

Notice to Public

Request for Qualifications for Guaranteed Energy Savings Contract: Saint Joseph County Airport Authority

Notice is hereby given that the Saint Joseph County Airport Authority of South Bend, Indiana will accept sealed "Qualifications for a **Guaranteed Energy Savings Contract: Airport Authority**". The objectives of the Guaranteed Energy Savings Contract are as follows:

1. To replace, repair or upgrade existing energy consuming assets to reduce utility and operating costs in both the short and long term including deep energy retrofits in some areas
2. To achieve and quantify higher levels of environmental stewardship through the implementation of measures that pay for themselves prior to the end of their useful life
3. To provide Airport Authority operations and maintenance staff an improved ability to operate energy consuming assets according to industry best practices and to improve building management/automation systems to enhance that effort
4. Define and develop the most attractive opportunities for energy savings across the portfolio of Airport Authority assets to produce an initial project with a high potential for success and a high likelihood of over performance
5. To pay for improvements largely through energy savings and to acquire a guarantee to that end
6. To assist the Airport Authority in the development of a budget for the selected improvements
7. Provide an Utility Rate Analysis
8. Apply for any applicable rebates
9. Provide any necessary training

The specifications and requirements for this RFQ are available at the Airport Authority website @ <http://flysbn.com/sbn/business/>

The specifications are also available for review only at the office of the Airport Authority at 4477 Progress Drive, South Bend, Indiana 46628 Monday - Friday between the hours of 9:00AM and 3:00PM.

Upon request, The Airport Authority will provide 36-month electric utility data history for all facilities under consideration for this project.

RFQ responses will be in accordance with I.C. 36-1-12.5 RFQ guidelines.

All RFQ responses must include the content and be organized in the format contained therein.

Qualifications responses are to be mailed or delivered in sealed packages clearly marked "**GUARANTEED ENERGY SAVINGS CONTRACT: AIRPORT AUTHORITY**" to:

Saint Joseph County Airport Authority
4477 Progress Drive
South Bend, Indiana 46628-5511

RFQ responses are to be received not later than 1:00 PM on May 21, 2018. Qualification responses received after this time will not be considered. Opening and initial review of the RFQ responses by the Airport Authority will be beginning at 9:00 PM on May 11, 2018 in the Airport Authority Board Room.

The Airport Authority reserves the right to be the sole judge of the value and merit of the RFQ responses offered; to waive irregularities, or to reject and re-solicit proposals in accord with what it deems to be in the best interest of the Airport Authority.

First Public Advertisement	April 13, 2018
Second Public Advertisement	April 20, 2018

St. Joseph County Airport Authority

**Request for Qualifications
for
Guaranteed Energy Savings Project**

By

St. Joseph County Airport Authority

April 13, 2018

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I. OVERVIEW AND GENERAL REQUIREMENTS

A. Introduction:

Pursuant to Indiana Revised Statutes, I.C. 36-1-12.5 RFQ guidelines, the Saint Joseph County Airport Authority, Indiana; hereafter known as the Airport Authority, requests qualification proposals from qualified Energy Services Companies (ESCOs) to analyze the operation of and propose energy saving retrofits and improvements for selected facilities of the Airport Authority as provided herein whereby improvements are funded through energy and energy related operational savings.

The proposals should describe the provider's ability to build a program that will identify the Airport Authority's future obligation for the costs for installation, modification, improvements and retrofits, including, without limitation, costs for design, engineering, project management, installation, repairs, debt service and all post installation energy auditing, monitoring or necessary maintenance. The Airport Authority is soliciting such proposals to identify a provider that will assist in the achievement of the following objectives:

1. To replace, repair or upgrade existing energy consuming assets to reduce utility and operating costs in both the short and long term including deep energy retrofits in some areas.
2. To achieve and quantify higher levels of environmental stewardship through the implementation of measures that pay for themselves prior to the end of their useful life
3. To provide Airport Authority operations and maintenance staff an improved ability to operate energy consuming assets according to industry best practices and to improve building management/automation systems to enhance that effort
4. Define and develop the most attractive opportunities for energy savings across the portfolio of Airport Authority assets to produce an initial project with a high potential for success and a high likelihood of over performance
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The issuance this Request for Qualifications is to provide a competitive means in which to select a single provider to meet the objectives of this project. The Airport Authority will base provider selection on several criteria including and most importantly based on what is in its best long-term interest. The Airport Authority may elect to independently finance the Project or may utilize financing options presented by the Provider.

