



ESSEX COUNTY
OFFICE OF THE MANAGER

7551 Court Street · P.O. Box 217 · Elizabethtown, New York 12932
Telephone (518) 873-3332 · Fax (518) 873-3339

Daniel L. Palmer
County Manager

Linda M. Wolf
Purchasing Agent

TO: All Bidders

FROM: Linda Wolf, CPA, Purchasing Agent

DATE: April 21, 2014

SUBJECT: Addendum #5 RFP ENERGY SAVINGS PERFORMANCE STUDY

This Addendum, issued to bid document holders of record, indicates changes to the bid documents for the *Energy Savings Performance Study RFP Opening May 16, 2014.*

Please note that there will be a walk through conducted on May 1, 2014 at 7:30 AM starting at the Buildings and Grounds Shop located behind the County Court House parking lot at 7559 Court Street, Elizabethtown, NY.

Also please include the attached Project Fee Bid Sheet as a part of your proposal.

Project Fee Bid Sheet

Comprehensive Energy Audit \$ _____

<u>Unburdened Construction Cost</u> ⁽¹⁾	Less than \$1,000,000	\$1,000,000 to \$3,000,000	Greater than \$3,000,000
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Construction Mark-up ⁽²⁾
 (as a % of total unburdened construction cost)

Program Management and Planning	_____ %	_____ %	_____ %
Design and Specifications (Engineer of Record)	_____ %	_____ %	_____ %
Administration	_____ %	_____ %	_____ %
Cost of Risk	_____ %	_____ %	_____ %
Construction Management and ESCO General Conditions	_____ %	_____ %	_____ %
Hazardous Waste Administration	_____ %	_____ %	_____ %
Commissioning	_____ %	_____ %	_____ %
Training	_____ %	_____ %	_____ %
Profit	_____ %	_____ %	_____ %
Corporate Overhead	_____ %	_____ %	_____ %
Other:	_____ %	_____ %	_____ %
Total	_____ %	_____ %	_____ %

Ongoing Project Management Costs

Annual Service/Maintenance Agreement Cost	\$ _____	\$ _____	\$ _____
Annual Energy Savings Measurement & Verification	\$ _____	\$ _____	\$ _____
Other Service fee	\$ _____	\$ _____	\$ _____

Other Project Information

Escalation rate for Service/Maintenance Agreements	_____ %/yr	_____ %/yr	_____ %/yr
Escalation rate for M&V	_____ %/yr	_____ %/yr	_____ %/yr
Escalation rate for Energy	_____ %/yr	_____ %/yr	_____ %/yr
Escalation rate for O&M Savings	_____ %/yr	_____ %/yr	_____ %/yr

Note 1. The unburdened construction cost shall be defined as the value of the actual construction cost paid by the ESCO to its subcontractor(s) for the supply and installation of energy conservation measures without any additional markups by the ESCO. The mark-ups listed above shall not be included in the value of the unburdened construction cost.

Note 2. The mark-ups listed above shall be the only cost that will be allowed to be added by the ESCO to the unburdened construction cost. The total project cost will be the addition of the unburdened construction cost and the value of the above listed mark-ups. Proposer must include the signed affidavit as required in the RFP.

PROPOSAL REQUIREMENTS

A. General Requirements

1. **Inquiries** - Inquiries concerning the request for proposals and the subject of the request for proposals must be made to:

Linda M. Wolf, CPA, Purchasing Agent
7551 Court Street, P.O. Box 217
Elizabethtown NY 12932
518-873-3332

The following is an outline of the requirements for submittal contents described in this section:

Section A: Background and Qualifications

Form I: General Information

Section A-1: Project Team Resumes

Section A-2: Work Experience

Section A-3: Proprietary Information and any additional information

Section B: Technical Approach

Section B-1: Project Development Process for the Detail Study

Section B-2: Survey and Analysis Methodology

Section B-3: Service and Maintenance Procedures

Savings
Section B-4: Methodology for Measurement and Verification of Guaranteed Energy

Section B-5: Training and Support Information

Section C: Financial Capability

Section C-1: Largest Project Implemented Over Last Three Years

Section C-2: Bonding/LOC Information

Section C-3: Annual Reports or Financial Statements

Section D: Preliminary Study

Section D-1: This should consist of the technical strategies for meeting the County's energy efficiency objectives. Project details include savings and fees, term, and project size. The detailed Final Project will be allowed a maximum of 15% deviation from the preliminary study.

EVALUATION PROCEDURES

A. Review of Proposals

The Selection Committee will review qualifications of the proposals. Firms with unacceptably low technical qualifications will be eliminated from further consideration.

The County reserves the rights to retain all proposals submitted and use any idea in a proposal regardless of whether that proposal is selected.

Proposals will be evaluated and scored on the basis of the following criteria:

1. Experience and Qualifications of the Proposer - (maximum 30 points)

Consideration will be given to proposers demonstrating strong capabilities, experience and reputation in undertakings similar to those described in this RFP, and providing authoritative documentation of their financial soundness and stability. Similar experience will be understood to include development of performance contracts to furnish energy efficiency and cogeneration improvements in commercial or institutional facilities of similar size and use. . Specifically, the respondents shall list public entities where similar projects have been successfully implemented and monitored.

2. Technical Approach (Maximum Points – 35 points)

Proposals will be evaluated on the soundness and detail of:

- a. Technical Approach – Proposals will be evaluated on the soundness and detail of presentation of technical strategies proposed for meeting the County's energy efficiency objectives. The proposal should include descriptions of improvements both to the physical facility and to the integration of other relevant services such as training, operations and maintenance practices, utilities procurement, and measurement and verification of savings. Respondents should include a description of their responsibilities for maintenance and repair of equipment and systems following installation, and should demonstrate the ability of the respondent to provide service on both a routine and emergency basis.
- b. Responses should also outline the respondent's project development process and how it collaborates with and maximizes financial benefit to the County and minimizes risk.

3. Financial Terms (Maximum 30 points)

Consideration will be given to proposals that responsibly maximize the net economic benefit to the County over the term of the proposed energy services agreement and that responsibly minimize the risk to the County in connection with the proposed transaction.

Factors that will be considered include: the proposed term (length) of the energy services agreement, the projected net dollar benefit to the County from entering into the transaction, the methods that will be used to determine the amount of the proposer's compensation, purchase option terms (both during the term of and the end of the energy services agreement, if alternative financing is proposed), the proposer's source(s) of financing, and the degree to which the proposer has minimized risk to the County in connection with the project. Such risks may include performance risks, as well a potential interruptions to building operations and financial risks.

4. Ability to Implement Project Promptly (Maximum 5 points)

Preference will be given to proposals demonstrating an ability to carry out the tasks and responsibilities outlined in the proposal, including the procurement of any necessary financing, and the performance of all contract obligations throughout the contract term in a prompt and efficient manner.

B. Oral Presentations

During the evaluation process, the Selection Committee at their discretion may request any one or all firms to make oral presentations. Such presentations will provide firms with an opportunity to answer any questions that the Committee may have on a firm's proposal. Not all firms may be asked to make such oral presentations.

C. Right to Reject Proposals

Submission of a Proposal indicates acceptance by the firm of the conditions contained in this request for proposal unless clearly and specifically noted in the proposal submitted and confirmed in the contract between the County and the firm selected.

The County reserves the right without prejudice to reject any or all proposals.