School Building Authority of West Virginia

SBA REQUEST FOR PROPOSALS (RFP) TEMPLATE

FOR ENERGY SAVIGNS PERFORMANCE CONTRACT PROJECTS

**SBA FORM 210**

**\_\_\_\_\_\_\_\_\_\_ COUNTY BOARD OF EDUCATION**

NOTICE TO PERFORMANCE COMPANIES

GENERAL INFORMATION AND REQUEST FOR PROPOSALS FOR

(*Insert scope – ex:* AN ENERGY EFFICIENCY AND HVAC SYSTEM IMPROVEMENT PROJECT)

The \_\_\_\_\_\_\_\_County Board of Education is issuing this Request for Proposals (RFP) for the selection of an energy services company (ESCO) to implement a \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ project. The proposals shall consist of qualifications, experience, financial proposal and staffing plan.

A copy of the complete RFP will be available for pick up at the \_\_\_\_\_\_\_\_ County Board of Education Office at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ or by emailing \_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

ESCO’s that are interested in being considered must submit a Proposal in response to this RFP on or before \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

The County will conduct a mandatory pre-proposal conference and walk-through inspection tour of the facilities included in this RFP on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_. The pre-proposal conference will be held first at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, with the walk through to begin immediately thereafter. County officials and project consultants will be present to answer questions regarding the RFP and the project. Contractors interested in attending the conference must contact \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ no later than \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. **Proposals will be accepted only from contractors represented at the pre-proposal conference.** Following the conference, arrangements can be made by contact the person named above to make an additional site visit(s) for the purpose of gathering additional information.

The successful ESCO will be determined solely from the Proposals. However, the County Board of Education reserves the right to interview all of the candidates if so chooses.

An original and two copies of the proposal are required. To prevent opening by unauthorized individuals, your submittal should be identified on the envelope as follows:

 **PROPOSAL ENCLOSED**

 **TIMED MATERIAL**

 Performance Services Project

The proposal shall be addressed to:

 Contact Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 County Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 City, State, Zip: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The County Board of Education reserves the right to amend the RFP based on questions and issues raised during the conduct of this solicitation.

**\_\_\_\_\_\_\_\_\_\_ COUNTY BOARD OF EDUCATION**

PROPOSAL INSTRUCTIONS AND CONDITIONS

REQUEST FOR PROPOSALS FOR A PERFORMANCE SERVICES PROJECT

**I. INTRODUCTION AND BACKGROUND**

The objective of this Request for Proposals (RFP) is to solicit proposals for a performance project to assist the County Board of Education in making \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

The County Board of Education wishes to implement the proposed energy project on an energy performance contract basis per the conditions as listed in West Virginia Code §5A-3B-1 et seq. and the SBA Policy & Procedures Handbook – Section 210.

The County Board of Education will only consider performance contract proposals based on a guaranteed savings agreement, i.e. savings and/or guarantee payments will equal or exceed the cost of the lease payments or debt service, plus any cash infusion to the project by the board or other funding sources. It is expected that savings and/or guarantees provided by the ESCO selected pursuant to this RFP will fully offset the project costs involved for the County Board of Education.

*(If financing is arranged as a part of the ESCO scope of services and not an independent financing consultant, include the following paragraph.)*

Proposers should propose arrangements for acquisition, financing, and ownership of equipment to be installed as part of this project that responsibly maximize the net economic benefit to the CountyBoard of Education or reduce the risk to the County Board of Education.

**II. GENERAL INFORMATION**

The qualifications, experience, financial terms and staffing plan (of ESCO’s proposing to implement this comprehensive performance services projects for the County on a performance contracting basis) will be evaluated and ranked. Written questions will be received by the County until \_\_\_\_\_\_\_\_\_ at \_\_\_\_\_ PM. Questions shall ONLY be submitted to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ via email at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**The ESCO selected, as a result of this RFP, will be expected to:**

A. Provide comprehensive performance services, including but not limited to:

 1. The performance of an investment-quality Comprehensive Energy Performance Audit.

 2. The design and specification of the proposed equipment and systems.

 3. Services associated with the procurement, installation, and commissioning of new equipment and systems.

 4. Preventive and emergency maintenance and servicing of the equipment installed.

 5. Staff training.

 6. Services in connection with the arrangement of program financing or by working with the County’s independent financing consultant on the program financing.

 7. Savings/revenue enhancements performance guarantees.

 8. The ESCO must work cooperatively with the County Board of Education staff and consultant(s) in coordinating this project.

