



REQUEST FOR QUALIFICATIONS
SBC PROJECT NO. 529/000-01-2023
AMENDMENT No. One
FOR Energy Savings Performance Contracting Services -
Secondary Procurement

DATE: January 9, 2024

RFQ SBC Project No.: 529/000-01-2023 IS AMENDED AS FOLLOWS:

- 1. This RFQ Schedule of Events updates and confirms scheduled RFP dates. Any event, time, or date containing revised or new text is highlighted.**

	EVENT	TIME (Central Time)	DATE	UPDATED / CONFIRMED
1	RFQ Issued		December 19, 2023	CONFIRMED
2	Disability Accommodation Request Deadline		December 27, 2023	CONFIRMED
3	Pre-Response Conference (VIRTUAL ONLY – PLEASE REFER TO RFQ SECTION 1.9)	10:00 am	January 10, 2024	CONFIRMED
4	Notice of Intent to Respond Deadline		January 11, 2024	CONFIRMED
5	Written “Questions & Comments” Deadline	2:00 pm	January 17, 2024	CONFIRMED
6	State Response to Written “Questions & Comments”		January 23, 2024	CONFIRMED
7	Response Deadline	2:00 pm	January 31, 2024	CONFIRMED
8	Technical Response Evaluation Period		February 1 - 12, 2024	CONFIRMED
9	Interviews (if applicable)		February 13 – 26, 2024	CONFIRMED
10	State Issues Notice of Intent to Award and RFQ Files Opened for inspection		At the conclusion of the evaluation period including interviews if applicable.	CONFIRMED
11	Protest Period Ends		Seven calendar days after Notice of Intent is issued.	CONFIRMED
12	Anticipated State Building Commission (SBC) Approval		March 14, 2024	CONFIRMED

- 2. Please delete RFQ Section 4.6.1 in its entirety and replace with the following:**

4.6.1. The apparent successful Respondent (and Respondent employees, subconsultants, and subcontractors, as applicable) will be responsible for holding all necessary, appropriate business and professional licenses to provide service or perform work as required by any project specific RFQ (Attachment B) prior to submitting a response to said project specific RFQ (Attachment B). The State may require any Respondent to submit evidence of proper licensure.

3. **Delete RFQ Attachment 6.2. Section B and RFQ Attachment 6.2. Section C in its entirety and replace with the attached (changes are highlighted in yellow).**

TECHNICAL RESPONSE & EVALUATION GUIDE

SECTION B - GENERAL QUALIFICATIONS & EXPERIENCE. The Respondent shall address all items detailed below and provide, in sequence, the information and documentation as required (referenced with the associated item references). The Respondent shall also detail the response page number for each item in the appropriate space below.

Question B.11 will be evaluated by the Governor's Office of Diversity Business Enterprise. Proposal Evaluation Team members will independently evaluate and assign one score for all other responses to Section B which will be added to the scoring of B.11, to provide a total score for Section B.

RESPONDENT LEGAL ENTITY NAME:		
Proposal Page # (Respondent completes)	Item Ref.	Section B— General Qualifications & Experience Items
	B.1	<p>Provide a personnel roster listing the names of the proposed individuals who will have responsibilities under the ESCO Master Contract and any other identifiable project principals or key personnel who the Respondent will assign to meet the scope of services provided in RFQ Section 1.2. At a minimum, this should include all team members who will be involved in all ESCO projects regardless of scope or size. Follow the personnel roster with a resume for each of the people listed detailing the individual's title, education, current position with the Respondent, and employment history. Provide the anticipated project organizational structure identifying the key personnel. If a member of the project team is a subcontractor, provide a statement specifying that each proposed subcontractor has expressly assented to being proposed as a subcontractor in the Respondent's response to this RFQ.</p>
	B.2	<p>For the individuals included in the personnel roster listing provided under B.1 submit a narrative outlining their experience on relevant ESCO projects performed by the Respondent including qualifications and description of involvement/experience. This should include the degree of apparent relevant competencies of the principal professional(s) and lead staff relevant to the project and services required, and evidence of competence.</p> <p>Include the Respondent's experience and qualifications in a consultant role while working with designers and contractors during phases of planning, preconstruction, design, construction, branding and successful operation for similar projects. Include information on your team's performance with an emphasis on adherence to schedules and budgets.</p> <p>Include any certifications, industry ratings, and national or international achievement recognitions, etc., to attest to the level of experience and success.</p> <p>Identify any challenges experienced while running the multiple concurrent tasks and the approaches made to overcome these challenges.</p>

