

# **NEW BOSTON SCHOOL DISTRICT**

**REQUEST FOR QUALIFICATIONS**  
For Energy Performance Contracting Services

For

**New Boston Elementary School**

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# REQUEST FOR QUALIFICATIONS

## Energy Performance Contracting Services for the New Boston Elementary School

### INTRODUCTION

The **New Boston School District** (hereinafter referred to as **District**) seeks proposals from interested Energy Services Companies (**Contractor**) to conduct a detailed energy audit of the facility and to develop an Energy Performance Contract, in order to identify and implement capital improvements to reduce energy and building system operating costs.

### BACKGROUND

The New Boston Central School is a K-6 Elementary School set in the rural community of New Boston, NH. The building houses approximately 650 students, staff and faculty. The New Boston School District is searching for a highly qualified company to perform a building needs assessment to determine a logical and economical approach to enhance the buildings internal and external electrical and mechanical systems. This will be a multi-year approach to ensure that the enhancements support the mission of the school, keeping all stake holders informed during the planning process and to ensure the greatest return for school district's capital investments.

### OVERVIEW

The District seeks to maximize energy cost avoidance in order to pay for facility upgrades and services. The contractor is expected to analyze the district's current energy and systems related costs, determine the driving factors of those costs, and recommend improvements to reduce or eliminate those costs.

Services and capital improvements may be financed through an energy performance contract which:

- Allows the district to make a trade study between different financing options and capital investment over time.
- Achieves significant long-term cost savings.
- Achieves a guarantee for cost savings.
- Maintains consistent and reasonable levels of occupant comfort.
- Maintains consistent levels of building functionality.
- Maintains building systems reliability.
- Captures additional benefits that may directly result from energy-related services and capital improvements, such as environmental protection, hazardous materials disposal or recycling, improved occupant comfort, reduced maintenance needs, and improved indoor air quality, in addition to other building improvements.

The RFQ and contracting process has four phases:

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- RFQ Phase: Through this RFQ, a Contractor may be selected based on written proposals, interviews with top candidates and a final reference check.
  - Audit and Project Development Phase: A Detailed Energy Audit and Project Development Agreement may be developed with the selected Contractor to define the project scope, cost and financial terms.
  - Construction/Implementation/Financing Phase: Upon satisfactory results of the Detailed Energy Audit, an Energy Performance Contract may be developed to implement a project based upon the recommended and agreed-upon scope.
  - Commissioning/Guarantee/Monitoring Phase: Upon completion of construction, the Contractor may offer a variety of services to ensure savings are achieved, such as a savings guarantee, staff training, follow-up monitoring, and contract maintenance services.

## STATEMENT OF WORK

### Contractor Services

Contractor must have the demonstrated capability in engineering and management to provide a broad range of services. Services may include but are not limited to the following:

#### Audit and Project Development Phase

- detailed energy audit to evaluate costs and savings of a variety of energy-saving measures
- This should include all data/assumptions and explanation of calculations
- Project development plan including financial analysis to include phases/timeline and ROI
- How to design an expandable system (Think additions or else we are just going to be in the same place down the road)

#### Construction/Implementation/Financing Phase

- design services
- equipment procurement and purchasing
- construction management/ project management
- hazardous waste disposal or recycling
- financing capability or ability to help the District identify sources and secure financing.

#### Commissioning/Guarantee/Monitoring Phase

- commissioning
- continuing operations and maintenance for all improvements
- staff training on routine maintenance and operation of systems
- training of occupants
- performance and cost guarantee of savings
- monitoring and verification for measurement and reporting of the performance and savings from improvements
- monitoring and reporting of emissions reductions
- maintaining long-term, high-efficiency performance of buildings

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Contractor must have the technical capability to address a broad range of systems including, but not limited to:

- Mechanical Systems. Heating, ventilating and air conditioning (HVAC) systems, energy management and control systems, domestic hot water systems, distribution systems, etc.
- Plants. Centralized/District heating systems, hot water distribution systems.
- Building envelope systems. Windows, insulation, weatherization, roofs, etc.
- Specialty Systems: Kitchen equipment, renewable energy systems and emergency electrical power.
- Water and Sewage Systems: Automatic controls, low-flow faucet aerators, low-flow toilets.

