



Lewisburg Area School District



REQUEST FOR QUALIFICATIONS

Energy Conservation Performance Contract

Date Requested: October 7, 2020

Time: 2:00 pm

Location: Central Offices

Submit RFQ in a sealed envelope to:

Lewisburg Area School District

1951 Washington Avenue

Lewisburg, PA 17837

Attention: John Fairchild

Submit RFQ in electronic format to:

fairchild_j@lasd.us

Mark RFQ: LASD HVAC ESCO RFQ

Request for Qualifications – Energy Services Company

The Lewisburg Area School District invites qualified Energy Service Companies (ESCO) which meet the requirements set forth herein to submit proposals for an energy performance contract. The intent of this request is to identify and select an ESCo to develop and implement a comprehensive Energy Conservation and Modernization program for the existing schools and other facilities at the District on a Performance Contracting basis that is in accordance with the Guaranteed Energy Savings Act, 62 Pa.C.S.A. §§ 3751, et seq. (the “Act”). The program targets to increase the efficiency of the District and reduce its operating costs through:

- Reduction of energy consumption of existing operating systems like HVAC, Lighting, Optimizing Automation Controls, Recommissioning, Water Conservation, and Building Envelope,
- Improve air quality and air filtration with Needlepoint Bipolar Ionization
- Evaluate and implement renewable energy opportunities
- Plan, Design and Install air conditioning to the Kelly Elementary, Linntown Intermediate and Donald H. Eichhorn Middle School buildings.

The cost savings and the increase revenues from the program will be accomplished without requiring up front capital from the District and will provide a positive cash flow each and every year of the financing term.

For the purpose of this RFQ, “ESCO” refers to a qualified provider of energy solutions, including design and implementation of energy savings projects, retrofitting, energy conservation, energy infrastructure outsourcing, power generation and energy supply and risk management. Responses to this RFQ shall describe the ESCo’s capability to identify the need for, design, install, maintain, monitor, and arrange the financing of a large-scale, comprehensive energy conservation and modernization program. Lewisburg Area School District intends to select an ESCo and award contract(s) to perform cost-effective energy conservation retrofits and modernizations.

- 1. Services Requested.** The District is interested in implementing a comprehensive range of energy services and efficiency improvements using a performance-based contract or similar type of approved agreement with guaranteed savings and/or additional revenues.

The requested services may include but are not limited to: a primary study of energy conservation and efficiency optimization, an in-depth investment grade audit of measurements of improvement, financing options, design-build capabilities, installation personnel, project management, measurement and verification capabilities, and the necessary training in the operation of new equipment or systems.

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The goal of the project is to improve air quality at all buildings, provide air conditioning at three district buildings, as well as significantly reduce the operational costs and improve efficiencies at the District associated with the heating, ventilation and air conditioning systems, chilled water systems, hot water boiler systems, lighting systems, control systems, and any other energy costs at the schools and other District facilities.

The cost savings achieved by the proposed improvements must be sufficient to cover all project costs including annual maintenance and monitoring fees for the duration of the contract term.

Energy conservation and modernization measures must result in a guaranteed minimum energy savings with the ESCo payments linked to actual documented energy and cost reductions. Any stipulated energy and/or operational cost savings that may be attributed to this project will be rigorously reviewed and, if agreed to, will be limited to those that can be thoroughly documented and verified by the ESCo and approved by the Lewisburg Area School District.

In accordance with law, the aggregate (of all phases) contract shall not exceed twenty (20) years in duration and must comply with applicable statutes, regulations, and procurement laws. The savings achieved by the energy conservation and modernization measures must be sufficient to cover all project costs including annual maintenance and monitoring fees on an annual basis for the duration of the contract term. The contract must provide that the savings in any year are guaranteed to the extent necessary to make payments under the contract during that year.

The District expects the following services to be provided by the ESCo:

A. Comprehensive Energy and Efficiency Analysis. The ESCo will perform a Comprehensive Energy and Efficiency Analysis of the District's facilities to determine what potential energy savings are available.

The analysis will identify and individually list Energy Conservation Measures (ECMs) and other Measurements of Improvement (MOIs) outline an implementation cost, the energy savings, the increased revenues and the payback timeframe for each. The ESCo will make preliminary recommendations. After reviewing the list of ECMs and MOIs, considering the ESCo's recommendations, the District will select a combination of ECMs/MOIs for design and implementation by the ESCo.

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If the ESCo cannot provide the District with a project, which can be paid for from savings and during a period not to exceed twenty years, the District can terminate the agreement at no cost.

