members in high performance school design and ESCO services as it relates to indoor environmental quality, energy performance, and renewable energy.	15%
Cost of Services	The District is looking for a high-quality firm that will provide excellent personalized service and a fair price. The proposed fee levels will be the basis for this rating.	30%
Added Value Services	The list of proposed services will be the basis of PCSD evaluation. This list should provide the highest value to the PCSD within the limit of “not to exceed” cost.	10%

Appendix A - ASHRAE Guidelines

Level 1 – Assessment Report

In this level, provide / conduct the following:

- Conduct a preliminary walk through of the facilities
- Provide a review of the major facilities components including but not limited to:
 - Lighting (indoor and outdoor)
 - Heating, Ventilation, and Air Conditioning (HVAC) systems
 - Building Control System
 - Hot water systems
 - Roofing & Fenestration and building shell
 - Life safety
- Assessment Report which includes:
 - Table breakout of all project ideas with simple economics including total project costs and return on investment (ROI)
 - Brief narrative of each facility and Energy Conservation Measures (ECMs)
 - Complete a utility rate analysis of the facilities electric, gas, and water usage covering three years of data

The District shall then work with respondent to isolate down and consolidate the list of the ECMs or Facility Improvement Measures (FIMs) that the District wishes to review in more depth for Level 2.

Level 2 – Feasibility Study

In this level, provide all items from Level 1, including the following:

- A more detailed project budget and savings analysis via the use of industry best practices regarding the employment of instrumentation and recording durations so as to achieve an accurate and faithful characterization of energy use
- Conduct a demand (kW) utility usage review for savings
- Complete both Long and Short Term Operational & Maintenance and savings analysis for each project
- Develop a measurement and verification (M&V) plan for each measure

The District shall then work with respondent to isolate down and consolidate the list of Energy Conservation Measures (ECMs) and Facility Improvement Measures (FIM) that the District wishes to review in more depth for level 3.

Level 3 – Investment Grade Audit

Provide all items from Level 1 & 2, including the following:

- Finalize the scope of work
- Draft Request for Proposals (RFP) for all projects and Bid all projects
- Negotiate final pricing and terms for each project chosen
- Develop an energy savings performance agreement (ESPA)