



**REQUEST FOR PROPOSALS**  
**ENERGY PERFORMANCE CONTRACTING SERVICES**  
**Investment Grade Audit and EPC Project Proposal**

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**SECTION A: SELECTION PROCESS**

**1. GENERAL INFORMATION**

**Lake County School District** seeks qualified Energy Service Companies (ESCO) to perform an investment grade audit (IGA) and develop an EPC Project Proposal. The **Lake County School District** has executed a Memorandum of Understanding with the Colorado Energy Office (CEO)’s Energy Performance Contracting (EPC) Program and will follow its guidelines, practices, and procedures.

The goals of the project are to: (1) evaluate the **Lake County School District’s** facilities for energy and water efficiency upgrades, renewable energy systems, and other measures as requested (2) conduct an IGA and provide a report that makes recommendations for possible projects, (3) support the **Lake County School District’s** efforts in locating funding and/or financing of the proposed energy projects within the boundaries of Dodd-Frank and other regulations, (4) if retained, execute and implement an EPC. EPC execution includes guaranteeing energy and water savings through a specific scope of work, and measuring and verifying that the savings guarantee has been delivered. EPC implementation including construction and implementation oversight and management, commissioning, and execution of the measurement and verification (M&V) plan that meets or exceeds the requirements of the **Lake County School District**, enabling legislation, and CEO protocols.

While it is the desire of the **Lake County School District** to enter into a long-term partnership with the awarded ESCO, **Lake County School District** does not guarantee the award of an EPC to the chosen ESCO. An EPC award will be determined following acceptance of the project proposal.

**2. TIMELINE**

The following table provides the anticipated timeline for the completion of this RFP process.

| <b>Activity</b>   | <b>Timeline</b>               |
|---|-------------------------------|
| Issue RFP.  | <i>April 9, 2024</i>          |
| Hold pre-proposal meeting and conduct site visit.   | <i>April 22, 2024, 4:00PM</i> |
| Proposals due   | <i>May 6, 5:00 PM</i>         |
| Review proposals. Selection Committee meets to develop shortlist.<br>Arrange interview times. | <i>May 6- May 19</i>          |
| Interview ESCOs.  | <i>May 20</i>                 |
| Select ESCO.  | <i>May 21-22</i>              |
| Make recommendation to governing body.  | <i>June 5</i>                 |
| Develop and execute IGA and Project Proposal Contract.  | <i>14 days after approval</i> |
| ESCO commences IGA.   | <i>Upon execution</i>         |

### 3. MINIMUM QUALIFICATIONS

Lake County School District intends to follow the CEO EPC Program's Secondary ESCO Selection Process to award a contract.

Lake County School District will only consider proposals from the CEO's list of pre-qualified Energy Service Companies (ESCOs).

### 4. SCOPE OF WORK

The Lake County School District desires an aggressive energy and water savings program to result from the relationship.

The awarded ESCO shall evaluate 1 building and other facilities for energy and water efficiency upgrades, renewable energy systems, beneficial electrification, onsite battery storage and other distributed resource management, optional additional scope as recommended by the proposer, and other measures as requested. (Buildings and other facility information, including annual utility use and cost, may be found in Attachment A.)

In addition, Lake County School District has several specific projects to be included in the overall engineering review in addition to the firm's proposed buildings found in Attachment A.

Specific projects to be evaluated in the IGA process include:

- **Lake County High School**

This does not limit the ESCO from suggesting other energy savings projects in the normal course of the contract.

In their ESCO Base Contract with CEO, pre-qualified ESCOs agree to abide by CEO's Standard IGA Pricing model.

After the execution of the IGA contract, the chosen ESCO will then provide a comprehensive IGA report and EPC Project Proposal to make recommendations for possible projects based on the results of the IGA. Upon completion of the IGA and EPC Project Proposal, Lake County School District may elect to enter into an EPC with the awarded ESCO for design, project management, construction, commissioning and measurement and verification services.

