REQUEST FOR QUALIFICATIONS

PERFORMANCE CONTRACT FOR GUARANTEED ENERGY COST SAVINGS

RFQ #2015-02



Issued By:
Baker County Board of County Commissioners
55 N. 3rd St.
Macclenny, FL 32063
(904) 259-3613
Website: http://www.bakercountyfl.org

Due Date/Time for Receipt of Proposals: October 2, 2015 @ 3PM

DEFINITIONS

ENERGY, WATER, AND WASTEWATER EFFICIENCY AND IMPROVEMENT

MEASURE means a training program incidental to the contract, facility alteration, or equipment purchase to be used in new construction, including an addition to existing facilities or utility infrastructure, which reduces energy or water consumption, wastewater production, utility-related operating costs or enhances revenues and includes, but is not limited to:

- 1. Insulation of the facility structure and systems within the facility.
- 2. Window and door system modifications that reduce energy consumption.
- 3. Enhancements to existing energy management system.
- 4. Heating, ventilating, or air-conditioning system modifications or replacements.
- 5. Replacement or modifications of interior and exterior lighting fixtures to increase the energy efficiency of the lighting system, which, at a minimum, shall conform to the State, Local building Code and State
- 6. Energy recovery systems.
- 7. Energy conservation measures that provide long-term operating cost reductions and significantly reduce BTU consumed.
- 8. Renewable energy systems, such as solar, biomass, and geothermal
- 9. Devices, which reduce, water consumption or sewer charges.
- 10. Storage systems, such as fuel cells and thermal storage.
- 11. Generating technologies, such as micro turbines
- 12. Waste Management
- 13. Utility meter technology that increases meter accuracy, provides enhanced customer service, or decreases operating costs
- 14. Any other repair, replacement, or upgrade of existing equipment

GUARANTEED ENERGY, WATER, OR WASTEWATER BENEFITS means a measured reduction in the cost of fuel, energy, or water consumption, wastewater production, and stipulated operation and maintenance created from the implementations of one or more energy, water, or wastewater efficiency or improvement measures when compared with an established baseline for the previous cost of fuel, energy, or water consumption, wastewater production, and stipulated operation and maintenance. Alternately, utility infrastructure benefits shall relate to the measured increase in billable production when compared to an established baseline. The combination of measured reduction in facility operating costs and the measured increase in billable utility meter production is equal to the total guaranteed energy, water, or wastewater benefits.

INVESTMENT GRADE ENERGY AUDIT means a detailed energy, water, and wastewater audit, along with the accompanying analysis of proposed energy, water, and wastewater improvement measures and their costs, savings, and benefits prior to entry into an energy savings contract.

INVESTMENT GRADE ENERGY AUDIT REPORT means the written report, which is issued by the vendor to the Baker County to summarize the vendor's findings based upon the energy audit of energy savings at the Baker County, identified specific locations.

ESCO means Energy Performance Savings Contract

CUSTOMER ABBEVIATION X means Baker County

RFO means Request for Qualifications

1.0 PURPOSE

The intent and purpose of this RFQ is to enter into a guaranteed energy, water, and wastewater performance savings contract with a guaranteed energy, water, and wastewater performance savings contractor to reduce energy or water consumption, wastewater production, or energy-related operating cost of Baker County through one or more energy, water, or wastewater efficiency.

Baker County requests proposals from qualified contractors for the provisioning of Guaranteed Energy Savings Contracting. Pursuant to §489.145 F.S., and 287.055 F.S, Baker County is seeking qualifications from interested Energy Performance Savings Contractors (ESCOs) capable of providing comprehensive energy management and energy-related capital improvement services for Baker County Infrastructure.

The guaranteed energy, water, and wastewater performance savings contractor must be a person or business that is licensed under Chapter 471 or Chapter 481 FS, is an approved contractor on the Department of Management Services Energy Savings Contract number 973-320-08-1, ITN No. 24-973-320-X, and is experienced in the analysis, design, implementation, or installation of energy, water, and wastewater efficiency and improvement measures through energy performance contracts.