 9. Financial incentives and rate reductions available from companies supplying fuel oil, natural gas, electricity, or transmission and associated distribution services.

B. Identify measures that can be taken to reduce operating costs for all activities and energy sources including natural gas and electricity and to reduce consumption for heating, cooling, ventilation, refrigeration, lighting, water heating, and other systems in each facility. Measures may involve controlling, modifying, adding, or replacing equipment and systems.

C. The proposed contract resulting from the Comprehensive Energy Performance Audit shall include a table of the identified measures that clearly lists the costs and benefits of each measure to allow the County Board of Education to select the group of measures to be included in the final contract.

D. Structure the terms of the County Board of Education’s obligation to pay for the services provided on a performance-contracting basis. The savings and/or guarantees provided by the ESCO selected pursuant to the RFP will fully offset the project costs involved for the County Board of Education.

**III. THE SELECTION PROCESS**

 **A. Timetable**

The County expects to undertake the selection process according to the following schedule:

* Deadline for receipt of written questions: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Proposal Submission with a sample Audit: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* ESCO interviews (at the BOE’s discretion): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* ESCO selection: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 **B. Proposal Evaluation Criteria**

Upon review of proposals received in response to this RFP, the owner expects to select a single ESCO to provide comprehensive energy services as outlined in Section II above. If a viable project is identified following the Comprehensive Energy Performance Audit, the ESCO and the County Board of Education will then negotiate an energy performance contract to provide for the implementation of the proposed project.

**Proposals will be evaluated and scored on the basis of the following criteria:**

1. Qualifications and Project Experience Rating (Maximum 25 points with Interview)

 (Proposal Section 1 & Section 2) (Max. 20 points with No Interview)

Points will be awarded based on demonstrated experience with similar guaranteed energy performance contracting projects as reported in the Statement of Qualifications and Experience and responses from project references. Experience with similar projects will be understood to include development of performance contracts to furnish performance services in facilities similar to facilities in this project.

Only experience where the energy services company (ESCO) provided an energy savings guarantee will be viewed as applicable. Experience as a first-tier subcontractor or sub-consultant to an ESCO will not be viewed as relevant. Also, experience as a Design-Build contractor that did not include an energy savings guarantee will not be considered relevant. Engineering design experience on a project that was not included in a guaranteed energy savings performance contract shall not be given full consideration.

All references must be for the “responding ESCO” operating under its existing name and must be for the “responding ESCO” as a company. References will not be for an individual person, but for the Company as a whole.

ESCO must be accredited as an Energy Services Company by the National Association of Energy Service Companies (NAESCO) and be qualified by the U.S. Department of Energy as an Energy Service Company.

2. Staffing Plan (Maximum 15 points)

 (Proposal Section 3)

Points will be awarded based on qualifications of proposed number of licensed and certified professionals (Professional Engineers, LEED Accredited Professionals, etc.), not including unrelated subcontractors, documented technical and project administration skills, licensure, certification and experience of the proposed project team. Only those individuals proposed to work directly on the subject project should be included in the Staffing Plan. Consistency of staff in the example projects and the proposed team should be ranked higher.

**NOTE: ESCOs that intend to self-perform the installation services must full disclose this intent. Note well that ESCO’s that intend to self-perform installation services must also obtain pricing from up to four companies for the supply and installation of the proposed equipment. The County must be assured that they are receiving “fair market” pricing for all equipment and installation. Opinions of cost or estimates from third party companies will not be considered an adequate substitute for the above described pricing process. The ESCO will have the option to self-perform the work for the price of the lowest price obtained or to hire the contractor with the lowest price as a subcontractor.**

3. Technical Approach (Maximum 20 points)

 (Proposal Section 4)

Points will be awarded based on the quality and comprehensiveness of the technical approach, sample Comprehensive Energy Performance Audit, description of the energy baseline methodology, and the approach to project management and subcontractor selection process.

4. Financial Terms (Maximum 30 points)

 (Proposal Section 5)

The County Board of Education is interested in selecting an ESCO that conducts business with a philosophy of full disclosure of all project costs. Construction mark-up will be the primary factor evaluated for the value brought to the CountyBoard of Education by the proposed approach to project implementation. Consideration will be given to proposals that responsibly maximize the net economic benefit to the CountyBoard of Education over the term of the energy services agreement, and that responsibly minimize the risk to the County Board of Education in connection with the proposed transaction.

