



REQUEST FOR QUALIFICATIONS

Energy Performance Contract Implementation

The Town of Norwich (TON) is requesting qualifications from interested performance contracting firms for implementation of an energy performance contract in the buildings identified in Appendix A.

The objective in issuing this Request for Qualifications (RFQ) is to provide a competitive means by which to select a Qualified Provider with whom to negotiate a final performance contract for a comprehensive program which will reduce costs and upgrade facilities in the identified buildings. The comprehensive program may include but not be limited to:

- (a) Investment grade energy audits of each building,
- (b) Design and installation of energy efficient equipment and systems which will reduce energy consumption associated with the HVAC system including upgrade/replacement of boiler systems, domestic hot water systems, HVAC controls, fresh air ventilation and other energy using systems,
- (c) Implementation of programs which may not reduce energy consumption but which are aimed at improving indoor air quality i.e. increased ventilation and space control,
- (d) An open book estimating process, broken down by building and building system in each building,
- (e) Retrofit of existing systems if possible and recommendations for,
 - a. Replacement of systems beyond their useful life
 - b. Upgrading systems where life cycle cost effective
 - c. Training of existing TON personnel in the operation and maintenance of existing and new equipment installed under the project,
 - d. Indoor air quality diagnostics and testing,
- (f) Researching and recommending potential financing strategies,

**Norwich, VT – Request for Qualifications
Energy Performance Contract Implementation
July 2019**

- (g) Support obtaining available funding grants and utility rebates,
- (h) Support setting up a monitoring protocol of energy costs,
- (i) Support establishing a preventative maintenance program for HVAC mechanical equipment and installed systems.

TON may also add certain building improvements not related to energy, such as relatively minor building renovations, fire alarm systems, security systems, etc.

**Section I
General Information**

1. Purpose

This Request for Qualifications requires that firms demonstrate the experience, stability, expertise and financial criteria required to provide the services of a performance contractor in the development and implementation of a comprehensive program for the TON. TON intent is to replace HVAC equipment and other building systems that are beyond their useful life and to upgrade equipment wherever it is life cycle cost effective. The systems that will be evaluated include, but are not limited to:

- Ventilation and air handling units
- Boiler systems
- Heat pump systems
- Unit ventilators that are beyond their useful life
- Replacing pneumatic controls with direct digital controls
- Adding CO2 monitors and demand control ventilation capability wherever practical
- Adding HVAC controls where none or substandard controls exist.
- Upgrading lighting may be considered, including potential for advanced controls, daylighting considerations, etc.
- Potentially drinking water and waste water upgrades and efficiencies.

2. Existing Information:

**Norwich, VT – Request for Qualifications
Energy Performance Contract Implementation
July 2019**

To prepare for this project, the TON has been collecting relevant information. This information includes:

- All buildings are benchmarked in EPA Portfolio Manager and are up to date.

3. Performance Contracting

For the purposes of this document, “Performance Contract” means a contract for services and equipment in which the performance contractor guarantees to reduce energy consumption and to offset capital costs as much as possible through operational cost savings including “right –sizing” of HVAC and other equipment, utility rebates, and overall project revenues available from the project under the terms of the agreement. While energy and operational savings are important, guaranteed savings do not need to offset all potential debt service costs. In addition to energy savings measures other building improvement projects may be added to the scope. The town expects the chosen performance contractor to manage all aspects of the scope of work once it is finalized.

4. Eligible Offerors

Eligible offerors are limited to companies that can demonstrate successful performance contracting projects for a minimum of ten (10) years. A minimum of three (3) references of performance based contracts with public building towns in Vermont or New Hampshire shall be provided. The references shall include the following at a minimum:

- investment grade energy audits
- annual first party financial guarantees
- bundled energy retrofits
- examples of financing of program costs

Provide an executive summary of each project along with the applicable public building town’s contact person (name, title, address, email address and telephone number).

5. Qualifications Format

Proposal responses must be submitted in the format prescribed in this document. Each statement will be reviewed to determine if it is complete before evaluation.

**Norwich, VT – Request for Qualifications
Energy Performance Contract Implementation
July 2019**

Statements not containing the information requested will not be considered. Statements will be evaluated according to the materials and substantiating evidence presented in the response.

6. Inquiries

Questions must be submitted in writing via email **no later than Thursday, July 18, 2019 by 10:00 am** to:

Herbert A. Durfee, III
Town Manager
Town of Norwich
300 Main St., PO Box 376
Norwich, VT 05055
HDurfee@norwich.vt.us

Responses to all questions will be sent to all firms that were sent this RFQ or who indicated interest.

