

**COMMONWEALTH OF PENNSYLVANIA  
GUARANTEED ENERGY SAVINGS PROJECT**

**REQUEST FOR PROPOSALS FOR THE  
WATTSBURG AREA SCHOOL DISTRICT**

**Date of Issue: January 14, 2022**

The Wattsburg Area School District, (hereinafter, District) is interested in contracting for a full range of energy services and energy-related capital improvements ("energy conservation measures" or "ECMs") financed through a guaranteed energy savings contract to be implemented in the facility(ies) identified in Attachment A. The cost of implementing the ECMs shall be financed through a guaranteed energy savings contract in accordance with the requirements of Act 57 of 1998, 62 Pa. C.S. §3751-3757 and Act 77 of 2004, 62 Pa. C.S. §3752-3758 ("Acts 57/77") and Act 39 of 2010. Energy Service Companies (ESCOs) which are interested in being selected for this project are required to submit a formal Proposal to the District at the address listed below. The District will select an ESCO based upon the information provided in the Proposals and the District's evaluation of ESCO qualifications.

A **mandatory** pre-proposal meeting will be held at the Wattsburg Area School District Administration Office on Wednesday, February 9, 2022 at 10:00AM. A tour of the district's facilities will follow the completion of the meeting. Due to current health restrictions, the meeting may be limited to 1 or 2 persons from each responding ESCO. The district shall advise attendance limits based on the number of ESCOs planning to attend. Let the district know if your firm plans to attend the meeting by contacting Mr. Eric Schultz, Operations Manager at 814-824-4114 no later than Friday, February 4, 2022.

Proposals should be titled "**General Energy Performance Contracting Services Proposal for the Wattsburg Area School District**". Submit one original, two bound copies, and one electronic copy of the Proposal to the address listed below.

Proposals shall be submitted in accordance with this Request for Proposals and the specific requirements outlined in Part 4 of the RFP.

Attachment A to this RFP is a Technical Facility Profile(s) which includes information to assist you in determining whether you are interested in being considered for this project.

The Wattsburg Area School District reserves the right to reject any or all submissions and this RFP does not commit the district to award a contract or pay any cost incurred by those submitting.

**Proposals must be received by the issuing District no later than 2 PM on Wednesday, February 23, 2022 at the following address:**

**Wattsburg Area School District  
10782 Wattsburg Road  
Erie, PA 16509  
ATTN: Vicki Bendig, Business Administrator**

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**Refer to section 1.13 below for a complete timeline. PART 1. GENERAL INFORMATION**

**1.1 PROJECT**

The Wattsburg Area School District is interested in contracting for a full range of energy services and energy-related improvements (Energy Conservation Measures or ECMs), financed through a guaranteed energy savings contract, for the Project Site(s). The ECMs may include but are not limited to improvements to HVAC systems, lighting systems, building envelope systems, plumbing systems, water consumption systems, and/or renewable energy systems. Other opportunities may include measures that do not reduce energy consumption but rather result in cost savings such as fuel switching, demand reduction, onsite generation, utility bill auditing, utility rate changes, distribution upgrades, etc. ECMs may also include the training of facility staff with respect to routine maintenance and operation of all improvements. ECMs must result in a guaranteed minimum energy savings with the ESCO payments linked to actual documented energy and cost reductions. Any stipulated energy and/or operational 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 the Wattsburg Area School District.

The contract shall be no longer than fifteen (15) years in duration and must comply with applicable statutes, regulations, and procurement laws. The contract must provide that the savings in any year are guaranteed to the extent necessary to make payments under the contract during that year. Any shortfall in savings is the responsibility of the ESCO to reimburse the district.

**1.2 DESCRIPTION OF PROCUREMENT PROCESS**

It is anticipated the process for the procurement of these energy services will proceed as follows:

- A. **SUBMISSION OF WRITTEN PROPOSALS.** ESCOs will be required to conduct a technical assessment of the Project site. The Wattsburg Area School District will review and evaluate proposal submissions in accordance with the evaluation criteria listed below.
- B. **SELECTION OF ESCO.** The Wattsburg Area School District will select the best qualified ESCO to negotiate a final contract scope, specific financing arrangements and terms, and the project energy and cost savings, as well as special conditions offered by the ESCO.

