

REQUEST FOR QUALIFICATIONS BASED PROPOSALS (RFP)

RFP # MASD 23-02

August 28, 2023

MINERSVILLE AREA SCHOOL DISTRICT

GUARANTEED ENERGY SAVINGS PERFORMANCE CONTRACT

SUPERINTENDENT'S OFFICE
1 Battlin Miner Drive
P.O. Box 787
Minersville, PA 17954

Dr. Carl G. McBreen
Superintendent

REQUEST FOR QUALIFICATIONS BASED PROPOSAL (RFP)

**Guaranteed Energy Savings Performance Contract
RFP # MASD 23-02**

MINERSVILLE AREA SCHOOL DISTRICT

REQUEST FOR QUALIFICATIONS BASED PROPOSALS
FOR GUARANTEED ENERGY SAVINGS PERFORMANCE
CONTRACT

RFP NO. MASD 23-02

ISSUE DATE: August 28, 2023

ISSUING DEPARTMENT: Superintendent's Office

SEALED PROPOSALS WILL BE RECEIVED UNTIL 1:00 P.M. EASTERN STANDARD
TIME ON: September 18, 2023.

DATE OF AWARD: September 27, 2023

One original and one (1) digital copy on a non-returnable external drive for a total of two (2)
proposals must be returned in a SEALED ENVELOPE clearly marked "RFP NO. MASD 23-02".

Direct all inquiries / questions in writing to:

Brittany K. Doyle, CPA
Business Manager
(570) 544-1400 extension 1015
bdoyle@battlinminers.com

All questions must be in writing and will be addressed in writing to all parties that have contacted
the District with interest in responding.

Proposal should be mailed or hand delivered to:

Superintendent's Office
1 Battlin Miner Drive
P.O. Box 787
Minersville, PA 17954

Any alterations to the document made by the Proposer may be grounds for rejection of proposal,
cancellation of any subsequent award, or any other legal remedies available to the Minersville Area
School District.

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1.1 Purpose and Objective

The Minersville Area School District (MASD) is soliciting written proposals from a qualified contractor to provide guaranteed energy savings performance services. MASD intends to award a contract to the respondent deemed most qualified and responsive to this request and whose proposal best benefits MASD.

The focus of this RFP is to explore installation of a solar photovoltaic array and other energy saving improvement opportunities. This project may be combined with other non-energy-related projects to be delivered by other project delivery methods, including hybrid project delivery methods. Responders will need to show that they can coordinate between projects and provide value to the District with this project delivery method. The Energy Services Contractor (ESCO) may be limited to as few as one facility and narrowed project scopes, as directed by the District.

Upon award of an Energy Audit Agreement, the ESCo will complete work on the facilities as directed by the District.

The ESCo is responsible for all certification and documentation of personnel necessary to comply with the laws to perform work in the District and in the Commonwealth of Pennsylvania.

1.2 Background

MASD is a school system with a Pre-K–12 student population of approximately 1,200 students. The students are educated in three (3) school buildings; which are made up of:

<u>School Building</u>	<u>Grades</u>	<u>School Day</u>
Early Childhood	Pre K to K	9:00 A.M. to 3:30 P.M.
Elementary Center	1st to 6th	8:45 A.M. to 3:20 P.M.
Jr./Sr. High School	7th to 12th	7:50 A.M. to 2:50 P.M.

1.3 Qualifications and Requirements of Respondents:

- A. Attention directed to the Commonwealth of Pennsylvania Procurement Code (Title 62 Pa. CSA §§3751 et seq.) regarding Guaranteed Energy Savings Contracts. All considered energy performance contracts and financing arrangements proposed must be capable of being implemented under the laws and regulations of the Commonwealth of Pennsylvania.
- B. Must maintain a current office within the State of Pennsylvania, preferably Schuylkill County or adjacent counties for necessary visits with the MASD.

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- C. All company representatives that will be on sight will need to submit background checks as regulated for Pennsylvania Public K-12 schools.
- D. This project is subject to the Pennsylvania Prevailing Wage Law, approved August 15, 1961 (Act No. 442), as amended, and reference is made to the prevailing minimum wage rates applicable to this project which has been promulgated by the Secretary of Labor and Industry.