B. Date of Issue

The Saint Joseph County Airport Authority of South Bend, Indiana is issuing this Request for Qualifications April 13, 2018.

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C. Contracting Unit

Upon selection of the Qualified Provider, the final contract shall be negotiated with:

Saint Joseph County Airport Authority
4477 Progress Drive
South Bend, Indiana 46628-5511

D. Point of Contact

The Airport Authority's point of contact for any information related to this RFQ is:

Jon Burke
Tactical Energy Group
South Bend, Indiana
(574) 485-4230
jburke@tac-nrg.com

All communications by interested respondents concerning this RFQ must be directed to the contact person listed above. Unauthorized contact with other Airport Authority personnel regarding the RFQ may result in disqualification.

Any oral communication will be considered unofficial and non-binding on the Airport Authority. Only written statements issued by the Airport Authority will be considered binding addenda to the RFQ.

All interpretations made to any proposer(s) will be issued in the form of addenda to the RFQ and will be posted on the Airport Authority Website at <http://flysbn.com/sbn/business/>. It is the sole responsibility for each proposer to receive and review any addenda posted on the website. Such addenda are essential RFQ documents, and in closing the contract, they become a part thereof.

A mandatory tour of Airport Authority facilities will be conducted on April 24, 2018 and will depart from the Airport Authority administrative office at 1:00 PM. All questions must be submitted in writing.

E. Deadline for Submittals

All qualification proposals must be submitted in a sealed package plainly marked "**Guaranteed Energy Savings Contract: Airport Authority**" and received on or before 1:00 PM EST on May 11, 2018 at the following address:

St. Joseph County Airport Authority
4477 Progress Drive
South Bend, Indiana 46628-5511

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Clearly mark one (1) Submittal as "ORIGINAL" and provide six (6) copies of the original documents, signed by an authorized representative or officer of the proposing organization, formatted as described herein. Late responses will not be accepted. No telephone, fax, or email proposals will be accepted. A digital copy of the Qualification proposal is requested but not required.

Documents are to be prepared simply, providing a straight forward, concise description of the organization's capabilities to satisfy the requirements of this qualification proposal. Emphasis should be on completeness and clarity of content. All Qualification proposals must be limited to 80 pages in length.

F. Right to Reject and Modify

The Airport Authority reserves the right to accept any qualification proposal, reject any or all qualification proposals, and waive any irregularities or informalities when to do so is in its best interest.

A qualification proposal that is in the possession of the Airport Authority may be altered by letter bearing the signature of the person authorized for offering, providing it is received prior to the date and time of opening.

This RFQ does not commit the Airport Authority to award a contract, pay any costs incurred in preparing a document, procure, or contract for services, or to adhere to any predetermined timeline or schedule of events.

Qualification proposals that are incomplete, not properly endorsed, do not follow the requested format, or otherwise are contrary to the guidelines of the RFQ may be rejected as non-responsive at the discretion of the Airport Authority.

The Airport Authority reserves the right to request clarification from any or all respondents.

The Airport Authority may select a qualified respondent even if there is only one response.

G. Disposition of Qualification Proposals

All qualification proposals become the property of the Airport Authority and will be returned only at the option of the Airport Authority and at the expense of the requesting respondent. One copy of each submittal will be retained in the official file of the Airport Authority.

H. Proprietary Data

Proprietary data or information will be used by the Airport Authority solely for the purpose of evaluating the qualifications of the respondent. If a response includes any propriety data or information the respondent does not want disclosed to the public, such data or information must be clearly and specifically identified on each page where it occurs by the respondent. The disposition of all confidential information will be governed by the laws under which the Airport Authority operates, including FOIA exemption classifications as per IC 5-14-3-4.

I. Withdrawal of Qualification Proposals

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Qualification Proposals and all conditions therein shall remain in effect for a minimum of sixty (60)-days from the submission date. Any document may be withdrawn or modified by written request of the respondent, provided the Airport Authority receives such a request before the deadline for submissions and at the address specified above.