**1.3 EVALUATION CRITERIA.**

Evaluation of Proposals. Proposals will be evaluated based on completeness of the information provided. Failure to provide any of the requested information may result in disqualification. The criteria listed below will be used in the evaluation of the written proposals, client references and responses of the short listed ESCOs during any final selection interviews, as appropriate. The evaluation criteria are as follow:

- A. Experience
  - 1) Qualifications and experience of ESCO's personnel with implementing guaranteed energy savings contracts.
  - 2) Quality and completeness of documentation of achieved energy savings from previous projects.
  - 3) Reliability of equipment performance on past projects.
- B. Project Management
  - 1) Clear assignment of responsibility for various project tasks to specific individuals
  - 2) Ability to effectively manage project construction and complete project on schedule.
  - 3) Quality of energy savings monitoring, and measurement and verification services on past projects.

- 4) Clarity, organization and level of detail in written proposal.
- 5) Quality of communication skills of the ESCO's personnel

C. Technical Approach

- 1) Quality of project-specific technical proposal, including comprehensiveness of analysis and understanding of existing building systems and conditions.
- 2) Quality of the proposed ECMs and associated cost and savings estimates.
- 3) Quality of approach to project commissioning.

D. Financial

- 1) Financial soundness and stability of the ESCO.
- 2) Project financials (cost and savings).
- 3) Demonstrated ability to provide or arrange project financing.

E. Measurement & Verification

- 1) Description of method(s) used to confirm guaranteed energy savings.
- 2) Demonstrated experience in past projects.
- 3) Example of annual M&V Report.

1.4 REJECTIONS OF PROPOSAL

The Wattsburg Area School District reserves the right to reject at any time any and all proposals received, or to negotiate separately with any and all competing ESCOs.

1.5 INCURRING COSTS

The Wattsburg Area School District is not liable for any cost or expenses incurred by the ESCOs in the preparation of their written responses or for attendance at any conferences and meetings related to the RFP. Any cost or expense incurred by ESCOs in performing any analyses associated with this RFP shall be borne solely by the ESCO.

1.6 AMENDMENT TO THE RFP

If it becomes necessary to revise any part of the RFP, an amendment will be issued to all proposers who received the basic RFP.

1.7 CONFIDENTIALITY

To the extent allowed by law, proposals will be held in confidence by the Wattsburg Area School District.

1.8 RESTRICTION OF CONTACT

From the issue date of the RFP until a determination is made regarding the final selection of the Project ESCO, all contact concerning this RFP must be made only through the Business Office in coordination with Eric Schultz 814-824-4114. Failure to do so will result in ESCO disqualification.

1.9 PROPOSALS

To be considered, proposals must be a complete response to the RFP. Proposals are to be straightforward, concise presentations without extraneous material. Font size may be no smaller than 10 point. The proposal must remain valid for ninety (90) calendar days.

1.10 PAYMENT AND PERFORMANCE BONDS

The successful ESCO shall be required to provide payment and performance bonds in the amount of 100% of the total contract value.

1.11 PRIME CONTRACTOR ACCOUNTABILITY

The ESCO selected as the project contractor under this RFP will be considered the prime contractor. The ESCO will be required to assume full responsibility for delivery of all services for each facility as specified in the RFP and included in the final contract. Further, the selected ESCO will be the sole point of contact concerning all contractual matters for the duration of the contract term.

1.12 SITE VISITS

The Wattsburg Area School District will arrange inspection tours of the building to be audited. Site visits for each of the buildings may be scheduled by contacting Mr. Eric Schultz, Operations Manager at 814-824-4114

1.13 PROPOSED PROJECT SCHEDULE to be completed

Issue RFP – January 14, 2022

Pre-Proposal Meeting – February 9, 2022 – 10:00AM

Schedule site visits – February 9, 2022 through February 16, 2022

Note: Due to covid restrictions, all visitors must wear masks while in the building.