Factors that will be considered for purposes of providing the greatest net benefit to the County Board of Education include:

* Construction mark-up per the Projected Implementations Costs form included in Section 5 of the proposal;
* The approach to project financing or the ability to work with the district’s placement agent / municipal advisor;
* The approach to procuring equipment, material and installation labor.

*(If financing is arranged as a part of the ESCO scope of services and not an independent financing consultant, include the following sentence.)*

Additionally, if alternative financing is proposed, the proposer’s sources of financing and purchase option terms (both during the term of and at the end of the performance services agreement) will be considered.

5. Proposed Project Schedule (Maximum 5 points)

 (Proposal Section 6)

Proposals will be evaluated on the reasonableness, clear presentation, length and detail of the proposed project schedule. The proposal should include descriptions of how the proposer intends to achieve the project schedule.

6. Official Statement of the Proposer (Maximum 5 points)

 (Proposal Section 7)

7. Interview (Option Reserved by the BOE) (Maximum 5 points)

*Note: If the BOE does not desire to interview the ESCO, the 5 maximum points for this category shall be reassigned to the Qualifications and Project Experience Rating category.*

Interviews will be held with up to three top ranked ESCO-s to obtain clarification of issues raised by earlier stages of the evaluation process, and to assess the qualifications of the project team and its ability to implement all tasks and responsibilities in a prompt and efficient manner. Scores assigned for proposals, under any category, may be amended based on information obtained during the oral interviews. The proposed project team should be made available during the oral interview to discuss their individual experience, as well as their specific role in this project.

 **C. Final ESCO Selection**

The proposal with the highest combined total of awarded points from all members of the review team will ultimately determine the ESCO to be selected to implement the project. The total maximum points per reviewer shall be 100. The selection team’s score sheets shall be made public upon request.

The County Board of Education reserves the right to implement the project in multiple phases and award future phases to the ESCO selected via this RFP.

**IV. RFP PROCEDURES**

 **A. Point of Contact**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Email Address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**B. Submission of Proposal/Sample CEA**

Respondent must submit an original and two (2) copies of their Proposal.

 **C. Modification or Withdrawal of Proposals**

Any proposal may be withdrawn or modified by written request of the proposer, provided such request is received by the County Board of Education at the above address prior to the date and time set for receipt of proposals.

 **D. Right to Reject Proposals**

This RFP does not commit the County Board of Education to award a contract, pay any cost incurred in the preparation of a proposal in response to this RFP, or procure or contract for services. The County Board of Education intends to award a contract on the basis of the best interest of and advantage to the County and reserves the right to accept or reject any or all proposals received as a result of this request. The County Board of Education reserves the right to negotiate with all qualified proposers, or to cancel this RFP in part or in its entirety, if it is in the best interest of the County to do so.

**V. REQURIED PROPOSAL CONTENTS**

Proposals must be submitted in the format outlined in this section. The County Board of Education reserves the right to eliminate from further consideration any statements deemed to be substantially or materially non-responsive to the requests for information contained herein.

**Section 1 – Statement of Qualifications**

Proposer must include the following elements in response to this RFP:

* Names, titles, and email address of two people authorized to represent the firm on this project, and answer any questions presented by the County.
* Quantity and type of licensed and/or certified professionals in office that will support this project.
* Provide certificate stating that ESCO is accredited as an Energy Service Company by the National Association of Energy Service Companies (NAESCO).
* Provide supporting documentation stating that the ESCO is qualified as an Energy Service Company by the U.S. Department of Energy.

**Section 2 – Project Experience**

Proposer must describe three projects that best exemplify the range of ESCO performance contracting services for a project similar to this one. Projects where the ESCO did not provide an energy saving guarantee directly with the Owner are not considered relevant experience and should not be included. Each project description (not to exceed 2 pages) should include:

* Name and telephone number of references for the project. (County presumes permission to contact.)
* Total contract cost.
* Brief description of the project’s scope of services and status. (Include type of facility at which project was implemented, whether the project was completed on the original schedule and whether significant problems occurred that affected project performance. As appropriate, identify all prime contractors or subcontractors and their role in each project.) This section should be used to demonstrate the firm’s experience in completing a project using the technologies relevant to the County’s facilities.
* Energy use and costs prior to project implementation.
* Annual guaranteed savings and annual actual savings achieved.

**Section 3 – Staffing Plan**

This section should include a complete description of the individual experience and qualifications of the proposed project staff. The staffing plan should include name, title, experience and relevant duties of each individual active in this specific project. No credit will be granted during the evaluation process for the experience of anyone who will not be directly involved in implementing this project. Provide an organizational chart.