### **Buildings and Facilities**

Facilities identified for this work are listed in **Attachment E: Technical Facility Profile**. The District reserves the right to reduce the scope of work or conduct work in phases. Additional buildings and facilities may be included in the future under the same contract.

## **ADMINISTRATIVE INFORMATION**

### **RFQ Phase**

**Site Visit:** A site meeting and tour of the facilities will be held prior to the proposal due date. Knowledgeable representatives will be available to answer questions about operation and maintenance practices, problems, concerns and future plans. Fill-out the **Site Visit Registration Form** in this RFQ to register for the site visit and obtain more details. The site visit is recommended for all Contractors who will later submit a proposal. All Contractors will tour the facility at the same time so each Contractor hears all questions and answers.

**Review of Written Proposals:** Proposals must be prepared as described in **Attachment C: Contractor Response**. An evaluation team will review and score written proposals based on the evaluation criteria identified in **Attachment D: Evaluation Criteria**. Based on the overall score, proposals within the competitive range will be identified.

**Interviews:** Contractor with proposal scores in the competitive range may be interviewed by the project evaluation team. Interviews will be scored as described in **Attachment D: Evaluation Criteria**. The interview provides the opportunity for the Contractor to address questions and to more fully describe how the approach to this project satisfies the evaluation criteria. Contractor representatives at the interview should include individuals who will be *key* points of contact and have *major* responsibility for contract negotiation, engineering and design, construction management and follow-up monitoring. Each interview may be tape-recorded. Interview scores will be ranked and a Contractor will be considered for award.

**Final Selection:** Final reference checks may be conducted with the apparent awardee prior to making the final selection. An award may be made to the selected Contractor.

### **Audit and Project Development Phase**

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**Detailed Energy Audit and Project Development Contract:** A Detailed Energy Audit and Project Development Agreement may be negotiated with the selected Contractor.

**Construction/Implementation/Financing Phase**

**Energy Performance Contract:** Following completion of the Detailed Energy Audit and presentation by Contractor to the District of a project proposal that meets all financial, technical, and performance criteria specified in the Project Development Agreement, to negotiate an Energy Performance Contract to implement the project.

**The District reserves the right to change the RFQ or issue amendments at any time. The District also reserve the right to cancel or reissue the RFQ, to reject any or all proposals, to waive any irregularities or informalities in the selection process, and to request clarification of information from any vendor or to request supplemental material deemed necessary to assist in the evaluation of any proposal. This RFQ does not obligate the District to accept or contract for any expressed or implied services.**

**FAX TO: (603) 497-8425  
ATTENTION: Randy Loring**

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**SITE VISIT REGISTRATION**  
**For Contractors Responding to RFQ for**  
**New Boston School District**

The New Boston School District invites you to attend a tour of the facility prior to responding to the RFQ for Energy Performance Contracting Services. This site visit is recommended so that all Contractors tour the facility at the same time and hear all questions and answers.

**DATE:** Wednesday, November 29, 2017

**TIME:** 12:30PM until 2:00PM

**LOCATIONS:**

**New Boston Elementary School**  
**15 Central School Road**  
**New Boston, NH 03070**  
**12:30PM – 2:00PM**

**Sign in at front office upon arrival.**

\_\_\_\_\_ *Yes, I plan to attend the site visit.*

*Today's Date:* \_\_\_\_\_

*Name:* \_\_\_\_\_

*Company Name:* \_\_\_\_\_

*Mailing Address:* \_\_\_\_\_

\_\_\_\_\_

*Phone:* \_\_\_\_\_ *Fax:* \_\_\_\_\_

*E-mail Address:* \_\_\_\_\_

### ATTACHMENT A: SPECIAL CONTRACT TERMS AND CONDITIONS

Following are the special contract terms and conditions that will be an integral part of the subsequent contracts and are highlighted here to emphasize their importance.

#### ENERGY AUDIT PHASE

**Payment for Audit.** If an energy performance contract is not developed after the audit has been accepted, The District agrees to pay the cost of the audit as stated in the submitted proposal or as negotiated in the subsequent Detailed Energy Audit and Project Development Contract. The District shall only pay for square-footage actually audited. Area deemed by Contractor not to be audited will not be charged to the District.

The District shall have no payment obligations under this contract provided the Contractor and District execute an Energy Performance Contract. The fee for the Detailed Energy Audit shall be incorporated into the Contractor's project costs in the Energy Performance Contract and paid through the Energy Performance Contract funding mechanisms.