Receipt of Proposals – February 23, 2022 by 2:00PM

Selection of ESCO – February 25, 2022

Comprehensive Project Development - February 25, 2022 through March 10, 2022

Final Project Submission – Friday, March 11, 2022

Project Review with ESCO and Final Approval – March 21, 2022

**PART 2. SCOPE OF SERVICES – TECHNICAL REQUIREMENTS**

- 2.1 All energy audits (including this RFP response), feasibility studies, engineering, design, plans and specifications shall be prepared, reviewed and approved by Professional Engineers licensed in the Commonwealth of Pennsylvania.
- 2.2 The Wattsburg Area School District reserves the right of final approval of any selected equipment or modifications proposed. Only prior reviewed and approved equipment or modifications will be permitted. Review and approval shall be conducted by the district in a timely manner.
- 2.3 The ESCO will be required to work with current building management and maintenance personnel, to coordinate construction and provide appropriate training in the operation of all retrofits. No equipment shall be installed that will require the hiring of additional personnel by the Wattsburg Area School District unless contract negotiations produce explicit exemption of this rule for a specific installation.
- 2.4 ESCO must provide two (2) complete sets of reproducible “as built” and record drawings of all existing and modified conditions associated with the project, conforming to typical engineering standards. These should include architectural, mechanical, electrical, structural, and control drawings. Operations and Maintenance manuals must be submitted within 30 days of the completed installation.
- 2.5 The ESCO shall be responsible for the proper removal offsite of all packaging materials and all replaced or demolished materials or equipment.

- 2.6 During the Comprehensive Project Development Phase, the selected ESCO shall develop all aspects of a final project for submission to the district by the stated submission date. The Comprehensive Project Development shall include: all final project costs and guaranteed energy / water savings, detailed project scope of work for each measure, project equipment selections, savings calculations, and project implementation time line. The selected ESCO shall also provide at least three (3) bids from each of the following trades for implementation of the project scope of work – mechanical / HVAC, electrical, plumbing, and roofing.

**PART 3. CONTRACTUAL PROVISIONS**

- 1.1 The contents of the RFP as well as the ESCO’s proposal become part of the final contract.
- 1.2 The Wattsburg Area School District reserves the right of final approval over the scope of work and all end-use conditions. Only prior reviewed and approved equipment and modifications will be permitted by the district.
- 1.3 The ESCO shall demonstrate insurance coverage during the life of the contract public liability and property damage insurance in the amount of \$1,000,000 against claims of damages for bodily injury, including wrongful death, as well as from claims for property damages which may arise from operation under this contract, whether such operations be by the ESCO, or any subcontractor or anyone directly employed on the project. This insurance shall not expire or be cancelled without ten (10) days advance written notice to the Wattsburg Area School District. The ESCO shall require sub-contractors not protected under the ESCO’s insurance policies to take out and maintain insurance of the same nature and in the same amounts as required of the ESCO for comprehensive public liability and property damage.
- 1.4 All drawings, reports, and materials prepared by the ESCO in the performance of the contract shall become the property of the Wattsburg Area School District and shall be delivered to them as needed or within thirty (30) days after construction is completed and accepted by the district that the project is fully installed and operating properly.
- 1.5 The ESCO must secure all necessary licenses and permits and comply with all federal, state and local laws with respect to this project. All work completed under this contract must be in compliance with all applicable building codes and accreditation, certification, and licensing standards. All drawings will be stamped by a Pennsylvania Professional Engineer.
- 1.6 The repayment obligation and term of the financing for this project must be arranged to coincide with the acceptance by the Wattsburg Area School District that the project is fully installed and operating properly.
- 1.7 ESCOs will be required to guarantee energy and cost savings on an annual basis. No credit for the achievement of savings above and beyond the annual guarantee will be credited to satisfy performance guarantees in future years of the contract. Annual reconciliation of the achieved savings will be required.

