

# **Whitehall School District, Whitehall, Wisconsin**

REQUEST FOR QUALIFICATIONS  
FOR THE PURPOSE OF

Performance Contract for Infrastructure and  
Sustainability Improvements

**Issue Date:** July 27, 2016  
**Submission Due:** August 16, 2016

# Whitehall School District, Whitehall, Wisconsin

## REQUEST FOR QUALIFICATIONS

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## NOTICE TO BIDDERS:

Notice is hereby given that the Whitehall School District, Whitehall, Wisconsin (hereinafter referred to as "District"), requests proposals or qualifications for the implementation of savings initiatives that will help finance equipment and repair, modernization, maintenance, energy and training services in District buildings on a performance contracting basis. The District's objective in issuing this Request for Qualifications (RFQ) is to provide a competitive means in which to select a single qualified Energy Services Company (ESCO) to execute a Guaranteed Savings Performance Contract. Proposals will be in accordance with Wisconsin statutes and Municipal Law section 66.0133 Energy Saving Performance Contracts and the RFQ/RFQ guidelines.

- A. We are submitting herewith for your consideration an invitation to respond to a proposal covering Performance Contract for Infrastructure and Sustainability; descriptions and specifications of the items to be purchased can be obtained from the Whitehall School District, Whitehall, Wisconsin.
- B. Please note that proposals must be **SEALED** and addressed to Whitehall School District, Whitehall, Wisconsin, 19121 Hobson Street, Whitehall, WI 54773. Bid envelope must be plainly marked in lower left-hand corner of individual envelopes "**Performance Contract for Infrastructure and Sustainability**". Any bids received not properly and clearly marked and thus inadvertently opened will be rejected.
- C. Proposal must be submitted separately; i.e., not attached to outside of package or enclosed in a package containing samples.
- D. Please note that proposals must be on file in the District's office no later than noon, Tuesday, August 16, 2016; bids received after the date and hour specified will be rejected.
- E. Proposals will be opened on the date and hour specified. Award, if any, will be made as soon thereafter as possible.
- F. On Tuesday, August 2, 2016 at 10:00 AM there will be a MANDATORY pre-bid meeting at the District Administrator's Office at Whitehall School District, Whitehall, Wisconsin, 19121 Hobson Street, Whitehall, WI 54773
- G. All proposals must be guaranteed for thirty (30) days after the date of opening.
- H. Published on Wednesday, July 27, 2016 by authority of Whitehall School District, Whitehall, Wisconsin, 19121 Hobson Street, Whitehall, WI 54773
- I. Any and all questions should be submitted by email to [beighleym@whitehall.k12.wi.us](mailto:beighleym@whitehall.k12.wi.us), Mike Beigley, District Administrator, Whitehall School District. Any and all questions and answers will be distributed on Tuesday, August 2, 2016 at 10:00 AM at the MANDATORY Pre-Bid Meeting. No questions will be acknowledged if received after noon on Monday, August 1, 2016.

## STANDARD CONDITIONS OF BID

1. These Standard Conditions of Bid are hereby incorporated into this proposal and apply in like force to any subsequent contract resulting from this inquiry.
2. The District reserves the right to accept or reject any or all bids, to waive any technicality in any bid submitted, and to accept any part of bid deemed to be in the best interest of the District.
3. Bid shall be firm for acceptance for thirty (30) days from date of bid opening.
4. The District and all its agencies are exempt from payment of all federal excise and all state and local sales taxes. Such taxes shall not be computed or quoted as part of the bid. Contractors performing construction activities will pay state tax on the cost of materials.
5. All bids submitted must be accompanied by the enclosed Non-collusion and Nondiscrimination Affidavits properly executed by an authorized representative of the bidder. Bid acceptance is contingent upon their receipt.
6. The District reserves the right to cancel any purchase order or contract for failure of the contractor to comply with the terms, conditions, and specifications of this inquiry.
7. The District is not liable for any costs incurred in replying to this request. All bids become the property of the County and are public records.
8. Failure to comply with the provisions of Paragraphs 3, 7, and 10 shall disqualify the bid.
9. Bid/RFQ Appeal Process: Vendor will send a certified letter to Mike Beigley, District Administrator, Whitehall School District, Whitehall, Wisconsin, 19121 Hobson Street, Whitehall, WI 54773 stating reason for disagreement with bid/RFQ decision within five (5) business days of the mail date notifying them of the award decision. Whitehall School District will review the award based on the qualified ESCO's complaint and notify the vendor of the results.
10. No ESCO suggested RFQ Addendums will be considered.
11. If a special award or recognition is mentioned the submittal the ESCO must cite the specific source and date of the recognition or award.
12. District prefers ESCO provide team members to work on the District's project who reside in Wisconsin.

