

RFP ATTACHMENT 2

For an Energy Service Company for the
Energy Performance Contract
UT Health Science Center
SBC No. 540/013-05-2016

QUALIFICATIONS AND TECHNICAL PROPOSAL

SECTION A: MANDATORY REQUIREMENTS

PROPOSER NAME:

Proposal Page Number By Proposer	MANDATORY REQUIREMENTS
	A.1 Describe your firm's form of business (i.e., individual, sole proprietor, corporation, non-profit corporation, partnership, limited liability company) and the name of the U.S. state in which it is established.
	A.2 Provide a statement of whether there have been any mergers, acquisitions, or sales of your firm within the last five years, and if so, an explanation providing relevant details.
	A.3 Provide a statement that discloses any pending litigation against your firm; and if such litigation exists, an attached opinion of counsel as to whether the pending litigation will impair your firm's performance in a contract under this RFP.
	A.4 Provide a statement of whether, in the last ten years, your firm has filed (or had filed against it) any bankruptcy or insolvency proceeding , whether voluntary or involuntary, or undergone the appointment of a receiver, trustee, or assignee for the benefit of creditors, and if so, an explanation providing relevant details.
	A.5 Identify your firm's contact person regarding the proposal with mailing address, telephone number, and e-mail address.
	A.6 State whether the Proposer or any individual who will perform work under the Contract has a possible conflict of interest (e.g., employment by the State of Tennessee or University of Tennessee) and, if so, the nature of that conflict. The University reserves the right to cancel an award if any source could either give the appearance of a conflict of interest or cause speculation as to the objectivity of the Proposer. Such determination regarding any questions of conflict of interest will be solely within the discretion of the University.
	Mandatory Requirements (Pass or Fail)

SECTION B: QUALIFICATIONS AND EXPERIENCE

PROPOSER NAME:

Proposal Page Number By Proposer	QUALIFICATIONS AND EXPERIENCE
	<p>B.1 Briefly state your firm’s credentials to deliver the required services. Include your firm’s license information, number of employees, type of client base, and location of offices. Include awards or honors earned from industry organizations and publications.</p>
	<p>B.2 List contracts with the Owner and the State of Tennessee including current contracts and contracts completed within the previous five years.</p>
	<p>B.3 List current projects on which your firm is presently committed, or will be committed, with client name, dollar amount, the start and completion dates, and the services being provided.</p>
	<p>B.4 Provide summary information for each of no more than five projects of similar scope that have been contracted or are being constructed by your firm and describe the services provided. Format information as shown after this section.</p> <p>As an approved alternate, the Proposer may provide a sample work product to meet B.4 requirements.</p> <p>*If a Proposer is chosen for an interview then the Proposer will be asked to provide a sample work product to further meet this requirement.</p>
	<p>B.5 List your firm’s management, supervisory, and technical professional personnel that will be assigned to the project in (a) the Master Contract and (b) the Construction Phase. Provide one-page résumés of key personnel with title/position, role for this project; time commitment for this project, education, professional license or registration, state of residency, and general employment history. Provide relevant references names with contact information for the project manager(s). Identify the decision-maker for the EPC in each phase.</p> <p><i>NOTE: The Owner will apply the requirements of General Conditions Section 3.9.1 to the key personnel, requiring such personnel be designated in writing prior to Construction Services award and requiring that the Contractor shall not change personnel designated without consent of Owner.</i></p>
	<p>B.6 Provide a table identifying personnel named in B.5 that were assigned to projects named in B.4 and their job titles for that project.</p>
	<p>B.7 Provide an organizational chart highlighting named participants in B.5. Illustrate the lines of authority and designate the individual responsible for the completion of each service component.</p>
	<p>B.8 As used herein, the term “Tennessee Business” means a business in which the majority of the employees of the business working on this project are Tennessee residents working out of an office with a location in the State of Tennessee. Provide documentation of your firm’s current contracts with Tennessee Businesses. Please include the following information:</p> <p style="padding-left: 40px;">(a) <u>Business Strategy.</u> Provide a description of your firm’s procedures designed to encourage and foster commerce with Tennessee Businesses, including how your firm will</p>

	<p>provide Tennessee Businesses the opportunity to competitively compete for subcontracts awarded pursuant to Pro Forma Master Contract Section D.5.</p> <p>(b) <u>Business Relationships</u>. Provide a listing of your firm's current contracts with Tennessee Businesses. Please include the following information:</p> <ul style="list-style-type: none"> (i) Contractor's name, point of contact name, and telephone number, (ii) Contractor's primary place of business and location of staff (if different than primary place of business); and (iii) Contract description and total value.
	<p>Qualifications and Experience Proposal Points (Maximum = 50)</p>

QUALIFICATIONS AND EXPERIENCE INFORMATION

Information and format required for Qualifications and Experience Criteria B.4.