In addition, any subcontractors the ESCO intends to use for the project shall be identified and their role(s) described. Provide subcontractor’s name, address, contact person, phone number and relevant experience. Examples of subcontractors that shall be identified include but are not be limited to:

* Firm to provide the Comprehensive Energy Performance Audit
* Architectural/engineering firm that will be responsible for project design
* Construction manager
* Construction contractors
* Hazardous material consultants and contractors

**Section 4 – Technical Capability**

In a Section to be labeled **Section 4-1**, the proposal must explain the approach your organization will take in delivering the comprehensive technical services required to audit, design, install, commission and maintain the proposed energy efficiency improvements. Describe the process to be followed in selecting and managing subcontractors. A Comprehensive Energy Performance Audit and design/specification documents are not required at this time.

In a Section to be labeled **Section 4-2**, describe the Comprehensive Energy Performance Audit that will be conducted for this project **after selection of an ESCO on the basis of this RFP**. Your proposal must include information on the systems to be covered and the general method to be used. Provide, as an attachment, an abridged copy of the Comprehensive Energy Performance Audit developed for one of the three example projects listed above. The example audit provided should be similar to the Comprehensive Energy Performance Audit anticipated for this project.

A proposal audit is not requested or required at this time.

In a Section to be labeled **Section 4-3**, describe in detail the method you will use to compute the baseline. Attach a sample computation from a previous project done by your firm, with full documentation of methods, assumptions and input data.

**Section 5 – Financial Terms**

The County Board of Education seeks to structure the project such that payments to finance the total project cost plus payments for ongoing incremental project maintenance and M&V services will be paid in full by the value of measured savings and/or revenue enhancements resulting from the project. The following terms are established as a baseline for the ESCO submission and shall be used in the proposed cash flow:

Maximum Term: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Interest Rate on Lease Purchase: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Escalation Rates (Utilities, O&M, Capital Avoidance, M&V): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The County Board of Education shall participate in the competitive bidding and selection of all construction contractors. Construction bids will be reviewed with the County Board of Education Staff and Contractor selection will be jointly determined between the ESCO and the CountyBoard of Education. The County BOE Staff shall approve the bid documents and any subsequent addenda required prior to release. If School Building Authority funds are awarded as a part of this project, the SBA shall approve the construction bid documents prior to releasing the project to bid, and all bid dates must be coordinated through the SBA staff. If the proposer is intending to provide a portion or all of the construction utilizing their own personnel, the process by which the assurance of a competitive construction cost will be insured shall be described in detail. None of the ESCO’s expenses and/or overheads shall be included in any way as part of the construction bids including subcontracting of typical ESCO project development activities. A signed certification statement shall be required from the ESCO stating this is true. Refer to Section 7 – Official Statement of Proposer.

For the purpose of calculating the construction mark-up percentages below, the unburdened construction cost shall be defined as the value of the final construction cost paid for facility improvements without any additional mark-up by the ESCO. Construction shall be defined as the cost of the facility improvement work and shall not include any of the activities listed on the Project Implementation Costs form in Appendix A. If the ESCO intends to use their own labor and/or materials, the unburdened construction cost shall be market price for those services.

Detailed financial information required in this Section includes the following estimated costs that are based on the information provided in this RFP. This information shall be provided using the Project Implementation Costs form in Appendix A.

Note: The County Board of Education will not pay for any additional costs above the unburdened construction cost that are not identified in the proposal. Refer to Section 7 – Official Statement of Proposer. The ESCO shall be required to include cost of the County personnel performing construction inspection activities as a reimbursable cost in the final contract. These inspections costs are not to be included in the above overhead costs or the construction cost. The cost of County inspectors shall be defined during the Comprehensive Energy Performance Audit.

**Section 6 – Proposed Project Schedule** The proposer must provide a complete schedule for achievement of all major project milestones including but not limited to:

* Commencement and completion of Comprehensive Energy Performance Audit
* Design phase including design and specification documents
* Subcontractor pricing and selection
* Preparation and execution of final performance contract documents
* Obtaining all required permits and School Building Authority approvals (if applicable)
* Procurement of all major equipment
* Construction phase including construction kickoff and construction completion, startup and commissioning
* Training of facility personnel
* Commencement of normal operations

**Section 7 – Official Statement of Proposer**

The proposer must check the box, sign and include this statement. Statement must be signed by an individual authorized to bind the respondent.

