



Division of Finance and Business Operations

**Request for Qualifications
and Specifications for
RFQUAL Energy Performance Contracting**

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**Wayne State University
Procurement & Strategic Sourcing**

September 30, 2022



Division of Finance and Business Operations

Procurement & Strategic Sourcing
5700 Cass Avenue, Suite 4200
Detroit, Michigan 48202
(313) 577-3734
FAX (313) 577-3747

September 30, 2022

Dear Vendors:

Wayne State University invites you to submit your qualifications **relating to Energy Services Companies (ESCOs) to provide energy conservation equipment and services**, for the University's **Facilities, Planning and Management**, per the specifications and requirements contained in this Request for Qualifications (RFQual), entitled: **RFQual for Energy Performance Contracting**.

Submission Instructions to Vendors are as follows:

- Responses are to be on this RFQual only. Additional documents may be submitted; however, this form must be completed in full.
- Replies must be received electronically in the WSU Purchasing Office no later than **2:00 p.m. Eastern Standard Time on October 20, 2022**. The link for bid submission will be posted with the bid details at <http://go.wayne.edu/bids> beginning **September 30, 2022**.

Documents may be obtained by vendors from the University Purchasing Website at <http://go.wayne.edu/bids> beginning **September 30, 2022**. When visiting the Website, click on the "**Service**" link in green. If you are interested in participating in this process, Delivery of Responses are by electronic submission. The link for submission will be posted with the RFQual details at <http://go.wayne.edu/bids>

The electronic submission of information provided to the University should be limited to no more than one of each of the following file types: One (1) Word Document and/or one (1) PDF document, with a total file size less than **20 megabytes**

We look forward to receiving your Information on or before **October 20, 2022**. Should you have any questions or concerns about this invitation, please contact me at **(313) 577-3712 or by e-mail at RFPTeam3@wayne.edu**.

Thank you for your interest in doing business with Wayne State University.

Sincerely,

Robert Kuhn
Senior Buyer

Cc: Paul Bernard, Kenneth Doherty, Miriam Dixon, Valerie Kreher



INFORMATION FOR VENDORS

The Calendar of Events is as follows:

<u>Activity</u>	<u>Responsibility</u>	<u>Date</u>
Formal Release of RFQual	Procurement	September 30, 2022
Questions due to the Procurement & Strategic Sourcing	Vendors	October 11, 2022 , no later than 12:00 (noon)
Delivery of Information electronically. The link for bid submission will be posted with the bid details at http://go.wayne.edu/bids beginning September 30, 2022.	Vendors	October 20, 2022 , by 2:00 p. m. (Detroit / EST)

INFORMATION REQUESTED

Wayne State University, founded in 1868, is committed to preparing its students to excel in a fast-paced and interconnected global society. It combines the academic excellence of a major research university with the practical experiences of an institution whose history, location and diversity make it a microcosm of the world students will enter when they graduate. The University holds the Highest Carnegie Foundation classification for research activity. It has 13 colleges and schools and offers more than 325 academic programs including bachelor's, master's and doctoral degrees; post-baccalaureate, graduate and specialist certificates; and three professional programs (<http://wayne.edu/about/facts/>).

Prior to the issuance of a formal Request for Proposal (RFP) (if any), the University is seeking information that will aid us in defining our requirements. We want to better understand what is available and will best meet our needs. Information submitted as a result of this RFQual will also help determine which vendors to include in any subsequent RFP.

Note: To be considered for the RFP process, you are strongly encouraged to respond to this RFQual.

GENERAL INFORMATION

Purpose

The University will receive Statements of Qualifications from Energy Services Companies (ESCOs) interested in implementing a comprehensive, performance-based energy conservation program at its facilities. The stated intent of the University is to enter into a guaranteed energy savings performance contract. The University reserves the right to execute multiple phases of this program, under this RFQual.

The University will make its final selection based upon its specific needs and requirements. The University shall negotiate and execute a professional services agreement with the selected firm for the conduct of an investment grade energy audit. In the event that a guaranteed energy savings contract is not implemented, the University shall pay for the cost of the work completed according to the terms of the professional services contract.

