

*The Birchwood School District is using the Revenue Limit Exemption to move forward with energy efficiency projects and is soliciting responses to a Request for Qualifications (RFQ) for a qualified provider under WI Statute 66.0133. Please receive the RFQ on the school website at <http://www.birchwood.k12.wi.us>. At the June 29, 2015 meeting of the Birchwood School District Board of Education, the board will review submitted Qualifications Responses and intends to award a performance contract for the installation of efficiency measures. Parties involved include Birchwood School District and respondents to the request for qualifications.*

# **Guaranteed Energy Savings Program**

**Birchwood School District**

**REQUEST FOR QUALIFICATIONS**  
June 17, 2015

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## II. PROJECT DESCRIPTION

1. The School District of Birchwood (the "District") requests detailed responses regarding the implementation of a Performance Contract for guaranteed energy saving improvements through the modification or replacement of a roof, lighting and other options as found in the scoping audit.

It is the District's intent to leverage this partnership to get the best possible value on these projects for the taxpayers of our District. To that end, prospective firms are encouraged to look for innovative and creative ways to accomplish the projects including using District staff and resources where possible. Respondents must ensure that they will allow District direct or other tax free purchasing for tax savings as requested. Respondents must also ensure open book pricing and provide a transparent response in Section B showing all mark-ups, fees, internal labor and other costs associated with the project.

This Request for Qualifications (RFQ) will provide a competitive means by which to select a Qualified Provider (per §66.0133) to provide the Performance Contract.

2. In general, the components of the program are to:
  - a) Provide energy and operations savings through the modification or replacement of a roof, lighting and other options as found in the scoping audit.
  - b) If selected, the Respondent must include, as part of the program, a minimum written guarantee of energy and/or operational savings.
3. The Scope of Work shall be the oversight and savings guarantee for energy and/or operational savings associated with the modification or replacement of a roof, Lighting and other options as found in the scoping audit. **Current estimated project costs are: \$195,000.** The District reserves the right to change the size and scope of the project.
4. The scope of work for the selected provider may include, but is not limited to, the following tasks:
  - A. Preliminary scoping audit to identify energy and operational savings that fulfills the requirements as identified in WI Statute 66.013.
  - B. Project management. The Respondent will be asked to indicate how they will partner with the District in managing and supervising the project. The District expects a minimum of bi-weekly on-site visits by the Project Manager.
5. The District has a full service purchasing department and therefore we intend on realizing all reasonable and practical sales tax savings through the use of owner direct purchases.
6. It is expected that the Performance Contractor will work with the District to pursue and obtain any and all possible/practical rebates, grants or other funding for the projects outlined in the Scope of Work and the detailed report prepared by the Performance Contractor in order to minimize the impact on the District taxpayers wherever possible.

### III. RESPONSE FORMAT

Responses shall be submitted in the format outlined in this section. Each proposal will be reviewed to determine if it is complete prior to actual evaluation. The District reserves the right to eliminate from further consideration any proposal deemed to be substantially or materially unresponsive to the requests for information contained herein.

#### A. CONTRACTOR QUALIFICATIONS

Each proposal must include the following information regarding your Firm's qualifications:

1. Provide the general background information of your company including address, contact information, firm type, tax identification numbers, and the year established.
2. Provide a complete overview of your firm including personnel assigned to this project. To include but not be limited to their responsibility, individual backgrounds, industry experience, etc.
3. Provide your firm's expertise in assisting school districts on low cost energy savings projects.
4. Provide your firm's expertise in managing environmental hazards. Note if your firm is properly insured and equipped to manage any environmental issues that arise during the project (asbestos, lead, mold etc...). Include whether the project management of this service will be handled by your company or subcontracted.
5. Provide three (3) references of projects performed by the Respondent for school districts in Wisconsin the last three years including proof of relationships of longevity with at least five (5) school districts in Wisconsin.

