



August 24, 2021

REQUEST FOR QUALIFICATION

RFQ – 8-21

Energy Performance Contracting Services

For the
School Administrative Unit #106
Timberlane Regional School District
30 Greenough Rd,
Plaistow, NH 03865

The School Administrative Unit (SAU) 106/Timberlane Regional School District is seeking qualifications from interested Energy Service Companies (ESCOs) for assistance with planning and executing District-wide energy performance upgrade projects, renovations, and upgrades. These projects will include but not be limited to: Heating, Ventilation, Air Conditioning (HVAC) repairs/replacement, indoor air quality (IAQ) improvements, building envelope repairs/replacements (i.e., roofs, siding, windows, and doors), and electrical system upgrades. We are seeking to contract with an ESCO to conduct an audit of our facilities and systems, make recommendations for improvements and upgrades for all District facilities, provide oversight and execution of upgrade projects, and provide energy savings guarantees. The projects are contingent upon the District's receipt of Federal and/or State funds.

The Timberlane School Board reserves the right to accept or reject any or all submissions, wholly or in part, to negotiate with any or all responsible submitters, and to waive any formality or irregularity in the Request for Qualification, to call for new submissions, to negotiate with any company providing a submission, to enter into an agreement with the ESCO, and to accept the qualification package that the SAU 106/Timberlane Regional School District, in its sole discretion determines is in the best interests of the SAU 106/Timberlane Regional School District. Submitters shall be responsible for any and all expenses that they may incur in preparing qualifications.

A mandatory site visit has been scheduled on Wednesday September 1, 2021 at 9 A.M. starting at Timberlane Regional School District, SAU-106 Administrative Building, 30 Greenough Road, Plaistow, NH 03865. After the Administrative Building is toured, there will be visits to the High School Performing Arts Center and Middle School all on Greenough Rd.. After visiting the Middle School, there will be a visit to The Pollard School, 120 Main Street, Plaistow, 03865, Atkinson Academy, 17 Academy Ave, Atkinson, 03811, Danville Elementary, 23 School Street Danville, 03819, Sandown Central School, 295 Main Street, Sandown, 03873, and Sandown North School, 23 Stagecoach Rd. Sandown, NH 03873

All RFQs (**5 copies and 1 PDF File**) must be submitted in a **sealed envelope, plainly marked:**

**SAU 106/Timberlane Regional School District Request for Qualification
ENERGY PERFORMANCE CONTRACTING SERVICES FOR
THE TIMBERLANE REGIONAL SCHOOL DISTRICT
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**"Sealed RFQ – 8-21 –Energy Performance Contracting Services for the
Timberlane School District"**

Karl Ingoldsby, Director of Plant Operations
SAU 106/Timberlane Regional School District
30 Greenough Rd
Plaistow, NH 03865

**All qualification packages must be received no later than Tuesday, September 28, 2021 at
12:30 P.M.
(No e-mailed or faxed submissions will be accepted)**

All qualification packages submitted are governmental records subject to disclosure under the Right-to-Know Law. The District will not accept qualification packages marked confidential in whole or in part.

I. GENERAL INFORMATION

- A. Timberlane Regional School District/SAU 106 consists of 9 buildings located in Plaistow, Atkinson, Danville, and Sandown, New Hampshire: Timberlane Regional High School, Performing Arts Center, Timberlane Regional Middle School, Pollard Elementary, and SAU 106 Administrative Building and Athletic Fields, in Plaistow, NH, Sandown Central School and Sandown North School in Sandown, NH, Atkinson Academy in Atkinson NH, and Danville Elementary in Danville, NH.
- B. Some of the school buildings have recently been upgraded to LED lighting. Additionally, some HVAC unit and system replacements at the schools have occurred within the last few years. However, many opportunities to improve each school's energy efficiency remain. The SAU office has not had any recent energy efficiency projects.

II. SCOPE OF WORK/SUMMARY OF SERVICES DESIRED

- A. Pre-Construction Services to include:
 - i. The completion of an investment grade energy audit of all buildings by December 1, 2021.
 - ii. Provide the District with a full detailed report to determine the scope of needed energy efficiency and building upgrades to improve the health and safety of students and staff as well as to improve energy efficiency and operation of building systems throughout the District.
 - iii. Cost estimates for identified energy efficiency upgrades, HVAC upgrades, building upgrades, and renovations to assist the District with current and future planning.
 - iv. Provide input and guidance in developing an overall project schedule including a realistic schedule of milestones for the construction phase leading to re-occupancy of the school buildings as agreed upon by District officials.