## Section I. Overview

### Background

The District requests proposals for the implementation of facility improvements in the District's buildings on a performance based solution. The specific nature of these proposed improvements will be left up to the Qualified Provider based upon the Qualified Provider's understanding of the District's needs. The scope of work will likely include:

1. the completion of detailed facility audits,
2. the design, presentation, assistance in selection and installation of energy efficient equipment and systems,
3. the training of existing personnel in the operation and maintenance of installed equipment and systems,
4. the monitoring of energy costs and systems, and the securing of financing for the transaction,
5. a written energy guarantee guaranteeing program costs covered by program energy, operational, and capital cost avoidance savings
6. long-term performance management of the guaranteed savings.
7. A written guarantee specifying the installed mechanical equipment will have a useful life of at least twenty (20) years with proper preventative maintenance; and, the lighting equipment will have a useful life of at least fifteen (15) years with proper preventative maintenance
8. A written guarantee ensuring that all necessary software costs (e.g. HVAC controls) for installed equipment will be included for the duration of the finance term; and, semi-annual HVAC controls optimization will be included for the duration of the financial term provided by the Energy Services Company (ESCO)
9. Whitehall School District will only accept submittals from Energy Services Companies that are members of the National Association of Energy Services Companies (NAESCO).

Systems that may be addressed may include building automation, heating, ventilation, air-conditioning, lighting, building envelope, domestic hot water, and other items that drive energy and operational costs. Services are also requested for training, service/preventive maintenance, operation of the new or existing system(s) and equipment, and for other measures that may not provide savings but will have an impact on the quality of the building spaces.

The structure of the payment obligations of the District for these improvements and services will be negotiated with the final proposal. The Qualified Provider must be prepared to guarantee the associated savings to the District and make payment for any shortfall in guaranteed savings on an annual basis in cash.

### Purpose

The purpose of this RFQ is to identify a Qualified Provider that has strong in-house engineering and project management capabilities and proven success in developing and implementing facility improvements through comprehensive energy and operational efficient strategies and the replacement and/or updating of large capital cost items.

## Statement of Intent

The intent of this RFQ is to provide the District with the means to realize maximum energy and operational related improvements in District facilities. The District seeks to enter into contract negotiations with the Qualified Provider demonstrating the strongest qualifications for comprehensive facilities improvements combined with ongoing operations, maintenance and guaranteed energy savings.

## Type of Contract

The District is authorized to enter into an installment payment contract, a lease purchase contract, or a financing arrangement using currently existing funds. The choice of debt instrument should attempt to best meet the requirements of the County's overall program needs.

## Terms of Contract

The Qualified Provider will review and/or prepare all contract documents. The successful proposal will comply with the provisions of Wisconsin Municipal Law section 66.0133 and the requirements outlined above.

## Standard Contract Information

This RFQ does not obligate the District to perform until a letter of intent or contract is signed and approved by both parties. Once there is written approval, it is effective from the date of written approval by the District. The Owner shall not be responsible for work done, even in good faith, prior to approval of the letter of intent or contract. The selected Respondent will be required to assume total responsibility of the project. The selected contractor will be considered the prime contractor and the sole point of contact with regard to all contractual matters.

## Point of Contact

Whitehall School District, Whitehall, Wisconsin, issues this RFQ. For additional information regarding this document, please contact:

Mike Beighley  
District Administrator  
Whitehall School District  
19121 Hobson Street  
Whitehall, WI 54773

All inquiries and communication must be made to the contact person listed above. Clarifications regarding the request for proposal process, timeline, submission requirements can be directed to Mike Beighley. Any communications such as regarding matters of clarification must be made in writing before noon on Monday, August 1, 2016 wherein a response is deemed appropriate to the process, will be answered and forwarded on to all Respondents who attend the Mandatory Pre-Bid Meeting on Tuesday, August 2, 2016 at 10:00 AM.