## 5. SPECIAL PROCUREMENT STIPULATIONS

Lake County School District has target procurement requirements for the selected ESCO to adhere to when selecting subcontractors for the Investment Grade Audit and EPC project proposal. These requirements specific to our jurisdiction are listed below:

- *Preference for local contractors within Lake County.*

## 6. PRE-PROPOSAL CONFERENCE

Note that a pre-proposal conference will be held on the date and time identified in Section A.2. Timeline. The pre-proposal conference will begin at the **Lake County High School Office**. During the pre-proposal conference, certain facilities may be visited.

This pre-proposal conference is **mandatory**; the **Lake County School District** wishes for interested firms to have representatives attend to get familiarized with **Lake County School District**, its facilities, subsystems, and current state of energy usage.

## 7. PROPOSAL DUE DATE

Proposals are due by the date and time identified in Section A.2. Proposals should be sent electronically to the **Board of Education at [boardofeducation@lakecountyschools.net](mailto:boardofeducation@lakecountyschools.net), ATTN: Lake County School District's EPC Selection Committee.**

## 8. SELECTION

The **Lake County School District's** EPC Selection Committee will review the proposals submitted by the stated deadline.

A project consultant assigned by the CEO EPC Program will provide the Selection Committee with technical assistance, but will not/ cannot participate as a member of the Selection Committee, nor engage in decision-making.

The **Lake County School District** may schedule interviews with **up to five** firms.

**Lake County School District** anticipates conducting interviews on the date identified in Section A.2. Interviews will be held at **Lake County School District Board of Education conference room at the District Office.**



After the interview process, the committee will make a recommendation to the **Board of Education**. The **Lake County School District** reserves the right to waive any formality or any informality in the proposal award process. **Lake County School District** reserves the right to accept any proposal, in whole or in part, and to reject any or all proposals as necessary.

## 9. AWARD

After contract award, the **Lake County School District** and selected ESCO will negotiate and finalize the IGA and Project Proposal Contract.

## 10. CONTACT INFORMATION

Questions regarding this Request for Proposal should be directed to:  
**boardofeducation@lakecountyschools.net** no later than **the date and start time of the** pre-proposal meeting and site visit identified in Section A.2.

## SECTION B: SELECTION CRITERIA

Pre-qualified ESCO proposals will be evaluated on its written response to the following criteria.

### 1. MANAGEMENT APPROACH

#### 1.1 Project Management and Coordination

Provide ESCO's organization chart (by name as available) for implementing and managing the proposed project, including the title of each individual shown and the lines of authority within the overall organization. Identify portions of the effort, if any, that are proposed to be subcontracted and provide the same information for subcontractor organization and personnel.

#### 1.2 Appropriate Market Sector Experience/Expertise

Provide information that emphasizes ESCO's experience and expertise in our specific market sector.

List in one table the Energy Performance Contracting projects developed and implemented by your firm in our specific market sector **within the past five years**. Only include projects where work was directly conducted by your company.

| Project Name | Facility Type | City & State | Project Size (Dollars) | Project Size (Square Feet) | Year Completed |
|--------------|---------------|--------------|------------------------|----------------------------|----------------|
|              |               |              |                        |                            |                |

If your firm has EPC projects performed in our specific market sector by staff members of your team **within the past five years**, while they were an employee by another firm, clearly identify the firm with overall responsibility for that project, the individual's name, and their role in the project.

| Project Name/Prime ESCo/ | Staff's Name/Role in Project | Facility Type | City & State | Project Size (Dollars) | Project Size (Square Feet) | Year Completed |
|--------------------------|------------------------------|---------------|--------------|------------------------|----------------------------|----------------|
|                          |                              |               |              |                        |                            |                |

#### 1.3 Project Personnel and Staffing

Identify each individual(s) who will have primary responsibility for the following tasks: technical analyses, engineering design, construction management, construction, training, post-construction measurement and verification, and other services. Include a table to identify and describe the individual(s) who will have primary responsibility for each task. Also include any added expertise and capability of staff available through other branch offices, subcontracts, etc., that you can provide.