1.4 Inquiries

- A. Questions concerning this RFP MUST be submitted in writing no later than September 8, 2023 by 3:00 P.M. EST and sent via e-mail:

Brittany K. Doyle, CPA, Business Manager
1 Battlin Miner Drive, Minersville, PA 17954
Office: (570) 544-1400 extension 1015; Fax: (570) 544-6162
bdoyle@battlinminers.com

- B. MASD Schools reserves the right to withdraw this RFP at any time and for any reason, and to issue such clarifications, modifications, and/or amendments as it may deem appropriate.

1.5 Projected Timetable

Use the following timetable as a guide for planning purposes. MASD reserves the right to adjust the timetable as necessary during the RFP process.

<u>Event</u>	<u>Date</u>
RFP Issued	August 28, 2023
Deadline for submitting questions	September 8, 2023 by 3:00 P.M. EST
Proposals Due at District Administration	September 18, 2023 by 1:00 P.M. EST
RFPs opened at District Administration	TBD and closed.
Board Decision	September 27, 2023

1.6 Terms and Conditions

- A. Upon notification of ESCo selection, the successful ESCo respondent will negotiate specific scope and competitive industry rates for execution of an Investment Grade Audit (IGA) and a Guaranteed Energy Savings Contract (GESA) on the facilities as directed by MASD.

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1.7 Instructions for Proposal

A. Compliance with the RFP

1. Proposals must be in strict compliance with this Request for Proposals and in the proposal response format contained herein. Failure to comply with all provisions of the RFP may result in disqualification. All information requested must be submitted, or a statement giving the rationale of the proposer for not submitting requested information.
2. The District is not liable for any cost or expenses incurred by proposing firms in the preparation of their written responses or for attendance at any conferences and meetings related to this RFP.

B. Delivery of Proposals

All proposals are to be delivered before 1:00 P.M. Eastern Standard time on: September 14, 2023 to:

Superintendent's Office
1 Battlin Miner Drive
P.O. Box 787
Minersville, PA 17954

MASD will not accept any proposals received after 1:00 P.M. EST or delivered to a location other than what is listed above. Late or incorrectly delivered proposals will be returned to the Offeror at their expense or destroyed after 30 days.

C. Proposal Response Format

1. All proposals shall be completed and returned in the order indicated below with each section divided and tabbed with the appropriate section title. The District may, during the evaluation process, request additional information to supplement and/or clarify the information provided by any respondent.

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.

The response is limited to forty (40) total single-sided pages or twenty (20) double-sided pages. The financial Information is not included in this limit.

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2. Submittal guideline as follows:

Section 1: Cover Letter

Include a cover letter at the beginning of the submission summarizing the information presented in the qualifications; names, telephone and email addresses 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. Include the name and title of the person(s) authorized to conduct final contract negotiations on behalf of the ESCo.

Section 2: Introduction

- Table of Contents: Include a table of contents referencing each section of this RFP, along with the contents further subdivided to describe information included within each section of the submission.
- Executive Summary: Provide an executive summary highlighting the ESCo's unique qualifications and capabilities for this project.

Section 3: Personnel

- Attach a project staffing plan and 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 an organizational chart of the participants listed in the ESCo's qualifications and their responsibilities in the program. Highlight 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 ESCo's approach to energy conservation projects and range of services provided directly by the ESCo. Specifically address the following areas:

- Services, Approach and Measure Experience - Describe energy efficiency improvements and identify specific measures that the ESCo has implemented, including design and M&V. List all types of services provided.
- Benchmarking and Energy Savings Verification - Describe the normal method used to establish benchmarks, baseline energy use and verification methods. Describe the method used to justify variances between the baseline and actual energy consumption. Describe and justify the methods used in M&V for project savings.