## **Section II. Required Qualifications to Bid**

### **Required Experience and Qualifications**

The following are the minimum qualifications required to respond to this RFQ:

1. Respondent must have a current State contractor's license and have been a contractor in the State of Wisconsin under that license for a minimum of five years from the date of issuance of this RFQ. If Respondent is partnering with another firm, both vendors must comply.
2. Engineering and technical support staff that will be directly engaged in this project must possess training and experience specific in current technical practices and techniques in the field of utility cost reduction, building operations and sustainable practices. Engineering services must be available in the field of heating, ventilating, and air conditioning systems, interior and exterior lighting, integrated HVAC and lighting control systems, domestic and heating water delivery system, utility service cost control, maintenance planning and execution, customer service, value engineering, training and project commissioning. Respondent should have a sufficient number of completed projects within the last three years that can demonstrate the vendor's ability and skill in establishing and maintaining mutually beneficial partnerships with customers.
3. Respondent must have experience in designing, installing and maintaining automated controls systems and HVAC systems (chillers, air-handling units, rooftops, etc.)
4. Respondent must be able to demonstrate and discuss research capabilities and knowledge of upcoming technologies, equipment innovation, etc.
5. Respondent must provide services and contact information for twenty-four (24) hour service needs with a maximum response time of two (2) hour for Owner defined critical systems and must have a service repair facility located within 60 miles of the District.
6. Respondent must employ a Professional Engineers licensed in the State of Wisconsin for a minimum of five years from the date of issuance of this RFQ.
7. Respondent must be able to provide District with data aggregation system for energy management, tracking and predictive maintenance. Remote operation and monitoring services must be available.
8. Respondent must have factory trained technicians on staff and must be able to provide direct in house training. No third party training will be allowed.
9. Respondent must be a member in good standing with the National Association of Energy Services Companies (NAESCO).
10. The finance term may not exceed fifteen (15) years.
11. The useful life of the installed mechanical equipment must be guaranteed to provide at least be twenty (20) years of useful life with proper preventative maintenance; and, the installed lighting equipment must be guaranteed to provide at least fifteen (15) years of useful life with proper preventative maintenance.

12. The Energy Services Company (ESCO) must provide a written guarantee ensuring that all necessary software costs (e.g. HVAC controls) for installed equipment will be included for the duration of the finance term; and, semi-annual HVAC controls optimization will be included for the duration of the financial term provided by the Energy Services Company (ESCO)

## Section III. Submittal Requirements

### General

Respondents shall submit an original and four (4) copies of their RFQ submission. The sealed RFQ shall include a statement signed by an official with the authority to contractually bind the Respondent located in the Appendix. The name and title of the individual signing the transmittal should be typed immediately below the signature. Attach the Delegation of Authority (if necessary).

Sealed submissions must be received on or before Tuesday, August 16, 2016 at noon. Submissions received thereafter will be disqualified and returned unopened. Sealed submissions should be delivered to the following address:

Mike Beighley  
District Administrator  
Whitehall School District  
19121 Hobson Street  
Whitehall, WI 54773

Submittals must be clearly marked on the package “**Performance Contract for Infrastructure and Sustainability Improvements**”. Submissions that are incomplete, do not follow the requested format, or are otherwise contrary to the guideline of this RFQ, may be rejected as non-responsive.

### Mandatory Pre-Bid Meeting

A mandatory pre-bid meeting will be held on Tuesday, August 2, 2016 at 10:00 AM at the District Office, 19121 Hobson Street, Whitehall, WI 54773. This will provide an opportunity for respondents to tour District facilities. ESCOs that do not attend the mandatory pre-bid meeting may not submit to the RFQ.

### Preparation of Submissions

RFQ submissions must be complete, and correct in format. Clear and concise submissions are required rather than elaborate promotional materials. Respondents must address each item in the order as described in Section IV, “Submission Format, Content and Specific Criteria” of this RFQ and clearly reference the respective section being addressed.

The Respondent is expected to respond to all items in as much detail as necessary for the District and its resources to make an objective evaluation of the RFQ responses. Respondents should respond in a concise direct manner to the issues within the RFQ.



## **Proprietary Data**

Submissions and any other information submitted by Respondent in response to this RFQ shall become the property of the County. Respondent must clearly identify any proprietary information that the contractor does not want disclosed to the public. The District and their consultants for the purpose of evaluation and contract negotiations will use data or information so identified. Disclosure of any proprietary information by the District shall be in accordance with the laws and regulations regarding disclosure in force in the State of Wisconsin.