**B. PROJECT FINANCIALS**

- The selected respondent must be able to develop a comprehensive report showing firm, guaranteed costs and savings projections for the modification or replacement of a roof, Lighting and other options as found in the scoping audit.

The Respondent’s response to RFQ shall contain the following financial information:

- The Performance Contractor markup (based on percent of total project cost) and any additional fees:
- Individual markups and fees:

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. Unexplained ranges for markups are not acceptable.

<b>Fee Component (% of total project cost charged)</b>	<b>Fee Percentage</b>
Overhead	
Profit	
Bond	
Project Management	
Measurement and Verification/Reports	
Energy Guarantee Risk/Insurance	
All other General Conditions	
<b>TOTAL FEE PERCENTAGE</b>	
<b>Category of Mark Up</b>	<b>Mark Up%</b>
Internal Design, Engineering, Consulting	
Sub consultants (design, engineering, etc.)	
Internal Labor	
Equipment Supplied or Purchased	
Material Supplied or Purchased	
Subcontractor Labor	
Subcontractor Materials or Equipment	

Please note your project management fee (if any):

Will ESCO internal labor be charged to this project? Yes \_\_\_ No \_\_\_

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 the hourly rate and markups proposed to be applied to the hourly rate here and in the table above:

**\*\*\*If not identified above with hourly rate and applicable markup, no ESCO labor hours will be allowed to be charged as part of final contract.**

District also reserves the right to accept a proposed set fee amount for work to be performed.

## **IV. THE SELECTION PROCESS**

### **A. TIMETABLE**

The District expects to undertake the selection process described below according to the following schedule:

- |  |               |
|--|---------------|
| 1. Advertise Request for Qualifications  | June 17, 2015 |
| 2. Submission of Qualification Responses | June 24, 2015 |
| 3. Selection of Qualified Provider       | June 29, 2015 |
| 4. Award of Contract                     | June 30, 2015 |
| 5. Exemption Resolution                  | July 15, 2016 |

### **B. SITE VISITS**

Site visits can be scheduled as necessary. Interested parties should contact Frank Helquist at (715)354.3471.

### **C. PROPOSAL EVALUATION**

Responses will be evaluated on the basis of the following criteria:

#### **A. Contractor Qualifications**

Preference will be given to Respondents that have demonstrated success providing the technical services being requested by the District and that can provide the services to the District the most efficiently and cost effectively.

#### **B. Project Financials**

Preference will be given to the proposals that responsibly maximize the net economic benefit to the District and responsibly minimize the risk to the District.

## **V. INSTRUCTIONS FOR SUBMITTING PROPOSALS**

### **A. REQUESTS FOR FURTHER INFORMATION**

Questions concerning this RFQ and the procedures for responding to the RFQ should be directed to Frank Helquist at (715)354.3471.

### **B. SUBMISSION OF PROPOSALS**

Firms shall submit sealed, written Qualification Responses by 2:30 p.m. central time on June 24, 2015 at the School District of Birchwood, Attn: Frank Helquist, 300 Wilson Street - Birchwood, WI 54817. Late responses will not be accepted. The District reserves the right to disqualify from consideration proposals which do not substantially provide all of the information requested in this RFQ.

### **C. RIGHT TO REJECT**

In submitting a Qualifications Response, it is understood by the Respondent that the right is reserved by the District to accept any response in any and all parts, to reject any and all responses, and to waive any irregularities or informalities, which are in the best interest of the District.

### **D. COST OF PROPOSAL PREPARATION**

The cost of preparing a response to this RFQ will **not** be reimbursed by the District.

## RESPONDENT ACKNOWLEDGMENT OF RFQ REQUIREMENTS

The undersigned declares that he/she has carefully examined the instructions and specifications contained in the RFQ and will furnish the properties and services set forth in its sealed proposal for the price set forth in its sealed proposal.

Name of Company: \_\_\_\_\_

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

City/State/Zip: \_\_\_\_\_

Phone/Fax: \_\_\_\_\_

Representative/Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_