**Project With Insufficient Savings.** District shall have no payment obligations under this Contract in the event that Contractor's final **Detailed Energy Audit and Project Proposal Contract** does not contain a package of energy saving measures which, if implemented, will provide the District with cash savings sufficient to fund District's payments of all costs and fees associated with the Energy Performance Contract, including 1) the fee associated with the Detailed Energy Audit, 2) all monthly payments to finance the measures, 3) any annual fees for monitoring and maintenance incurred by the District. Should the Contractor determine at any time during the Detailed Energy Audit that savings cannot be attained to meet these terms; the Detailed Energy Audit will be terminated by written notice by the Contractor to District. In this event this Contract shall be cancelled and District shall have no obligation to pay, in whole or in part, any amount.

**Cost Estimates.** The Detailed audit must include estimates of savings for each measure each year. Also, the cost estimate for each measure must include an estimate of all costs including design, engineering, installation, maintenance, repairs and debt services as well as other categories presented in the stated cost markups in the RFQ.

#### **Allowable Payment Sources.**

Payment sources to support the capital investment payments are shown below.

The following payment sources will be allowed:

- Annual energy cost savings
- Annual utility cost savings.
- Material/commodity savings including avoided costs such as scheduled replacement of parts, etc. (only for the years that these savings are applicable).
- Maintenance cost savings such as terminated service contracts on equipment.

During negotiations, District may consider savings to include the following:

## RFQ for Energy Performance Contracting Services

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- Labor cost savings, in-house.
- District deferred maintenance cost.
- Offset of future customer capital cost.

At option of District, an equity cash outlay can supplement savings.

Any cost savings related to maintenance and operation of the facilities will be rigorously reviewed and, if agreed to, will be limited to those that can be thoroughly documented.

**Annual Savings Estimates:** The utility and operational and maintenance cost savings for all measures must be estimated for each year during the contract period. Data and assumptions are to be provided to back the estimates.

**Annual Savings Exceed Annual Costs.** Annual savings shall exceed annual payments each and every year while the performance guarantee is in effect. This means that excess savings in other years and interim savings during the construction period will not be allocated to meet shortfalls in any year. Annual payments include debt service, Contractor fees, maintenance services, monitoring services, and other services.

**Excess Savings (beyond the guaranteed amount).** Excess savings will be retained by the District and may not be allocated to shortfalls in savings in other years. See “Annual Savings Exceed Annual Costs” above.

### CONSTRUCTION/IMPLEMENTATION PHASE

**Use of Stated Cost Markups.** Cost markups provided in the proposal are the maximum markups to be used in the Energy Performance Contract, provided the size and scope of the project remain similar. Cost markups presented in the proposal can be negotiated downward.

**Equipment Compatibility or Standardization.** All equipment installed that is comparable to similar equipment at the facility(ies), shall offer compatibility with existing systems, and/or be of the same manufacturer for standardization of equipment agency-wide, unless excepted by District. Open system solutions are required over proprietary solutions.

### COMMISSIONING/GUARANTEE/MONITORING PHASE

**Contract Term.** The required contract term is 25 years or less.

**Annual Appropriations.** Annual payment is subject to annual appropriations.



**Excess Savings.** Annual cost savings beyond the guaranteed minimum savings will be retained by District, and will not be allocated to shortfalls in other years.

**Inflation and Escalation Rates.** Any inflation rates will be pre-approved by District.

**Energy Escalation Rates.** Where the annual lease-purchase payments are set up to escalate each year in anticipation of annually escalating energy cost savings, the escalation rates shall be agreed on between District and Contractor and shall be calculated and substantiated based on region and utility specific historical data.

**Monitoring and Verification Plan.** A monitoring and verification plan will be developed per guidelines in the energy performance contract.

**ATTACHMENT B: PROPOSED PROJECT SCHEDULE**

The following schedule is the proposed schedule, and may change during the project.