7. Evaluation Criteria (see Section IV)

Evaluation will be made per the following criteria:

- Experience and Background
- Capabilities
- Financial Solution
- Project Implementation
- Legal Approach
- On-going Support Program

**Norwich, VT – Request for Qualifications
Energy Performance Contract Implementation
July 2019**

**Section II
General Information**

1. Submission of Written Qualifications

The TON will review and evaluate the responses to the RFQ according to the evaluation criteria identified herein. Submissions must be delivered in hardcopy no later than **Monday, July 29, 2019 at 4:30 pm** to:

Herbert A. Durfee, III
Town Manager
Town of Norwich
300 Main St., PO Box 376
Norwich, VT 05055

Late responses will not be accepted. Offerors are encouraged but not required to submit responses via email attachments in addition to hardcopy. Email responses may be submitted prior to the deadline, and hardcopies must be date stamped in our central office no later than the time and date specified above.

2. General Requirements of each Offeror

- Provide three (3) hardcopies of your response
- Provide audited financial statements of your firm for the last two fiscal years

3. Selection of Performance Contractor

The TON will issue a Letter of Intent (LOI) to the selected performance contractor for this project. The chosen contractor will conduct a detailed technical evaluation of the identified facilities (Appendix A) to develop a plan and final proposal detailing all aspects of their proposed program.

4. Timeline

The TON will evaluate submissions and hopes to select a preferred firm by August 1, 2019. Town staff will work with the preferred firm to collect all necessary information to refine a scope of work during the summer and fall of 2019. TON intends to present a final plan for this project to voters no later than March 2020. The intent is to implement this project during the summer of 2020.

**Section III
General Submittal Information**

Proposals shall be prepared simply and printed in a single-spaced, double-sided format and on recycled paper. Other than a single staple, binding products (e.g., 3-ring binders, spiral binders, plastic report covers, etc.) are not necessary and are discouraged. Proposals are prepared at the sole expense of the respective firms preparing their proposal. All proposals must contain statements of description of each of the following areas. Begin each section and subsection on a separate page. Number the pages in each section consecutively. Each page shall have the name of the respondent indicated clearly at the upper right corner of each page. If any confidential and/or proprietary information is included, then each page containing such information must be so “stamped” **It is not acceptable to label the entire proposal as confidential and proprietary.**

1. Table of Contents

This section should indicate the section and page number of the information included.

2. Executive Summary

Statements shall include a concise abstract of not more than two (2) pages stating the respondent’s overview of your response to the RFQ.

3. Experience and Background

A. Offeror’s Profile and Financial Stability

Provide general information on the responding firm, including: name, business address, local telephone number, officers of the firm, and contact person for this project. Each firm should provide their bonding capacity and bonding rate. If the firm is a factory owned branch, specify the legal business classification, state of incorporation, provide the last two years of audited annual reports, and summarize the financial strength and longevity of the firm. If the firm is a separate legal entity from the manufacturer, provide audited financial statements of the local firm for the last two years, and summarize the longevity and financial strength of the local firm.

B. Offeror’s Experience

Provide references of similar projects including the completion date of installation, ongoing maintenance services and equipment provided, energy savings performance, value of guaranteed savings, project costs and financing description, contract term, benefits to the Owner, Owner’s name and address, telephone number and contact

**Norwich, VT – Request for Qualifications
Energy Performance Contract Implementation
July 2019**

person. A minimum of three (3) public building town projects shall be included in this section.

C. Offeror's guarantee experience

Document the quantity of guaranteed savings contracts and total dollar amount currently guaranteed by the firm. Provide supporting data to substantiate that the firm has the financial resources to financially guarantee the results of this project.

D. Offeror's Proof of Insurance

Document (e.g., Declarations Page) sufficient liability and other necessary insurance to carry out the implementation of the intended project.

4. Total Capabilities

Provide a detailed description of the firm's total capabilities including team members and their qualifications; include but do not limit descriptions to the following areas:

- Existing facilities and proximity to the TON
- Technical solution capabilities including in-house engineering, design and construction
- In-house maintenance and service of systems and/or equipment installed as part of a performance contract
- Project management
- Customer training programs
- Specialized capabilities, i.e. fire alarm, security and indoor air quality, etc.

5. Financial Solution

A. Project Financing

Describe the source and types of financing the offeror would intend to use to implement this project if the project were financed by the performance contractor. Indicate the prior use and experience with this method of financing. Indicate whether your firm provides the financing or arranges through another entity. The financial package should allow for annual payments which will allow the TON to pay for the cost of the program within a mutually agreed upon time frame. Include a sample copy of all forms and or documents related to financing that the TON may be required to execute.