Performance Contracting

For the purposes of this document, "performance contracting" is defined as a contract for the design and implementation of energy efficiency measures including services, equipment, and maintenance for which the payment obligation is directly related to the energy and operational cost savings (avoidance) attributable to the scope of services (and equipment) provided under the contract for the term of the agreement.



Project Funding and Savings Guarantee

Respondents shall be willing and able to assist with the necessary information required to obtain the financing for this project in accordance with applicable federal, state and local laws.

The ESCO shall provide a written energy savings guarantee, clearly stated in units of energy to be saved. The ESCO's guarantee shall be a first party direct guarantee from the ESCO to the University. No third-party guarantee shall be accepted. All savings in excess of the guaranteed savings shall be the sole property of the University.

Proposal Format

Proposals must be submitted in the format outlined in this document. Each proposal will be reviewed to determine if it is complete prior to actual evaluation. Proposals not containing the information requested will not be considered. Respondents shall use the prescribed format to indicate their experience and qualifications, describe their approach to the project and explain their proposed contract. In addition, the University reserves the right to waive any irregularities and formalities in the selection of the ESCO for this project.

Contract Responsibility

The selected ESCO will be required to assume total responsibility of the project. The selected ESCO will be considered the vendor and the sole point of contact with regard to all contractual matters.

Taxes, Fees, Code Compliance and Licensing

The ESCO shall be responsible for payment of any required permits, sales and/or use taxes or fees associated with the execution of the performance contract. The ESCO shall be responsible for compliance with all applicable codes and laws

References and Proprietary Information

Submission of a response constitutes permission to make inquiries concerning the respondent to any persons or firms deemed appropriate by the University. Any proprietary information that the submitting vendor does not want disclosed to the public shall be so identified on each page on which it is found. Data or information so identified will be used by the University solely for the purpose of evaluation and contract negotiations for the project as stated herein. Disclosure of any proprietary information by the University shall be in strict accordance with the laws and regulations regarding disclosure in the State of Michigan.

Expenses for developing and presenting submittals shall be the entire responsibility of the Vendor and shall not be chargeable to the University. All supporting documentation and manuals submitted with this request will become the property of the University unless otherwise requested by the Vendor, in writing, at the time of submission, and agreed to, in writing, by the University.

RESPONSE FORMAT AND PREPARATION INSTRUCTIONS

Responses must be submitted in the format outlined in this section. Responses are limited to **25 pages total**, one sided, and eleven (11) point font. (This is inclusive of all required documents and schedules and any optional material included at the discretion of the respondent, but tab sheets and the cover pages do not count in the overall document count.) The University reserves the right to eliminate from further consideration any response that is deemed to be substantially, or materially, unresponsive to the requests for information contained in this document. The intent of the University is that all responses follow the same format and protocol, in order to evaluate each response fairly. Responses will be evaluated in light of the material and substantiating evidence presented therein, and not on the basis of what is inferred.

All responding firms must be on the DEPARTMENT OF ENERGY'S qualified list of Energy Services Companies - updated June 2022.

Only NAESCO accredited firms, carrying the ESP (Energy Services Provider) designation will be considered. Proof of NAESCO accreditation is required in the qualifications submission and must be



included in the "Background and Experience" Section (see Point A.3), in the response for easy access by the Customer.

A. Response Format

1. Table of Contents

Responses shall include a table of contents properly indicating the sections and page numbers of the information included.

2. Executive Summary

Responses shall include a summary overview of the Respondent's qualifications, approach and other pertinent information. The Executive Summary should be no more than two (2) pages in length.

