

Request for Qualifications

In Preparation for a Guaranteed Savings Contract

Issued by:

Charles A. Beard Memorial School Corporation Board of School Trustees
Knightstown, Indiana

OVERVIEW

The Charles A. Beard Memorial School Corporation Board of School Trustees of Knightstown, Indiana is seeking the submission of qualifications from qualified and interested firms that are capable of providing comprehensive energy management, energy, operational, and maintenance related capital improvement services for the buildings described within this Request for Qualifications (RFQ). All energy, operational, and maintenance related capital improvements will be developed with a guaranteed savings plan to demonstrate and verify reductions in the operating budget for the buildings in accordance with the Indiana Code 36-1-12.5, Guaranteed Savings Contracts and Energy Efficiency Programs Used by school corporations.

PROJECT SCOPE

The goal of the school corporation is to reduce energy consumption and demand, while improving the infrastructure, and minimizing the operational and maintenance costs across the entire energy and operations infrastructure. The Board of School Trustees considering energy, operational, and maintenance related capital improvement services for all of the Charles A. Beard Memorial School Corporation.

It will be the responsibility of the selected firm to develop cost-effective energy efficiency projects for the School Corporation. Potential energy efficiency measures are described in IC 36-1-12.5-1.

QUALIFICATIONS OF THE FIRM

The school corporation may award a contract to the firm that, in its sole opinion, is most capable of providing the range of services described and anticipated by this RFQ, and in the long-term best interest of the school corporation. To be considered for this and future projects, a Qualified Provider must demonstrate knowledge and experience in similar projects from the following:

- Adequate financial resources to support the range of alternatives anticipated.
- References that can attest to the quality of the Qualified Providers past work.
- An established record of technical performance on similar energy, operational, and maintenance related projects.
- A proven record of on-time and on budget performance.
- Trained and knowledgeable staff.
- Competent management support at all levels.
- Ability to work in a dynamic, fluid and progressive environment.
- Ability to effectively communicate with the school corporation and school board, as necessary.

Charles A. Beard Memorial School Corporation reserves the right to investigate the qualifications of all Providers under consideration and to confirm any part of the information furnished by a Qualified Provider, or to require other evidence of managerial, financial or technical capabilities that are considered necessary for the successful performance of the contract.

SUBMITTAL REQUIREMENTS

The submitting Providers must have demonstrated technical and managerial capability across a broad range of energy, design, construction, operations and maintenance areas. The school corporation will consider the following background and experience factors in the evaluation of all proposals.

Proposal Format:

1. Cover Page
2. Table of Contents
 - Responses shall include a table of contents properly indicating the section and page numbers of the information included.
3. Executive Summary
 - Responses shall include a concise abstract of no more than (2) pages.

4. General

Include the following information on the Qualified Provider:

- Name of Company
- Address
- Telephone Number
- Fax Number
- Contact Person for this Project

5. Firm's Qualifications and Management

- Number of Years Company Has Operated in Indiana
- List the Lead Personnel employed by the Qualified Provider involved in this project. Include a resume on each person listing education, experience, work history, and responsibilities on this project.
- The Most Recent Audited Financial Report or Annual Report
- Include a copy of the certifications(s) from the Indiana Department of Public Works that proves the responding firm is a Certified Professional Services Provider.

6. Engineering

Each Qualified Provider shall provide the information requested below regarding the engineering services they will provide if selected to implement this project:

- In-house Engineering Staff: Provide resumes on all Professional Engineers registered in the State of Indiana who are direct employees of the Qualified Provider who will perform engineering services on this project. In addition, list all other technical personnel who are direct employees of the Qualified Provider who will perform engineering services on this project. Specifically identify which engineers will be performing which engineering services.
- Engineering Approach: Include a detailed explanation of how engineering services will be implemented. This explanation should include the people, specific engineering services, timeline and external forces that could affect this approach.

7. Training and Support Services

- Explain Qualified Provider's plan for providing training and support services.
- Range of Services: Describe the range of services being offered by your firm, such as maintenance, training, follow-ups, auditing, etc.

8. Performance Assurance

- Explain how the Qualified Provider plans to address performance assurance.