- B. Financing.** The ESCO will provide or arrange financing options for the project.
 - C. Engineering Design.** The ESCo should provide a complete design of the ECMs/MOIs selected by the District. The ESCo will secure approvals from required local, state, and federal agencies and will comply with all applicable codes and statutes. This includes obtaining all required permits and licenses prior to installation.
 - D. Implementation.** The ESCo will provide a “turn-key” installation of the selected ECMs/MOIs. This will include procurement, installation, construction and project management.
 - E. Commissioning.** The ESCo will provide a commissioning of the installed systems to assure proper installation and performance.
 - F. Training.** The ESCo will provide training to District personnel on proper operation and maintenance of new and retrofitted equipment and systems.
 - G. Monitoring and Verification.** The ESCo shall provide monitoring and verification of energy savings for the term of the performance contract.
 - H. Warranty.** The ESCo shall provide a warranty for all installed systems
- 2. Selection.** The Lewisburg Area School District will evaluate submitted written qualifications and proposals and may choose to invite the ESCo in order to determine the most highly qualified to participate in an oral interview and presentation. The District will evaluate the participants and select the one best suited to the District’s needs.

Terms and conditions of an Energy & Efficiency Services Agreement will be negotiated with the successful ESCo. If an agreement cannot be reached with the selected ESCo, the District will terminate discussion with that ESCo and commence negotiations with the ESCo determined to be the next best suited to the District’s requirements.

After Board approval, the selected ESCo shall proceed with the Comprehensive Energy Analysis of each facility as directed by the District. The ESCo will be provided access to each site on a schedule convenient to the District. The District will provide the ESCo with utility usage data

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and other reasonably available information as requested by the ESCo to perform the analysis.

3. Evaluation. Proposals submitted in response to this request for qualifications will be evaluated using the format in Attachment A. Selected firms may be invited to interviews. Firms will then be scored from both the statement of qualifications and the oral presentation.

4. Mandatory Requirements.

A. Proposal Cost. Cost for developing proposals and making proposal presentations is entirely the responsibility of the ESCo and shall not be chargeable in any manner to the District.

B. Acceptance of Proposal Content. The contents of the proposal of the successful firm will become contractual obligations. Failure of the successful firm to accept these obligations in a subsequent contractual agreement may result in cancellation of the award.

C. Submittals. One electronic copy and one hard copy of the qualifications package should be submitted by the ESCo and delivered to:

Lewisburg Area School District
Attn: John Fairchild
1951 Washington Avenue
Lewisburg, PA. 17837
570-522-3206
fairchild_j@lasd.us

Submissions are limited to 30 pages double-sided (total of 60 pages, single sided, of information). Submissions longer than this limit will not be considered or reviewed. Submissions are to be straightforward, concise presentations without extraneous material. Font size may be no smaller than 11 point.

D. Security & Access. Security and access requirements are outlined in Appendix B.

5. Rejection of Proposals. The Lewisburg Area School District reserves the right to reject at any time any and all proposals received, or to negotiate separately with any and all competing ESCos. Additionally, Lewisburg Area School District reserves the right to reject, as non-responsive, any

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proposals which are not organized and formatted as described in this RFQ.

- 6. Response Date.** One (1) original paper copy of the ESCo proposal must be delivered to the location designated below, no later than Wednesday October 7, 2020 at 2:00 pm.

John Fairchild
Director of Administrative Services
Lewisburg Area School District
1951 Washington Avenue
Lewisburg, PA 17837

And one (1) electronic copy must be emailed to fairchild_j@lasd.us no later than Wednesday October 7, 2020 at 2:00 pm.

Proposals delivered or received after that time will not be considered. Late or incomplete proposals will not be accepted regardless of the reason.

- 7. Confidentiality.** To the extent allowed by law, proposals will be held in confidence by the Lewisburg Area School District.
- 8. Restriction of Contact.** From the issue date of this RFQ until a determination is made regarding the final selection of the Project ESCo, all contacts with Lewisburg Area School District personnel (including School District Board Members) concerning this RFQ must be made through Delbert Gallegos, Supervisor of Buildings and Grounds, or John Fairchild, Director of Administrative Services.
- 9. Payment and Performance Bond.** The successful ESCo shall be required to provide payment and performance bonds in the amount of 100% of the total final contract amount.
- 10. Prime Contractor Accountability.** The ESCo who is selected as the project contractor under this RFQ will be considered the prime contractor. The ESCo will be required to assume full responsibility for delivery of all services for each facility under the final contract. Further, the selected ESCo will be the sole point of contact concerning all contractual matters for the duration of the contract term.

