

**School District of Borough of Morrisville
Morrisville, Pennsylvania**

**Request for Qualifications
For a GUARANTEED ENERGY SAVINGS
PERFORMANCE CONTRACT**

**IN ACCORDANCE WITH THE PROVISIONS
OF THE GUARANTEED ENERGY SAVINGS
ACT, 62 Pa.C.S.A. § 3751, et.seq., as
amended**

Table of Contents

- I. Purpose of Solicitation
- II. Requested Services
- III. Selection Process
 - a. Proposal Evaluation
 - b. Final Contract
- IV. Schedule
- V. Evaluation Criteria
 - a. Presentation
 - b. Personnel Qualifications
 - c. Services and Approach
 - d. Project Experience
 - e. Business and Financial Qualifications
- VI. Format of Response
 - a. Cover Letter
 - b. Introduction
 - c. Personnel
 - d. Services and Approach
 - e. References
 - f. Financial Information
 - g. Additional Information

I. PURPOSE OF SOLICITATION

The intent of this request for qualifications (RFQ) is to solicit qualifications from energy services companies (ESCOs). For the purpose of this RFQ, “ESCO” refers to any company that is qualified to provide the School District of Borough of Morrisville with energy audit services and enter into a guaranteed energy savings performance contract in accordance with the Pennsylvania Guaranteed Energy Savings Act, 62 Pa.C.S.A. § 3751, et.seq., as amended (the “Act”). Responses to this RFQ should describe the ESCo’s capability to perform energy audit services, benchmark facilities, develop baseline performance data, identify energy efficiency measures, perform savings calculations, cost estimating, construction management, and all other services listed herein. The District intends to select an ESCo and award contract(s) to perform a guaranteed energy savings performance contract.

Please note that responses to this RFQ must be received by 12:00 pm on January 8, 2018 at the address below. One (1) original copy and three (3) copies of the response must be sealed and delivered to:

Mr. Jason Harris
Business Manager
Morrisville School District
550 West Palmer Street
Morrisville, PA 19067-2195

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

The District reserves the right to reject as non-responsive any submissions that do not contain the information requested in this RFQ. Additionally, the District reserves the right to reject as non-responsive any submissions that are not organized and formatted as described in this RFQ. The District also reserves the right to reject some or all of the submissions which it deems in its sole discretion to not be in the interest of the District.

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

Mr. Jason Harris, Business Manager
E-Mail: jharris@mv.org

All questions will be answered by email to all parties that have contacted the District with interest in responding. Respondent and their agents are advised not to contact any other administrators or Morrisville School District School Board Directors. Failure to comply with this directive will result in non-consideration of the offending firm.

II. REQUESTED SERVICES

The District proposes to address utility uses in its facilities, with focus on the Middle/High School, Intermediate School, and Grandview Elementary buildings. The District has not yet selected scopes of work and other methods of project delivery may be provided concurrently with this GESA work. Other facilities owned by the District may be included in the program at the discretion of the District. Other ancillary buildings owned by the District are hereby incorporated into this RFQ. Work may be combined with non-energy-related publicly procured work by the District. Responders will need to show that they can coordinate between/among projects and delivery methods, providing value to the District.

The ESCo will provide a comprehensive building energy audit including all aspects of energy efficiency being considered, accurate savings and cost estimates, and recommended measurement and verification methods. The audit will include benchmarking of facilities, analysis of utility rates, on-site observations, data logging, energy modeling, energy efficiency measure development and analysis, energy savings calculations, recommendations, and measurement and verification methods. The District anticipates a reduction in annual utility costs through the implementation of the energy efficiency measures identified in the audit.

Respondents to this RFQ should identify their experience and qualification to engineer and manage a major energy conservation project that involves energy efficiency measure (EEM) retrofits that address the following building components, including but not limited to: lighting, space heating, ventilation, air conditioning, building envelope, heat recovery, energy management systems, domestic water heating, fuel switching, air distribution systems, electrical systems, and water consumption systems. The District is also interested in the respondents' qualifications and experience related to programs designed to train building occupants and maintenance workers in energy conservation techniques and awareness.

The ESCo is responsible for all certification and documentation of personnel necessary to comply with the laws to perform work for public entities in the state of Pennsylvania.

III. SELECTION PROCESS

a) Qualifications Evaluation

Interested ESCos must provide the information required to complete the RFQ. The District will evaluate submittals and choose the most highly qualified ESCo. The District may require oral presentations of the responses by the most qualified responders as determined by the District. The determination and selection of the most qualified ESCo will be the sole discretion of the District.

b) Final Contract

Upon selection, the ESCo will negotiate specific scope and competitive industry rates for execution of the guaranteed energy savings performance contract.