## **PART 4. ESCO RFP SUBMISSION REQUIREMENTS**

Each respondent is required to fully answer all questions in each category listed below. Provide your responses on 8 ½ " x 11" sheets of paper and number and title each answer to the corresponding category. Font size should be no smaller than 10 point. All pages in your response to this attachment should be numbered sequentially. Respondents must also include a Table of Contents that indicates the section and page numbers corresponding to the information included.

### **Project Summary (see attachment A for additional Project Submission requirements)**

Based on your technical site assessment and available information discuss the site conditions and status of building systems, current operating procedures and potential cost effective energy conservation measures (ECMs). Summarize the ECMs to be included in this project and the scope of services (design, financial, operations, maintenance, training, etc.) offered by your firm for this project including the added value to the Commonwealth of your firm's services. Preliminary ECMs must include description of the measure, estimated implementation costs, and estimated energy savings. ***Final project scope must be within +/- 10% of the preliminary costs and savings estimates.***

### **1.0 Project Team Members**

Describe the relevant experience, qualifications and educational background for **ONLY** those **PRIMARY** team members **who will directly be assigned to this project**. Use the following form:

- 1.1. ESCOs Team Member Qualification Form.**  
**Do not include individual resumes in lieu of this information.**

Use one form to describe each of the Project Team Members. A sample form follows.

### 1.1 ESCOs Team Member Qualification Form

<b>Personnel Information</b>	
Name of project team member:	
<b>Current Employment</b> Current job title: Job responsibilities: Number of years with ESCO: Primary office location: Job responsibilities:	
<b>Previous Employment</b> Company name: Number of years with firm: Job responsibilities:	
<b>Educational Background</b> Degrees/disciplines: College/university:	
<b>Professional/Technical</b> Professional affiliations: Publications: Technical training: Indicate the total years of relevant energy-related experience for this individual:	
<b>Five Year History of Energy Performance Contracting Project Experience</b>	
List all energy performance contracting projects this individual has been involved with during the past five years including: project location: type of facilities: year implemented: dollar value of installed project costs:	
Describe the specific role and responsibilities this individual had for each listed project.	
Provide a detailed description of the role and responsibilities this individual will have for the duration of this project.	
Describe any other relevant technical experience.	

### **1.1 Organizational Chart**

Submit an organizational chart that clearly identifies the roles and relationships of all key team members.

### **1.2 Project Plan**

Provide a project implementation plan to include key milestone dates.

### **1.3 Project Financing**

Describe your firm's preferred approach to providing or arranging financing for this project. Describe the structure of the financing arrangement including projected interest rate, the responsibilities/liabilities of each party, and any special terms and conditions that may be associated with the financing of this project. Describe how construction will be financed.

### **1.4 Cost of Audit**

Provide a cost proposal for Investment Grade Energy Audit which would be paid by the District if no guaranteed energy savings contract is negotiated.

### **1.5 Project Commissioning**

Describe your approach to project commissioning including procedures and personnel assignments.

### **1.6 Project Training**

Describe your firm's proposed approach to providing technical training for facility personnel. Indicate the proposed number of personnel to be trained and the type and frequency of training to be provided for the duration of the contract. Indicate how your firm will address any turnover of key facility personnel as it relates to project performance.

### **1.7 Project Maintenance**

Describe any major changes in operations or maintenance for this project that you company anticipates. Include a description of the types of maintenance services projected for this project. Address how you would approach the role of district personnel in performing maintenance on new and existing equipment. Discuss the relationship of maintenance services to the savings guarantee, any required duration of the maintenance agreement and what impact termination of the maintenance prior to the end of the contract term would have on the savings guarantee.

### **1.8 Savings Measurement & Verification**

Please submit an explanation of your proposed Measurement & Verification Plan for the project using the IPMVP (International Performance Measurement & Verification Protocol) standards. Include your proposed M&V plan for each proposed ECM (energy conservation measure) with a brief explanation. It is not necessary to define the four IPMVP options as part of your response.

