

FLORENCE-LAUDERDALE PUBLIC LIBRARY

**REQUEST FOR PROPOSAL ON QUALIFICATIONS
FOR AN ENERGY CONSERVATION SERVICES PROGRAM**

DECEMBER 2, 2019

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I. PURPOSE OF SOLICITATION

The intent of this Request for Proposal on Qualifications (RFP/Q) is to solicit qualification proposals from Energy Services Companies (ESCOs). For the purpose of this RFP/Q, "ESCO" refers to any company that is qualified to provide a turnkey energy conservation program that includes all services listed in this RFP/Q. Responses to this RFP/Q shall describe the ESCO's capability to identify the need for, design, install, maintain, monitor, and arrange the financing of a large-scale, comprehensive energy-conservation program that includes the services listed herein. Florence Lauderdale Public Library intends to select an ESCO and award contract(s) to perform cost-effective energy conservation retrofits.

Please note that responses to this RFP/Q must be received by January 8th, 2020 at 2:00 PM at the address below. One (1) paper copy and one (1) electronic copy of the response must be sealed and delivered to:

Florence-Lauderdale Public Library
350 N Wood Ave
Florence, AL 35630
derek@flpl.org
Re: Proposal on Qualifications for an Energy Conservation Services Program
ATTN: Mr. Derek Wilson, Executive Director, Florence-Lauderdale Public Library

FLORENCE-LAUDERDALE PUBLIC LIBRARY is not liable for any cost incurred by any person or firm responding to this RFP/Q.

FLORENCE-LAUDERDALE PUBLIC LIBRARY reserves the right to reject as non-responsive any proposals that do not contain the information requested in Section VII and Appendix A of this RFP/Q. Additionally, FLORENCE-LAUDERDALE PUBLIC LIBRARY reserves the right to reject as non-responsive any proposals which are not organized and formatted as described in this RFP/Q.

Any and all questions regarding this RFP/Q and the program it represents must be submitted in writing to:

Mr. Derek Wilson, Executive Director, Florence-Lauderdale Public Library
Email: derek@flpl.org

All questions will be answered by email to all bidders.

Prospective respondents must limit their contact regarding this RFP/Q to Mr. Derek Wilson. Communications by firms, its agents, employees, and/or representatives with any employee, agent, or representative of FLORENCE-LAUDERDALE PUBLIC LIBRARY, other than Derek Wilson, regarding its proposal or intention to submit a proposal in response to this RFP will be considered inappropriate communications. If any such inappropriate communications are deemed to hinder, influence and/or alter the competitive proposal process, FLORENCE-LAUDERDALE PUBLIC LIBRARY, in an effort to ensure a fair and equitable review and selection process, reserves the right to decline consideration of the offender's sealed proposal.

Environmental Impact

Your actions do make a difference! By submitting only one paper copy of your proposal response, you make the following contributions to the environment:



Waste

5.7 pounds of solid waste not generated



Tree

6% of a tree preserved



Water Conservation

46.78 gallons of waste water avoided



Lighting

97036.73 BTUs of energy not consumed



Greenhouse Gas

14.23 pounds of greenhouse gas prevented

Healthy forests filter water, remove air pollution, sequester carbon and provide homes for wildlife. To plant a tree in return for your paper usage, go to <http://www.americanforest.org/>.

**Calculations are for one 500 page proposal response printed on regular paper. It does not include binders and dividers.*

II. BACKGROUND

FLORENCE-LAUDERDALE PUBLIC LIBRARY proposes to address all gas, water, and electric utility uses in all its facilities for this conservation program. Additionally, FLORENCE-LAUDERDALE PUBLIC LIBRARY intends to upgrade outdated and obsolete building equipment and perform property improvements through the program.

FLORENCE-LAUDERDALE PUBLIC LIBRARY anticipates a major reduction in annual utility and operational costs through the implementation of this energy conservation program. The ESCO will provide a written guarantee of all utility reduction and provide all financing for the project. The contract life of the program is expected not to exceed **20** years per Alabama State Statute. FLORENCE-LAUDERDALE PUBLIC LIBRARY intends to structure the program's implementation schedule in a manner to minimize the program's financed capital needs.

