

**TIPTON COUNTY SCHOOLS
REQUEST FOR QUALIFICATIONS (RFQ)
for
ENERGY PERFORMANCE CONTRACTING SERVICES**

I. INTRODUCTION

A. Purpose

The purpose of this RFQ is to find the most competent provider to partner with in addressing our energy management issues in all Tipton County Schools' ("the District") facilities.

B. Project Overview

Repair, replace, upgrade, or implement district-wide: LED lighting upgrades, water conservation measures, DX/gas-fired HVAC systems, Hydronic HVAC systems, building automation systems, central plant equipment, HVAC system retro-commissioning, building envelope improvements, and other areas of concern.

II. RESPONSE PREPARATION AND SUBMISSION

A. Questions

Any questions regarding this Request for Qualifications shall be directed in writing to Glenn Turner, Energy Director at 901-476-7148 or gturner@tipton-county.com by February 12, 2019. Information obtained from any other source is not official. Inquiries and responses will be recorded and will be distributed to all respondents by February 13, 2019.

B. Restriction of Contact

From the issue date of this RFQ until the Customer selects a respondent for award, the contact person listed above is the sole point of contact concerning this RFQ. Any violation of this condition may be cause to reject the offending respondent's submission. If it is discovered that respondent has engaged in any violations of this condition, the offending respondent's response may be rejected or contract award rescinded. Respondents must agree not to distribute any part of their submissions. A respondent that shares information contained in its submission with other District personnel and/or competing respondent's personnel may be disqualified.

C. Shortlist

Subsequent to the submission of responses, interviews and negotiations may be conducted with some of the respondents, but there shall be no obligation to receive further information from any respondent. The shortlisted respondents may be asked to prepare a presentation and/or provide additional information prior to the final selection.

D. Statement of Qualifications Submission

Six (6) copies of the response must be received at Tipton County School District's Superintendent's office by 2:00 pm, February 21, 2019. They should be addressed to Mr. Glenn Turner and delivered to the address below:

1580 Highway 51 South
Covington, TN 38019

Responses shall be submitted in a sealed box labeled "**Qualifications for Energy Performance Contracting Services**" with your firm name and response deadline clearly marked.

E. Acknowledgment of Addenda

Any addendums to the RFQ will be posted on the District's website and e-mailed to the contacts provided during the pre-response meeting. Addenda must be acknowledged in the appendix. Failure to properly acknowledge any addendum may result in the response being deemed non-responsive.

F. Response Schedule

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

| | |
|------------------------------------|--------------------|
| Request for Qualifications Issued: | February 7, 2019 |
| Questions Due | February 12, 2019 |
| Questions Answered: | February 13, 2019 |
| Submission Deadline: | February 21, 2019 |
| Oral Interviews (as needed): | March 6 or 7, 2019 |
| Contractor Selection: | March 14, 2019 |

III. RESPONSE FORMAT

Responses must be submitted in the format outlined in this section. Tipton County Schools reserves the right to eliminate from further consideration any response that is deemed to be substantially or materially unresponsive to the requests for information contained in this section.

A. Executive Summary

Responses shall include an abstract of no more than three pages on the information presented in the response and the contractor's unique qualifications and services.

B. Qualifications and Experience

1. Firm Profile

- Firm name, corporate address, local address and type of firm
- Main contact person with full contact information
- Year firm was established
- Years of experience in the energy business
- Years of experience in performance contracting
- Number and value of performance contracts in effect
- Number of performance contracts for school districts
- Financial Stability
 - Describe the financial soundness and stability of the firm.
 - Submit the most recent annual summary (1-3 pages) of the annual Statements of Financial Conditions, including balance sheet, income statement and statement of cash flows, dated within the past twelve (12) months, along with name, address, and the telephone number of firm(s) that prepared the financial statements.
- NAESCO Accreditation. State whether your firm is accredited as an Energy Services Provider under the National Association of Energy Services Companies (NAESCO). Special consideration will be given to NAESCO accredited firms.

2. Project Experience

- Provide a minimum of five performance contracting references for projects of similar scope and complexity indicating your firm's recent experience with K-12 or other similar clients. Each project description shall describe the services provided, project cost, savings amount and contract term in a maximum of two pages. Projects where the responding firm was not the prime contractor are not acceptable. Emphasis should be placed on projects that were completed by the branch office and/or personnel proposed for this project. Client names with a contact person's phone number and address shall be listed.
- Provide an overview of the performance contracts your firm has implemented for school districts in the past three years, including client, project cost and guaranteed savings.
- Provide Tennessee School District projects and project costs (Maximum 5)

3. Ongoing Service and Maintenance Capabilities

- State the location of your nearest servicing office and provide an overview of your firm's capabilities for servicing the installed equipment, as well as procedures for handling emergencies. At least a two-hour response time is required.
- Describe maintenance services provided by the Respondent, including a description of the service

organization and personnel directly employed by the Respondent. Include a list of services provided and the ability to provide “truck-based services” for all related improvements.

4. Training and Specialized K-12 Programs

- Describe your firm’s proposed approach to providing technical training for District personnel, noting training sites and methodologies.
- The Respondent shall describe sustainable education and awareness tools which could assist the District in utilizing the benefits of their services to improve the overall campus environment.
- Provide information on additional programs for school districts offered by your firm.

5. Bonding, Warranties and Insurance

- Provide the current bonding capacity; bond rating; and confirmation that firm is currently bondable for 100% of a payment bond for construction of this project and 100% of a performance bond for construction of this project.
- Confirm that the respondent will provide general liability insurance with limits of \$5,000,000 per occurrence and \$5,000,000 aggregate with the District as a named insured. Include a Certificate of Insurance in the Appendix.