## **Right to Reject**

The District reserves the right to accept in part or in whole any Submission, waive any formalities, or minor technical inconsistencies or delete any item/requirements from the RFQ or resulting contract when deemed to be in the District's best interest.

## **Cost of Submission Preparation**

The District will not provide compensation to the Respondent(s) for any expense incurred by the Respondent(s) for Submission preparation, product evaluations, or demonstrations that may be made preparing this submission.

## **Evaluation and Selection Procedures**

Award will be made to the Qualified Provider whose proposal is judged to be in the best interest of the District. The District will consider the following factors/criteria (among other factors/criteria deemed important during the evaluation process):

- Experience and qualifications
- Financial approach and guarantee
- Educational Support Programs
- IT Support & Technology
- Local references
- Sample scope of work
- Sample implementation plan
- Demonstration of understanding of the County's needs and objectives
- Presentation of relevant information contained within the response to RFQ

The District will formally evaluate each response. The evaluation process will grade the responses on their merit and responsiveness. The evaluation process will include verification of references and project team members, confirmation of financial information, and may include other information as deemed important by the District.

The RFQ submissions will be evaluated according to the criteria listed in Section IV. The selection process is planned to be in the follow steps. The steps involve:

- Interested Respondents respond to this RFQ.
- The RFQ's will be reviewed and evaluated by the District. Oral interviews will occur if deemed appropriate by the District.

After the formal evaluation and selection of a Respondent, a performance contract will be pursued with the selected ESCO. This contract shall include the scope of work to be completed, the cost to be incurred by the District, energy and operational savings information, the accepted IPMVP protocol to ensure guaranteed savings are met, and means to compensate the District if the savings are not met.

\*\*The District staff and District Board members will not schedule meetings with ESCO's during the RFQ process. We ask that all questions be sent via e-mail to the District Administrator, and responses will be provided to all ESCO's whom attend the MANDATORY Pre-Bid Meeting.

## **Section IV. Submission Format, Content and Specific Criteria**

### **Submission Format**

Request for Proposals (RFQ) submissions must be submitted in the format outlined in this document, referencing each respective section being addressed. Each submission will be reviewed to determine if it is complete prior to actual evaluation. The District reserves the right to eliminate from further consideration any response deemed to be substantially or materially nonresponsive. The intent is that all RFQ's follow the same format in order to evaluate each fairly.

Submissions that are qualified with conditional clauses, alterations, items not called for in the RFQ or irregularities of any kind are subject to disqualification by the District, at its option. Each submission should be prepared economically, providing a straightforward and concise description of Respondent's ability to meet the requirements of the RFQ. Emphasis should be on completeness and clarity of content. Submissions will be evaluated on their responsiveness to the requirements and scope of this package and not on extraneous supplements.

The response to the RFQ shall be submitted in a three-ring or spiral-bound binding with specific tab sections as listed below. A further clarification of the contents for each of the sections follows the tab listings.

- Table of Contents
- Executive Summary
- Section I - Background and Qualifications
- Section II - Partnering and Commitment to Customer
- Section III - Technical Approach
- Section IV - Performance Guarantee and Contract Documents
- Section V - Non-collusion and Non-discrimination Affidavits
- Appendix - Copy of Professional Engineer Licenses

### **Table of Contents**

Request for Proposals shall include a table of contents properly indicating the section and page numbers of the information included.

### **Executive Summary**

Request for Proposals shall include a concise abstract of no more than two (2) pages stating the respondent's overview of the project. Please summarize the scope of services (design, financial, operations and maintenance, training, etc.) that would be offered by your firm for this project.

## Background and Qualifications (Section I)

Section I should provide an overview of the organizational philosophy for approaching this project. Include an organizational vision or mission statement if they have been developed, adopted and embraced by the Respondent. Include information regarding Respondent's commitment to the governmental marketplace.