J. Timeline

The Airport Authority expects to undertake the selection process described below according to the following projected schedule:

April 13, 2018	RFQ advertisement in two local papers
April 20, 2018	Second RFQ advertisement in two local papers
April 24, 2018	Mandatory tour from the Airport Authority administrative office.
May 7, 2018	All questions due
May 11, 2018	All Qualification proposals received at the Airport Authority Office by 1:00pm EST
May 25, 2018	Interviews of Finalists
May 31, 2018	Selection of Qualified Provider
August 1, 2018	Determination of Final Scope and Firm Pricing
TBD	Airport Authority executes final contract with Qualified Provider.
TBD	Financing secured for project
January 2019	Project Implementation begins
TBD	Substantial Completion

K. Disadvantaged Business Enterprise (DBE) Participation Goals.

The requirements of 49 CFR Part 26, regulations of the U.S. Department of Transportation, apply to this agreement. It is the policy of the Authority to practice non-discrimination based on race, color, sex, or national origin in the award of performance of this contract. A DBE goal of 3.86% annually is defined herein and has been established by the Authority. This goal

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percentage is updated periodically. Provider will be required on an annual basis to report any DBE participation to the Authority.

II. CONTENT & FORMAT

St. Joseph County Airport Authority (the Owner) requests submittal of qualifications for the implementation of energy conservation measures, repairs and replacement services at the Airport Authority facilities on a performance contracting basis. The Owner's objectives in issuing this Request for Qualifications are to provide a competitive means in which to select a single Qualified Provider (state certified guaranteed energy savings company) to perform the implementation of a guaranteed savings contract. The contract shall follow IC36-1-12.5 and RFQ guidelines. Qualified Providers must submit seven (7) copies of their qualification proposals. The cost of preparing a response to this request, including site visits and engineering analysis will not be reimbursed by the Airport Authority.

All Documents must be submitted in the format outlined in this section. For each qualification proposal a checklist will be used in the review to determine if it is complete prior to actual evaluation. The Owner reserves the right to eliminate from further consideration any qualification proposal deemed to be substantially or materially unresponsive to the requests for information contained herein.

A. Table of Contents

Responses shall include a table of contents properly indicating the section and page numbers of the requested information.

B. Executive Summary

Responses shall include a concise abstract stating the respondent's overview of the project.

C. Company Profile

This section should include the following information on the Qualified Provider.

1. Company name
2. Address
3. Telephone number
4. Fax number
5. Contact person(s) for this project
6. Email address
7. Number of years Company has operated in Indiana
8. Total number of projects completed in Indiana
9. Lead Personnel
 - a. List the Lead Personnel employed by the Qualified Provider involved in this project. Include a resume on each person listing name, title, education, experience, work history, and responsibilities on this project. Identify specifically the type of work performed by each person and for how long. Include the name of the engineer(s) or engineering firm providing the design engineering for the project including their PE numbers.

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10. Energy Savings Results and References

- a. Each Provider must have completed (with at least one year of reported guaranteed savings results) a minimum of five (5) GESCs with Indiana Public facilities to be considered for this project. Provide the following reference information for the five (5) most recently completed projects in Indiana.
 - ◆ Project name
 - ◆ Owner contact phone number and email address
 - ◆ Owner Chief Financial Officer contact phone number and email address
 - ◆ Owner Director of Facilities contact phone number and email address
 - ◆ Description of work performed under the Guaranteed Energy Savings Contract
 - ◆ Installed cost
 - ◆ Guaranteed savings as follows; individually and in total:
 - Percentage savings from energy use reductions
 - Percentage savings from capital cost avoidance
 - Percentage savings from operation and maintenance
 - Percentage savings from all other categories
 - Percentage savings in TOTAL
 - ◆ Completion date
- b. Provide a spreadsheet listing every Guaranteed Energy Savings Contract project:
 - ◆ Completed since April 2006;
 - ◆ Within the State of Indiana;
 - ◆ With at least one year of reported guaranteed savings.

Provide facility name, project cost, date guarantee started, guaranteed annual savings, most recent actual savings.

- c. Shortfalls
 - ◆ The Provider must include a summary of the reported annual savings for all completed projects within the State of Indiana completed since April 2006. Any projects that did not meet the annual energy guarantee for single or multiple years must be listed with the amount of the shortfall, an explanation for the shortfall and the corrective action taken.