3. Background and Experience

A. Firm Profile - The firm shall provide the following information:

- Firm name.
- Federal Employer Identification Number.
- Corporate office address.
- Local office address, distances from the district, number of employees based out of each location and capabilities.
- Names and titles of two (2) contact people within the firm: one for questions regarding this submission and one with responsibility for contract negotiations.
- Year firm was established and current financial condition.
- Number of years the firm has provided energy efficiency services and general capabilities regarding these services. Note your firm's experience with renewable energy systems and energy supply services.
- Proof of NAESCO (National Association of Energy Services Companies) Accreditation.
- Does your firm manufacture products/equipment that are used in energy efficiency projects? If yes, will the customer have a choice in product/equipment selection?
- Payment and performance bonding limits.

B. Project Team and Support

Provide a list of the personnel to be used on this project, with their specific roles and qualifications, and their specific geographic location. Concise resumes including education, experience and other pertinent information shall be included in an appendix for each team member assigned to the project. Project resumes are to be no more than one (1) page in length and are not included in the 25-page limit.

How is the Respondent's project team supported by regional or corporate resources?

C. Performance Contracting References

The Respondent shall include five (5) references that indicate prior relevant work as the ESCO Vendor in the lower Michigan Service Area. References for projects where the responding firm was not the ESCO Vendor are not acceptable. These references should be projects where ESCOs team participated in the past 3 years.

Provide the owner's name, address, phone number, and contact person for each reference. Each reference shall describe the project cost, scope of work and benefits to the owner.

In addition, list all performance-based energy conservation projects performed by your firm for the last five years (client name, location, project size and number of facilities involved in the project).



4. Technical Approach

- A. Performance Contracting Approach In two (2) pages or less, “summarize your firm’s approach to performance contracting”, and to what extent the owner is involved in these activities.
- B. Facility Audits and Project Development: Indicate your firm's approach to performing detailed energy audits, identifying and designing facility Improvement measures, and your process for recommending which measures should be included in the performance contracting project.
- C. Project Management: Indicate your firm's approach to managing the installation phase. Describe the various responsibilities of your team members during construction, and how they will keep the owner's personnel informed of the project's progress. What is the Respondent's approach to ensuring safety during the installation phase? What is your firm's Experience Modification Rate (EMR)? Indicate your understanding of applicable codes and construction practices for this project.
- D. Scope of Services: Describe your firm's available support services to the owner after construction is complete - in addition to the measurement and verification of project results, which is covered in Item 5, Financial Approach. Include examples of how your firm has provided school districts with energy awareness programs for students, faculty and operations staff. Preference will be given for “Buy America Act.”

Please complete the tables below found in Schedule E and reply in Excel Format:

Performance Contracting Services	Direct Provider	Third Party	Not Provided
Project Energy Study			
Engineering Design			
Project Economic Analysis			
Savings Guarantee			
Project Financing			
HVAC System Training			
Energy Management Training			
Scheduled HVAC Maintenance Services			
Scheduled Building Automation System Services			
HVAC and Building Automation System Repair Services			
Emergency Services			
Guarantee Monitoring			

Proposed Energy Equipment- Complete the table below indicating the energy efficient equipment offerings provided by the Respondent. In each case, designate whether Respondent is a direct manufacturer, a distributor, and/or buys and resells energy efficient equipment.

Energy Efficient Equipment	Direct Manufacturer	Distributor	Buy/Resell
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HVAC Mechanical Equipment			
Energy Management Systems			
Building Automation Systems			
Lighting Systems			
Plumbing Systems			

- E. Training: Address your firm's approach to training the owner's personnel on the newly installed equipment. Does your firm offer additional training services to enhance the skills of facility operations personnel? State location of your nearest training facility.
- F. Support Services: Describe your firm's available support services to the owner after construction is complete - in addition to the measurement and verification of project results, which is covered in Item 5, Financial Approach.
5. Financial Approach
- A. Financing Source - Discuss the Respondent's demonstrated ability to provide or arrange project financing. If financing is arranged through a third party, explain to whom payments will be made.
- B. Savings Guarantee - Describe your firm's approach to proving that the energy savings associated with this project have been achieved, including the monitoring, verification and reporting of results. How does your firm handle situations in which the actual energy savings fall short of the guaranteed energy savings amount? Describe all events that may lead to guarantee modification or termination.
- C. Best Value - Describe ESCO's approach to providing the greatest financial value for the customer.