IV. SCHEDULE

The schedule below is expected to be followed during the procurement period of this RFQ:

December 18, 2017	Release of RFQ
January 8, 2018	Receive qualifications – 12:00 p.m.
January 17, 2018	Present recommendation to School Board of Directors
January 17, 2018	Approve selected vendor by School Board of Directors

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

The District reserves the right to reject any and all responses resulting from this RFQ. Late responses will not be accepted and will be returned to the submitting company unopened. The District reserves the right to reject, as non-responsive, any statement of qualifications that does not contain the information requested. Additionally, the District reserves the right to reject, as non-responsive, any proposals that are not organized and formatted as described in this RFQ.

V. EVALUATION 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.

a) Proposal Presentation

Preferences will be given to respondents demonstrating strong capabilities, experience and reputation in undertakings similar to those described in this RFQ, and providing authoritative documentation of the respondent's financial condition and stability.

b) Personnel Qualifications

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

c) Services and Approach

- The respondent's approach to energy conservation projects will be significant criteria for selection, respondents demonstrating innovative and cost-effective approaches will be strongly considered.
- The range of services offered will also be an important consideration.
- Methodologies and technical approach will be evaluated for practicality and soundness.

d) Project Experience

- Experience with energy conservation projects of a similar size and type as the project proposed by the District.
- Experience taking responsibility for the full range of roles contemplated for this project (e.g. identification and analysis of EEMs, design, installation, operation, training, savings verification, etc.).
- References (minimum of 5).

e) Business and Financial Qualifications

- Business unit dedicated to providing energy savings programs.
- Affiliation with energy and/or business organizations.
- Financial viability.

VI. FORMAT OF RESPONSE

The responses to this RFQ must be completed and returned in the order indicated below with each section divided and tabbed with the appropriate section title. The District 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 RFQ 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.

Section 1: Cover Letter

Include a cover letter at the beginning of the submission and summarize the information presented in the qualifications; names, 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. Also include the name and title of the person(s) authorized to conduct final contract negotiations on behalf of the ESCo.

Section 2: Introduction

- **Table of Contents**
Include a table of contents referencing each information section of this RFQ, along with the contents further subdivided to describe information included within each section of the submission.
- **Executive Summary**
Provide an executive summary highlighting the ESCo's unique qualifications and capabilities for this project.

Section 3: Personnel

Attach a project staffing plan and 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.

Provide an organizational chart of the participants listed in the ESCo's qualifications and their responsibilities in the program. Highlight the company and personnel responsible for each phase of the project, lines of authority and relationships between prime contractor and subcontractors.

Section 4: Services and Approach

Provide an overview of the ESCo's approach to energy conservation projects and range of services provided directly by the ESCo. Specifically address the following areas:

- **Services, Approach and EEM Experience**
Describe energy efficiency improvements and identify specific energy efficiency measures that the ESCo has had responsibility over, including design, implementation and measurement and verification. List all types of services provided.
- **Benchmarking and Energy Savings Verification**
Describe the normal method used to establish benchmarks, baseline energy use and verification methods. 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.
- **Cost and Savings Estimating and Bid Procurement Experience**
Describe experience and accuracy of cost and savings estimating, and provide examples of cost estimates, bid procurement experience and accuracy.
- **Building Commissioning Experience**
Describe experience and approach to building commissioning and/or retro-commissioning, including in-house expertise and project experience.
- **Training Information**
Outline any training proposed as part of the project, including the subject, duration and location of training. Also describe the relationship with the organization providing training, if not provided by the prime contractor.

- **Project/Construction Management**
Describe experience and approach to project management, including coordination with subcontractors, division of responsibility among project staff and interaction with the District representatives.

Section 5: Project References

Provide references on five (5) energy-related projects (public projects) that the respondent has successfully implemented within the last five (5) years.

References should include the following:

- Customer name
- Name and telephone number of contact
- Brief description of the project
- Project beginning and ending dates
- Specific EEM's recommended
- Project cost and savings estimates

Section 6: Financial Information

Include the company's annual report, audited financial statements or equivalent showing information for the past three (3) complete financial year periods. If a bound document (such as an annual report) is included, it must be placed in the response's appendix section.

Section 7: Additional Information

Attach any additional information that is not contained within the RFQ.