In lieu of the above criteria "an approved contractor on the Department of Management Services (DMS) Energy Savings Contract number 973-320-08-1, ITN No. 24-973-320-X" a proposer for qualifying ESCO may apply under these criteria. Any ESCO contractor who is not in the DMS Energy Savings contractor list must meet ALL the following criteria:

- 1. Hold a current Florida license as a General Contractor and Mechanical Contractor, with an additional contracting license in either Plumbing or Electrical trade.
- 2. Have (3) Florida licensed Professional Engineers directly employed by the contractor.
- 3. Must have held a valid Mechanical Contractor license in Florida for at least 10 years.
- 4. Completed a minimum of ten (10) Performance Contracting projects at not less than a total value of \$150 million.

Firms/teams interested in providing services to Baker County are hereby notified that a sealed Proposal for providing the requested services in response to this RFQ will be

accepted until **3:00 p.m., local time**, **October 2, 2015**, and must be received by mail or delivered in hand to the following location. Baker County will not accept proposals received after this deadline.

The Proposal is limited to 50 informational pages (Do not include page tabs or table of content in the count) and shall be presented in a three ring binder format. Respondent must provide one (1) original and three (3) copies plus one (1) electronic copy of the Proposal submitted in a sealed package clearly labeled with the RFQ title and the name of the submitting firm/team. Sample Investment Grade Energy Audit and Customer Savings Report required in Section 7, are not included in the RFQ's 50 page limitation.

The format of the Proposal shall be in strict conformance to stipulated criteria in Instructions to Submitting Firms/Teams and the Selection Process.

2.0 PROJECT DESCRIPTION

Baker County desires to secure the services of ESCO for a full range of energy services and energy related capital improvements (financed through a guaranteed performance-based contract at no initial capital cost to Baker County). Any stipulated energy and/or non-energy cost savings that may be attributed to this project will be rigorously reviewed and, if agreed to, will be limited to those that can be thoroughly documented and verified by the ESCO and approved by Baker County.

All contracts must comply with the statutory provisions contained in 489.145 F.S. All project costs shall be financed and paid from the savings; with 100% of the savings above the guaranteed amount to be the sole property of Baker County.

2.1 Contractual Provisions

Key elements that must be provided for in any contract that Baker County enters into will minimally include the following:

- A. The contract must comply with the statutory provisions contained in 489.145 F.S.
- B. Baker County retains final approval over the scope of work.
- C. A guaranteed energy, water, and wastewater performance savings contract must include a written guarantee
- D. The guaranteed energy, water, and wastewater performance savings contract must provide that all payments, except all obligations on termination of the contract before its expiration, may be made over by Baker County and that the annual savings are guaranteed to the extent necessary to make annual time, but not to exceed 12 years from the date of complete installation / implementation and acceptance payments to satisfy the guaranteed energy, water, and wastewater performance savings contract

- E. The guaranteed energy, water, and wastewater performance savings contract must require that the ESCO provide a 100% Public Construction Bond to the Baker County for its faithful performance as required by 255.05 F.S.
- F. The guarantee energy performance savings contract shall require the ESCO provide to Baker County an annual reconciliation of the guaranteed or associated cost savings. If the reconciliation reveals a shortfall in annual energy or associated cost savings, the ESCO is liable for such a shortfall. If the reconciliation reveals an excess in annual cost savings, 100% of the savings above the guaranteed amount to be the sole property of Baker County.

3.0 SCOPE OF SERVICES

An ESCO must have the demonstrated capability in performance contract engineering and construction to provide a range of energy, water and operating improvement services within the State of Florida. Services may include but are not limited to the following:

- 3.1 Project approach and development plan
- 3.2 Investment Grade Savings Audit approach and schedule to evaluate costs and savings of a variety of energy, water and/or operational savings measures.
- 3.3 Engineering and design Services for all systems included in the project
- 3.4 Equipment and system procurement, purchasing and installation
- 3.5 Construction Management approach in an active campus environment.
- 3.6 Methodology for assuring seamless work continuance in the event sub-contractor default or bankruptcy
- 3.7 Safety program and safety history
- 3.8 Sources of project financing
- 3.9 Staff training on routine maintenance and operation of systems
- 3.10 Develop and implement energy awareness and improvement program for Baker County staff and administrators utilizing mixed media methods
- 3.11 Performance guarantee monitoring
- 3.12 Performance guarantee model and methodology for Baker County project
- 3.13 Identification and evaluation of all available Demand Side Management (DSM) or energy conservation related incentives or grants.
- 3.14 Facilitate maximum participation in all available incentives, rebates and grants, when applicable and proven cost effective.
- 3.15 Systems to be reviewed:
 - A. Governmental & Administrative Facilities Energy, Water, and Operational Expending Systems. Lighting, lighting controls, plumbing, HVAC, HVAC controls, water heating, building envelope, irrigation, waste management/recycling, and other designated systems where a short- and long-term operating efficiency can be achieved.
 - B. <u>Information Technology (IT) & Security Systems within Governmental & Administrative Facilities.</u> Voice, Data, Wireless, CCTV, Mass Notification,