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- Cost and Savings Estimating and Bid Procurement Experience - Describe experience and accuracy of cost and savings estimating, and provide examples of cost estimates, bid procurement experience and accuracy.
- Building Commissioning Experience - Describe approach to building commissioning and/or existing building commissioning, including in-house expertise and/or use of consultants.
- Training Information - Outline any training proposed as part of the project, including the subject, duration and location of training. Also describe the relationship with the organization providing training, if not provided by the ESCo.
- Project/Construction Management - Describe experience and approach to project management, including coordination with subcontractors, division of responsibility among project staff and interaction with District representatives.

Section 5: Project References

Provide references on at least three (3) energy-related projects (specifically public projects) that the respondent has successfully implemented within the last five (5) years.

References should include the following:

- Customer name including name and telephone number of contact
- Brief description of the project
- Project beginning and ending dates
- Project cost and savings estimates

Section 6: Pricing / Fee Structure

- Provide a fee for completion of the Investment Grade Audit phase of the project. (Submission of a fee of \$0 will be viewed as non-responsive.)
- Describe and demonstrate how the respondent will assure that the District will receive fair and reasonable pricing for the resultant scope of work through description of the respondent's fee structure as well as equipment and subcontractor procurement methods.

Section 7: Financial Information (Excluded from Page Limit of 40 Pages/20 Double Sides)

Include the ESCo'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. **Only one original copy of the financial services is required**, and it may be placed in a separate sealed envelope. Electronic PDFs will be accepted in lieu of a hard copy.

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Section 8: Additional Information

- Confirm that the proposing firm has not been involved with any projects where legal action or injunctions have been sought as a result of the work provided by the proposing firm. If legal **action or injunctions have been sought, provide an explanation, and attach resulting opinions.**
- Include Investment Grade Audit Agreement.
- Attach any supplemental information that is not requested by the RFP and not subject to the 40 total page limit (20 double-sided).

D. Evaluation of Proposals

1. MASD will evaluate the proposals as deemed fit. It is the intent of the MASD to award the contract to the respondent based upon relative experience, qualifications, and who will provide the highest quality of service at fair and competitive prices.
2. MASD reserves the right to modify these specifications as deemed necessary. All modifications will be posted on our website.
3. MASD reserves the right to waive minor irregularities in response proposals, provided action is deemed in MASD best interests.
4. Evaluations will be based on the following selection criteria:

a.) Experience and Qualifications – 20 points

1. Preference will be given to respondents demonstrating strong capabilities, experience, and reputation in undertakings such as those described in this RFP and providing authoritative documentation of the respondent's financial condition and stability.
2. Experience taking responsibility for the range of roles contemplated for this project. Similar experience will be understood to include development of performance contracts in public schools or institutional facilities of similar size and use, and overall experience with public school and institutional construction and construction methods.
3. Quality of personnel assigned to this project and degree of pertinent experience.

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b.) Technical Approach – 35 points

1. Preference will be given to respondents demonstrating practicality, soundness and cost-effectiveness in their approach to energy conservation projects.
2. The range of services offered will also be an important consideration, including alternative project delivery methods and the ability to coordinate projects using different project delivery methods.
3. Methodologies and technical approach to developing energy efficiency measures and demonstrating the tangible and intangible benefits to those measures.

c.) Financial Terms/Pricing Structure – 35 points

1. Fee structures and pricing methods that demonstrate the ability to deliver the best project at a fair and reasonable price while minimizing the financial risk to the District.
2. Methods for determining realistic and achievable energy savings, including measurement and verification of savings.

d.) Other Considerations – 10 points

1. Breadth of independent services provided to Pennsylvania Public Schools, Municipal Government, and State Government facilities.
2. Demonstrated ability to develop and manage a construction schedule, implement projects promptly, and minimize impact on school operations.
3. Local experience with references.
4. Legal action information.
5. Other unique qualifications.

E. Acceptance of Proposals

1. The MASD Agent shall accept all proposals that are submitted properly. However, MASD, or designee, reserves the right to request clarifications or corrections to proposals.

F. Validity of Proposals

1. All proposals shall be valid for a period of ninety (90) days from the opening date of the request for Proposal.