

UPPER BUCKS COUNTY TECHNICAL SCHOOL

**REQUEST FOR PROPOSAL
FOR A GUARANTEED ENERGY SAVINGS PERFORMANCE
CONTRACT**

**IN ACCORDANCE WITH THE PROVISIONS OF
PENNSYLVANIA ACTS 163, 57, 77 AND 39,
TITLE 62**

SEPTEMBER 5, 2022

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I. PURPOSE OF SOLICITATION

The intent of this Request for Proposal (RFP) is to solicit proposals from Energy Services Providers (ESP). For this RFP, "ESP" refers to any company that is qualified to provide a guaranteed energy savings performance contract in accordance with Pennsylvania Acts 163, 57, 77 And 39, Title 62. Responses to this RFP shall describe the ESP's capability to benchmark facilities, develop baseline performance data, identify energy efficiency measures, perform savings calculations, cost estimating, construction management, and all other services listed herein. The Upper Bucks County Technical School (UBCTS) intends to select an ESP and award contract(s) to perform a guaranteed energy savings performance contract.

Please note that responses to this RFP must be received electronically on September 30, 2022 by 3:00 pm to Michael Herrera, Assistant Director.

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

UBCTS reserves the right to reject as non-responsive any proposals that do not contain the information requested in this RFP. Additionally, UBCTS reserves the right to reject as non-responsive any proposals, which are not organized and formatted as described in this RFP.

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

Michael Herrera
Assistant Director
UBCTS
3115 Ridge Road, Perkasie, PA 18944
215-795-2911
mherrera@ubtech.org

All questions will be answered by email to all responders.

II. REQUESTED SERVICES

UBCTS proposes to address **indoor air quality, building envelope, building mechanical/electrical/plumbing system upgrades, and any other building improvements as directed by the School.**

The ESP 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 shall 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. UBCTS anticipates a reduction in annual utility costs through the implementation of the energy efficiency measures identified in the audit.

Respondents to this RFP shall identify their experience and qualification to design and construct an energy conservation project and comprehensive facility renovation that involves energy efficiency measure (EEM) which address any of the following building components: lighting, space heating, ventilation, air conditioning, building envelope, direct

digital controls and management systems, domestic water heating, air distribution systems, electrical systems and water consumption systems. UBCTS is also interested in the respondents' qualifications and experience related to facilities addition/renovation planning and construction management services, as well as, the ability to manage/construct Architectural scopes of work, as allowable.

The ESP is responsible for all certification and documentation of personnel necessary to comply with all applicable laws to perform work in public schools in the Commonwealth of Pennsylvania.

III. SELECTION PROCESS

Proposal Evaluation

Interested ESPs responding to this RFP must provide the information required. UBCTS will evaluate submittals and choose the most highly qualified ESP. UBCTS may require oral presentations of the responses by the most qualified responders as determined by UBCTS. The determination and selection of the most qualified ESP shall be the sole discretion of UBCTS.

Final Contract

Upon selection the ESP will design and develop specific scopes of work to meet the District's intent for this facility modernization project. The selected ESP shall competitively bid all scopes of work in coordination with the Owner's preferred vendors.

IV. SCHEDULE

The following time frame is expected to be followed during the procurement period of this RFP:

9/5/22	Release of RFP
9/30/22	Proposal received – 3:00 pm
10/20/22	Administration Presents recommendation for Board Approval

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

UBCTS reserves the right to reject all responses resulting from this RFP. Late responses will not be accepted and will be returned to the submitting company unopened.

UBCTS reserves the right to reject, as non-responsive, any proposal that does not contain the information requested in this RFP. Additionally, UBCTS reserves the right to reject, as non-responsive, any proposals that are not organized and formatted as described in this RFP. UBCTS all reserves the right to accept any proposal with minor defects.

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.

Proposal Presentation

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

Personnel Qualifications

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

Services and Approach

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

Project Experience

- Experience with energy conservation projects of a similar size and type to that proposed for UBCTS Experience taking responsibility for the full range of roles contemplated for this project (e.g. Energy Efficiency Measures, Program Management Services, Design Methodology, Construction Installation capabilities, estimating and scheduling services, and Construction Management.)
- References

Business and Financial Qualifications

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

Fee

- Respondents should include a fee to conduct an Investment Grade Audit.

VI. FORMAT OF RESPONSE

The responses to this RFP will consist of seven (7) specific information subject areas, which must be completed and returned in the order indicated below with each section divided and tabbed with the appropriate section title. UBCTS may, during the course of the evaluation process, request additional information to supplement and/or clarify the information provided by any ESP. Any additional information not specifically requested in this RFP 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**

The ESP's proposal will include a cover letter at the beginning of the proposal. The cover letter shall provide a summary of the information presented in the proposal, names and telephone/email 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. This cover letter shall also include the name and title of the person(s) authorized to conduct final contract negotiations on behalf of the ESP.

➤ **Section 2: Executive Summary**

The ESP will provide an Executive Summary highlighting the ESP's unique qualifications and capabilities for this project. Additionally, please confirm that your firm is prequalified by the PA Department of General Services for each of the following:

- Contractor for the Commonwealth's Guaranteed Energy Savings Program
- Statewide Construction Management
- Statewide Commissioning Agent

➤ **Section 3: Personnel**

Each ESP will attach a Project Staffing Plan, the proposed plan will 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 a graphical representation (organizational chart) of the participants listed in the ESP's proposal and their responsibilities in the program. The chart is to be used to show 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 ESP's approach to energy conservation projects and program management and the range of services provided directly by the ESP. Specifically address the following areas:

- *Services, Approach and EEM Experience*
Provide a description of the ESP's approach to energy efficiency improvements and identify specific energy efficiency measures that the ESP has had responsibility over including, design, implementation and measurement and verification. List all types of services provided by your firm.
- *Benchmarking and Energy Savings Verification*
Provide a description of 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*
The ESP shall describe experience and accuracy of cost and savings estimating; provide examples of cost estimates, bid procurement experience and accuracy.
- *Building Commissioning Experience*
Describe respondent's experience and approach to building commissioning and/or retro-commissioning, including in-house expertise and project experience.

The ESP shall outline any training proposed as part of the project, including the subject, duration, and location of training. Respondent shall also describe the relationship with the organization providing training, if not provided by the prime contractor.

- *Program/Construction Management*
Describe respondent's experience and approach to project management, including: coordination with subcontractors, division of responsibility among project staff, and interaction with UBCTS representatives.

➤ **Section 5: Project References**

Provide information on 5 related projects that the respondent has successfully implemented within the last five years. References shall include:

- Customer Name
- Name and Telephone Number of Contact
- Brief Description of the Project

- Project Beginning and Ending Dates
- Specific EEM's recommended

➤ **Section 6: Financial Information**

The ESP shall 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: Fees**

The ESP shall provide a fee to complete and deliver an Investment Grade Audit (IGA) for the indoor air quality, building envelope, and building mechanical/electrical/plumbing system upgrades.

➤ **Appendix: Additional Information**

Respondents may attach any additional information that is not contained within the RFP.