- County-wide Communication, and Broadband Media Services systems, configuration, and operational improvement and optimization strategies.
- C. <u>Exterior Lighting Systems</u>. Roadway, pathway, and outdoor area lighting systems, lighting controls, and lighting optimization strategies.
- D. <u>Exterior Water & Irrigation Systems.</u> Field, park, green space and other outdoor area watering systems, controls, and optimization strategies.

4.0 CONTRACT PERIOD

The guaranteed energy, water, and wastewater performance savings contract may extend beyond the fiscal year in which it becomes effective; however, the term of any contract expires at the end of each fiscal year and may be automatically renewed annually for up to 20 years, subject to the Baker County making sufficient annual appropriations based upon continued realized energy, water and wastewater savings.

5.0 AWARD

Any award will be based on the selection committee recommendation and approval by the Baker County Board of County Commssioners.

6.0 PROPOSED CALENDAR OF EVENTS

The following is the proposed timetable.

Event	Date
Request for RFQ Available	9/3/15
Deadline for Questions	9/18/15
Proposal Due Date	10/2/15
Committee Evaluation/Short-	10/16/15
list/Ranking	10/10/13
Recommendation/Award	11/3/15

7.0 INSTRUCTIONS ON SUBMITTING RFQ

A. General

Request for Qualifications (RFQ) is two-phase process for securing services.

Phase 1 Written Requirements. The responses received to this RFQ will be evaluated and ranked by a selection Team in accordance with the process and evaluation criteria contained in Section 9.0. The selection team will short-list no less than three (3) firms/teams to proceed to the oral presentation.

Phase 2 Oral Presentation. The selection team will evaluate and rank the firms/teams based on presentations in accordance with the process and evaluation criteria contained in Section 9.0.

B. Additional Information / Addenda

Any ambiguity, conflict, discrepancy, omissions or other error discovered in this solicitation must be reported immediately in writing to the jurisdiction and a request made for modifications or clarification. Request for additional information or clarifications must be made in writing no later than September 18, 2015. Request for additional information or clarifications will be received by email or letter. The request must contain the submitter's name, address, phone number, facsimile number, and email address and addressed to:

CJ Thompson County Manager 55 N. 3rd St. Macclenny, FL 32063 (904) 259-3613

Email: cj.thompson@bakercountyfl.org

The County will issue responses to inquiries and any other corrections or amendments it deems necessary in written addenda issued prior to the bid opening date. Submitters should not rely on any representations, statements or explanations other than those made in this solicitation or in any addendum to this solicitation. Where there appears to be a conflict between the RFQ and any addenda issued, the last addendum issued will prevail.

It is the submitter's responsibility to be sure all addenda were received. The submitter should verify with the designated contact person prior to submitting a proposal that all addenda have been received. Submitters are required to acknowledge the number of addenda received as part of their submission of the proposal. Proposers shall submit the Addendum Acknowledgment form attached hereto as Attachment D.

C. Insurance Requirements

- 1. ESCO will be required to obtain a Performance Bond.
- 2. The ESCO will be required to provide a 100 percent public construction bond in a form containing all obligations required by Florida Law and executed by a surety company satisfactory to the BAKER COUNTY and licensed to do business in Florida.
- 3. ESPC shall require a bond or sub-guard insurance on subcontracts of \$25,000 or greater
- 4. Errors and Omissions Professional Liabilities Insurance will be required for the Design Professional(s).
- 5. Insurance in the form of General Liability, Automobile, Worker's Compensation and

Employers Liability will be required of the construction contracting entity with minimum coverage's to be published at a future date.

