MOUNT CARMEL AREA SCHOOL DISTRICT

REQUEST FOR PROPOSAL
FOR A GUARANTEED ENERGY SAVINGS PERFORMANCE CONTRACT

IN ACCORDANCE WITH THE PROVISIONS OF PENNSYLVANIA ACTS 163, 57, 77 AND 39, TITLE 62

OCTOBER 21, 2024

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I. PURPOSE OF SOLICITATION

The intent of this Request for Proposal (RFP) is to solicit qualification proposals from Energy Services Providers (ESP). For the purpose of this RFP, "ESP" refers to any company that is qualified to provide a guaranteed energy savings performance contract in accordance with Pennsylvania Acts 163, 57, 77 And 39, Title 62. Responses to this RFP shall describe the ESP's capability to benchmark facilities, develop baseline performance data, identify energy efficiency measures, perform savings calculations, cost estimating, construction management, and all other services listed herein. Mount Carmel Area School District intends to select an ESP and award contract(s) to perform a guaranteed energy savings performance contract.

Please note that responses to this RFP must be received electronically on November 6, 2024 by 2:00 PM Local Prevailing Time to Mr. Peter Cheddar @ cheddarp@mca.k12.pa.us.

Mount Carmel Area School District reserves the right to reject any responses resulting from this RFP. Late responses will not be accepted and will be returned to the submitting company unopened. Mount Carmel Area School District is not liable for any cost incurred by any person or firm responding to this RFP.

Mount Carmel Area School District reserves the right to reject as non-responsive any proposals that do not contain the information requested in this RFP. Additionally, Mount Carmel Area School District reserves the right to reject as non-responsive any proposals which are not organized and formatted as described in this RFP. Mount Carmel Area School District also reserves the right to reject any and all proposals based on the funding received from the Pennsylvania Schools Facilities Improvement Grant.

Any and all questions regarding this RFP and the program it represents must be submitted in writing to:

Mr. Pete Cheddar, Superintendent
Email to: cheddarp@mca.k12.pa.us

All questions will be answered by email to all responders.

II. REQUESTED SERVICES

Mount Carmel Area School District proposes to address energy and utility conservation upgrades, indoor air quality improvements, and building system updates for some or all buildings in the district. For the purposes of flexibility for the District, the inclusive building list for this RFP is: Mount Carmel Elementary School, Mount Carmel [Area] Junior/Senior High School, Administration Building, sports facilities, and maintenance facilities. Other ancillary buildings owned by the district are hereby incorporated into this RFP. This project may be combined with other non-energy-related projects to be delivered by other project delivery methods, including hybrid project delivery methods. The fee requested for the Investment Grade Audit will be limited to a focused scope of buildings. Mount Carmel Area School District shall direct the selected ESP regarding buildings and systems to consider within any Investment Grade Audit or project.

The ESP will provide a comprehensive building energy audit including all aspects of energy efficiency being considered, accurate savings and cost estimates, and recommended measurement and verification methods. The audit shall include benchmarking of facilities, analysis of utility rates, on-site observations, data logging, energy modeling, energy efficiency measure development and analysis, energy savings calculations, recommendations, and measurement and verification methods. Mount Carmel Area School

District anticipates a reduction in annual utility costs through the implementation of the energy efficiency measures identified in the audit.

Respondents to this Request for Proposal (RFP) shall identify their experience and qualification to design and construct an energy conservation project and comprehensive facility renovation that involves energy efficiency measure (EEM) which address any of the following building components: lighting, space heating, ventilation, air conditioning, building envelope, direct digital controls and management systems, domestic water heating, air distribution systems, electrical systems and water consumption systems. Mount Carmel Area School District is also interested in the respondents' qualifications and experience related to facilities addition/renovation planning and construction management services, as well as the ability to manage/construct Architectural scopes of work, as allowable.

The ESP is responsible for all certification and documentation of personnel necessary to comply with the laws to perform work in the state of Pennsylvania.

