

Arkansas Energy Performance Contracting Program



Request for Project Proposals Template



ARKANSAS
ENERGY & ENVIRONMENT

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[Insert Participating Public Entity Logo]

REQUEST FOR PROPOSALS

ENERGY PERFORMANCE CONTRACTING SERVICES

Investment Grade Audit & AEPC Project Proposal

Please note that this RFP template has been developed by the Arkansas Division of Environmental Quality - Arkansas Energy Office as a working template for all public entities interested in pursuing energy performance contracts through the Arkansas Energy Performance Contracting Program. As such, edits may be needed to meet a participant's procurement needs or statutory requirements. All text in italics is intended to be edited by the program participant.

Section 1 – SELECTION PROCESS

General Background & Purpose

This Request for Proposals (RFP) seeks Energy Service Companies (ESCOs) to develop and complete an Investment Grade Audit (IGA) and Energy Performance Contract (EPC) contract proposal for *[Participating Public Entity]*, hereinafter referred to as “Owner”. The Owner has executed a Memorandum of Understanding with the Arkansas Department of Environmental Quality – Arkansas Energy Office (AEO)’s Arkansas Energy Performance Contracting (AEPC) Program and will follow the program’s rules and guidelines.

As this project is being conducted through the AEPC program, Owner will only consider proposals from AEO’s pre-qualified list of ESCOs, which may be found at:
<https://www.adeq.state.ar.us/energy/incentives/performance.aspx>

Lead Contact Information & Inquiries

For inquiries regarding this RFP, please contact:

- *Name*
- *Title*
- *Phone*
- *Email*

Communication with other officials of the Owner, the Selection Committee, or others associated with the project with regard to this RFP is prohibited.

Inquiries must be submitted in writing or electronically to the Owner’s lead contact by DATE. Inquiries received prior to this deadline will be answered and distributed via the AEO to all ESCOs who have stated a written interest in responding to the RFP.

Timeline

Please find the anticipated timeline for the Owner's AEPC project following.

AEO can accommodate nearly all stated Owner timelines, as needs arise. Selection can range from a roughly three week process (if no interviews or walkthroughs are involved) to two months. It is AEO's ultimate goal to assist Owners in selecting an ESCO that best meets their needs for their stated project scope.

Issue Request for Proposals for EPC	Date
Hold Pre-Proposal Walkthrough/Meeting (if necessary)	Date
Deadline for Questions	Date
Anticipated Response to Questions	Date
Proposals Due	Date
Review Proposals	Date
Interview ESCOs (if necessary)	Date
Select ESCO	Date

Scope of Work

The Owner intends to pursue the following Energy Conservation Measures (ECMs) through this project, though this does not preclude the ESCO from suggesting other ECMs deemed beneficial to the Owner during the IGA process:

- *ECM 1 (Please describe all measures in as much detail as possible)*
- *ECM 2*
- *ECM 3*
- *ECM 4*

Relevant utility data may be found as Attachment A. Building information for the facilities being considered in the project scope may be found as Attachment B.

Pre-Proposal Walkthrough/Meeting

Owner will hold a pre-proposal site walkthrough and meeting on *DATE/TIME* at *LOCATION*. The intent of the walkthrough is to provide potentially interested qualified ESCOs access to Owner's facilities and an overview of their current energy usage. The intent of the meeting is to provide an opportunity to interact with Owner's staff.

AEO recommends including a Pre-Proposal Walkthrough/Meeting if at all possible to allow for the most thorough responses from pre-qualified ESCOs.

Submittal Instructions

Proposals are due by the date specified in the Timeline by 5 PM. Proposals may be submitted electronically, mailed, or delivered. Proposals must be addressed to Owner's lead contact at the following address:

- *ATTN: Lead Contact*
- *Owner*
- *City, State, Zip*

Evaluation and Selection

The Owner will appoint a Selection Committee to review the proposals by the submitted deadline. The evaluation process will objectively grade the responses on their merit. Proposals will be reviewed to confirm the accuracy of the material presented in the response.

The AEO will provide the Owner's Selection Committee with technical assistance during the evaluation process but will not and cannot participate as a member of the Selection Team.

The Owner, at their choosing, may interview up to three pre-qualified ESCOs after reviewing RFP responses. ESCOs will be notified by AEO to coordinate follow-up interviews if the owner has opted to interview candidates for further clarification. Interviews will typically be within 10 business days of evaluations.

Once a selection has been made, AEO will notify all respondents and Owner and selected ESCO will negotiate an IGA Contract through the AEPC Program with the intent to execute.