**Norwich, VT – Request for Qualifications
Energy Performance Contract Implementation
July 2019**

B. Financial savings calculation methodology

Provide a detailed description of the financial savings calculation methodology.

C. Energy baseline calculation methodology

Describe the process, methodology and procedures carried out by your firm in developing an energy guarantee baseline.

D. Reconciliation of guaranteed sums

Provide a detailed description of the reconciliation process, types of reports, schedules, etc. Include a sample guaranteed savings energy audit from one of the town building references listed in section 3-B of this response.

6. Project Implementation

Provide an overview of your proposed project team. Include a list of qualifications, certifications, licenses, etc. held by direct employees of your firm which will facilitate the implementation of this performance contract.

7. Legal Approach

Include a copy of a sample legal agreement and samples of all documents that will be required to be signed by the TON.

THE TOWN OF NORWICH RESERVES THE RIGHT TO ACCEPT OR REJECT ANY OR ALL PROPOSALS, OR ANY PART THEREOF, AND TO WAIVE ANY FORMALITIES AND/OR TECHNICALITIES WHERE DEEMED TO BE IN THE BEST INTEREST OF THE TOWN.

Section IV
General Information

I. Experience & Background

Profile & Financial Stability

- No information provided..... Unqualified
- Limited information provide Somewhat Qualified
- Some Company Profile & Financial Information..... Qualified
- Complete Company Profile & Financial Information Highly Qualified

Experience- Project References

- No references provided..... Unqualified
- Fewer than 3 Vermont or New Hampshire Building project references not included, no project guarantee experience Somewhat Qualified
- 3 reference minimum included but references contacted were not satisfied with project results, limited project guarantee experience..... Qualified
- Met or exceeded 3 reference minimum with satisfactory results, extensive project guarantee Highly Qualified

II. Capabilities

- Limited capabilities with limited or no local support..... Unqualified
- Satisfactory capabilities with local support within 50 miles of TON..Somewhat Qualified
- Satisfactory technical capabilities with in-house maintenance/service support 50 miles of TON Qualified
- Extensive technical capabilities with in-house maintenance/service support, experienced project management, customer training programs, indoor air quality

**Norwich, VT – Request for Qualifications
Energy Performance Contract Implementation
July 2019**

diagnostics and testing capabilities, and specialized capabilities (i.e., fire alarm, security, etc.) Highly Qualified

III. Financial Solution

Project Financing

- No program outline Unqualified
- Program outlined but no prior experience Qualified
- Sound program with proven track record..... Highly Qualified

Financial Savings Calculation Methodology

- No savings calculation methodology or savings calculation methodology provided but not substantiated Unqualified
- Savings calculation methodology provided and substantiated Qualified

Energy Baseline Calculation Methodology

- No calculation methodology or calculation methodology provided but not substantiated Unqualified
- Calculation method provided and substantiated..... Qualified
- Calculation method provided, substantiated, and use industry stands ... Highly Qualified

Documented experience in working with efficiency programs to obtain rebates and incentives

- No documented experience Unqualified
- Some prior experience Somewhat Qualified
- Documented experience with proven success in less than three buildings in the last three years..... Qualified

**Norwich, VT – Request for Qualifications
Energy Performance Contract Implementation
July 2019**

- Documented experience with proven success in more than three buildings in the last three years Highly Qualified

IV. Project Implementation

- No Implementation process provided Unqualified
- General process provided Satisfactory
- Specific implementation process provided Qualified
- Specific implementation process provided with specific milestones and deadlines Highly Qualified

V. Legal

- No sample agreements included Unqualified
- Sample contracts and other sample documents Qualified

VI. On-going Support Program

- No details provided Unqualified
- Limited details provided, limited local support within 50 miles of TON. Non-licensed personnel, limited capabilities in maintaining and providing training for the HVAC systems in the buildings Qualified
- Detailed program provided which reinforces the goals and objectives of the TON as outlined in the RFQ. Includes a list of 3 licensed service personnel within 50 miles of the TON Highly Qualified

APPENDIX A

List of Buildings

1. Tracy Hall	20,867 SF
300 Main Street	
Norwich, VT 05055	
2. Public Safety Building	3,866 SF
10 Hazen Street	
Norwich, VT 05055	
3. Town Garage	8,156 SF
21 New Boston Road	
Norwich, VT 05055	
4. Norwich Public Library	7,812 SF
368 Main Street	
Norwich, VT 05055	