This project may use funding from the Pennsylvania School Funding Improvement Grant (PSFIG). The project portions that use such funds shall be subject to appropriate wage rates and contract conditions applicable to the use of those funds.

The following is a description of the proposed priority project scopes that is requested to be funded in full or in part from PSFIG funds:

SUMMARY FROM GRANT
The Mount Carmel Area School District is proposing to utilize PSFIG funds to fund in whole or part the repair, upgrading, and maintenance of the elementary school building within the district including improvements to the heating, ventilating, and air-conditioning systems and upgrades/repairs/modifications to the building envelope, and related and impacted architectural work. Unit ventilators in the Mount Carmel Area Elementary School will be replaced with packaged air-to-air heat pumps including upgrades to the electrical infrastructure to accept the higher voltage equipment and related building automation system upgrades; architectural components (flooring, chases, millwork/casework, finishes) will also be addressed in the area of construction.

III. SELECTION PROCESS

Proposal Evaluation
Interested ESPs responding to this RFP must provide the information required. Mount Carmel Area School District will evaluate submittals and choose the most highly qualified ESP. Mount Carmel Area School District may require oral presentations of the responses by the most qualified responders as determined by Mount Carmel Area School District. The determination and selection of the most qualified ESP shall be the sole discretion of Mount Carmel Area School District.

Final Contract
Upon selection, the ESP will design and develop specific scopes of work to meet the District’s intent for this facility modernization project. The selected ESP shall competitively bid all scopes of work in coordination with the Owner’s preferred vendors.

IV. SCHEDULE

The time frame below is expected to be followed during the procurement period of this RFP:

October 21, 2024	Release of RFP
November 6, 2024	Proposal Due by 2:00 PM Local Prevailing Time
November 14-21, 2024	Administration Presents Recommendation/Board Approval

This is a tentative schedule, and dates are subject to change.

Mount Carmel Area School District reserves the right to reject any and all responses resulting from this RFP. Late responses will not be accepted and will be returned to the submitting company unopened.

Mount Carmel Area School District reserves the right to reject, as non-responsive, any proposal that does not contain the information. Additionally, Mount Carmel Area School District reserves the right to reject, as non-responsive, any proposals which are not organized and formatted as described in this RFP. Mount Carmel Area School District reserves the right to reject any and all proposals based on the funding received from the Pennsylvania Schools Facilities Improvement Grant.

V. EVALUATION CRITERIA

Qualification of all business entities that respond to this solicitation, including any subcontractors to be used, will be evaluated using the following selection criteria.

Proposal Presentation
Preferences will be given to respondents demonstrating strong capabilities, experience, and reputation in undertakings similar to those described in this RFP and providing authoritative documentation of the respondent's financial condition and stability.

Personnel Qualifications
Quality of personnel assigned to this project and degree of pertinent experience.

Services and Approach
- The respondent’s approach to energy conservation projects shall be significant criteria for selection, and respondents demonstrating innovative and cost-effective approaches shall be strongly considered.
- The range of services offered shall also be an important consideration.
- Methodologies and technical approach will be evaluated for practicality and soundness.

Project Experience
- Experience with energy conservation projects of a similar size and type to that proposed for Mount Carmel Area School District.
- Experience taking responsibility for the full range of roles contemplated for this project (e.g. Energy Efficiency Measures, Program Management Services, Design Methodology, Construction Installation capabilities, estimating and scheduling services, and Construction Management.)
- References

Business and Financial Qualifications
- Business unit dedicated to providing energy savings programs.
- Affiliation with energy and/or business organizations
- Financial viability

Fee
- Respondents should include a fee to conduct an Investment-Grade Audit.