Owner reserves the right to reject any and all submissions and to waive any informality if deemed in the best interest of Owner to do so.

Section 2 – SELECTION CRITERIA

Owner may adapt Selection Criteria as needed after consult with AEO. Selection Criteria have been based off national standards for EPC RFPs.

Qualifications & Team Experience

Provide information that emphasizes your ESCO's qualifications and expertise relating to the ECMs identified in the Scope of Work. Describe experience of the team members being proposed for this project. Specifically, provide the following:

1. Qualifications and experience of ESCO's personnel who will be involved on project. Identify primary responsibilities for each team member, as well as any additional resources ESCO expects to be able to provide to the project.

2. Documented experience developing and implementing the ECMs identified in the scope of work.
3. At least three (3) regional client references.

Project Personnel

Identify each individual(s) who will have primary responsibility for the following tasks: technical analyses, engineering design, construction management, construction, training, post-construction.

Project Design

It is expected that communication and coordination during the design and development phase of the IGA will be required to obtain Owner approvals for ECM specifications. Discuss your ESCO's approach to design and incorporating Owner input into the IGA proposal specific to the ECMs identified in the Scope of Work.

Product Selection & Bidding

Discuss your firm's product bidding and selection procedures. If your ESCO intends to self-perform any ECMs or work on this project with preferred subcontractors, explain how this will deliver benefits to the Owner.

Project Management & Construction

Discuss your firm's project management & construction approach, including:

1. Work plan development and coordination of Owner work requirements
2. Methods of procedures, submittals and approvals
3. Safety practices and procedures
4. Systems Commissioning Process

Measurement & Verification

Describe your ESCO's approach to M&V, both generally, and with regard to the potential Scope of Work proposed by the Owner. Specifically:

1. What would be a reasonable M&V term for this proposed project scope? How often are reports delivered and discussed with the Owner?
2. How do you balance the ongoing cost of M&V with the risk of underperformance for your public partner?
3. What are your typical safety factors for the proposed ECMs?
4. AEO recommends using current Federal Energy Management Program Guidelines for M&V of installed ECMs. Does your ESCO follow these standards? If not, why?
5. Though each project is unique, what does your ESCO consider a reasonable percentage cost for M&V relative to the overall project?

Owner Engagement

Discuss your ESCO's approach to cultivating a positive long-term relationship with the Owner through such activities as:

1. Training
2. Staff Engagement
3. Behavior Modification
4. Provision of Record Documents post-Construction

EPC Financing

Describe your ESCO's experience assisting clients through the financing of guaranteed energy savings projects in Arkansas. Further, please answer the following questions:

1. What, if any, existing relationships does your ESCO have with financiers well-versed in EPC contracts?
2. Would you be willing to consider a financier suggested by the Owner?
3. What vehicle would your ESCO deem most appropriate for this project?

General Conditions

To be considered, proposals must be received by 5:00 PM on *DATE* in set forth in this solicitation. An incomplete submission will not be considered.

It shall be clearly understood that any costs incurred by the ESCO in responding to this request are at the ESCO's own risk and expense as a cost of doing business, and that Owner is not liable for reimbursement to the ESCO for any expense so incurred, regardless of whether or not the submission is accepted.

Any information provided herein is intended to assist the ESCO in the preparation of submissions necessary to properly respond to this RFP. The RFP is designed to provide pre-qualified ESCOs with sufficient information to provide a response but is not intended to limit content or to exclude any relevant or essential data.

Respondents are required to be thoroughly familiar with the requirements herein and applicable state statutes before submitting their statement of qualification to Owner for consideration.

The submission must contain the signature of a duly authorized officer or agent of ESCO's firm empowered with the right to bind and negotiate on behalf of ESCO for the work and terms proposed.

ATTACHMENT A – UTILITY INFORMATION

For each building you wish to include in the IGA, list please provide at least twelve months of utility data. If you are auditing all facilities under your jurisdiction (which is common), simply provide all bills. If this data is not available, provide what you might have, as it will be key to the determination of what buildings and systems are most of need of upgrades.

DO NOT COPY

ATTACHMENT B: BUILDING AND FACILITY INFORMATION

For each building you wish to include in the IGA, please provide:

- *the building name,*
- *use type of building*
- *gross square feet,*
- *age (original and any renovations/additions)*
- *annual utility use (if not provided in Attachment A)*
- *known maintenance issues,*
- *current capital projects underway,*