<b>ACTIVITY</b>	<b>DATE</b>
<b>RFQ Phase</b>	
<b>Issue RFQ</b>	<b><u>11-06-2017</u></b>
<b>Site Visit</b>	<b><u>11-29-2017</u></b>
<b>Written inquiries accepted by prospective Contractors</b>	<b><u>12-08-2017</u></b>
<b>Proposal Due</b>	<b><u>12-22-2017</u></b>
<b>Proposal Review Begins</b>	<b><u>12-27-2017</u></b>
<b>Contractor Interviews if required</b>	<b><u>1-10-2018</u></b>
<b>Contractor Selection</b>	<b><u>1-17-2018</u></b>
<b><u>Detailed Energy Audit Phase</u></b>	
<b>Audit, Final Report and Presentation (During New Boston School Board Meeting)</b>	<b><u>3-28-2018</u></b>
<b>Energy Performance Contract Phase</b>	
<b>Installation (subject to change)</b>	<b><u>7-02-2018</u></b>
<b><u>Commissioning/Monitoring Phase</u></b>	
<b>Commissioning</b>	<b>TBD</b>
<b>Monitoring</b>	<b>TBD</b>
<b>Training</b>	<b>TBD</b>
<b>Other</b>	<b>TBD</b>
<b>Proposed Contract Term</b>	<b>TBD</b>

Note: This schedule is subject to change.

## **ATTACHMENT C: CONTRACTOR RESPONSE**

### **GENERAL INFORMATION**

Refer to “Administrative Information” in the body of the RFQ for an overview of the process.

For further information, E-Mail Questions to:

Randy Loring

Director of Buildings & Grounds

New Boston School District SAU 19

11 School Street Goffstown, NH 03045

Phone: 603-660-5766

E-mail: randy.loring@sau19.org

### **Due Date:**

Proposals must be *received* at the below address on or before TBT

### **Submit Proposal**

Prepare responses to “Contractor Profile & Approach to Project” (see below).

Quantity: 4 Paper Copies

Clearly mark one proposal as “**ORIGINAL**”.

### **Submit Sample Detailed Energy Audit** (as described below)

This sample should be representative of the type of facility and the type of audit that will be conducted.

Quantity: one (1) copy

### **Delivery**

Mailing Address:

New Boston School District

Attention: Randy Loring

11 School St.

Goffstown, NH 03070

**REQUEST FOR PROPOSALS  
For Energy Performance Contracting Services  
For New Boston School District**

**Cover Sheet**

**EIN:** \_\_\_\_\_

**Delivery Date:** \_\_\_\_\_

**Authorized Signature:** \_\_\_\_\_

**Printed Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Company Name:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**City:** \_\_\_\_\_

**State:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**Contact for Clarifications:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**E-mail Address:** \_\_\_\_\_

**CONTRACTOR PROFILE & APPROACH TO PROJECT**

- *An electronic copy of this RFQ section is available for easier preparation.*
- *Answer all questions or state “N/A” if not applicable.*
- *Please number and re-state each subheading or question, followed by your response. This improves clarity and makes it much easier to evaluate your proposal.*
- *Number all pages.*

**1. Qualifications and Capability**

**a. General Firm Information**

- (1) Type of Firm. (corporation, partnership, sole proprietorship, joint venture)
- (2) Year Firm Established. Number of years has your firm been in business under its present business name.
- (3) Other Firm Names. Indicate all other names by which your organization has been known and the length of time known by each name.
- (4) Parent Company. If applicable, state name, address, former name if applicable, tax identification number.
- (5) Participating Division or Branch Offices. State division or branch offices that will participate in the development of the proposal, in its evaluation process, and/or in the conduct of any services provided (office name, and address).
- (6) Submittal. Submittal is for parent company, subsidiary, division, or branch office.

**b. Experience of Firm**

- (1) Years in Energy Business. State the number of years your firm has been involved in the energy-efficiency related business. State the number of years your firm has offered performance contracting services.
- (2) Number and Value of Contracts. Indicate the number of energy savings performance contracts actually implemented by your firm, each year for the past 5 years. Indicate the associated dollar value. (NOTE: If this response is submitted by a branch office or division of a parent company, indicate the number of projects that have been managed directly by the specific branch or division.)
- (3) Full-Time Personnel. Indicate the number of full-time personnel employed by your firm.
- (4) NAESCO Accreditation and other Pre-Qualifiers. Is your firm accredited by NAESCO? Describe the relevance or importance of any accreditations or pre-qualifications with regard to this project.