- Column 1: Name and title. Indicate whether ESCO staff or subcontractor. If a subcontractor, indicate name of subcontractor firm. Indicate base location as: permanent office in Colorado, on assignment from other state, or out-of-state support.
- Column 2: Specify intended role and responsibilities for this contract and for possible EPC/implementation work, such as technical analysis, engineering design, construction management, construction, training, post-construction measurement and verification, support, or other services (specify).
- Column 3: Identify the estimated percentage of the individual’s time that will be spent on this project.
- Column 4: Level of expertise, indicated by: number of years of relevant experience, and relevant supervisory responsibilities.

|   | <b>Name</b><br>Title<br>Staff or subcontractor?<br>Base location | Intended Role | Percentage of<br>Time on Project | Level of expertise |
|---|--|---------------|----------------------------------|--------------------|
| 1 |  |               |                                  |                    |
| 2 |  |               |                                  |                    |
| 3 |  |               |                                  |                    |
| 4 |  |               |                                  |                    |
| 5 |  |               |                                  |                    |
| 6 |  |               |                                  |                    |
|   |  |               |                                  |                    |

Include resumes/historical information for each member of the proposed project team. Include a list of their relevant projects during the last five years including role, type of project, project cost, and any other information to support their skills/knowledge.

## 2. PROJECT APPROACH

The expectation is that there will be schematic and design development phases where client input and approvals will be required prior to construction document development. Additionally, the client will provide design build design intent specifications for the major mechanical, electrical, plumbing and technology improvements that may be looked at for energy savings. The requirements of these specifications will need to be incorporated into the design documents and final construction.

### 2.1 Design

Discuss your firm’s design approach.

## 2.2 Product Selection

Discuss your firm's product specification procedures.

## 2.3 Construction

Discuss your firm's construction approach, including:

- Work plan development and coordination of identified client work requirements
- Communication with users and facilities personnel throughout process
- Methods of procedures submittals and approvals
- Support for client calendar and events
- Safety practices and procedures

## 2.4 Closeout

Discuss your firm's approach to the following critical closeout activities:

- Systems Commissioning
- Owner Training
- Post-Implementation Report, which is a reconciliation of the EPC savings guarantee with any modifications during project implementation.
- Provision of Record Documents – i.e. As-Builts /Operation & Maintenance manuals

## 2.5 Measurement and Verification

Discuss your firm's approach to measurement and verification. Describe how your team works with clients to identify and report on energy savings and/or potential energy savings shortfalls.

## 2.6 Other

Discuss your firm's experience in other, supporting areas, such as:

- Staff Engagement
- Behavior Modification

## 3. COST AND PRICING

*Note: In accordance to the Colorado Open Records Act, (CORA) C.R.S. § 24-72-201:206, it is advised that the issuer of this RFP share its procurement department's policy on what will/will not be subject to public inspection.*



**3.1 IGA Pricing**

The CEO has standard pricing for IGAs, based on the location and square footage of the public sector commercial building to be audited. (See following table.)

| Standard IGA Pricing Table              |                |                               |            |          |
|---|----------------|-------------------------------|------------|----------|
| Tiered Pricing<br>(\$/sq ft)            |                | Total Facility Square Footage |            |          |
|   |                | Under 250K                    | 250 – 500K | 500K +   |
| Distance from CEO<br>1580 Logan, Denver | Under 75 miles | \$ 0.250                      | \$ 0.225   | \$ 0.200 |
|   | 75 – 150 miles | \$ 0.275                      | \$ 0.250   | \$ 0.225 |
|   | Over 150 miles | \$ 0.300                      | \$ 0.275   | \$ 0.250 |

All ESCO’s submitting proposals will use CEO’s IGA pricing structure in their proposals.