Respondents to this Request for Qualifications (RFP/Q) shall identify their experience and qualification to design, install, and manage a major energy conservation project that involve energy conservation measure (ECM) retrofits which address the following building components and applications: lighting, space heating, ventilation, air-conditioning, envelope, heat recovery, energy management systems, environmental system controls, motors, domestic water heating, fuel switching, air distribution systems and water consumption systems. FLORENCE-LAUDERDALE PUBLIC LIBRARY is also interested in the respondents' qualifications and experience related to programs designed to train building occupants and maintenance workers in energy conservation awareness.

III. SERVICES REQUESTED

For this RFP/Q, FLORENCE-LAUDERDALE PUBLIC LIBRARY is interested in Energy Services Companies for the identification, engineering, design, installation, training, maintenance and financing of approved ECMs for its facility. FLORENCE-LAUDERDALE PUBLIC LIBRARY has the option to contract all or some of the services listed above.

If FLORENCE-LAUDERDALE PUBLIC LIBRARY contracts project financing through the ESCO, payment for the contracted services will be indexed to measure reductions in annual energy costs or consumption and will not begin until after the project is operational and generating savings. Financing shall be structured so that annual payments never exceed annual savings. Services will be required to provide the financing in such a manner as to ensure that all costs are paid for from only the utility and operational savings associated with the energy conservation program. Operational savings will be strictly scrutinized as part of annual savings. The ESCO must make available a program that guarantees the energy savings of the energy conservation services financed. The ESCO's demonstrated ability to provide this guarantee will be an evaluation criterion.

It is expected that, as a minimum, the following energy conservation techniques will be investigated on an individual basis or in combination with other techniques and implemented, if deemed cost effective by FLORENCE-LAUDERDALE PUBLIC LIBRARY and the ESCO:

- Energy management control system
- Large-scale lighting control
- Individual room lighting control (motion sensors)
- Optical reflectors for LED light fixtures
- Fluorescent lamp and ballast replacement to LED
- Incandescent to LED lighting conversion
- Conversion to LED
- Motion sensor control
- Day lighting control
- Exit sign conversion
- Security lighting
- Exterior Lighting
- Other lighting modifications
- Air conditioning unit replacement
- Chiller replacement
- Chiller optimization and control
- Economizer control
- Thermal storage for heating and cooling
- Environmental system control replacement
- Heating, ventilating, and air conditioning system modifications
- Air handler replacement
- Variable speed/frequency drives
- Air compressor replacement/upgrade
- Fuel conversion
- Boiler/burner replacement
- Boiler heat recovery
- Boiler combustion controls
- Steam system modifications
- Domestic hot and cold water systems
- Air management systems
- Kitchen appliance conversion to gas or electric
- High efficiency motors

Motor down-sizing
IT system upgrades
Facility communications upgrades
Renewable energy systems
Building envelope improvements
Water system improvements
Energy conservation awareness training
Any unique and /or specialty ECMs proposed by ESCOs

Any other ECMs proposed by the ESCO will also be considered. All ECMs considered shall be proven, commercially available and result in verifiable energy savings.

All equipment provided by the ESCO for this program shall have a history of successful operating experience in similar installations and shall be in new and unused condition. This equipment shall be state-of-the-art with readily available replacement parts. All equipment used for this program shall be approved by FLORENCE-LAUDERDALE PUBLIC LIBRARY prior to installation.

IV. SELECTION PROCESS

Proposal Evaluation

Interested ESCOs responding to this RFP/Q with a proposal must provide the information required to complete the forms included in Appendix A. FLORENCE-LAUDERDALE PUBLIC LIBRARY will evaluate submittals and choose the most highly qualified ESCO.

Engineering Proposal

Upon completion of the proposal evaluation, FLORENCE-LAUDERDALE PUBLIC LIBRARY and the ESCO will design a Letter of Agreement which, when approved by FLORENCE-LAUDERDALE PUBLIC LIBRARY, will allow the ESCO to proceed with the energy analysis, feasibility study, conceptual engineering design, and permitting plan for an energy conservation program.