**c. Scope of Services**

- (1) Types of Services. Summarize the scope of services (auditing, design, construction, monitoring, operations, maintenance, training, financing, etc.) available from your firm.
- (2) Expertise in Systems. Describe your ability to offer services to upgrade HVAC, controls, lighting, renewables, kitchen, and other systems.
- (3) Provision of Financing. Describe general ability and approach to help with financing. Describe ability to ensure low rates.
- (4) Provision of Insurance. Generally, describe your capability to secure insurance policies.

## RFQ for Energy Performance Contracting Services

### Attachment C: Contractor Response

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#### d. Financial Soundness

- (1) Financial Statement. Attach your firm's most recent financial statement or annual report for each of the last three years.

#### e. Attachments for "Qualifications and Capability of Firm" Section

Label Attachments and list here including Attachment Name, Description and Location in RFQ Response. Insert attachments here at the end of this section, or include elsewhere in a clearly marked location for easy reference.

## 2. Experience and Expertise

#### a. Project History

Briefly describe all energy performance contracts or related projects that *your* firm has managed within the last three (3) years. Identify project references that involve buildings similar in type, size or scope to the building(s) described in the technical appendices and in similar types of locations.

If this response is from a branch office or division of a parent company, please provide project histories for those that have been managed directly by the specific branch or division.

Projects that have been managed by individuals who will be specifically assigned to this project should also be included and identified.

If you include projects/contracts managed by team members or subcontractors or by your employees while employed by other firms, ***clearly indicate*** the name of the company that was responsible for the project.

Include the following information on each project (*no preferred format*):

***Project Identification:*** Name of project owner, type of project (K-12 school, municipal facility, university, office building, etc.), location (city, state).

***Project Dates:*** Actual construction start and end dates

***Project Size:*** Number of buildings, total square footage, total contract amount and the total project capital cost.

***List of Improvements:*** Type of retrofits and operational improvements related to energy, water and other cost savings.

***Projected Annual Savings:*** State the projected annual energy, water and O&M savings (Therms, kWh, kW, Gallons, etc.).

***Guaranteed Savings:*** State the amount of the guarantee (see sample form below). Also describe how the guarantee functioned and if your firm was required to pay funds to meet the guarantee.

***Actual Annual Savings:*** State the actual annual energy, water and O&M savings (Therms, kWh, kW, Gallons). Also describe if savings were measured or stipulated.

***Contract Terms:*** Type of contract (shared-savings, lease purchase, guaranteed savings), contract term, and financing arrangement.

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**Source of Funds:** Source of funds used for the project. If applicable, describe your firm's role in securing funds.

**Technical Design Personnel:** Include name(s) of primary technical design personnel.

**Project Schedule:** Indicate if the project was completed on schedule. If not, please explain.

**Comments:** Comment on any special features, services, conditions, etc.

**References:** Names and contact information of owner(s)' representatives who can serve as references.

#### b. Personnel Information

- (1) Qualifications and Experience. Describe the number and quality of staff you currently have to conduct technical analysis, engineering design, construction management, construction, training and post-contract monitoring. If needed, refer to resumes in the "Site Specific Project Information" section below.
- (2) Areas of Expertise. List all areas of expertise related to potential energy and water improvements in facilities. Also describe the professional and skilled trades that your firm customarily performs with employees.
- (3) Technical Qualifications. Point out your firm's technical qualifications.
- (4) Subcontractors. Describe the nature of work generally conducted by subcontractors.

#### c. Attachments for "Experience and Expertise" Section

Label Attachments and list here including: Attachment Name, Description and Location in RFQ Response. Insert attachments here at the end of this section, or include elsewhere in a clearly marked location for easy reference.

### 3. Technical Approach

#### a. Audit

- (1) Technical Site Analysis. Describe your general approach to auditing a facility. What is involved? How is customer involved? Methodical approach? Level of expertise involved? Information and resources needed from customer?
- (2) Sample Detailed Audit. Submit a sample Detailed Energy Audit conducted by your firm for a similar project (as directed in the Proposal Submittal Information). This audit must include detailed energy and economic calculations.

#### b. Design/Construction

- (1) Engineering Design. Describe your firm's approach to the technical design of this project.
- (2) Standards of Comfort. Describe standards of comfort and functionality that are generally used for light levels, space temperatures, ventilation rates, etc. in the intended facilities.