D. General Conditions

- 1. Issuance of this RFQ does not constitute a commitment by Baker County to award a contract. Baker County reserves the right to reject any or all submissions received in the response to the RFQ or to cancel this RFQ if it is deemed in the best interest of Baker County to do so
- 2. Baker County reserves the right to request clarification of information submitted and to request additional information from one or more firms/teams
- 3. All proposals become the property of Baker County upon receipt and will not be returned to the firm/team, unless self-addressed, stamped envelopes have been provided by the proposer, in which case all but two copies will be returned. Selection or rejection of proposer will not affect this right
- 4. Baker County is subject to Chapter 119, F.S. the "Public Records Law." No claim of confidentiality or propriety information in all or any portion of a response to the RFQ will be honored unless specific exemption from the Public Records Las exists and it is cited in the response to the RFQ. Any claimed exemption must be specifically identified by the page and paragraph numbers(s). Any incorrectly claimed exemption does not disqualify the ESCO and/or it subcontractor(s), only the exemption claim
- 5. By making a submission, the firm/team agrees to comply with all applicable federal, state and local statutes and regulations
- 6. Employ directly or integral member of the ESCO team, three (3) registered professional engineers (PE), licensed in the State of Florida, proficient in mechanical, electrical, and plumbing must review and approve ALL designs, drawings and specifications required for the procurement and installation of equipment for a complete system under this contract.
- 7. ESCO must have executed Energy Savings Performance Contracts in the Municipal Government market in the last five (5) years and have at least ten (10) active Performance Contracts in progress within the area of southern United States
- 8. ESCO must also have fully completed at least three (3) years of savings guarantees in at least five (5) Performance Contracts in the Municipal Government field and show the audited savings results.
- 9. ESCO must have extensive internal experience in information technology & security installation and development field under a performance contract or energy services agreement.

8.0 QUALIFICATIONS PROCESS

A. Selection Team

The Proposals received in response to this RFQ will be evaluated and ranked by a Selection Team. The Selection Team will select (short-list) no more than three (3) firms/teams to give a presentation at a later date to the Selection Team.

B. Evaluation Criteria

The following Criteria are intended to provide the Selection Team with information regarding the qualifications of each proposing ESCO. Proposals shall respond to each of the Criteria in the same order listed below.

1. Title Page

Show the RFQ number, title, the name of the ESCO, address, telephone number, fax number, email address and the date.

2. Table of Contents

Include a clear identification of the material by section and by page number.

3. Proposal Letter

Provide a letter stating your intent to qualify for this project under provisions of section 1 of this document. Give the names of the persons who will be authorized to make representations for the Proposer, their titles, addresses, telephone numbers and email addresses.

4. Firm Profile

Provide an overview of your firm and general firm information.

5. Project Understanding

Clearly demonstrate your firm/team's understanding of the scope of the project. Present a concise outline of specific services your firm/team is qualified and prepared to provide for the project.

6. Project Team & Qualifications

- (a) Provide information describing the Proposers' experience with providing energy cost savings services to Utility Authorities and agencies.
- (b) Identify the ES
- CO team, their relationship and accountabilities within the project.
- (c) Indicate key personnel and their relationship to this project and other team members. Provide an organization chart identifying ESCO personnel proposed for the project.

- (d) Provide resumes of key personnel, their disciplines, respective roles, education, licenses and their experience in energy cost savings services.
- (e) Provide certifications (e.g. National Association of Energy Services Companies, US Department of Energy).
- (f) Submit proof of the Municipal Government Performance Contract projects that have completed a 5-year savings history and at least three (3) Municipal Government Performance Contract Projects implemented within the last five (5) years.

As a separate document, but part of the Attachment B submittal, provide an excel spreadsheet showing all completed and open guarantees with Florida customers in the Municipal Government market. Additionally, provide the same list of information for at the least three (3) Municipal Government projects outside of Florida in a physically similar environment as Florida.

7. Similar Project Experience/Client References

Complete Project History forms for at least two (2) energy performance contracting Municipal Government projects located within the area of southern United States currently under contract with your firm that are in repayment with at least one full year's worth of saving data. Your response should include projects that have been managed directly by the specific branch, division, office or any individual in such branch, division, or office that will be specifically assigned to this project. Complete Attachment B.