Upon acceptance of the Letter of Agreement by the Board, FLORENCE-LAUDERDALE PUBLIC LIBRARY and the ESCO will sign the agreement, thereby requiring the ESCO to proceed. If during this phase, it is determined that the program options identified by the ESCO do not fall within mutually agreed upon acceptable financing requirements and project scope, the Letter of Agreement will be terminated with no financial liability to FLORENCE-LAUDERDALE PUBLIC LIBRARY. Shall it be determined that the project's feasibility is within the agreed-upon financing parameters and project scope and FLORENCE-LAUDERDALE PUBLIC LIBRARY terminates the Letter of Agreement for any reason, then FLORENCE-LAUDERDALE PUBLIC LIBRARY agrees to compensate the ESCO a mutually-agreed upon amount for the engineering design and permitting effort incurred through termination. That amount will be stated in the Letter of Agreement.

Negotiating and Signing of Contract

Upon the determination that the project is feasible and acceptable to FLORENCE-LAUDERDALE PUBLIC LIBRARY, an Energy Services Agreement (ESA) will be drawn up between FLORENCE-LAUDERDALE PUBLIC LIBRARY and the ESCO. All engineering, design, and permitting cost incurred by the ESCO under the Letter of Agreement will be incorporated into the ESA. Upon acceptance of the ESA by the Board, the ESA will be signed and the program will commence. It is anticipated that the ESA will be presented to the Board on or before March 2020.

V. SCHEDULE OF EVENTS

The following time frame is expected to be followed during the procurement period of this RFP/Q:

December 2, 2019	Release of RFP/Q
January 8, 2020	Proposal received – 2:00 PM
Late January 2020	Vendor selected
TBD	Investment Grade Audit contract approved by Board

This is a tentative schedule, and dates are subject to change.

Please note that responses to this RFP/Q must be received by 2:00 PM on January 8, 2020, at the address below. One (1) paper copy of the response must be sealed and delivered to:

Florence-Lauderdale Public Library
350 N Wood Ave
Florence, AL 35630
Re: Proposal on Qualifications for an Energy Conservation Services Program
ATTN: Mr. Derek Wilson, Executive Director, Florence-Lauderdale Public Library

FLORENCE-LAUDERDALE PUBLIC LIBRARY reserves the right to reject any and all responses resulting from this RFP/Q. Late responses will not be accepted and will be returned to the submitting company unopened. FLORENCE-LAUDERDALE PUBLIC LIBRARY is not liable for any cost incurred by any person or firm responding to this RFP/Q.

FLORENCE-LAUDERDALE PUBLIC LIBRARY reserves the right to reject, as non-responsive, any proposal that does not contain the information requested in Section VII of this RFP/Q and on the forms contained in Appendix A. Additionally, FLORENCE-LAUDERDALE PUBLIC LIBRARY reserves the right to reject, as non-responsive, any proposals which are not organized and formatted as described in this RFP/Q.

VI. SELECTION CRITERIA

Qualification of all business entities that respond to this solicitation, including any subcontractors to be used, will be evaluated using the following selection criteria. (Percentage weighting among categories of selection criteria is noted.)

Business and Financial Qualifications (20% maximum)

- Business unit dedicated to providing guaranteed energy savings programs.
- Business unit dedicated to ensuring project performance
- Years in business overall and the experience within the State of Alabama
- Affiliation with energy and/or business organizations (including ISO certification and EPA or DOE affiliations)
- Demonstrable ability to bond project through a third party surety
- Financial viability of entity proposed to provide technical and financial guarantees
- Financing capability and lines of credit

ESCO will provide financial statements including income statement, balance sheets and statements of changes for three (3) most recently completed fiscal years.

The ESCOs will provide information documenting the source(s) of proposed financing.

Personnel Qualifications (20% maximum)

Quality of personnel assigned to this project and degree of pertinent experience on projects in the State of Alabama.

Project Management Plan (20% maximum)

- Comprehensiveness and rationale of project management plan, based on:
 - o Approach to project management, including staffing and contractor-oversight
 - o Ability to successfully complete projects on time and to FLORENCE-LAUDERDALE PUBLIC LIBRARY's satisfaction.
- Method employed to establish baseline energy use
- Method of measurement and verification used to demonstrate energy use reduction and cost savings as guaranteed
- Quality of any proposed value-added services

Prior Project Performance (40% maximum)

- Experience with energy conservation projects in the state of Alabama of a similar size and type to that proposed for FLORENCE-LAUDERDALE PUBLIC LIBRARY.
- Experience taking responsibility for the full range of roles contemplated for this project (e.g. identification and analysis of ECMs, design, installation, operation, training, financing, savings verification, etc.)
- Performance on prior projects, including data on projecting, achieving, documenting, and verifying energy savings to ascertain accuracy of projections
- References from prior and current customers. Must submit at least seven Alabama references from the last ten years.
- All Alabama Project reference examples must state that the proper approvals were issued from the Authority Having Jurisdiction over the project. Any project that has not gone through appropriate building approvals will not be considered.
- Examples of value added services will be reviewed and included in this section.