PROPOSER NAME:

Project Information:

Project:	Period of Service:
Client:	Current Project Status:
Client Point of Contact:	Start Date:
Location:	Completion Date:
Key Personnel with Office Location:	
Manager:	
Supervisor	
Architect / Engineer or Technical Professional:	
Other Personnel:	

Summary of Scope and Services Provided:

Listing of Energy Savings Projects Implemented including the following information for each listing:

- Amount Invested
- Annual Energy Cost Savings Identified
- Energy Usage and/or Demand Savings
- Calculation Methodology
- Project Simple Paybacks, Other Benefits, etc.
- Brief Description of Building Types included in the Gross Square Footage
- Average Unit Cost of Energy by Type
- Type of Funding Secured and Payment Methodology
- Savings Guarantee Arrangement
- Measurement and Verification Methodology, Reporting, Results, Any Resolutions, etc.

SECTION C: TECHNICAL APPROACH

PROPOSER NAME:

Proposal Page Number By Proposer	TECHNICAL APPROACH
	<p>C.1 Energy Performance Contracting: Describe the methods to be used for the following services for this project. Proposers should highlight their management and cost approach to delivering the services with enough information to show their understanding of the project.</p> <p>Master Contract Phase</p> <p style="padding-left: 40px;">a. Construction Development Phase</p> <p>Construction Services Phase</p> <p style="padding-left: 40px;">b. Design and Construction Documents</p> <p style="padding-left: 40px;">c. Construction</p> <p style="padding-left: 40px;">d. Closeout</p> <p>Performance Period Phase</p> <p style="padding-left: 40px;">e. M&V Methodology</p> <p style="padding-left: 40px;">f. M&V Reporting</p> <p style="padding-left: 40px;">g. Operations and Maintenance</p>
	<p>C.2 Technical Services: Describe the methods to be used for the following services for this project.</p> <p style="padding-left: 40px;">a. Assessments and Audits: Provide evidence demonstrating capabilities including: Organizational participation; data collections procedures; proposer furnished equipment to be used</p> <p style="padding-left: 40px;">b. Initial Proposal: Provide evidence demonstrating capabilities including: List of technologies; calculations; preliminary economics</p> <p style="padding-left: 40px;">c. Detailed Energy Study: Provide evidence demonstrating capabilities including: List of proposed energy savings; modeling and calculations; energy and cost savings; cost basis for the construction services</p> <p style="padding-left: 40px;">d. Final Proposal: Provide evidence demonstrating capabilities including: Final energy savings; owner interface issues and energy savings bundles; final economics</p> <p style="padding-left: 40px;">e. Construction: Provide evidence demonstrating capabilities including: Scheduling; cost control; subcontractors</p> <p style="padding-left: 40px;">f. Performance Period: Provide evidence demonstrating capabilities including: Measurement and verification plan and results; O&M plan with training</p> <p style="padding-left: 40px;">g. Lessons Learned: Provide statements or relevant lessons from previous experience.</p>
	<p>C.3 Describe your firm’s experience with implementing criteria for sustainable design and construction such as Tennessee High Performance Building Requirements, State of Tennessee Sustainable Design Guidelines, LEED, Green Globes, or Energy Star.</p>
	<p>C.4 Describe your firm’s diversity participation as follows:</p> <p style="padding-left: 40px;">1) A description of the Proposer’s existing programs and procedures designed to</p>

	<p>encourage and foster commerce with business enterprises owned by minorities, women, persons with a disability and small business enterprises.</p> <p>2) A listing of the Proposer's current contracts with business enterprises owned by minorities, women, persons with a disability and small business enterprises.</p> <p>3) An estimate of the level of participation by business enterprises owned by minorities, women, persons with a disability and small business enterprises in a contract awarded to the Proposer pursuant to this RFP.</p> <p>4) The percent of the Proposer's current employees listed by gender, noting ethnicity and disability.</p>
	<p>C.9 Describe how your firm will select its professional representative licensed in the discipline of engineering in the State of Tennessee to manage the services required of a design professional under the Pro Forma Contract. Please be aware that such selection process must be compliant with the requirements of Tenn. Code Ann. § 12-4-107.</p>
	<p>C.10 Describe how your firm will select subcontractors used to perform Construction Phase services not self-performed by your firm.</p>
	<p>Technical Approach Points (Maximum = 50 points)</p>

END OF QUALIFICATIONS AND TECHNICAL PROPOSAL