### **1.9 Sample Contract Documents**

Provide a complete set of sample contract documents that may need to be executed as part of this agreement. These would include the agreement for the Investment Grade Energy Audit and the contract for the implementation of the follow-on guaranteed energy savings project.

**1.10 Project History And Client Reference Form**

Provide at least 5 (five) and no more than 10 (ten) energy performance contracting projects (client references) **in repayment** by and currently under contract with your firm. Each client reference shall be completed utilizing the following form: **All information requested is required.**

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. Please put an asterisk by any project references involving buildings similar to the building(s) described in the technical appendices.

Information for each of the Annual Savings listed MUST be completed using the format provided. DO NOT provide energy savings in terms of BTUs or dollars. Data should be given in the form of fuel units that appear in the utility bills.

A sample ESCO Project History and Client Reference Form follows.

**ESCO PROJECT HISTORY AND CLIENT REFERENCE FORM  
(ATTACHMENT A—1.7)  
COMMONWEALTH OF PENNSYLVANIA  
GUARANTEED ENERGY SAVINGS CONTRACT**

<b>Project History</b>	
Project Name and Location	
Type of Facility(s) and Use; Number of Buildings; Total Square Footage	
Number and Types of ECMs. Indicate the method of Measurement and Verification used for each ECM. IPMVP Option letters (A, B, C, and D) should be used.	
Project Dollar Amount (installed project costs)	
Financed Project Cost	
Source of Project Financing	
Construction Start and End Dates	
Guarantee Period Start & End Dates	
Indicate if the project was completed on schedule. If not, please explain.	
Dollar Value of <b>Projected</b> Annual Energy Savings	
Dollar Value of <b>Guaranteed</b> Annual Energy Savings	
Indicate the total percent of stipulated savings.	
Dollar Value and Type of Annual Operational Cost Savings, if applicable (e.g., outside maintenance contracts, material savings, etc.).	
Identify all ESCO personnel associated with this project and their specific role(s) and responsibility(s). Limit the identification of personnel to those who will be assigned to this project.	
Provide current and accurate telephone and fax numbers and email address 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.	

**PROJECT HISTORY SAVINGS FORM**

<b>Project Name, Location</b>							
<b>Performance Information</b>							
<b>Annual Savings</b> (List Commodity Savings in Units – not Dollars)	<b>Projected</b>	<b>Guaranteed</b>	<b>Achieved</b>				
			<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>
Electric Demand (KW)							
Electric Energy (KWH)							
Natural Gas							
Fuel Oil							
Steam							
Water							
Other (Specify)							
Other (Specify)							
Material (\$)							
Maintenance Contracts (\$)							
<b>Total Annual Savings (\$)</b>							
<b>ESCO Notes or Comments</b>							

## ATTACHMENT A

### Technical Facility Profile Wattsburg Area School District Erie, PA

#### OVERVIEW

For the purposes of this RFP, the project scope will be limited to the following buildings:

Seneca High School and Wattsburg Area Elementary Center

Building Details are as follows:

Seneca High School – 138,000 square feet. Last major renovation was 2005; fully air conditioned, hot water heating system, mixture of fluorescent and LED lighting, hot water boilers and tank storage for domestic hot water. Annual energy use: 1,110,500 kwh electric; 53,380 ccf natural gas.

Wattsburg Area Elementary Center – 96,000 square feet. Constructed in 1996. Ground source heat pump heating and cooling (heat pumps replaced in 2021), mix of fluorescent and LED lighting, standard hot water tanks for domestic hot water. Annual energy use: 843,000 kwh electric; 2,953 ccf natural gas.

**For the purposes of this RFP, Energy Conservation Measures must include the following:**

- Windows as specified at the Elementary Center
- Domestic Hot water boilers, tanks, circulators, mixing valve replacements at both schools

Note: The selected ESCO shall obtain at least 3 quotes for all work to be performed prior to final project approval by the district. The quotes shall be provided to the district at the time of final project submission.