Provide a minimum of three (3) references from performance contract projects in the South for private, State and/or Municipal government clients under construction within the last five years. Complete Attachment C.

Provide samples of the following (2 Copies Only):

- a. Sample Investment Grade Energy Audit from a similar Municipal Government Project or similar.
- b. Sample Annual Savings Report from a Municipal Government Project or similar.
- c. Proof and examples of knowledge and experience with utility Demand Side Management (DSM) conservation incentive programs.
- d. Proof and examples of knowledge and experience with leveraging utility rate options or alternative rates for maximum cost savings.

8. Performance Results

Describe your firms performance record, specifically, the results of Performance Contracting projects. List at least three (3) projects completed in the South in the United States Municipal Government market.

- 1. Show the project size, date the project was completed and the cumulative energy savings guarantee and actual results over the term of the guarantee. Cost avoidance and maintenance contracts are not to be include in the savings calculation but noted
- 2. Those projects that did not reach the guaranteed results, briefly specify the reason for the missed guarantee and the actions that were taken to meet the compensation requirements.

9. Innovation

Please provide your firm's approach to Innovation on this Performance Contract Project. Identify and discuss any of the services, or method of approach to the services, which your firm/team believes to be either "unique" or "outstanding", or which is recognized as giving your firm/team a competitive edge or advantage.

10. Financial Strength

- a. Provide information indicating financial capability of the firm to provide the resources required on this Performance Contract Project.
- b. Provide information indicating potential financial structures including innovative structures your firm offers excluding shared-savings structures. Provide examples of where your firm has utilized innovative financial structures (not necessarily within Municipal Government market).

9.0 **SELECTION PROCESS**

The selection process shall be conducted as follows:

A. Short-List

The responses received in response to this RFQ will be evaluated and ranked by a Selection Committee in accordance with the evaluation criteria contained in Section 8.0 and utilizing the attached Evaluation Criteria Rating Sheet. A ranking shall be established as outlined in Section 9.0C. The Committee will select (short-list) firms to give a presentation at a later date to the Selection Committee.

No information will be released by Baker County after the due date for submission of the Proposals until the selection of the short-listed firms has been made. All submitting firms will receive notification of the firms selected (shortlisted). The ranking established for Short-listing will not carry forward to the next portion of the process.

B. Presentation

The short-listed firms/teams will make oral presentations to the Selection Team on the date shown in Section 6.0 of this RFQ. The short-listed firms/teams will be given 45 minutes for an oral presentation an 15 minutes for questions. The format of the

presentation should be structured to clearly address the Evaluation Criteria contained in Section 7.0. Presentation boards and handouts are acceptable. The short listed firm is responsible to provide their own projection screen and projector. Under no circumstances will the total time of one hour be exceeded.

The Selection Committee will evaluate and rank the firms based on the proposal submittals and presentations in accordance with the process and evaluation criteria contained in Section 8.0. A ranking shall be established as outlined in Section 9.0C.

C. Evaluation Criteria Rating Sheet

The Selection Committee will evaluate the Proposals received in response to this RFQ based on the Evaluation Criteria in Section 8.0. Each evaluation committee member will score, in writing, each proposal on the Selection Criteria Rating Sheet (Attachment A). Each evaluation committee member shall enter his/her comments, if any; regarding the proposal and then sign, the completed score forms.

Each committee member shall total the sum of scores given to each firm to get a grand total score and then establish a ranking of each firm by assigning the firm with the highest score a number 1, and then the next highest firm with a number 2 and so on until each firm is ranked. A total rank of each firm is established by totaling the evaluation committee member ranking of all firms. The highest ranked firm is the firm with the lowest total.

Example

	Company A	Company B	Company C
Committee Member	1	2	3
1			
Committee Member	2	1	3
2			
Committee Member	1	3	2
3			
Committee Member	1	2	3
4			
Committee Member	2	1	3
5			
Total Rank	7	9	14
Rank	1	2	3

The Selection Committee will utilize the Evaluation Rating Sheet for both the Short Listing and Presentation/Interview portions of the process.

