

Guaranteed Energy Savings Program

REQUEST FOR QUALIFICATIONS
September 2013

I. TABLE OF CONTENTS

Section

- I. Table of Contents
- II. Project Description
- III. Proposal Format
- IV. The Selection Process
- V. Instructions for Submitting Proposals

II. PROJECT DESCRIPTION

1. The School District of Fort Atkinson (the “District”) requests detailed responses regarding the implementation of a Performance Contract for guaranteed energy saving improvements through the modification or replacement of the chiller system at the High School. 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 project including using District staff and resources where possible. 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/or operations savings through the modification or replacement of the chiller system at the High School.
 - b) If selected, the Respondent must include, as part of the program, a minimum written guarantee of energy and/or operational savings. The energy guarantee must be a first party guarantee from the Respondent.
3. The Scope of Work shall be the oversight and savings guarantee for energy and operational savings associated with the modification or replacement of the chiller system at the High School. **Current estimated project costs are: \$300,000 - \$450,000.** 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:
 1. Provide a review of all engineering design and installation documentation (shop drawings) in order to verify and guarantee savings.
 2. Make periodic site visits to oversee the installation of a system to modify or replace the current chiller system at the High School in order to verify the working system to insure energy savings achievement.
 3. Advise on the project management schedule. The Respondent will be asked to indicate how they will assist the District in managing and supervising the project. The District expects a minimum of bi-weekly phone conversations or on-site visits.
 4. Include information for any recommended maintenance and training services.
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 three (3) references of projects performed by the Respondent for school districts in the last three years including proof or relationships of longevity with school districts.

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 the chiller system at the High School.

The Respondent's response to RFQ shall contain examples of the following financial information:

1. The Performance Contractor markup (based on percent of total project cost) and/or
2. 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. Ranges for markups are not acceptable.

CATEGORY OF MARK-UP	% MARK-UP
Overhead	
Profit	
Labor – Internal	
Equipment Purchased	
Materials Purchased	
Subcontract Labor	
Subcontract Material	

Please note your project management fee (if any):

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 markups proposed to be applied to the hourly rate.

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 | September 26, 2013 |
| 2. Submission of Qualification Responses | October 7, 2013 |
| 3. Award of Contract | October 24, 2013 |
| 4. Exemption Resolution | October 24, 2013 |

B. SITE VISITS

Site visits can be scheduled as necessary. Interested parties should contact Mr. Dennis Kuchenmeister at 920-563-7808 ext. 8881.

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 and financial 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 that 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 Mr. Jason Demerath at 920-563-7800 ext. 8801.

B. SUBMISSION OF PROPOSALS

Firms shall submit sealed, written Qualification Responses by 9:00 a.m. central time on Monday, October 7, 2013 at the School District of Fort Atkinson, Attn: Jason Demerath, 201 Park Street, Fort Atkinson, WI 53538. 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: _____