#### c. Engineering Analysis

- (1) Baseline Calculation Methodology. Describe in detail the methodology your firm normally uses to compute baseline of energy performance.
- (2) Adjustment to Baseline Methodology. Describe the method(s) used to adjust the energy, water and O&M baseline due to such factors as weather and facility use changes. Describe factors that would necessitate adjustment. Refer to **Attachment E: Technical Facility Profile** and address issues regarding buildings projected to have substantial changes in use.

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- (3) Savings Calculations. List all procedures, formulas and methodologies including special metering or equipment, which your firm will use to calculate energy, water and O&M savings. Include assumptions made in the calculations.
- (4) Dollar Savings Calculations. Describe the procedure to assign dollar values to the savings. Include energy savings as well as maintenance or material savings.
- (5) Cost Savings Guarantee Calculations. Describe your firm's procedures and schedule for measuring financial performance of projects. Describe how the guarantee provisions work in the event that project results vary from projections. Also describe how excess savings can be documented.
- (6) Billing and Invoices. Describe your standard billing procedures and attach a sample invoice.

#### d. Attachments for "Technical Approach" Section

Label Attachments and list here including Attachment Name, Description and Location in RFQ Response. Insert attachments here at the end of this section, or include elsewhere in a clearly marked location for easy reference.

### 4. Performance Contracting Approach

#### a. Approach

- (1) Differentiation of Your Firm. Describe particular characteristics of how your firm approaches performance contracting.
- (2) Management. Briefly describe your firm's approach to management.

#### b. Other Services

- (1) Training Provisions. Describe your firm's capabilities in providing technical training for facility personnel and experience on past projects. Describe your firm's involvement in developing training manuals for facility staff.
- (2) Performance Guarantee. Describe your firm's approach to the performance guarantee. Is it required? When is it recommended for the guarantee to be dropped? Does the guarantee cover the annual monitoring & verification and maintenance contract costs?
- (3) Monitoring and Verification. Describe the methodology proposed for ongoing monitoring and savings verification of each recommended project's performance, including the frequency of such efforts. Note if an industry standard such as the *International Performance Measurement and Verification Protocol* is used and describe the preferred method.
- (4) Maintenance Contract. Describe the types of services that can be included in the maintenance contract. Describe how maintenance services will be implemented for preventative maintenance and emergency service calls. Comment on whether Customer's maintenance staff can perform some of these duties if desired, and describe any impact on the guarantee. Describe company responsiveness to general maintenance and emergency service calls. (These duties could include programming and maintaining the control system, maintaining HVAC equipment, etc.). Describe your firm's flexibility in terminating the guarantee. Describe the required length of the maintenance contract and the relationship with the guarantee in the event that District



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### Attachment C: Contractor Response

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chooses to terminate the maintenance contract prior to the end of the performance contract.

- (5) Project Financing. Describe your firm's preferred approach to providing or arranging financing for the proposed project. Describe the mechanics of the financing arrangement, including equipment ownership, responsibilities/liabilities of each party, security interest required and any special terms and conditions that may be associated with the financing this project. Please comment on how you would work with District to utilize tax-exempt financing if appropriate, or other methods to keep financing costs to a minimum.
- (6) Energy Star Label. Describe your willingness and experience/capability to provide services and prepare an application to achieve the Energy Star Label on retrofitted buildings.
- (7) Emissions Reductions Reporting. Describe your willingness and experience/capability to calculate and report emissions reductions.

#### c. Construction Issues

- (1) Environmental Liability. State your firm's position with respect to the acceptance of liability for any hazardous materials encountered during the course of the project. If the firm is willing to accept any level of environmental liability, state the level and provide a cost analysis.
- (2) Equipment Ownership and Service Responsibility. Describe the status of equipment ownership and service responsibility at contract expiration.
- (3) Warranties. State the nature and term of typical warranties.

#### d. Attachments for "Performance Contracting Approach" Section

Label Attachments and list here including Attachment Name, Description and Location in RFQ Response. Insert attachments here at the end of this section, or include elsewhere in a clearly marked location for easy reference.

## 5. Site-Specific Approach

#### a. Project Scope

- (1) Types of Services. Summarize the scope of services (auditing, design, construction, monitoring, operations, maintenance, training, financing, etc.) offered for this project.
- (2) Potential Projects. Based on your preliminary assessment of the information provided, describe any equipment modifications, installations or replacements at the facility that your firm would consider installing as a part of this project. Address energy, water and operation and maintenance opportunities. Also describe any special features, renewable technologies, or advanced technologies that might be applicable. Describe any special features or services associated with your proposed improvements that would add value to District. Describe your approach to achieve compatibility (such as open systems) and/or standardization of equipment in the facilities to be addressed.
- (3) Benefits. Describe the specific benefits your firm can offer.