11. Litigation

- a. List any projects with public facilities in Indiana with which the Provider (or any of its subsidiaries that may be involved in this project) has entered into litigation or arbitration during the past 5 years. Provide a brief summary detailing the litigation/arbitration. Omission of any past litigation will result in disqualification.

12. Certifications, Registrations and Insurance

- a. IC36-1-12.5 requires that Qualified Providers submit with their documents a certification from the Indiana Department of Public Works that they and their subcontractors (for all subcontracts in excess of \$150,000) are certified to perform the work included in their qualification proposal. This statute also requires that each Provider be a Certified Professional Services company that employs a minimum of one full time employee registered in the State of Indiana as a Professional Engineer.
- b. Include a copy of the certification from the Indiana Department of Public Works that proves the Provider is a Certified Professional Services Company. Please make sure the certificate is current.

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- c. Include a copy of the certification from the Indiana Department of Public Works that proves the Provider is a Certified Contractor. Please make sure the certificate is current.
- d. Include the names and PE numbers for all full-time employees who are professional engineers registered in the State of Indiana.
- e. Include Certificates of Insurance your firm maintains for Performance Contract work in the State of Indiana.

D. Technical Approach

Section D should contain the following information about the respondent's technical approach to meet the Owner's objectives regarding specific facilities and potential solutions as defined below:

- Replace, repair or upgrade existing energy consuming assets to reduce utility and operating costs in both the short and long term. This includes deep energy retrofits in some areas.
- To achieve and quantify higher levels of environmental stewardship through the implementation of measures that pay for themselves prior to the end of their useful life
- To provide Airport Authority operations and maintenance staff an improved ability to operate energy consuming assets according to industry best practices and to improve building management/automation systems to enhance that effort
- Define and develop the most attractive opportunities for energy savings across the portfolio of Airport Authority assets to produce an initial project with a high potential for success and a high likelihood of over performance. Assets included in this project include:
 - All terminal buildings
 - Maintenance complex
 - Safety building
 - Administrative building
 - All parking lot and exterior lighting
 - Airfield lighting
 - Potential solar installation (grid connected 250 KW, roof top or carport style or combination thereof)
 - Potential Alternate fueling facility; EV charging stations

Potential Solutions Include:

- HVAC upgrades and replacements
- Control upgrades and replacements
- Plumbing upgrades and replacements
- Electrical upgrades and replacements
- Lighting upgrades
- Building Envelope repairs/upgrades
- Renewable energy solutions
- Other energy related improvements recommended by Provider
- Other work causally connected to the energy related solutions proposed by the Provider as required to properly implement the proposed energy related solutions
- To pay for improvements largely through energy savings and to acquire a guarantee to that end.
- To assist the Airport Authority in the development of a budget for the selected improvements

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1. **Engineering Approach:** Describe your firm's approach to the technical design of this project. Please tell us how your approach differentiates your firm from other providers.
2. **Energy Engineering:** Please describe at least two innovative solutions your firm has deployed in the Midwest that utilize advanced technologies to address anticipated future energy risks and reduce operating costs.
3. **Contractor Selection:** Describe the process the Provider utilizes to obtain contractors and what criteria will be used to make contractor selections. In addition, describe the bidding process and the methodology used to award bids.
4. **Equipment Selection:** Describe the process the Provider utilizes to obtain equipment to be used on the project and specifically what criteria will be used to make equipment selections.
5. **Installation Approach:** Describe how the Provider intends to implement the installation phase of the project in terms of approach, priorities, philosophies, timelines, change-orders and commissioning
6. **Commissioning:** Describe in detail the commissioning process the Provider intends to utilize to commission buildings to achieve and maintain optimal efficiency
7. **Performance Assurance:** Describe in detail the performance assurance processes the Provider intends to utilize to insure the building operates at peak performance both at the completion of the installation phase and throughout the contract term.
8. **Customer Care:** Please describe in detail your normal engagement with a client during the 24 months following project completion.
9. **Additional Information:** Additional information about the Provider's technical approach to the project may be included.

E. Financial Aspects

Section E should contain the financial processes and pricing structure of each respondent.