D. Recommendation

The selection committee will recommend, to Baker County Board of County Commissioners, in order of preference (ranking based on the Presentation) the ESCO deemed to be most highly qualified to perform the requested services

Should Baker County's representatives be unable to negotiate a satisfactory agreement considered to be fair, competitive and reasonable, with the first ranked firm, negotiations with that firm shall be formally terminated. Baker County's representatives shall then undertake negotiations with the second ranked firm. Failing accord with the second ranked firm the Baker County's representatives shall terminate negotiations. Baker County's representatives shall then undertake negotiations with the third ranked firm.

10.0 PRE-CONTRACT PROCESS

Prior to a contract for the design, installation or establishing implementation of energy, water, or wastewater efficiency and improvement measure the selected contractor, or contractors, shall provide:

- A. An 'Investment Grade Savings Audit' that summarizes the costs associated with the energy, water, and wastewater efficiency and improvement measures.
- B. Energy-related operational cost-savings measures
- C. An estimate of the amount of cost savings
- D. Methodology for achieving the cost savings
- E. Project plan for implementation

Baker County and the ESCO shall enter into an agreement to pay for costs associated with the preparation and delivery of the report in the event Baker County does not elect to enter into a contract with the selected firm/team or the reported projection of energy, water, and wastewater cost savings does not equal or exceed the total projected costs of the design, installation and implementation of the report's energy improvement measures

Baker County may enter into a guaranteed energy, water, and wastewater performance savings contract with one or more guaranteed energy, water, and wastewater performance savings contractors, if Baker County feels it is of benefit to do so.

ATTACHMENT A

PERFORMANCE CONTRACT FOR GUARANTEED ENERGY COST SAVINGS RFQ# 2015-02 SELECTION CRITERIA RATING SHEET

Company			Date:
Committee Member			
Evaluation Criteria	Criteria Value Potential	Score	Remarks
Project Understanding and Approach	<u>15</u>		
Project Team & Qualifications	<u>15</u>		
Similar Project Experience & Client References	<u>15</u>		
Performance Results	<u>25</u>		
Sample Audit & Savings Report	<u>10</u>		
Innovation	<u>10</u>		
Financial Strength	<u>10</u>		
TOTAL POINTS	<u>100</u>		
Comments:			
Signature_			

ATTACHMENT B PART I

Project History

Using Attachment B, list at least three (3) Municipal Government energy performance contracting projects in the area of southern United States currently under contract with your firm that are in repayment with at least one full year's worth of saving data. Limit your response to ONLY those projects that have been managed directly by the specific branch, division, office or any individual in such branch, division or office that will be specifically assigned to this project. Attach additional sheets as necessary.

Project History	
Project Name and Location	
Type of Facility(s)	
Project Dollar Amount (installed project costs)	
Primary ECMs Installed	
Construction Start Date/ Completion End Date	
Contract Start & End Dates	
Dollar Value of Projected Annual Energy Savings (cost avoidance and Maintenance contracts should be noted only and included in the projections.)	
Dollar Value of Guaranteed Annual Energy Savings (cost avoidance and Maintenance contracts should be noted only and included in the projections.)	
Dollar value, consumption value and Type of Annual Operational Cost Savings (where applicable)	
Method(s) of Savings Measurement and Verification	
Identify all ESCO personnel associated with this project and their specific role(s) and responsibility(s)	
Identify source(s) of financing and terms	

ATTACHMENT B PART II

For each project described above, complete the following table:

Annual Energy Savings	
Name of Project:	Name of ESCO:

	Projected	Guaranteed	Achieved				
			Year 1	Year 2	Year 3	Year 4	Year 5
KWH							
KW							
Therms							
Water kGal							
Dollars							

ATTACHMENT C

REFERENCES

Baker County as a part of the RFQ process requires proposing ESCOs to submit a minimum of three (3) business references as required within this document. The purpose of these references is to document the experience relevant to the scope of work and provide assistance in the evaluation process.

Provide current and accurate name, telephone and fax numbers of the owner(s)' representatives with whom your firm did business on this project. You should ensure that all representatives are familiar with this project.

ATTACHMENT D

Addendum Acknowledgment

Acknowledgment is hereby made of receipt of addenda issued during the solicitation period.	Addendum # through #
RFQ# 2015-01	Date:
Person Completing RFQ (Signature)	2.00
Name (Printed):	Title:

>>>Failure to submit this form may disqualify your response<<<