#### b. Relevant Experience to Apply to This Site

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- (1) Areas of Expertise. List all areas of expertise related to potential energy and water improvements in facilities. Include specialized areas of expertise in areas that might be relevant to the project (renewable energy system application or rehabilitation, daylight design, etc.) Also describe the professional and skilled trades that your firm customarily performs with employees.
- (2) Experience in Similar Projects. Identify projects your firm has completed that are similar in size, scope, facility type, and retrofit opportunity and present as follows:
  - Estimated size of this project (square footage):
    - 2 buildings, approximately 150 students per building, 30,000 square feet per building
  - Number of similar-sized projects completed
    - In the US: \_\_\_\_\_
    - In a multi-state region including this state: \_\_\_\_\_
    - In this state: \_\_\_\_\_
  - Number of similar type projects completed (building type): \_\_\_\_\_Reference projects in the “Experience and Expertise” section if needed.

#### c. Project Management

- (1) Management Approach. Briefly describe your firm’s approach to managing this project.
- (2) Qualifications and Experience of Staff Assigned to this Project. Identify the individual who will have primary responsibility for each task and phase of the project. List name, title, intended role and responsibilities for the duration of the contract, educational background, specific qualifications related to role and responsibilities, past relevant experience, number of years of relevant experience, supervisory responsibilities if relevant, list of projects individual was associated with during the last five (5) years including type of project and project cost and resume. Tasks and phases to address include technical analysis, engineering design, construction management, construction, training and post-contract monitoring. Indicate the percent of time each person is available to work on this project.
- (3) Subcontractors. Describe the nature of work that will likely be conducted by subcontractors. Describe your willingness to use local subcontractors or subcontractors specified by District.

#### d. Technical and Construction Issues

- (1) Construction Management. Describe how your firm would work with current building management and maintenance personnel in order to coordinate construction and avoid conflicts with the building’s operation and use. Describe your flexibility and/or any limitations regarding possible District activities such as: management of additional energy and water projects, monitoring of installation and performance of Contractor projects, integration of other identified capital needs with Contractor projects which may or may not contain energy and water saving opportunities.
- (2) Project Schedule. Propose a preliminary project schedule.
- (3) Operations and Maintenance. Describe any major changes in operations or maintenance of the facilities that your firm foresees based on the information provided. Briefly describe the maintenance responsibilities of your firm and District. Describe how your firm would provide appropriate training in operations and maintenance of installed improvements.

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- (4) Standards of Comfort. Describe standards of comfort and functionality that you would propose for light levels, space temperatures, ventilation rates, etc. in the intended facilities. Also describe how those standards will be maintained throughout the contract term.

**e. Attachments for “Site Specific Approach” Section.**

Label Attachments and list here including Attachment Name, Description and Location in RFQ Response. Insert attachments here at the end of this section, or include elsewhere in a clearly marked location for easy reference.

**6. Cost and Pricing**

**a. Cost of Audit.**

- (1) Describe your approach to auditing a facility.
- (2) State the total fixed cost of the Detailed Energy Audit.
- (3) State the cost per square foot of the audit.

This cost will be evaluated on the basis of reasonableness, so an unrealistically high or low cost will be devalued in the evaluation process. The audit cost will be the reimbursable cost if no performance contract is negotiated after completion of the Detailed Energy Audit.

- b. Markup Costs and Fees.** Markups represent a percentage added to the base cost for the project. Markup costs are disclosed to provide a typical project costing approach for a project of similar scope and size. This disclosure will provide the open book pricing structure to be used by the Contractor for this project. The markups will be used in the Detailed Energy Audit Contract and Energy Performance Contract. (A substantial change in the scope and size of the project may necessitate renegotiation of the markups.)

Provide your company’s proposed maximum allowable markups in the schedule below for each category listed on the schedule. (The use of margins in lieu of markups is not acceptable.) This format is required and must be completed in its entirety. Use only the categories provided. Ranges for markups are not acceptable.