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- v. Develop a plan to include the Districts needs identified in the energy audit, the districts Capital Improvement Plan and to address the HVAC needs. The District would expect a prioritized list of all equipment and their conditions.

B. Construction Phase Services to include:

Work with District officials to plan and execute energy efficiency upgrade projects as needed. The District anticipates that upgrade projects as needed in the following areas:

- i. ventilation improvements to meet or exceed ASHRAE recommendations,
- ii. air quality and filtration to meet or exceed ASHRAE recommendations,
- iii. air duct cleaning,
- iv. air conditioning and heating systems upgrades,
- v. installation of HVAC controls to promote effective use and management,
- vi. electrical systems upgrades,
- vii. building envelope upgrades such as roof, window, and replacements,
- viii. solar panels, other renewable energy opportunities should such projects be desired,
and
- ix. any improvements related to the installation of new energy efficiency upgrade equipment.

Provide the District a guaranteed maximum price for all design, construction, maintenance, and measurement and verification services.

Help with Securing ESSER funding.

Obtain all required permits and government approvals.

The guaranteed energy savings contract shall include a written guarantee of the qualified provider that either the amount of energy savings guaranteed will be achieved or the qualified provider shall reimburse the public agency for the shortfall amount. Methods for measurement and verification of guaranteed savings shall conform to the most recent standards established by the Federal Energy Management Program of the U.S. Department of Energy. The value of guaranteed savings may represent either all, or part, of annual payments at the discretion of the agency. The guaranteed energy savings contract term for providing a guarantee, measurement and verification, maintenance, service and installment or lease payments shall not exceed twenty (20) years. The guarantee shall be a first-party direct guarantee from the performance contractor to the SAU. No third-party guarantee shall be accepted. All savings in excess of the guaranteed savings shall be the sole property of SAU.

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- C. **It is anticipated that federal funding designated for public schools in response to the COVID 19 health pandemic and re-opening schools safely will be available to allow the District to begin to address the highest need ventilation and air quality projects in summer 2022. The projects will likely include:**
- i. HVAC upgrades at all district schools to increase indoor air quality.
 - ii. In addition to the above, it is the hope of the District to move forward with HVAC upgrades to replace any units approaching their end of life expectancy with newer, energy efficient and healthier equipment.
 - iii. Window Improvements and other building envelope improvements.
 - iv. Upgrades to parking and traffic flow.
 - v. Solar installations where it may be feasible and prudent.
- D. The Timberlane Regional School District/SAU106 may alter or amend this Scope of Work at its sole discretion prior to executing a contract with the ESCO selected. Once a contract is executed, the Scope of Work may be amended by mutual agreement in accordance with the contract documents.
- E. Contract Audits – The selected ESCO agrees that the United States Federal and State Governmental Agencies and the Timberlane Regional School Board have the right to review, obtain, and copy all records pertaining to performance of the contract. The ESCO agrees to provide the United States Federal and State Governmental Agencies and the Timberlane Regional School Board with any relevant information requested and shall permit the State and the Timberlane Regional School Board access to its premises upon reasonable notice for purposes of interviewing employees and inspecting records. The ESCO shall maintain records for a period of at least eight years after final payment under the contract.

III. ESCO Qualifications

Interested ESCO Contractors should submit qualifications in accordance with the following:

- A. Demonstrated expertise/experience in assessment, development, funding, and implementation of “turnkey” performance based contracting projects incorporating energy savings measures with annual guarantees that such energy savings measures will meet specified performance criteria consistent with International Performance Measurement and Verification Protocol (IPMVP) Options A-D.
- B. Demonstrated expertise/experience in assessment, engineering, design, installation, and maintenance of energy savings and building improvement projects.
- C. Demonstrated expertise/experience in obtaining third party funding opportunities.

