

JERSEY SHORE 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**

AUGUST 30, 2021

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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. Jersey Shore 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 September 8, 2021 by 2:00 PM Local Prevailing Time to bulmer@jsasd.org.

Jersey Shore 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. Jersey Shore Area School District is not liable for any cost incurred by any person or firm responding to this RFP.

Jersey Shore Area School District reserves the right to reject as non-responsive any proposals that do not contain the information requested in this RFP. Additionally, Jersey Shore Area School District reserves the right to reject as non-responsive any proposals which are not organized and formatted as described in this RFP.

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

Dr. Brian Ulmer, Superintendent
Email to: bulmer@jsasd.org

All questions will be answered by email to all responders.

II. REQUESTED SERVICES

Jersey Shore 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: Avis Elementary School, Jersey Shore Elementary School, Salladasburg Elementary School, Jersey Shore Area Middle School, Jersey Shore Area 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. Jersey Shore Area School District shall direct the selected ESP regarding buildings and systems to consider within any Investment Grade Audit or project.

The district is already engaged with Hunt Engineering as an architect and they will continue to serve in design services for the mechanical, electrical, and architectural services for the 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. Jersey Shore 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. Jersey Shore 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 in the state of Pennsylvania.

This project may use funding from the American Rescue Plan (ARP) and Elementary and Secondary School Emergency Relief (ESSER) funding sources. 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 project scopes that is requested to be funded in full or in part from Federal ESSER funds:

The Jersey Shore Area School District is proposing to utilize Federal ESSER funds to fund in whole or part the repair, upgrading, and maintenance of buildings 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.

The district has six facilities totaling approximately 531,971 square feet and consists of District High School, Middle School, three Elementary Schools and District Administration facility. The student population was roughly 2170 students in Fall 2021 and the annual utility expenditures on energy commodities totals approximately \$445,488 annually.

Avis Elementary School is located at 1088 3rd Street, Jersey Shore, PA 17740. It supports +/-175 pupils in grades kindergarten through 5, with more than 43% receiving a federal free or reduced lunch due to family poverty.

Jersey Shore Elementary School is located at 601 Locust Street, Jersey Shore, PA 17740. It supports +/-570 pupils in grades kindergarten through 5, with more than 52% receiving a federal free or reduced lunch due to family poverty.

Salladasburg Elementary School is located at 3490 PA-287, Jersey Shore, PA 17740. It supports +/-175 pupils in grades kindergarten through 5, with more than 43% receiving a federal free or reduced lunch due to family poverty.

Jersey Shore [Area] Middle School is located at 601 Thompson Street, Jersey Shore, PA 17740. It supports +/-500 pupils in grades 6 through 8, with more than 46% receiving a federal free or reduced lunch due to family poverty.

Jersey Shore [Area] High School is located at 701 Cemetery Street, Jersey Shore, PA 17740. It supports +/-700 pupils in grades 9 through 12, with more than 38% receiving a federal free or reduced lunch due to family poverty.

Administration Building is located at 175 A&P Drive, Jersey Shore, PA 17740. It supports staff for the district administration of approximate +/- 30 staff members. This building includes central supply, central food service storage, network infrastructure, print center and administrative offices. The following departments are represented: Business, Central Registration, Food Service, Human Resources, Maintenance, Special Education, Tax Services, Technology, Transportation

In response to heightened awareness of environmental health hazards during COVID-19 and in a continued effort to address potential environmental health hazards across the district this project includes the following and responds to the community priorities by:

- Installing updated heating, ventilating and air-conditioning components and systems including improvements indoor air quality
- Modify, repair, and/or upgrade building envelope to minimize water intrusion and potential mold growth, thereby improving indoor air quality

It is the district's belief that by addressing and improving the building heating, ventilating, and air-conditioning systems and building envelope at these facilities it is making a durable investment that will provide long-term health benefits and ensure healthy, resilient facilities for students and staff. These improvements will further facilitate the district's ability to properly manage and maintain recommended levels for indoor air quality, temperature, and humidity. Further, by modifying, repairing, and/or upgrading the building envelope systems, the district will prevent unwanted moisture from absorbent materials like building insulation that create a food-source for harmful bacteria growth that can impact the health and safety of students/staff.

The LEA has determined that the proposed project complies with the Cost Principles in 2 CFR Part 200, subpart E (e.g. the cost must be "necessary and reasonable" (2 CFR 200.403–200.404))

The Jersey Shore Area School District has determined that the proposed project complies with the Cost Principles in 2 CFR Part 200, subpart E. The district believes it meets the overall purpose of the ARP Act Programs, which "is to prevent, prepare for, and respond to "COVID 19", and are consistent with the proper and efficient administration of those programs. The price of the proposed scopes from the intended awarded entity shall be consistent with estimated costs from the district's independent design professionals. Additionally, these costs will be incurred during the approved budget period, adequately documented, are not being used to meet cost-sharing or matching requirements of any other federally-financed program. Finally, the district believes that time is of the essence and that this process shall provide for the shortest timeframe for pricing and installation to both reduce costs and provide upgraded facilities in the shortest amount of time possible.

The School District has engaged with Hunt Engineering to complete a district feasibility study and has retained them to complete design components of this project. Hunt Engineering has indicated the the High School and Middle School facilities are priority areas in need of this work.

The School District reserves the right to consider any other factors that it deems to be relevant to its needs. The School District reserves the right to request additional information from individual respondents, to request all respondents to submit supplemental materials in fulfillment of the content requirements of this RFP, or to meet additional information needs of the School District. The School District also reserves the unilateral right to waive any technical or format requirements contained in the RFP. Furthermore, the School District, in its sole discretion, will analyze any financial, operational, or other necessary criteria to determine their comfort and confidence that the respondent has the capability to fulfill their proposal.

III. SELECTION PROCESS

Proposal Evaluation

Interested ESPs responding to this RFP must provide the information required. Jersey Shore Area School District will evaluate submittals and choose the most highly qualified ESP. Jersey Shore Area School District may require oral presentations of the responses by the most qualified responders as determined by Jersey Shore Area School District. The determination and selection of the most qualified ESP shall be the sole discretion of Jersey Shore 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 following time frame is expected to be followed during the procurement period of this RFQ:

August 30, 2021	Release of RFP
September 8, 2021	Proposal Due by 2:00 PM Local Prevailing Time
September 9-13, 2021	Contractor interviews (if required)
September 13-27, 2021	Administration Presents Recommendation/Board Approval

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

Jersey Shore 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.

Jersey Shore Area School District reserves the right to reject, as non-responsive, any proposal that does not contain the information. Additionally, Jersey Shore Area School District reserves the right to reject, as non-responsive, any proposals which are not organized and formatted as described in this RFP.

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, 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 Jersey Shore 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. Jersey Shore 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 (5%)**

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 (10%)**

The ESP will provide an Executive Summary highlighting the ESP's unique qualifications and capabilities for this project. 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 (15%)**

Each ESP will attach a Project Staffing Plan, the proposed plan 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 (50%)**

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 Jersey Shore Area School District representatives.

➤ **Section 5: Project References (10%)**

- *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 (10%)**

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)/Project Development Agreement for heating, ventilating, and air-conditioning improvements (including related work) and building envelope improvements for the Avis Elementary School, Jersey Shore Elementary School, Salladasburg Elementary School, Jersey Shore Area Middle School, Jersey Shore Area High School, and the Administration Building.

➤ **Appendix: Additional Information**

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