RFQ Attachment 6.2. Section B

RESPONDENT LEGAL ENTITY NAME:														
Proposal Page # (Respondent completes)	Item Ref.	Section B— General Qualifications & Experience Items												
	B.3	<p>Indicate which accreditation category the Respondent has obtained (if any) through the National Association of Energy Service Companies (NAESCO):</p> <ul style="list-style-type: none"> • Energy Service Company (ESCO) • Energy Service Provider (ESP) • Energy Efficiency Contractor (EEC) 												
	B.4	<p>Provide an Executive Summary providing a brief overview of your company's expertise, qualifications, experience, and why you should be included on the State's pre-qualified ESCO list. Include highlights from your responses including company background and market sectors served. Also include your company's strengths, areas of expertise, and your general approach to performance contracting.</p>												
	B.5	<p>Describe your company's recent ESCO expertise (within the past eight years) in each of the following types of facilities (no more than one page per item).</p> <ul style="list-style-type: none"> • General Office • Correctional • Educational • Healthcare • Historical • Military • Parks • Other 												
	B.6	<p>List in one table the Energy Savings Performance Contracting projects (as described in RFQ Section 1) developed and implemented by your company within the past eight years.</p> <table border="1" data-bbox="428 1419 1385 1566"> <thead> <tr> <th>Project Name</th> <th>Facility Type</th> <th>City & State</th> <th>Project Size (Dollars)</th> <th>Project Size (Square Feet)</th> <th>Year Completed</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p>If projects were performed by staff members of your team, while they were an employee of another company, clearly identify the company with overall responsibility for that project, the individual's name, and their role in the project.</p>	Project Name	Facility Type	City & State	Project Size (Dollars)	Project Size (Square Feet)	Year Completed						
Project Name	Facility Type	City & State	Project Size (Dollars)	Project Size (Square Feet)	Year Completed									
	B.7	<p>Provide detailed information for a maximum of three ESPC projects listed in B.6 which can be used for references. Projects must be with non-K-12 government customers (including state, local, and higher education). Preference will be given to experience located in any of the following regional states: Georgia, Alabama, Mississippi, Arkansas, Kentucky, Ohio, Virginia, North Carolina, or South Carolina. Include the following information on each project as a minimum.</p>												

RFQ Attachment 6.2. Section B

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		<p>Project Identification: Owner name, city/state, and facility type (hospital, school, college, city, county, etc.).</p> <p>Contact Information: Names and contact information of owner(s) representatives who can serve as references.</p> <p>Project Size: Number of buildings and total project square footage.</p> <p>Project Dollar Amount: Total contract amount and the total project capital expenditure amount.</p> <p>Source of Funding: A description of the source of funding used for the project and the company's role (if any) in securing that funding.</p> <p>Project Dates: Actual dates of audit start and acceptance; actual construction starting and ending dates.</p> <p>Contract Terms: A description of the type of contract, financing arrangement, and contract term.</p> <p>Project Personnel: A list of the name(s) of individuals involved in the project, their role(s) and if these personnel will be assigned to projects in this program. (Attach their resumes in the personnel and staffing section).</p> <p>Project Schedule: Indicate if project was completed on schedule and an explanation if not.</p> <p>List of Improvements: The types of retrofits and operational improvements implemented related to energy, water, and other cost savings.</p> <p>Project Performance: The amounts of projected annual savings, guaranteed annual savings, and at least one year of actual annual savings for each project, as applicable, in a table as shown below.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin: 10px 0;"> <thead> <tr> <th style="width: 15%;"></th> <th style="width: 10%;">Projected Annual Savings</th> <th style="width: 10%;">Guaranteed Annual Energy Savings</th> <th style="width: 10%;">Actual Energy Savings Year 1</th> <th style="width: 10%;">Actual Energy Savings Year 2</th> <th style="width: 10%;">Actual Energy Savings Year 3</th> <th style="width: 10%;">Actual Energy Savings Year 4</th> <th style="width: 10%;">Actual Energy Savings Year 5</th> </tr> </thead> <tbody> <tr> <td>kWh</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>kW</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>MMBTU</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Gallons</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>(Other)</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Measurement and Verification (M&V): A brief description of the M&V approach for each project including which savings were stipulated, if any.</p> <p>Performance Guarantee: A description of the savings guarantee for each project and, if the guaranteed savings were not achieved, how the company compensated</p>							Projected Annual Savings	Guaranteed Annual Energy Savings	Actual Energy Savings Year 1	Actual Energy Savings Year 2	Actual Energy Savings Year 3	Actual Energy Savings Year 4	Actual Energy Savings Year 5	kWh								kW								MMBTU								Gallons								(Other)							
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RFQ Attachment 6.2. Section B

