

**USD 393 SOLOMON SCHOOLS  
REQUEST FOR QUALIFICATIONS  
FOR AN  
ENERGY CONSERVATION PROJECT WITH  
GUARANTEED SAVINGS**

**I. INTRODUCTION**

**A. Purpose**

USD 393 SOLOMON SCHOOLS (herein referred to as the "Owner") is interested in receiving proposals from qualified firms in accordance with **KSA 75-37, 125** for innovative turnkey professional services including project development and implementation of various energy and operational savings initiatives. This initiative will include turnkey performance based contracting services to upgrade the Owner's physical infrastructure, mechanical systems, lighting, and other needs. The intent of the Owner is to reduce energy and operating costs and gain efficiencies in operation while simultaneously accomplishing the needed improvements in its mechanical systems, lighting, building envelope, and other critical systems. The Owner may also implement green building initiatives or renewable energy projects to reduce its carbon footprint and the use of fossil fuels and greenhouse gases. The Owner's purpose is to ultimately contract with one firm that will provide turnkey, comprehensive and innovative services to develop a project and implement self-funding savings initiatives that will pay for themselves over a financing term not to exceed 30 years.

The Owner's objective in issuing this Request for Qualifications (RFQ) is to provide a competitive means whereby the Owner may identify and select a single ESCO to fulfill all aspects of a potential project. The Owner will base provider selection on several criteria including what is in the best long-term interests of its community. Particularly, the Owner is interested in identifying an ESCO whose approach is comprehensive, innovative, and sustainable. In this sense, the Owner seeks a partner with a history of successful project design, delivery, and implementation. The Owner reserves the right to implement any proposed project in multiple phases, or implement no project at all.

The selected firm will provide the necessary engineering and project development services to identify and quantify energy and operational savings that will be utilized over the term of the contract to offset the cost of implementing all construction improvements. The successful firm will be responsible for assisting the Owner in securing the best financing rates and programs available. At the Owner's request, long-term contractual, financial, engineering and design, cost and schedule assurances and guarantees may be required and the firm must have a track record of providing these types of written assurances.

**B. Project Overview**

Responses are requested from firms with a high degree of skill, capable of providing auditing, engineering, project development, and construction services to manage the installation of energy-saving facility and infrastructure projects. Firms must also have demonstrated experience providing

commissioning, savings measurement and verification, and guarantee services necessary to achieve and maintain energy and operational savings. The Owner is interested in any and all energy conservation measures and operational savings measures that could be included in a project whereby the firm guarantees a specific annual cost savings.

The Owner intends to award a performance-based contract to the firm deemed most qualified to provide aforementioned services. It is the Owner's intent to develop projects such that combined energy and operational savings will offset project costs over a term not to exceed 30 years. Any contract award will be based on selection criteria set forth in this RFQ.

The intent of the Owner is to execute a project development agreement with the most qualified firm as a result of this Request for Qualifications. This will initiate project development and engineering services necessary to define project scope of work, project cost, quantify savings numbers, detail savings assurances, detail project funding alternatives, and provide a final contract for Owner consideration and approval.

### **C. Questions**

Any questions regarding this RFQ shall be directed in writing to the USD 393 SOLOMON SCHOOLS contact person:

JUSTIN COUP, SUPERINTENDENT

Email: [jcoup@usd393.net](mailto:jcoup@usd393.net)

### **D. Proposal Submission**

Please email (1) electronic copy in PDF format of your RFQ Response no later than July 20, 2021 to [jcoup@usd393.net](mailto:jcoup@usd393.net). Submissions shall be no longer than eight (8) pages including cover page. Resumes should be included as an attachment and are not included in the 8-page limit. Submittal emails shall use the subject "RFQ Response for an Energy Conservation Project" with your firm name clearly in the body of the email. Requests for extensions to the due date will not be considered.

### **E. RFQ Award and Project Implementation Process**

The Owner will notify the responding firms in writing whether they have been selected. The Owner is targeting the negotiation of a Project Development Agreement with the successful respondent within thirty (30) days of the RFQ selection notification date, with selection notification to happen after the Owner has ratified the selection at a regularly scheduled meeting. The successful respondent will then conduct detailed engineering and project development services and evaluate the Owner's systems for efficiencies, quantify savings to be gained, determine project scope of work and services to be performed, identify all project benefits, quantify final savings guarantee numbers, quantify final cost, identify competitive financing sources and terms, and submit a performance contract for staff, administration and board review and approval. Upon legal review and presentation of final contracts, the Owner will consider action to implement a final performance contracting project but has no obligation to do so.

## F. Targeted Schedule of Project Events

The Owner expects to undertake the following selection process and implementation schedule:

- Request for Proposals Issued: June 29, 2021
- Submission Deadline: July 20, 2021
- Firm Selection: August 9, 2021
- Board Approval: August 9, 2021

## G. RFQ General Requirements and Conditions

- Respondents must be NAESCO (National Association of Energy Services Companies) Accredited.
- Respondent must have been conducting and providing guaranteed savings services for a minimum of ten (10) years to ensure the firm has established the strong financial stability necessary to back workmanship, guarantee long-term financial performance, and demonstrate business longevity to initiate a potentially long-term contractual partnership with the Owner.
- Respondent must satisfy the requirements of **KSA 75-37, 125**
- Respondent must be qualified by the Federal Department of Energy (DOE).
- Firms are requested to not make any contact with the Owner (collectively or individually) as well as the administration, board, faculty, or staff of the Owner as a result of this RFQ issuance and should make site visits only if approved by the Owner. Any questions are to be submitted via e-mail to the contact identified in Section C above.
- Pricing is not requested as part of this Request for Qualifications and final cost will be submitted when engineering and determination of final scope of work is complete. Premature and unsolicited cost submittals are not requested and may be grounds for proposal dismissal from consideration.
- The Owner may entertain oral presentations as part of this RFQ evaluation process from no more than three (3) respondents, based on the evaluation criteria below.