Audit pricing for other facilities will be discussed and negotiated only after Notice of Apparent Awardee is issued. Do not make any reference to this pricing in the proposal.

**3.2 Project Pricing**

Please use Attachment B Cost and Pricing Tool to identify the percentages proposed for this specific project that are equal to or less than the maximum rates stated in your Base Contract with CEO, based on the size, scope and location of the specific project.

**3.3 Annual Costing**

Provide estimated anticipated costs for Warranty, Measurement and Verification, and other pertinent categories below and how they are determined and applied to a project. Costs for the project shall not exceed the maximums established in the table below.

Determination of annual costs may be challenging without knowing project scope; therefore, elaborate on how annual pricing is determined.

| Category of Annual Cost      | Total Annual Cost | How Price is Determined | Years Applied (One-time, Annual, etc.) |
|------------------------------|-------------------|-------------------------|--|
| Warranty                     |                   |                         |  |
| Measurement and Verification |                   |                         |  |
| Other:                       |                   |                         |  |

**4. BEST VALUE**

Briefly describe how the company’s approach to performance contracting delivers best value for the investment. The responding company shall also describe any utility rebates or other financial incentives or grants it can potentially provide and/or facilitate.



**ATTACHMENT A: BUILDING AND FACILITY INFORMATION**

|  |  |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
|--|--|--|---------------------------|------|--------------------------|-------------|-----------------------|--------|----------------------|-------------|---------------------------|--------|---------------------------|-------------|
| <b>BUILDING NAME</b>                             | <b>LAKE COUNTY HIGH SCHOOL</b><br><b>1000 W 4th St, Leadville, CO 80461</b>  |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| <b>TYPE OF BUILDING</b>                          | SCHOOL BUILDING  |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| <b>GROSS SQ FT</b>                               | 121,000 GSF  |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| <b>YEAR BUILT</b>                                | 1955   |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| <b>RENOVATION YEAR</b>                           | 2014   |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| <b>ANNUAL UTILITY USE</b>                        | <table border="1"> <tr> <td>Tiger - Natural Gas (Dth)</td> <td>7211</td> </tr> <tr> <td>Tiger - Natural Gas (\$)</td> <td>\$58,169.82</td> </tr> <tr> <td>Xcel - Electric (kWh)</td> <td>660600</td> </tr> <tr> <td>Xcel - Electric (\$)</td> <td>\$71,436.65</td> </tr> <tr> <td>Parkville Water (gallons)</td> <td>815800</td> </tr> <tr> <td>Leadville Sanitation (\$)</td> <td>\$10,354.08</td> </tr> </table> |  | Tiger - Natural Gas (Dth) | 7211 | Tiger - Natural Gas (\$) | \$58,169.82 | Xcel - Electric (kWh) | 660600 | Xcel - Electric (\$) | \$71,436.65 | Parkville Water (gallons) | 815800 | Leadville Sanitation (\$) | \$10,354.08 |
| Tiger - Natural Gas (Dth)                        | 7211   |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| Tiger - Natural Gas (\$)                         | \$58,169.82  |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| Xcel - Electric (kWh)                            | 660600   |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| Xcel - Electric (\$)                             | \$71,436.65  |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| Parkville Water (gallons)                        | 815800   |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| Leadville Sanitation (\$)                        | \$10,354.08  |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| <b>KNOWN MAINTENANCE ISSUES</b>                  | None.  |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| <b>CURRENT PROJECTS UNDERWAY</b>                 | None.  |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |
| <b>FUNDING FOR POTENTIAL CHANGE IN OCCUPANCY</b> | N/A  |  |                           |      |                          |             |                       |        |                      |             |                           |        |                           |             |

**ATTACHMENT B: CEO EPC COST AND PRICING TOOL**

CEO's Cost and Pricing Tool, a Microsoft Excel workbook, is attached. Please read the **Overview and Instructions** and **Definitions** tabs before completing the spreadsheets. Return the completed workbook with your proposal.