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Proposal Page # (Respondent completes)	Item Ref.	Section B— General Qualifications & Experience Items														
		<p>the facility owner for any annual shortfall (e.g., pay funds to meet the guarantee, etc.).</p> <p>Project Status: Post M&V, Closed (M&V term completed), ESPC Phase in Progress (audit or construction), non-ESPC work in progress, other (explain).</p> <p>Additional Comments: Comments on any special features, services, conditions, creative approaches, special needs of customer, etc. that may be relevant to this program.</p>														
	B.8	<p>Does your company hold an Indefinite Delivery Indefinite Quantity (IDIQ) contract for the 2017 U.S> Department of Energy (DOE) ESPC program?</p> <p>Is your company pre-qualified with any states for as-needed ESPC services? If so, indicate which states.</p>														
	B.9	<p>Does your company hold any other industry qualifications such as:</p> <ul style="list-style-type: none"> • ISO 50,001 for Energy Management • ISO 9001 for Quality Management <p>Or any others?</p>														
	B.10	<p>Provide a table to show your personnel pool of individuals who will potentially be assigned responsibility for each task and phase of a project under this program. Also include any added expertise and capability of staff available through other branch offices, subcontracts, etc., that you can provide back-up strengths.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">Name</th> <th style="width: 15%;">Title</th> <th style="width: 15%;">Staff or Sub-contractor</th> <th style="width: 15%;">Potential Role</th> <th style="width: 15%;">Academic / Professional Qualifications</th> <th style="width: 15%;">Level of Expertise</th> <th style="width: 15%;">Base Location</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> <p>Legend: <i>Potential role: technical analysis, engineering design, construction management, construction, training, post-construction M&V, support, and other services.</i> <i>Level of expertise: years in industry or other brief description.</i> <i>Base Location: Permanent office in Tennessee; On assignment from other state; Out-of-state support.</i></p>	Name	Title	Staff or Sub-contractor	Potential Role	Academic / Professional Qualifications	Level of Expertise	Base Location							
Name	Title	Staff or Sub-contractor	Potential Role	Academic / Professional Qualifications	Level of Expertise	Base Location										
	B.11	<p>Commitment to Diversity (5 points)</p> <p>Provide documentation of the Respondent’s commitment to diversity as represented by the following:</p> <p>1) Business Strategy. Provide a description of the Respondent’s existing programs and procedures designed to encourage and foster commerce with business enterprises owned by minorities, women, service-disabled veterans, persons</p>														