VII. RESPONSE FORMAT AND COMMENTS

The responses to this Request for Proposal on Qualifications will consist of ten (10) specific information subject areas which must be completed and returned in the order indicated below with each section divided and tabbed with the appropriate section title. Additional forms (as detailed below) are provided in Appendix A. For areas that do not require a form, the ESCO shall provide specific information directly addressing the information requested in that section. FLORENCE-LAUDERDALE PUBLIC LIBRARY may, during the course of the evaluation process, request additional information to supplement and/or clarify the information provided by any ESCO. Any additional information not specifically requested in this RFP/Q 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. Responses must be paginated and must include a table of contents.

Section 1: Cover Letter

The ESCO's proposal will include a cover letter at the beginning of the proposal. The cover letter shall provide a summary of the information presented in the proposal, names and telephone and email 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. This cover letter shall also include the name of the person(s) authorized to conduct final contract negotiations on behalf of the ESCO.

Section 2: Introduction

Table of Contents

The ESCO's proposal should include a Table of Contents referencing each information section of this RFP/Q. The Table of Contents should be further subdivided to describe information included within each section of the proposal.

Executive Summary

The ESCO will provide an Executive Summary highlighting the ESCO's unique qualifications and capabilities for this project.

Statement of Responsibility

The respondent must be the Prime Contractor. The Prime Contractor will be responsible for all work and subcontractors involved in the project. The Prime Contractor will submit a list of all participants in the project prior to the actual contract negotiations. The Prime Contractor and subcontractors must provide evidence of general liability insurance coverage up to one million dollars. The Prime Contractor and subcontractors must also provide evidence of workmen's compensation insurance. If some or all the participants are not known at this stage, a selection strategy shall be identified noting which participants have not been selected. A statement of responsibility must be provided, using **FORM B** in the Appendix.

Section 3: Personnel

Each ESCO will attach a Project Staffing Plan, as shown in **FORM C** in the Appendix. The proposed plan will 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 a graphical representation (organizational chart) of the participants listed in the ESCO's proposal and their responsibilities in the program. The chart is to be used to show the company and personnel responsible for each phase of the project, lines of authority, and relationships between prime contractor and subcontractors.

The contractor shall not knowingly violate 8 U.S.C. & 1324a (employ an unauthorized alien) as a condition of receiving a contract. The contractor agrees to enroll in a designated employment eligibility verification system through the term of this contract. E-Verify is a free internet based system that is operated or authorized by the United States Department of Homeland Security that allows employers to electronically confirm the legal working status of newly hired employees. E-Verify shall be the designated employment eligibility verification system for the Contractor. As a contractor participant in E-Verify, the contractor shall be required to use E-Verify for all new employees who will be working directly on this contract.

If the contractor uses one or more subcontractors in connection with the performance of this contract, the contractor shall include in all subcontracts the requirement for compliance by the subcontractor with these provisions.

This contract shall be interpreted pursuant to the laws of the State of Alabama.

Section 4: Project Management

Describe respondent's approach to project management, including: coordination with subcontractors, division of responsibility among project staff, and interaction with FLORENCE-LAUDERDALE PUBLIC LIBRARY representatives. Include a sample of any contracts and/or agreements between the respondent and subcontractor(s) that would be used in this project in an appendix.

Section 5: Energy Savings

Provide a textual and numerical description of the normal method used to establish baseline energy use in individual buildings and facility-wide. Describe the method used to justify variances between the baseline consumption and actual annual consumption. Variances between baseline energy consumption/cost and actual energy consumption/cost can be attributed to changes in the unit price of energy, rate schedules, weather, occupancy, building utilization and building size, to name a few. Describe and justify the methods used in measurement and verification of project savings.

Include a sample guarantee contract in the Appendix to this response. Failure to include a sample contract will be viewed as unresponsive.