11. Scope of Services – Technical Requirements, Design Phase.

Once the ESCo is selected, it will be required to provide the following:

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- A. All energy audits, feasibility studies, engineering, design, plans and specifications shall be prepared, reviewed and approved by Professional Engineers licensed in the Commonwealth of Pennsylvania.
- B. The Lewisburg Area School District reserves the right of final approval of any selected equipment or modifications proposed. Only prior reviewed and approved equipment and modifications will be permitted. Review and approval shall be conducted by the Lewisburg Area School District in a timely manner.
- C. The ESCo will be required to work with current building management and maintenance personnel, as well as any architect or general contractor selected by Lewisburg Area School District. No equipment shall be installed that will require the hiring of additional personnel by the Lewisburg Area School District.
- D. ESCo must provide two (2) complete sets of reproducible "as built" and record drawings of all existing and modified conditions associated with the project, conforming to typical engineering standards. These should include architectural, mechanical, electrical, structural, and control drawings and operating manuals to be submitted within 30 days of the completed installation.
- E. The ESCo shall be responsible for the proper removal offsite of all packaging materials and all replaced or demolished materials or equipment.

12. Contractual Provisions:

- A. The contents of the ESCo's final technical proposal shall become part of the final contract.
- B. The Lewisburg Area School District reserves the right of final approval over the scope of work and all end-use conditions. Only prior reviewed and approved equipment and modifications will be permitted by Lewisburg Area School District.
- C. The ESCo must carry the level of insurance required by the Lewisburg Area School District for both the construction and operations phases, and must provide a certificate of insurance to the Lewisburg Area School District, naming the Lewisburg Area School District as an additional insured.
- D. All drawings, reports and materials prepared by the ESCo in performance of the contract shall become the property of the Lewisburg Area School District and shall be delivered to them as needed or within

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thirty (30) days after construction is completed and accepted by the Lewisburg Area School District that the project is fully installed and operating.

E. The ESCo must secure all necessary licenses and permits and comply with all federal and state laws with respect to this project. All work completed under this contract must be in compliance with all building codes and appropriate accreditation, certification and licensing standards. All drawings will be stamped by a Pennsylvania licensed engineer.

F. The repayment obligation and term of the financing for this project must be arranged to coincide with the acceptance by the Lewisburg Area School District that the project is fully installed and operating.

G. ESCOs will be required to guarantee energy and cost savings on an annual basis. Annual reconciliation of the achieved savings will be required.

H. If the term of the contract extends beyond one fiscal year, the agreement must include a provision which allows the District to terminate the contract if in any fiscal year the District does not receive sufficient funds in its annual appropriations to make the payments required under the contract.

I. The contract shall permit no change orders unless expressly requested and authorized by the Lewisburg Area School District Board of School Directors in a school board meeting. Any other change orders undertaken will be at the complete cost and responsibility of the ESCo, and will not be able to be charged or assigned to the Lewisburg Area School District.

THE ESTABLISHMENT, APPLICATION AND INTERPRETATION OF THE ABOVE CRITERIA SHALL BE SOLELY WITHIN THE DISCRETION OF THE DISTRICT.

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**ATTACHMENT A
EVALUATION CRITERIA**

The following criteria will be used to evaluate the written submissions of ESCO qualifications, interviews with previous clients, and responses of ESCOs during final selection interviews as appropriate.

- I. Management & Development Plan **15%**
 - A. Management & development plan
 - B. Local office and personnel**

- II. Technical Approach **20%**
 - A. Comprehensiveness of the technical approach to the project based on improvements likely to be included
 - B. Likely energy conservation measures**

- III. Financial Approach **20%**
 - A. Financial soundness and stability of the ESCO.
 - B. Demonstrated ability to provide or arrange project financing.
 - C. Verification of energy savings
 - D. Additional funding**

- IV. References **15%**
 - A. Provide an overview of similar projects implemented in the state and contracted directly with the public agency.**

- V. Ongoing Service & Support **20%**
 - A. In-house support facility equipped with full time service technicians within 50 miles of the site and the ability to manage construction, repairs, regular service, and emergencies effectively.**

- VI. Local Training Center **10%**
 - A. In-house training facility with full time service technicians within 50 miles of the site office to provide training to the District staff.**

ATTACHMENT B
SECURITY & ACCESS REQUIREMENTS

All employees of the ESCo who will be on site in a school facility or on school grounds must complete the following security clearances, and they must be on file with the Executive Assistant to the Superintendent and Assistant Superintendent before the ESCo employee begins work on site:

Act 24 – Arrest / Conviction Report and Certification Form

Act 34 – PA State Police Criminal Record

Act 151 – PA Child Abuse History

Act 114 – FBI Fingerprint Criminal History

The School District reserves the right to decide whether any ESCo employee may work at the school district site, and reserves the right to ask the ESCo to not use any particular employee for any reason in the project.

ESCo employees will access the sites during normal business hours, and will check in with the front office staff of each building and follow all safety and security procedures while on site.