SUBMITTAL EVALUATION

Vendor responses will be reviewed by an evaluation team consisting of members of the University's Procurement Department and the University's Facilities, Planning and Management Department. Procurement may subsequently request Vendors to make a presentation at a set time and date, to clarify information provided in the submittal. A Request for Proposal (RFP) may be developed using the information provided by the Vendors who chose to participate in this RFQual.

This RFQual in no manner obligates the University to the eventual purchase of any products or services described, implied, or which may be proposed.

Vendors must refrain from giving any reference to this program, whether in the form of press releases, brochures, photographic coverage, or verbal announcements, without specific written approval from the University.

Submittals are subject to public review. Vendors responding to this RFQual are cautioned not to include any proprietary information as part of their Submittal unless such proprietary information is carefully identified as such in writing, and the University accepts, in writing, the information as proprietary.

Responses with supporting documentation shall be submitted by **electronic submission**. The link for bid submission will be posted with the bid details at <http://go.wayne.edu/bids> beginning **September 30, 2022**. Remember, your submittal must be in the format provided and be received in the Procurement & Strategic Sourcing by **October 21, 2022, at 2:00 p.m.** Include any supplemental information that will illustrate your ability to provide additional services as proposed. Late responses will not be accepted.



**WAYNE STATE
UNIVERSITY**

If you have any questions regarding this bid, please contact **Robert Kuhn** by email at **RFPTeam3@wayne.edu**.

Sincerely,

Robert Kuhn, Senior Buyer

Attachment:

- Schedule A – (Not Applicable)
- Schedule B – (Not Applicable)
- Schedule C – Qualification Schedule
- Schedule D – Summary Questionnaire
- Schedule E – Performance Contracting Services & Proposed Energy Equipment Tables (Excel Format)



WAYNE STATE
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SCHEDULE A
(Not Applicable)



SCHEDULE B
(Not Applicable)



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SCHEDULE C - QUALIFICATION SCHEDULE

Qualification statements for consulting services for energy conservation equipment and services under an Energy Services Performance Contract.

Submissions with supporting documentation shall be submitted **by electronic submission**. The link for submissions will be posted with the request details at <http://go.wayne.edu/bids> beginning **September 30, 2022**. Remember, your response must be in the format provided and be received in the Purchasing Department by **October 21, 2022, by 2:00 pm**.

Company Name: _____

Address: _____

Telephone: () Fax: ()

Email Address: _____

Print Name: _____

Signature: _____ / _____
Date

Title: _____



SCHEDULE D – SUMMARY QUESTIONNAIRE

- | | YES | ALTERNATIVE |
|--|---|-------------|
| 1. Can your company provide the products quoted and/or commence services on or before TBD and be completed by NA? | <u>N / A</u> | _____ |
| 2. If required, will your company provide a certificate of insurance to meet or exceed all our minimum requirements as outlined in Schedule B? | <u>N / A</u> | _____ |
| 3. Did your company complete and provide the Summary Price Schedule A , and submit it electronically? (<i>Zip Files are not acceptable</i>) | <u>N / A</u> | _____ |
| 4. Are you or any Officer, Owner or Partner in this company an employee of Wayne State University, or have you been an employee within the past 24 months? If Yes, please explain. | <input type="checkbox"/> Yes
<input type="checkbox"/> No | |
| 5. Are any family members of any Officer, Owner or Partner in this company employees of Wayne State University? If Yes, please explain. | <input type="checkbox"/> Yes
<input type="checkbox"/> No | |
| 6. ADDENDA: | | |

The undersigned affirms that the cost of all work covered by the following Addenda are taken into consideration when providing price and other elements of the vendor's proposal.

Addendum No. _____ Date _____ Addendum No. _____ Date _____

Addendum No. _____ Date _____ Addendum No. _____ Date _____

Company Name: _____

Address: _____

Telephone: (_____) _____

Email address: _____

Submitted by: _____

Signature _____

(Title)

(Date)