RFQ Attachment 6.2. Section B

RESPONDENT LEGAL ENTITY NAME:		
Proposal Page # (Respondent completes)	Item Ref.	Section B— General Qualifications & Experience Items
		<p>with disabilities, and small business enterprises. Please also include a list of the Respondent’s certifications as a diversity business, if applicable.</p> <p>2) Business Relationships. Provide a listing of the Respondent’s current contracts with business enterprises owned by minorities, women, service-disabled veterans, persons with disabilities, and small business enterprises. Please include the following information:</p> <ul style="list-style-type: none"> a) contract description; b) contractor name and ownership characteristics (i.e., ethnicity, gender, service-disabled veteran-owned or persons with disabilities); and c) contractor contact name and telephone number. <p>3) Estimated Participation. Provide an estimated level of participation by business enterprises owned by minorities, women, service-disabled veterans, persons with disabilities and small business enterprises if a contract is awarded to the Respondent pursuant to this RFQ. Please include the following information:</p> <ul style="list-style-type: none"> a) a percentage (%) indicating the participation estimate. (Express the estimated participation number as a percentage of the total estimated contract value that will be dedicated to business with subcontractors and supply contractors having such ownership characteristics only and DO NOT INCLUDE DOLLAR AMOUNTS); b) anticipated goods or services contract descriptions; c) names and ownership characteristics (i.e., ethnicity, gender, service-disabled veterans, or disability) of anticipated subcontractors and supply contractors. <p><i>NOTE: In order to claim status as a Diversity Business Enterprise under this contract, businesses must be certified by the Governor’s Office of Diversity Business Enterprise (Go-DBE). Please visit the Go-DBE website at Go-DBE Online Certification for more information.</i></p> <ul style="list-style-type: none"> d) Workforce. Provide the percentage of the Respondent’s total current employees by ethnicity and gender. <p><i>NOTE: Respondents that demonstrate a commitment to diversity will advance State efforts to expand opportunity to do business with the State as contractors and subcontractors. Response evaluations will recognize the positive qualifications and experience of a Respondent that does business with enterprises owned by minorities, women, service-disabled veterans, persons with disabilities, and small business enterprises and who offer a diverse workforce.</i></p>
		<p>SCORE (for all Section B—Qualifications & Experience Items above): (maximum possible score = (60))</p>
<p><i>State Use – Evaluator Identification:</i></p>		

End of Section B

QUALIFICATIONS & EVALUATION GUIDE

SECTION C: TECHNICAL QUALIFICATIONS, EXPERIENCE & APPROACH. The Respondent shall address all items detailed below and provide, in sequence, the information and documentation as required (referenced with the associated item references). The Respondent shall also detail the proposal page number for each item in the appropriate space below. Proposal Evaluation Team members will evaluate and assign one score for all responses to Section C— General Qualifications & Experience Items.

RESPONDENT LEGAL ENTITY NAME:		
Proposal Page # (Respondent completes)	Item Ref.	Section C— Technical Qualifications, Experience & Approach Items
	C.1	Provide a brief, descriptive statement detailing evidence of the Respondent’s ability to deliver and manage the services sought under this RFQ, as outlined in RFQ Section 1 and the Master Contract (RFQ Attachment 6.4.).
	C.2	Provide a narrative that illustrates how the Respondent will manage the services sought under this RFQ, as outlined in RFQ Sections 1 to ensure completion of the scope of services.
	C.3	Describe how the State would benefit from your company’s services and expertise. Please provide other information that you think the State should consider in evaluating this proposal.
	C.4	Provide a summary on the Respondent’s approach for a typical Investment Grade Audit (IGA) (one page or less) and include, as an attachment, a sample of an IGA completed within the last eight years representative of a recent energy performance contracting project.
	C.5	Provide a summary of the standards of comfort the Respondent generally uses for light levels, space temperatures, ventilation rates, etc. in a government facility and any flexibility for specific client needs. Include a discussion of how your standards will meet Tennessee’s High Performance Building requirements (HPBrS).
	C.6	Provide a detailed description of the methodology normally used by the Respondent to compute the baseline of energy and water use for a facility. Include a discussion of how the facility owner is engaged for development of an agreement on the baseline.

RFQ Attachment 6.2. Section C

RESPONDENT LEGAL ENTITY NAME:		
Proposal Page # (Respondent completes)	Item Ref.	Section C— Technical Qualifications, Experience & Approach Items
	C.7	Provide a summary of typical factors that can impact the calculated baseline and the Respondent’s general approach to adjusting the calculated baseline if one or more of these factors are present. Include how the facility owner participates in any agreement on any adjustments.
	C.8	Provide a summary of the Respondent’s approach to developing and implementing a Measurement and Verification (M&V) plan as part of an ESPC. Provide an overview of the approach to using IPMVP methodology, educating the client on M&V, integration of M&V into project development, and selection of M&V options for energy conservation measures. Please see Tenn. Code Ann § 12-4-118(c) regarding requirements for M&V of ESPC projects.
	C.9	Describe how the Respondent will implement quality control throughout project phases, including how quality control is implemented without significantly increasing the overall length of the project’s schedule. Identify qualified personnel who will be responsible for quality control on the ESPC projects.
SCORE (for <u>all</u> Section C—Qualifications & Experience Items above):		
<i>(maximum possible score = (40))</i>		
<i>State Use - Evaluator Identification:</i>		
<i>State Use - Procurement Officer Signature, Printed Name & Date:</i>		

End of Section C