

SCHOOL DISTRICT OF OMRO – REQUEST FOR QUALIFICATIONS (RFQ)

Energy Performance Contracting Services

Solicitation Overview

The School District of Omro (“District”) is seeking proposals from Qualified Energy Services Providers (“Qualified Providers”) to assist the District in using the Revenue Limit Energy Exemption, in conformance with the requirements under Wis. Stat. § 66.0133, to implement Energy Conservation Measures throughout the District. The District is requesting Qualified Providers to respond to this RFQ and describe how they will assist the District 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 capability to provide performance report, project design and development, project management, and close out services that are best suited to the District’s needs. The District estimates a total project budget \$1,700,000.

Potential Energy Conservation Measures

The District has identified the need for facility improvements and possible energy conservation measures in the following areas:

- Roofing;
- HVAC;
- External window and door replacements, as well as, tuck pointing.

Additional, specific projects that will utilize performance contracting will be identified by the selected firm in collaboration with District staff. It is the District’s expectation that performance of all project work be bid and the District along with the selected firm will recommend bids to be awarded with Board approval. The selected provider may bid to self-perform work as well.

General Conditions

- This RFQ does not obligate the District to perform any work. This RFQ will be used to determine a qualifying firm with which the District will negotiate a performance contract.
- The District reserves the right to reject any and all proposals, including proposals that do not contain the requested information in the RFQ.
- All RFQ responses will become District property and subject to open records requests and to the public.
- Contractor must conduct a criminal background check and will not select employees to provide services to the District who have criminal convictions that are inconsistent with performing services on District facilities and in the presence of students.
- Respondent understands that the budget is not a fixed amount to be expended and any monies not so expended will be retained by the District. The District will approve all submittals and designs before implementation.
- Proposals that obligate the District to contract with the provider for the completion of any identified projects for any period of time will not be considered.

Remittal Requirements

Respondents shall submit 9 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 and 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 the School District's Business Manager, Nick Curran at ncurr@omro.k12.wi.us.

Mail RFQ responses to:

Nick Curran
Business Manager
School District of Omro
455 Fox Trail
Omro, WI 54963

Timeline

October 9, 2017 - RFQ issued

October 13 and 16, 2017 – Provider walkthrough at District campus (optional) please email the School District's Director of Building and Grounds, Steve Franz, at sfran@omro.k12.wi.us to schedule an appointment.

October 17, 2017 – All questions must be submitted by 12:00 PM

October 18, 2017 – Answers to questions provided by 4:30 PM

October 23, 2017 – Proposals due by 4:00 PM

October 26, 2017 – Ten (10) Day Notice of public meeting to select the Qualified Provider. Administration will make a recommendation after the Board reviews those qualified providers that submitted responses. The Board will approve a Qualified Provider to complete a performance report and to enter into a performance contract.

November 2, 2017 Update with Board, Board adopts initial resolution for debt issuance authority not to exceed \$1,700,000, publish notice to electors within 10 days, and begin 30 day petition period;

December 13, 2017 – Qualified Provider (that is selected) proposes performance report and scope of work along with related savings to the Board, and the Board determines whether it will see a return on the investment during the remaining useful life of the pertinent facility and determines to move forward on selected projects, if any.

December 13, 2017 - Board meets to approve the performance contract, and if approved, to adopt Resolution to exceed revenue limit for energy efficiency projects.

Acknowledgement of RFQ

Respondents should acknowledge their desire to bid by sending an email to the School District's Business Manager, Nick Curran at ncurr@omro.k12.wi.us 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 format and titles when you respond:

1. Executive Summary (limited to 2 pages)
Use this page to introduce your company and proposal.
2. Proposed Services and Capabilities (limited 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 (limited 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 (limited to 3 pages)

Provide a team overview and organizational 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 (limited to 5 pages)

Provide 5 references. For each reference, provide an overview and description of the project work along with contact information. Please provide information pertaining to relevant contracts for 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

Provide fee information for the following services:

- Preparation of the facilities report (performance report), and whether these costs are part of the overall project fee, paid separately, or paid only if the projects do not move forward;*
- Design and project management aspects of the project, including all bonding and identifying reimbursable cost categories*
- Self-performed work margin*
- Monitoring and Verifications Services*
- All additional mark-ups or other sources of fee revenue for the Provider (i.e. mark-up on reimbursements, consultants, etc.).*

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.

See Next Page for Evaluation Criteria

Evaluation Criteria

Criteria	Description	Percent Scale
Company Overview	Provider's experience in Wisconsin. Preference may be given to Wisconsin firms with both energy efficiency and renewable energy design and installation experience, and project management experience. Preference may 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 Energy Conservation Measures 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 this evaluation. This list should provide the highest value to the District within the limit of the project budget.	10%