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- D. Demonstrated expertise/experience in working in conjunction with multiple, simultaneous, and consecutive contracts and contractors in an occupied school facility.
- E. Professional references of individuals and firms that the ESCO will assign to this project.
- F. Provide fee structure including:
 - I. Pre-Construction Services as defined in Section II A
 - II. Construction Phase Services as defined in Section II B
 - III. Mark up structure using open book pricing
- G. Provide performance based contracting project client references for contact by the District. Include data from referenced projects including:
 - i. Client contact information
 - ii. Project size, scope, and schedule
 - iii. Post-construction savings summary referencing IPMVP Measurement & Verification protocols compared with Pre-construction projections

IV. Items for Inclusion in Qualification Package

All submitted qualification packages shall address the following items in the order listed below and shall be numbered 1 through 12 in the document package:

- 1) Interest Statement – Briefly describe the particular interest your firm has in the project.
- 2) Description of Firm – Provide the District information regarding the size, location, nature of work performed, years in business, and approach that will be used in meeting the needs of the District. The principals of the firm should be identified.
- 3) Experience Relative to District Needs – Provide a detailed summary of the firm’s experience in energy services and performance contracting of educational facilities. Provide the following information for each project in “table” format:

PROJECT NAME AND LOCATION (List all NH projects)	OWNER’S NAME, ADDRESS, CONTACT PERSON & TELEPHONE NUMBER	AWARD DATE & COMPLETION DATE	PROJECT COST	TOTAL AMOUNT OF ALL CHANGE ORDERS

- 4) Background of Energy Services Company Personnel – Identify all personnel who will be

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participating in the project and provide a brief resume of the pertinent experience of all personnel. (Projector Manager, Superintendent, Auditor and Estimator) Designate who will be the primary contact with the Timberlane Regional School Board. The submission of names shall be a commitment on the part of the firm to retain stated personnel on the project throughout its duration.

- 5) Experience with State Funded/Federal Funded School Construction – The new project will be partially funded by the State of New Hampshire and the United States Government. Describe the firm’s experience in State and Federal funded public-school projects. Identify any projects that have gone over the approved amount and explain the reason.
- 6) Costs for Pre-Construction and Construction Phase Services as described in the Scope of Work/Summary of Services Desires in Section II.
- 7) Davis Bacon Wages shall be in effect for the ESSER funded portion of this project and all laws Relating to the Davis Bacon Act Shall Be Followed. Please explain how you plan to address the Davis Bacon laws.
- 8) Project Plan and Methodology – Briefly describe the process the firm would use as an ESCO to insure that the needs of the Timberlane Regional School Board will be satisfied and that construction will be completed in a cost effective and timely manner. Use this section to address the ability of the firm to undertake the construction project keeping in mind the other workload of the firm.
- 9) Financial Statement – A certified or authenticated financial statement dated at least since the end of the last fiscal year may be required if a firm is selected.
- 10) Litigation – Please describe whether your firm is presently involved in, or has been involved in, any litigation, arbitration, mediation, disciplinary actions, or administrative proceedings.
- 11) References – List references including contact information (a minimum of five) public school contacts.
- 12) Other – Each firm is encouraged to provide any additional information or description of resources the firm feels is pertinent to this Request for Qualification. The inclusion of a brochure is acceptable.
- 13) Please provide information on any schools you have worked on and describe any challenges you may have encountered.
- 14) Provide preliminary schedule.
- 15) Before entering into a guaranteed energy savings contract, the SAU shall require the qualified provider to file with the public agency a payment or a performance bond relating to the installation of energy savings measures, in an amount equal to 100 per cent of the estimated contract value from a surety company licensed to do business in the State of

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NH. The successful respondent shall procure and maintain in effect during the life of the agreement commercial general liability insurance in amount not less than \$5,000,000 for each occurrence, comprehensive automotive liability insurance in amount not less than \$5,000,000, and workers compensation insurance. Evidence of required insurance shall be presented prior to contract execution. Insurance coverage shall not be canceled without thirty (30) days prior written notification to the SAU.