C. Project Management Approach

1. Organizational Chart. Provide an organizational chart that illustrates the structure of your team. Note all key personnel and sub consultants.
2. Key Personnel Resumes. Include a one-page resume, highlighting education, licenses, experience on similar projects and any other pertinent information, for each key team member assigned to the project.
3. Overall Project Management Overview. Provide detailed information on the firm’s approach to managing the development and implementation of energy performance contracting projects to ensure the project is completed within the schedule.
4. Sub consultant Management. Describe how your firm will select and work with subcontractors.

D. Technical Approach

1. Performance Contracting Approach

- Process Overview. Provide an overview of the process your firm uses to develop and implement performance contracts.
- Baseline Calculation Methodology. Describe in detail the methodology your firm normally uses to compute the energy baselines of the various ECMs, as well as actual performance.
- Adjustment to Baseline Methodology. Describe the method(s) used to adjust the energy, and O&M baseline due to such factors as weather and facility use changes. Describe factors that would necessitate adjustment.
- Savings Calculations. List all procedures, formulas and methodologies, including special metering or equipment, which your firm uses to calculate energy and O&M savings. Include assumptions made in the calculations.
- Dollar Savings Calculations. Describe the procedure to assign dollar values to the savings. Include energy savings as well as maintenance or material savings.
- Standards of Service and Comfort. Describe the method and documentation of standards of service and comfort. Describe the contract language to agree upon maintenance responsibilities, occupancy schedules, operational cost reductions, and other responsibilities in the guaranteed savings contract.
- Monitoring and Verification. Describe the methodology proposed for ongoing monitoring and savings verification, 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 option. Describe how the guarantee provisions work in the event that project results vary from projections. Also describe how excess savings can be documented. Third party guarantees are not acceptable.

E. Financial Approach

1. Preferred Approach. Provide descriptions of the sources and types, and costs of financing available, as well as your firm's preferred approach. Describe the mechanics of the financing arrangement, including equipment ownership, responsibilities/liabilities of each party, security interest and any special terms and conditions that may be associated with the financing this project.
2. Grants, Rebates and Incentives. Describe how your firm will maximize the use of grants, rebates and incentives.

IV. RESPONSE EVALUATION

The District's evaluation committee will consider the following criteria in evaluating responses:

| | |
|--------------------------------|-----------|
| Qualifications and Experience: | 35 points |
| Project Management Approach: | 20 points |
| Technical Approach: | 25 points |
| Financial Approach: | 20 points |

V. TERMS AND CONDITIONS

Contact with the District

Any communications, such as regarding matters of clarification, must be made in writing to the District contact person listed above. No verbal communications will be allowed.

Notification of Changes

All meeting attendees will be notified regarding any changes made to this document.

Funding

All District expenditures are subject to appropriation of funds. Therefore, the District reserves the right to discontinue the RFQ process if funding is not available.

Ownership of Responses

All responses to this request for qualifications become the property of the District.

Respondents Expenses

Prospective respondents are solely responsible for their own expenses in preparing a response and subsequent negotiations with the District, if any.

Contract Solution

The District reserves the right to award a contract in part or in full, or not at all, on the basis of responses received.

Acceptance of Responses

Late responses will not be evaluated. This RFQ should not be construed as a contract to purchase goods or services. The District reserves the right to reject any or all responses, or accept the response that appears to be in the best interest of the District. The District is not bound to accept the lowest price or any response of those submitted. The District shall not be obligated in any manner to any respondent whatsoever until a written agreement has been duly executed relating to an approved response. The District reserves the right to modify the terms of the RFQ at any time in its sole discretion.

Liability of Errors

While the District has used considerable efforts to ensure an accurate representation of information in this RFQ, all prospective respondents are urged to conduct their own investigations into the material facts and the District shall not be held liable or accountable for any error or omission in any part of this RFQ.

Acceptance of Terms

All the terms and conditions of this RFQ are deemed to be accepted by the respondents and incorporated in its response, except those conditions and provisions which are expressly excluded by the response.

Financial Stability

The successful respondent must demonstrate financial stability and the District reserves the right to conduct independent background checks to determine the financial strength of any and all organizations or individuals submitting responses.

Negotiation Delay

If any contract cannot be negotiated within thirty (30) days of notification to the designated respondent, the District may terminate negotiations with that respondent and negotiate a contract with another respondent of its choice.

Definition of Contract

The District may at its option notify a respondent in writing that its bid has been accepted and such acceptance shall at the District's option constitute the making of a formal contract for the services set out in the response. Alternatively, the subsequent full execution of written contract shall constitute the making of a contract for services, and no respondent shall acquire any legal or equitable rights or privileges whatever relative to the services until the District has delivered either a signed notice in writing to the respondent or a fully executed written agreement to the respondent.

Compliance with Laws

The contractor shall give all notices and obtain all the licenses and permits required to perform the work. The contractor shall comply with all Federal, State, and Local laws and codes applicable to the work or the performance of the contract.

Governing Law

This RFQ and any contract entered into between the respondent and the District shall be governed by and in accordance with the laws of the State of Tennessee and the United States of America.

Confidentiality and Security

This document, or any portion thereof, may not be used for any purpose other than the submission of responses.

Suppliers should be aware that pertinent fact relating to their response, excluding trade secrets or proprietary information, could potentially be released as soon as sixty (60) days after the selection of the successful supplier.

Should your submission to this RFQ contain "trade secrets," or other information the disclosure of which could reasonably be expected to be harmful to business interests, you must ensure that such information is clearly identified and marked as such. Identification must be specific by item or paragraph.

Marked information will be treated as **Confidential Third Party Information**. Should marked information be the subject of a request under the Freedom of Information law, you may be requested either to consent to the request, or make representation explaining why the information should not be disclosed.