Clearly indicate (mark by page) if elements of this section are requested to be treated as proprietary (the responsible Purchasing official will make the final decision if this is to be treated as proprietary).

<b>MARK-UPS</b>		
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**RFQ for Energy Performance Contracting Services**  
**Attachment C: Contractor Response**

<i>CATEGORY OF MARK-UP</i>	<i>MARK-UP APPLICATION</i>	<i>% MARK-UP</i>
Overhead		
Profit		
Labor – Internal		
Equipment Purchased		
Materials Purchased		
Subcontract Labor		
Subcontract Material		

Clearly describe how self-performed work will be charged (billed hourly, billed as a markup of equipment and labor costs, etc.). If self-performed work will be billed hourly, include markups proposed to be applied to the hourly rate.

*Include two hypothetical examples to show how each of the markups are applied: i) a standard lighting upgrade and ii) typical boiler replacement.*

(1) If contingency is a category, describe how excess contingency dollars will be used.

- c. **Fees:** Provide your company’s proposed maximum allowable fees in the schedule below for each category listed on the schedule. This format is required and must be completed in its entirety. Use only the categories provided. Ranges for fees are not acceptable. If a proposal is from a joint venture partnership, provide proposed maximum allowable fees in the schedule format below for each participating company.

<i>FEES</i>		
<i>CATEGORY OF FEE</i>	<i>HOW DETERMINED AND USED</i>	<i>YEARS APPLIED (One-time, Annual, etc.)</i>
Detailed Energy Audit and Project Development	\$ _____ per Square Foot	One time
Solicit & Evaluate Project Financing Proposals		
Design	(Example) ____% of _____	
Contingency		
Permits		
Performance Bond		
Project Management		
Commissioning		
Training		
Monitoring and Verification		
Warranty Service		
Maintenance on Installed Measures		

## RFQ for Energy Performance Contracting Services

### Attachment C: Contractor Response

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Provide the proposed maximum fee for Detailed Energy Audit and Project Proposal on a cost per square foot basis. The company agrees that the proposed maximum fees shall incorporate its responsibility to adhere to and complete the full scope of work as presented in the Standard Detailed Energy Audit and Project Proposal Contract.

For each fee category listed on the schedule describe how that fee is determined, how the fee is charged to the project and when it is applied. For example, fees might be based on a percentage of project cost. Markups on fees are not allowable.

- d. Other Costs.** Describe other costs such as maintenance and monitoring agreements and describe how they may be applied. Also point out if these are annual costs and if they are required each year of the contract.
  
- e. Best Value.**
  - (1) 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, knowledge of particular retrofits, etc.
  - (2) Describe any utility rebates or other incentives that you can potentially provide and/or facilitate.
  
- f. Attachments for “Cost” Section.** Label Attachments and list here including Attachment Name, Description and Location in RFQ Response. Insert attachments here at the end of this section, or include elsewhere in a clearly marked location for easy reference.
  
- g. Contingency.** Describe your company’s typical level of contingency budget for lighting, electrical, mechanical, controls projects, and other projects and how it proposes to apply contingency to cover changes in work scope and subcontractor change orders.

State how the contingency will be applied to cover changes in work scope and subcontractor change orders. State the typical level of contingency budget for lighting, electrical, mechanical, controls projects, and other projects.

## **ATTACHMENT D: EVALUATION**

### **WRITTEN PROPOSALS**

The Evaluation Team will identify scoring weights for each section. The Evaluation Team recognizes it is premature to place major emphasis on projected financial benefits prior to the completion of the Detailed Energy Audit, because the Audit will define the potential scope and cost benefit. Therefore, the most emphasis will be on qualifications and relevant experience and less emphasis will be placed on the cost information.

### **INTERVIEWS**

Contractors in the competitive range will be invited for an oral interview. The proposal scores will be modified based on clarifications to responses provided in the interview.

### **SELECTION**

The Evaluation Team will identify the apparent awardee and then contact references to complete the evaluation.

With quality references, the apparent awardee will be notified of selection; otherwise, the same process will be used with the second-ranked Contractor.

## **ATTACHMENT E: FACILITY PROFILE**

The **Contractor** is responsible for verifying the accuracy, as necessary.

### **Building List**

<b>New Boston Elementary School</b>	<b>60,600 gsf</b>
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Additional materials, including energy costs, will be provided at the mandatory site visit.