- A. **Firm Profile:** Provide general information on the responding firm, including: name, business address, local telephone number, officers of the firm, and contact person(s) for this project. Provide a certificate of insurance detailing present coverage and limits, and a profile of the local office presence of the Respondent. Provide the year the Respondent's firm was established, and former firm name(s) if applicable. If the firm is a separate legal entity from a manufacturer, for example a distributorship or manufacturer's representative or engineering firm, specify the legal business classification of the responding firm, if any.
- B. **Respondent's Team Information:** Provide a Project organizational chart that identifies the employees of the Respondent's firm that would work on the project. Specify the team members any other pertinent information shall be included for each member of the Respondent's project team. If the Respondent has more than one office involved with the project, indicate the total number of employed full-time personnel in each office. Also include an organization chart indicating the branch and corporate level positions.
- C. **Philosophy:** The Respondent shall describe their organizations philosophy for dealing with the issues of sustainability on a District campus. Describe the approach which would be utilize to address the wide range of sustainability issues ranging from the design and construction or renovation of a building, the efficiency improvement of a portfolio of facilities or the development of an organization-wide sustainability strategic plan. Include sustainable organizations and affiliations the respondent is involved with and how this would assist the District.
- D. **Performance Contracting References:**

References shall describe the services provided, project cost, savings amount and benefits to the Owner. Provide the Reference's name, address, current telephone number, and contact person for each reference. Provide a brief description of the projects: type of facility, scope of work, duration of project, problems, successes, key vendor personnel involved with the project. Identify any awarded utility participation money or funding provided outside of energy savings. References should be for projects where the prime Respondent is the prime contractor. References must be limited to projects the only worked on by the responding team members.

  - a. Provide a minimum of four (4) Performance Contracting references for projects of similar size, scope, and complexity located in Wisconsin indicating the Respondents recent experience with government institutions.
  - b. Provide a minimum of four (4) performance contracting projects for public sector clients within Wisconsin completed or in progress by the Qualified Provider in the last 24 months.

- E. **Financial History of Respondent's Firm:** Respondents shall provide a copy of their most recent annual report and a copy of the current balance sheet. Publicly held companies should include a 10K or annual report. Provide State of Wisconsin's contractor license number and Federal tax ID Number. Provide financial statements on parent company when the Respondent is not the parent company. Include any additional information that pertains to the financial soundness of the Respondent's firm. You may submit a CD with the required information in lieu of a printed report.
- F. **Bonding References:** Provide the following information concerning your Company's bonding: Name of bonding agent, largest privately financed and guaranteed Energy Program received in the last five years, state whether the Respondent's firm has had a bond invoked in the last five years, and state the total bonding capacity and bonding limit.

## Partnering and Commitment to Customer (Section II)

- A. **Benefits:** Address the benefits the owner will receive by selecting your firm as a partner in lieu of the conventional bidding method, i.e. reduced engineering, risk management, controlled project cost, inventory, quality control, continuity, handling of submittals. Expand on each point.
- B. **Corporate Commitment and Support:** State your commitment and your local commitment to an ongoing relationship with the Owner once the construction and commissioning phases have come to a close. Develop your firm's strategies that will allow the Owner to receive full benefit from corporate involvement and local branch representation. Develop and explain your corporate commitment to service during both the construction phase and after project completion. The respondent shall have the internal ability to provide support to the District for communicating the project benefits to the public using multiple media outlets. Grant Writing: The respondent shall be able to provide support resources to help the district apply for grants the District may choose to pursue.
- C. **Problem Resolution Process:** Address how your firm will staff, support, and respond to resolve issues relative to the project in a timely and efficient manner.

## Technical Approach (Section III)

- A. **Project Management:** Briefly describe your project management philosophy. Include any specific responsibilities, lines of communication, authority of the Respondent's management to control projects, typical procedures for identifying problems and preventing schedule setbacks and cost overruns. Include a sample timeline showing the necessary activities and schedules for implementation of the project. Address the means and methods by which new technology can be introduced to the project team, as it becomes available. **Project management needs to be performed by a local Project Manager whom resides in Wisconsin with a minimum of five (5) years experience working on guaranteed Energy Performance Contracts in the State of Wisconsin.**
- B. **Energy Savings Projections:** The Respondent shall describe their approach to projecting the energy savings. Describe the methodology and processes used to project energy savings. Provide sample savings calculation with all supporting information. The sample energy calculations shall show energy cost, energy units, operating hours and all assumptions made. Savings estimates shall show how savings estimates take into account interactive effects and the overall impact on rates and prices from energy supplies.
- C. **Operational Savings Projections:** The Respondent shall describe their approach to projecting operational and maintenance savings. Describe the methodology and processes used to project operational and maintenance savings. Provide sample savings calculation with all supporting information. The sample operating calculations shall show labor/equipment units, operating hours and all assumptions made
- D. **Service and Training:** Describe the Respondent's approach to operations and maintenance. Include capabilities of the Respondent for servicing HVAC equipment, procedures for handling emergencies, monitoring capabilities, and integration capabilities such as fire and security system, etc. Provide detailed information on training programs available to maintenance staff.