Respondents must show calculations and formulas in this section **and** document where those calculations are to be found in the sample contract.

Section 6: References

Provide information on at least 7 performance contracts, similar in size and scope to the project proposed for FLORENCE-LAUDERDALE PUBLIC LIBRARY that the respondent has successfully implemented within the last ten years within the state of Alabama.

References shall include:

- Customer Name
- Name and Telephone Number of Contact
- Brief Description of the Project
- Project Beginning and Ending Dates
- Specific ECMs installed
- Project Cost and Savings
- Method of Measurement & Verification (M&V)
- Most recent project dollar savings report

Section 7: Equipment, Maintenance and Training

The ESCO shall describe any relationships with manufacturers of energy equipment, including those manufactured by the respondent or listed subcontractors. The ESCO should also

demonstrate willingness to propose and ability to work with different makes of equipment should such equipment prove to be the optimal choice for Florence-Lauderdale Public Library.

The ESCO shall outline any training proposed as part of the project, including the subject, duration, and location of training. Respondent shall also describe the relationship with the organization providing training, if not provided by the prime contractor.

Respondent shall describe any customer support programs provided in the project. The ESCO shall detail the availability, duration, and services provided through the customer support program, if applicable. If the ESCO proposes a maintenance program, information must be provided detailing services provided and terms of contract, if any. The ESCO should also provide the justification for any proposed customer support or maintenance program.

Section 8: Project Non-Performance

Provide a complete list of all projects that in the last 20 years:

Have canceled or non-appropriated a performance contract with the respondent (list reason); or

Have past or pending lawsuits or litigation regarding a performance contract with a customer (list reasons); or

Have been reimbursed for non-performance on guaranteed savings.

Have past "out of court" settlements regarding a performance contract (list reasons).

If any of the above does not apply, provide an acknowledgment letter stating each that does not apply, signed by an officer of the respondent company. (Please include title of company officer). Failure to provide accurate and complete information as requested is grounds for disqualification.

Section 9: Financial Information

Describe the financial soundness and stability of the ESCO and its ability to support the performance guarantee.

Provide financial statements for the two most recently completed fiscal years in an appendix. Owner may, during the course of the evaluation process, request additional financial information to supplement and clarify the information provided.

Describe your firm's capacity to issue payment and performance bonds. Provide a letter from surety company demonstrating the bonding capacity of the ESCO.

Describe what resources your firm has available to assist customer with financing and funding solutions. Provide bank references that have provided financing for past projects.

Provide a letter of recommendation from a financial institution.

Section 10: Value-Added Services

The ESCO may choose to include explanations of value added services that help serve their clients to meet the established mission and vision of said projects.

APPENDIX A: PROPOSAL FORMS

FORM A: PROPOSAL CHECKLIST AND OUTLINE

Section 1: Cover Letter

Section 2: Introduction

- ☐ Proposal Table of Contents
- ☐ Executive Summary
- ☐ Statement of Responsibility

Section 3: Personnel

- ☐ Project Personnel Resumes
- ☐ Project Team Organizational Chart

Section 4: Project Management

Section 5: Energy Savings

- ☐ Sample Guarantee Contract

Section 6: References

Section 7: Equipment, Maintenance and Training

Section 8: Project Non-Performance

Section 9: Financial Information

Section 10: Value-Added Services

- ☐ Appendix

FORM B: STATEMENT OF RESPONSIBILITY

Prime Contractor (ESCO or Contractor);

Name: _____

Address _____

(Please note possession of any license or registration pertinent to this project.)

Area of Responsibility: (Describe in detail duties and responsibilities applicable to this project.)

FORM C: PROJECT STAFFING PLAN

RESPONDENT:

AREA OF RESPONSIBILITY	NAME	AFFILIATION
OVERALL PROJECT MANAGEMENT		
BUILDING AUDITING		
BASELINE ENERGY USE DEVELOPMENT		
ECM EVALUATION:		
LIGHTING		
HVAC		
EMS		
OTHER		
ECM SAVINGS VERIFICATION		
ENERGY USAGE MONITORING		
ENERGY EVALUATION		
FINANCING		
ANNUAL SAVINGS GUARANTEE		
FINANCIAL AFFILIATION		
SUBCONTRACTORS		