1. **Pricing:** Describe in detail the process the Provider intends to utilize to obtain the best prices for the Owner both initially and if additional work is required. Explain why this is the best approach.
2. **Energy Savings:**
 - a. Explain how the Provider intends to maximize energy savings and the advantage to the Provider's approach.
 - b. Provide a detailed explanation of how the Provider intends to calculate the energy baseline, energy savings, what types of guarantees will be offered and the cost of each option.
 - c. Provide the energy baseline, cost saving calculations and the actual results of the provider's most recent project in the AEP/NIPSCO/Mishawaka Utilities service area. Provide the most recent M&V report for that project.
 - d. Provide your firm's approach to estimating utility escalation rates used throughout the contract period.
 - e. Significant reductions in electricity use resulting from Performance Contracts often result in higher costs per kilowatt hour after project completion. Please describe how your firm mitigates this risk and what compensations, if any, are made to true up actual savings to the Owner.

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- f. Understanding that not all savings categories can be readily used for debt service, please describe how your firm designs a project that readily meets the debt service obligations of the Owner. In your description, please describe how savings categories other than energy savings are made available for debt service. Typical savings categories follow:
- ◆ Avoided utility costs
 - ◆ Capital cost avoidance
 - ◆ Deferred maintenance savings
 - ◆ Operational savings (supplies, labor)
 - ◆ Other(s)
3. **Cost of Services:** Please provide your firm's estimated Cost of Services as a percentage of the total cost of a hypothetical \$6,000,000.00 Northern Indiana project of average complexity for the following categories:
- ◆ Design and engineering services
 - ◆ Project/Construction Management
 - ◆ Guarantees, Bonds and Permits
 - ◆ Commissioning and Training
 - ◆ Measurement and Verification
 - ◆ Overhead
 - ◆ Profit
 - ◆ Contingency
 - ◆ Other – including General Conditions
 - ◆ TOTAL COST OF SERVICES
4. **Measurement and Verification:** Please describe your preferred Measurement and Verification approach as well as other options the Owner may wish to consider.
5. **Project Funding:** The Owner intends to explore all options to fund this project.
6. **Initial Contract:** Please define your initial contract terms that govern the initial design/scoping portion of the project.

III. EVALUATION CRITERIA

The Owner will likely reject any submission that does NOT meet the minimum criteria described in this RFQ. For qualification proposals meeting or exceeding the minimum criteria, the Owner will rate each submittal based on the weighted scoring criteria shown below. The Owner intends to award a contract to the Provider offering the best qualification proposal. The best qualification proposal will be the proposal with the highest score as determined solely by the St. Joseph County Airport Authority.

A. Ability to Successfully Implement Program (40 points)

1. Reputation of the Provider for successfully implementing energy savings projects and providing proven energy savings results on projects with work scopes similar to those being considered for this project.
2. The reputation of the Provider as derived from the comments from owners and representatives of the most recent 5 projects as per II-C-10-a
3. Background and qualifications of the employees responsible for implementing the proposed GESC. This includes in-house engineers and technicians responsible for designing, programming and commissioning the project
4. The ability to provide long term solutions to assure maximum savings over the term of the contract.
5. References of the company and staff members responsible for implementing the project
6. State of Indiana Certifications
7. Actual record of savings performance compared to guarantee

B. Technical Approach (25 points)

1. Approach to facility analysis, design and energy engineering with an emphasis on the development of significant energy savings resulting from the actual reduction in the use of Kilowatt hours, Therms and Units of Water.
2. Processes of contractor and equipment selection, ensuring quality and value for the Owner
3. In-house controls capabilities to ensure energy savings results and sufficient monitoring for facilities staff
4. Proven record of excellent customer care and the ability to assure long term technical performance

C. Financial Consideration & Net Economic Impact (25 points)

1. Transparency of pricing structure and cost of services
2. Process to be utilized to price any work negotiated after contractor selection
3. Energy savings approach and company's past performance related to guaranteed energy savings in Indiana
4. Proven ability to design a project that readily meets debt service obligations
5. Measurement and Verification program focused on meeting debt service obligations

D. Performance Guarantees (10 points)

1. Strength of the Qualified Provider's energy guarantee and the history of the Provider to meet or exceed the guaranteed level of energy savings.

IV. PERFORMANCE GUARANTEE AGREEMENT

- A. Provide a sample of your Performance Guarantee Agreement**