VI. FORMAT OF RESPONSE

The responses to this Request for Proposal will consist of seven (7) specific information subject areas which must be completed and returned in the order indicated below with each

section divided and tabbed with the appropriate section title. Mount Carmel Area School District may, during the evaluation process, request additional information to supplement and/or clarify the information provided by any ESP. Any additional information not specifically requested in this RFP must be put in a separate Appendix at the end of the response. Additionally, all supplemental materials (brochures, product information sheets, etc.) not specifically tailored to this response must be placed in the Appendix.

- **Section 1: Cover Letter**

  The ESP's proposal will include a cover letter at the beginning of the proposal. The cover letter shall provide a summary of the information presented in the proposal, names and telephone/email of persons authorized to provide any clarification required, and a statement accepting the terms of this solicitation or noting specific exceptions taken to any of the terms and conditions specified in this document. This cover letter shall also include the name and title of the person(s) authorized to conduct final contract negotiations on behalf of the ESP.

- **Section 2: Executive Summary**

  The ESP will provide an Executive Summary highlighting the ESP's unique qualifications and capabilities for this project. State experience working previously for the Mt. Carmel Area School District. Additionally, please confirm that your firm is prequalified by the PA Department of General Services for each of the following:
  - Contractor for the Commonwealth's Guaranteed Energy Savings Program
  - Statewide Construction Management
  - Statewide Commissioning Agent

- **Section 3: Personnel**

  Each ESP will attach a Project Staffing Plan, which will include a description of proposed staffing showing the project organization, supervisory responsibilities, and lines of authority. Identify the corporate affiliation for each staff member listed in the Project Staffing Plan. Attach resumes of all individuals who will have a role in the project.

  Provide a graphical representation (organizational chart) of the participants listed in the ESP's proposal and their responsibilities in the program. The chart is to be used to show the company and personnel responsible for each phase of the project, lines of authority, and relationships between prime contractor and subcontractors.

- **Section 4: Services and Approach**

  Provide an overview of the ESP's approach to energy conservation projects and program management and the range of services provided directly by the ESP. Specifically address the following areas:

  - *Services, Approach and EEM Experience*
    Provide a description of the ESP's approach to energy efficiency improvements and identify specific energy efficiency measures that the ESP has had responsibility over including, design, implementation and measurement and verification. List all types of services provided by your firm.

  - *Benchmarking and Energy Savings Verification*
    Provide a description of the normal method used to establish benchmarks, baseline energy use and verification methods. Describe the method used to justify variances between the baseline consumption and actual annual consumption. Describe and justify the methods used in measurement and verification of project savings.

- *Cost and Savings Estimating and Bid Procurement Experience*
  The ESP shall describe experience and accuracy of cost and savings estimating; provide examples of cost estimates, bid procurement experience and accuracy.

- *Building Commissioning Experience*
  Describe respondent's experience and approach to building commissioning and/or retro-commissioning, including in-house expertise and project experience.

- *Training*
  The ESP shall outline any training proposed as part of the project, including the subject, duration, and location of training. Respondent shall also describe the relationship with the organization providing training, if not provided by the ESP.

- *Program/Construction Management*
  Describe respondent's experience and approach to project management including: coordination with subcontractors, division of responsibility among project staff, and interaction with Mount Carmel Area School District representatives.

- **Section 5: Project References**

  Provide information on five (5) related projects that the respondent has successfully implemented within the last five years. References shall include:

  - Customer Name
  - Name and Telephone Number of Contact
  - Brief Description of the Project
  - Project Beginning and Ending Dates
  - Specific EEM's recommended

- **Section 6: Financial Information**

  The ESP shall include the company's annual report, audited financial statements or equivalent showing information for the past three (3) complete financial year periods. If a bound document (such as an annual report) is included, it must be placed in the response's Appendix section.

- **Section 7: Fees**

  The ESP shall provide a fee to complete and deliver an Investment Grade Audit (IGA) for heating, ventilating, and air-conditioning improvements (including related work) at the two educational buildings on campus.

- **Appendix: Additional Information**

  Respondents may attach any additional information that is not contained within the RFP.