V. SELECTION PROCESS

The process that will be used by the Timberlane Regional School Board in selecting the ESCO to perform services as outlined in this RFQ will be as follows:

- A. The Timberlane Regional School Board will select firms to be interviewed based on responses to this RFQ. After interviews, the Timberlane Regional School Board will select one ESCO. The selection of the ESCO is conditioned upon the firm signing a contract acceptable to the Timberlane Regional School Board within thirty (30) days of its selection. If the firm does not sign the contract within thirty (30) days of its selection, the Timberlane Regional School Board may withdraw its offer to the ESCO firm and select another ESCO.
- B. All designs, concepts, information, and cost analyses presented by the ESCO during the selection process shall become the property of the Timberlane Regional School District, and shall thereafter be used at its sole discretion. The District shall own all instruments of service.
- C. The District may at any time terminate the services and/or contract with firm at the District's convenience and without cause. In case of termination for the District's convenience, the firm shall be entitled to receive payment from the District limited to actual documented expenses as of the date of termination as its sole remedy. In no event will the District be responsible for lost profits, compensatory or other consequential damages.
- D. After execution of the contract, and upon sufficient development of the design, the ESCO shall prepare a guaranteed maximum price for the entire scope of the work and upon the District's acceptance of the guaranteed maximum price (GMP); it shall be added as an amendment to the contract. If the District does not accept the firm's GMP, the District may terminate the contract without any liability or damages to the ESCO.
- E. The Timberlane Regional School Board decision with regard to the selection of the ESCO shall be considered final. The Timberlane Regional School Board reserves the right to investigate the financial responsibility of any and all bidders to determine the ability of the ESCO to assure service throughout the term of the contract.

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VI. EVALUATION PROCESS

ESCOs submitting qualification packages are advised that all submittals will be evaluated to determine the “best” firm that will be able to meet the needs of the Timberlane Regional School District as determined by the School Board in its sole discretion. Evaluation will include, but not be limited to, the criteria listed below:

- A. Experience and expertise of the firm, particularly with public school construction in New Hampshire.
- B. Ability to meet the District’s schedule and budget.
- C. Project Plan/Methodology and a Statement of Interest as outlined in the qualification package.
- D. Completeness of the Qualification Package. **IN ORDER FOR A QUALIFICATION PACKAGE TO BE CONSIDERED, SAID PACKAGE MUST ADDRESS ITEMS OUTLINED IN THIS REQUEST FOR QUALIFICATION.**
- E. The oral interview and presentation: The Timberlane Regional School Board reserves the right to determine firms that will be requested to appear for oral interview and review and discussion regarding the firm’s fee structure for the project.
- F. References
- G. All personnel assigned to this project.
- H. The firm must have been contracted in the past five (5) years by a public school system in an ESCO capacity of similar size and nature.
- I. The firm must be able to show financial and managerial stability.
- J. Qualification Packages not meeting the above minimum submission criteria and requested information described in the Request for Qualification may be rejected.
- K. High performance green design and construction experience.
- L. Any and all other considerations that the Timberlane Regional School Board in its sole discretion determines are in the best interests of the project.

NOTE: Any omissions or errors in this RFQ are not binding on the Timberlane Regional School Board and/or District.

The District accepts no financial responsibility for costs incurred by any Energy Services Company responding to this request for qualification.

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VII. SUBMISSION REQUIREMENTS

Interested parties shall submit five (5) copies plus a PDF electronic file of their qualification package by **Tuesday, September 28, 2021 at 12:30 P.M.** to:

Karl Ingoldsby
Director of Plant Operations
30 Greenough Rd.
Plaistow, NH 03865
karl.ingoldsby@timberlane.net

The selection of a candidate does not obligate the District to enter into a contract provided however that any contract entered into between the District and a selected candidate shall be in a form entirely satisfactory to the District or its authorized agents.

The District reserves the right to request additional information from any candidate at the District's sole discretion.

VIII. SUBMITTAL INSTRUCTIONS

- A. Each organization submitting qualifications shall provide five (5) bound copies and one (1) digital copy (PDF) of the qualification package in a sealed envelope prominently marked with the Request for Qualification title, the due date and time, and the name of the organization submitting the qualifications.
- B. Qualification Packages submitted after **12:30 P.M. on Tuesday, September 28, 2021** will not be considered. Facsimile copies or emails of qualification packages will not be accepted.
- C. Qualification Packages shall be signed by an authorized individual or officer of the firm submitting the package.
- D. Qualification Packages may be withdrawn by the firm at any time prior to the closing date and time for receipt of package.

IX. SELECTION TIME LINE

- a. Deadline to submit qualification packages: 12:30 P.M., September 28, 2021
- b. Qualification Package Review and ESCO Selection: Expected no later than October 21, 2021