- E. **Renewable Energies:** The Qualified Provider shall share their experience and expertise in completing projects using renewable energies. Please provide a list of the various renewable energy solutions installed or used in projects completed and what factors were used to select those solutions.
- F. **Fire & Security:** The Qualified Provider shall demonstrate their knowledge, capabilities and expertise in delivery of Fire, Security and Life Safety enhancements to their projects.
- G. **IT Solutions:** The Qualified Provider must demonstrate their knowledge, capabilities and expertise in delivering a streamlined IT solution for the entire campus.
- H. **Research & Development:** The Qualified Provider must demonstrate their knowledge, capabilities and expertise in continuing research and development of upcoming technologies, equipment innovation, etc.

## Performance Guarantee and Contract Documents (Section IV)

- A. **Contract Documents:** Provide a copy of the Respondent's contract documents that would be used for this project. Describe the contract language used to agree upon maintenance responsibilities, occupancy schedules, operational savings, and other responsibilities in the contract.
- B. **Savings Guarantee:** The Respondent shall describe and provide their guarantee documents. Provide a description of the methodology, formulas, and reporting to be used to measure energy and operating savings. Include any methods to be used to adjust for factors such as weather, change in use, or change in the structure). **Third party guarantees are not acceptable.**
- C. **Historical Performance:** The Respondent shall describe their policy relative to projects that do not perform as specified. Give a specific example of a payout on a guarantee project. Identify how the costs are calculated. Show the Respondent's past record of projected costs and savings compared to actual performance improvements. Provide at least one reference with current phone number where projects did not perform as specified (if such a project exists). Provide proof of any shortfall checks written as a result of unrealized savings.
- D. **Financing Approach:** Describe the financing mechanisms, including sources and types of financing that could be used to finance improvements and maintenance operations over the term of the contract. Respondents shall be willing and able to facilitate the financing for this project in accordance with all-applicable Federal, State and Local Laws. Proposed financing shall allow early payment of the loan by the District. The District will consider different financing approaches that provide low interest rates and that do not reduce the District's bonding ability. Clearly identify advantages, disadvantages and relative costs associated with each financing method proposed. Provide sample business case analysis for all financing terms proposed by the Respondent using anticipated effective interest rates.
- E. **Funding Sources:** If possible, provide a list of alternative funding sources for the District to utilize which may assist with future projects on the campus.

## Affidavits and Cooperative Purchasing Form (Section V)

- A. The Non-collusion and Non-discrimination Affidavits located at the end of this document must be signed and notarized.

### Appendix and Supporting Information

- A. **Official Statement by Respondent:** The RFQ submission must contain a statement to the following effect, signed by an individual authorized to bind the Respondent:

- The Respondent has read and agrees to the terms and conditions set forth in this RFQ.
- The terms and conditions set forth in the Submission will remain open for at least 120 days from the deadline for submission.

Submissions must be signed by a company official(s) authorized to commit to such submissions. Failure to execute, sign and submit this form together with all required copies of the Submission package will be a basis for disqualification.

- B. **Supporting Data:** The Respondents are encouraged to organize any extended description of their qualifications, experience, or other lengthy documents germane to the requested information in the Appendix. Any extended documents should be summarized in the main body of the qualifications with supporting information included in appendixes. Please also include a copy of your Project Development Agreement Template.

## Section V. Evaluation and Timeline

### Initial Evaluation

Each response will be reviewed prior to the selection process for completeness and adherence to the format. Each submission should be prepared simply and economically, providing a straightforward, concise description of the Respondent's ability to meet the requirements of the RFQ. The executive summary of each response will be read to give an overview. All Submissions will pass this initial screening of responses to determine if all requested sections are included in the proper order and they have addressed all areas described in the RFQ. Emphasis shall be on completeness and clarity of content. Incomplete RFQ's and/or lack of adherence to format may disqualify respondent from further consideration.