## H. Proprietary Data

If a proposal includes any proprietary data or information that the respondent does not want disclosed to the public, such data or information must be clearly and specifically identified on each page where it occurs by the respondent. Proprietary data or information will be used by the Owner solely for the purpose of evaluating the qualifications of the respondent.

- Failure to comply with the above RFQ requirements may be grounds for disqualification.

## II. PROPOSALS EVALUATION CRITERIA

Responses should be submitted in the format outlined in this section. The Owner reserves the right to eliminate from further consideration any response that is deemed to be substantially or materially unresponsive to requests for information contained in this section.

### A. Executive Summary

Your firm's Executive Summary should not exceed one (1) page. Responding firm should highlight the firm's unique value, qualifications and services that should be considered by the Owner for this project.

### B. Firm Qualifications

#### 1. Firm Profile

- Firm name, corporate address and local address
- Main Contact person with full contact information
- Years of experience in performance contracting
- Performance Based Contracting portfolio
- Ratio of performance contracting sales to overall company sales (break out percent of equipment and controls systems sales, service and maintenance contracts, etc.)
- Overview of your firm's financial stability
- If respondent, including an affiliate organization such as a subsidiary or parent company, manufactures, sells, or otherwise distributes in commerce, equipment, materials, or other goods, then the respondent must clearly identify its relationship and interest, if any, with or in such organization(s) within its response.
- Identification of any and all ongoing and prior litigated claims, filed within the past seven (7) years, involving contracts executed by and between the responding firm and a governmental entity that included an allegation of poor workmanship, incomplete, or uncompleted work or allegations that the respondent failed to adhere to statutory requirements, including procurement and/or lobbying laws. Respondents must include a brief explanation of the disposition of any such litigation. Litigation history requested shall not be limited to claims between the respondent and the government but also includes

litigation between the respondent and any other person or entity, including taxpayers and subcontractors.

### **C. Project Team Qualifications and Experience for this type of project**

#### **1. Project Team assembled for the Owner's project**

- Roles and Responsibilities of each team member.
- Concise resumes of project team members including education, past project experience and any other pertinent information. Subcontractors or partners may be listed as part of your team but must be clearly identified.
- Performance Contracting Organizational Chart. Provide an organizational chart that illustrates the structure and roles of your Project Team members.

#### **2. Experience of your proposed Project Team**

- Your Project Team should provide a minimum of five (5) performance contracting references.

References of similar size, scope and complexity indicating your project team's experience with similar clients is preferred. Each Project description shall describe the services provided, project cost, guaranteed savings amount, and contract term. Client names with a contact person's phone number and address should be listed.

### **D. Technical Approach/Methodology and Financial Approach for this type of project**

#### **1. Performance Contracting Technical Approach and Process Methodology**

- Provide an overview of the performance contracting process your firm uses to plan, develop and implement performance contracts similar to this project.
- Describe how your firm would determine savings opportunities and conduct an Owner needs analysis during the detailed engineering and project development phase.
- Describe how your firm will calculate savings to be achieved by the Owner.
- Describe your firm's measurement and verifications services.
- Describe your firm's proposed approach to providing any required technical training for Owner personnel.

#### **2. Financial Approach**

- Provide descriptions of recent successful Owner financing arrangements and identify the funding sources available to finance your firm's projects.

#### **3. Project Management**

- Provide your Team's Project Management Overview. Provide detailed information on your team's approach to managing the development and implementation of the project to ensure a successful installation. Describe how your firm will select and work with any potential subcontractors on this project.

### III. PROPOSAL EVALUATION AND ESCO SELECTION

The Owner's evaluation will consider the following criteria in evaluating proposals. The Owner will select the responding firm that is deemed most qualified and the Owner determines provides the greatest value.

- Firm Qualifications (15 points)
- Project Team Members' Experience (15 points)
- References (25 points)
- Technical Approach/Process Methodology and Financial Approach (10 points)
- Measurement and Verification Approach (10 points)

Upon the deadline for submission of proposals, the Owner evaluation team will immediately evaluate each submittal. Based on the scores of the above sections, up to three (3) firms may be offered an opportunity to present their organization and expand upon their written proposal. Each invited firm will be allowed forty-five (45) minutes for the presentation. (25 points)

Alternatively, the Owner evaluation team may opt to forgo presentations and move directly to making a recommendation to the board.

The evaluation team will make a recommendation of a single firm to the board, at which time the board will either select the organization and proceed with the process, or decline to select an organization and choose to discontinue the project at that time. Selection of an ESCO is no guarantee a performance-based efficiency contract will be ratified by the board.