- In-house Personnel: Include resumes on any Measurement and Verification Specialist and Measurement and Verification Supervisor in direct employment of the Qualified Provider.
- Contracted Personnel: Include resumes on all Measurement and Verification Specialist and Measurement and Verification Supervisor presently contacted by Quality Provider.
- Organization: Describe the organization the Qualified Provider has in place to insure successful performance over the twenty (20) year guaranteed term.
- Baseline Methodology: Describe the methodology used to compute the energy baseline.
- Discuss energy measurement, verification protocol being used and conformance with International Performance Measurement and Verification Protocol (IPMVP).
- Past Guarantees: Provide a reference list identifying the following for ten (10) Indiana customers that falls within IC36-1-12.5 with which the Qualified Provider has a performance guarantee.
- Performance and Payment Bonds: Performance bonds will be required per IC36-1-12.5 to insure the faithful performance of the proposed guaranteed savings project. All Qualified Providers must provide Proof of Bondability with their RFQ response from the surety from whom they intend to purchase performance bonds. The Proof of Bondability must include a commitment from the surety to provide a bond covering 100% the estimated guarantee savings amount over the term of the guarantee. These bonds must have a minimum rating of 'A' from Best rating service. RFQ responses failing to provide a Letter of Bondability as described herein will be rejected.

9. Names and telephone numbers of five references, with a brief description of the work done for these individuals in the past three (3) years.

Upon review of all responses to this RFQ Charles A. Beard Memorial School Corporation Board of School Trustees intends to enter into a contract with the most Qualified Provider. Charles A. Beard Memorial School Corporation Board of School Trustees reserves the right to reject any and all RFQ responses.

PROPOSAL EVALUATION PROCESS

The school corporation's evaluation and selection process require that the appropriate specifications and terms of the RFQ be included in the Qualified Providers submission.

Charles A. Beard Memorial School Corporation may:

- Reject any or all Requests for Qualifications.
- Issue subsequent Request for Proposals.
- Cancel the Request for Qualifications.
- Approve or disapprove the use of a particular subcontractor.
- Modify any requirements contained within the RFQ and request a revised submission from all Qualified Providers.
- Negotiate with any, all or none of the Qualified Providers.

- Establish a short list of Qualified Providers eligible for interview after review of written proposals.
- Accept the written proposal as an offer, without negotiation, and issue a notice to proceed.
- Establish an added value point system.
- Establish other evaluation criteria determined to be in the best interest Charles A. Beard Memorial School Corporation and Board of School Trustees.

Note: This RFQ does not commit Charles A. Beard Memorial School Corporation to negotiate a contract, nor does it obligate the above mentioned to pay for any cost incurred in the preparation and submission of proposal or in anticipation of a contract Charles A. Beard Memorial School Corporation reserves the right to contract with any of the firms responding to this RFQ based solely upon its judgment of the qualifications and capabilities of the firm.

SUBMISSION DEADLINE

Three (3) copies of this Request for Qualifications must be received no later than 10:00 a.m., June 1, 2022 to the following:

Bryce Welsch, CFO
Charles A. Beard Memorial School Corporation
8139 W. US 40
Knightstown, IN 46148

Request for Qualifications may be either mailed or hand delivered. The school corporation and school board are not responsible for late delivery caused by the Postal Service or private carriers. Any Request for Qualifications received after the deadline will **not** be evaluated.

All submittals become the sole and unrestricted property of Charles A. Beard Memorial School Corporation and Board of School Trustees. The content of all submittals will be held confidential until the selection of a Qualified Provider is made. **Any “proprietary material” must be clearly marked.**

REQUESTS FOR INFORMATION

Any requests for clarification or additional information regarding this RFQ shall be submitted by email only to Bryce Welsch, CFO, at Bryce.Welsch@cabeard.k12.in.us

ECONOMY OF QUALIFICATIONS

Qualifications should be prepared simply and economically and give a straightforward and concise description of the Qualified Provider’s capabilities to satisfy the requirements of the project. Special bindings, colored displays, etc. are not necessary. Emphasis should be placed on completeness and clarity of content.

PROPRIETARY MATERIAL

Any proprietary information in a submittal must be designated clearly and should be bound separately and labeled with the words "PROPRIETARY INFORMATION". Appropriate references to this information must appear in the body of the qualifications. An entire submittal marked "PROPRIETARY INFORMATION" will not be accepted.

Qualified Providers should be aware that the Charles A. Beard Memorial School Corporation Board of School Trustees is required by law to make its records available for public inspection with certain exceptions. It is the school board's belief that this legal obligation would not require the disclosure of proprietary, descriptive literature that contains valuable designs, drawings or documentation. However, the Qualified Provider, by submission of materials marked "PROPRIETARY INFORMATION", acknowledges that the School Corporation and School Board will have no obligation or liability to the Qualified Provider in the event that either must disclose these materials.