In addition to project cost, the following table indicates the importance of the proposal parameters and the weighting that the Customer will use in evaluating the proposals. Maximum score value is equal to 100. If interviews are necessary an additional 15 points may be earned during the interview process.

Evaluation Criteria		Point Allocation
<b>Section I</b>	<b>Background and Qualifications</b>	<b>TOTAL 35</b>
	Firm Profile	5
	<b>National Association of ESCOs (NAESCO) member</b>	5
	Respondent's Team Information	5
	Philosophy	5
	References	5
	Financial History of Respondent's Firm	5
	Bonding References	5
<b>Section II</b>	<b>Partnering and Commitment to Customer</b>	<b>TOTAL 20</b>
	Benefits	5
	Corporate Commitment and Support	5
	Education and Awareness Tools	5
	Problem Resolution Process	5
<b>Section III</b>	<b>Technical Approach</b>	<b>TOTAL 20</b>
	Project Management	5
	Energy Savings Projections	5
	Operational Savings Projections	5
	Service and Training	5
<b>Section IV</b>	<b>Performance Guarantee and Contract Documents</b>	<b>TOTAL 25</b>
	Contract Documents	4
	Savings Guarantee	4
	Historical Performance	4
	Financing Approach	4
	Funding Sources	4
	Example of contact name and shortfall check	5



## Respondent Selection

The District will formally evaluate each response. The evaluation process will grade the Respondents on their merit and responsiveness. The evaluation process will include verification of references, Project Team members, confirmation of financial information, and may include other information as deemed important by the District.

Upon completion of the evaluation process the District will then enter into a formal performance contract with the selected Respondent.

### Timeline

- |  |                  |
|--|------------------|
| ■ Requests for Proposals advertised                      | July 27, 2016    |
| ■ Pre-bid meeting  | August 2, 2016   |
| ■ Requests due   | August 16, 2016  |
| ■ Selection of ESCO/Project Development Agreement signed | August 17, 2016  |
| ■ Detailed development completed                         | October 14, 2016 |
| ■ Guaranteed Energy Performance Contract signed          | October 19, 2016 |

## Section VI. Noncollusion Affidavit and References

### NONCOLLUSION AFFIDAVIT

\_\_\_\_\_ deposes  
(Name and Title)

says that

\_\_\_\_\_  
(Name of Company or Other Form of Business)

has not, either directly or indirectly, entered into any agreement or participated in any collusion or otherwise taken any action in restraint of free competition in connection with this proposal leading to the foregoing contract or in connection with the contract.

That the proposal leading to this contract has been independently arrived at without collusion with any other competitor or potential competitor.

That the proposal leading to this contract has not been knowingly disclosed prior to the opening of this proposal to any other competitor.

That no attempt has been made to induce any other person or firm to submit or not to submit a proposal which may have led to this contract.

That the above statement is accurate under penalty or perjury.

\_\_\_\_\_  
Signature

State of \_\_\_\_\_

County of \_\_\_\_\_

Subscribed and sworn to before me on

this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_

\_\_\_\_\_  
Notary Public

My commission expires \_\_\_\_\_, 20\_\_\_\_\_

# VENDOR REFERENCES

FOR VENDOR \_\_\_\_\_

Provide company name, address, contact person, email address, telephone number, and appropriate information for four (4) references that we can contact.

1. Company Name \_\_\_\_\_  
Address \_\_\_\_\_  
Contact Person \_\_\_\_\_ Phone No. \_\_\_\_\_  
Email Address \_\_\_\_\_  
Project(s) and/or Service(s) Used \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Company Name \_\_\_\_\_  
Address \_\_\_\_\_  
Contact Person \_\_\_\_\_ Phone No. \_\_\_\_\_  
Email Address \_\_\_\_\_  
Project(s) and/or Service(s) Used \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Company Name \_\_\_\_\_  
Address \_\_\_\_\_  
Contact Person \_\_\_\_\_ Phone No. \_\_\_\_\_  
Email Address \_\_\_\_\_  
Project(s) and/or Service(s) Used \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Company Name \_\_\_\_\_  
Address \_\_\_\_\_  
Contact Person \_\_\_\_\_ Phone No. \_\_\_\_\_  
Email Address \_\_\_\_\_  
Project(s) and/or Service(s) Used \_\_\_\_\_  
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