1. \_\_ The proposer shall include a statement to the effect that the proposal is a firm offer for a minimum 120-day period. The proposal shall also provide the: name, title, address, and telephone number of individual(s) with authority to negotiate and contractually bind the company and, also who may be contacted during the period of proposal evaluation.

 Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. \_\_ The ESCO accepts, and intents to comply with, the appropriate sections of the law and applicable regulations that address performance contracting.
2. \_\_ The ESCO hereby agrees to transparently disclose the unburdened construction cost as defined in Note 1 of the attached Project Implementation Cost Form with each of the ESCO’s pay applications. To document this obligation, the ESCO shall provide actual signed subcontractor invoices (as backup) with each ESCO invoice.
3. \_\_ This signed statement shall assure to the Owner that the only compensation that will be paid to the ESCO, will come from the ESCO costs included on the attached Project Implementation Cost Form. The Owner will not pay any ESCO fees, expenses, overheads, or profits in addition to those included on the Project Implementation Costs form attached.
4. \_\_ The ESCO shall include this statement acknowledging that some (or all) construction will be required to take place on other than first shift (to ensure that facility schedules will not be interrupted by construction activities) and that additional costs incurred by either the Owner, the contractor, or both shall be included in the project costs.
5. \_\_ The Owner must be assured that they are receiving “fair market” pricing for all equipment and installation. The ESCO agrees to obtain pricing from up to four companies for the supply and installation of the proposed equipment. ESCO’s that attend to self-perform the installation services must fully disclose this intent and must include certified payroll.

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ certify that the above information is true and accurate.

 *(print name and title)*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*Authorized Signature Date*

**RFP FOR ENERGY SAVIGNS PERFORMANCE CONTRACT PROJECTS**

**APPENDIX A**

PROPOSAL FORMS

\_\_\_\_\_\_\_\_\_\_\_\_ County Board of Education – Project Implementation Costs

**Comprehensive Energy Performance Audit** Total Cost $ \_\_\_\_\_\_\_\_\_\_\_\_

OR $\_\_\_\_\_\_\_\_ per square feet

$1,000,000 Greater than

**Unburdened Construction Cost (Note 1)** $3,000,000 $3,000,000

**Construction Mark-up (Note 2)**

(as a % of total unburdened construction cost)

Program Management and Planning \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

Design and Specifications (Engineer or Record) \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

Administration \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

Cost of Risk \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

Construction Management & ESCO General Conditions \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

Hazardous Waste Administration \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

Commissioning \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

Training \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

Profit \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

Corporate Overhead \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

Other \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

 Total \_\_\_\_\_\_\_\_\_\_% \_\_\_\_\_\_\_\_\_\_%

**Ongoing Project Management Costs**

Annual Service/Maintenance Agreement Cost $\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_

Annual Energy Savings Measurement & Verification $\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_

Other Service fee $\_\_\_\_\_\_\_\_\_\_ $\_\_\_\_\_\_\_\_\_\_

**Note 1.** The unburdened construction cost shall be defined as the value of the actual construction cost paid by the ESCO to its subcontractor(s) for the supply and installation of energy conservation measures without any additional markups by the ESCO. The markups listed above shall not be included in the value of the unburdened construction cost.

**Note 2.** The markups listed above shall be the only cost that will be allowed to be added by the ESCO in the unburdened construction cost. The total project cost will be the addition of the unburdened construction cost and the value of the above listed markups. Proposer must include the signed affidavit as required in the RFP.

**RFP FOR ENERGY SAVIGNS PERFORMANCE CONTRACT PROJECTS**

**APPENDIX B**

SCORING MATRIX

\_\_\_\_\_\_\_\_\_\_\_\_ County Board of Education

Instructions: This is to be filled out by the County Board of Education after the Evaluation and Interview (when applicable) of the proposing companies.

County: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Project: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Firm: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_ Rater: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |
| --- | --- | --- | --- |
| **CRITERION**  | **Remarks** | **Points Possible** | **Points Awarded** |
| **1. Qualifications and Project Experience Rating** |  | 20 |  |
| **2. Staffing Plan** |  | 15 |  |
| **3. Technical Approach** |  | 20 |  |
| **4. Financial Terms** |  | 30 |  |
| **5. Proposed Project Schedule** |  | 5 |  |
| **6. Official Statement of Proposer** |  | 5 |  |
| **7. Interview** (Optional, if no interview, Section 1 moves to 25 Points Possible) |  | 5 |  |
| **Grand Total:** (Minimum Score of 70 Required to be Considered) | 100 |  |

Comments:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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