

[SAMPLE]

REQUEST FOR PROPOSAL

Energy Awareness, Education and Training Program

[Name of School District]

[Date]

Purpose

The purpose of this solicitation is to obtain proposals from qualified consultants that can deliver an energy awareness, education, and training program which will achieve savings in the district's utility consumption and costs through that program alone. No equipment will be installed or modified under this contract. Although the primary utility of concern is electricity, the program is not limited to that utility only, but may include natural gas, water and sewer as well.

Services Requested

1. Assistance with energy management policy and program development, including recommendations and sample policy statements.
2. Training of district employees that will perform duties as energy managers in charge of executing the program.
3. Training of staff and faculty on tasks, commensurate with their assigned duties and job description, which are designed to optimize the district's utility resources.
4. Management and reporting of energy and utility resource consumption data, including the establishment of an initial base year and successive program years, as well as, savings achieved by the program.
5. Resource conservation curriculum that is correlated to the State Curriculum Requirements for use as a resource for teachers in grade levels 3 thru 8.

Term of Contract

The initial term of the contract will be for three years with an option to extend the contract in one year increments for an additional two years. The contract period will begin on the first day after both of the school district employees, which have been hired as the energy managers, are present for duty and available to begin training.

Termination

Either party may terminate the contract during the 3-year term providing that notice is given at least 90 days in advance. If the district requests early termination, the consultant will submit an itemized invoice for any outstanding program costs (e.g. materials, leases, or other reasonable upfront costs incurred that would have been paid for over the life of the contract). The consultant can include in the submission an alternative schedule of cost impacts for termination. The consultant will not be reimburse any additional fees specifically for termination. After the 3-year contract period, if no request for termination is submitted by either party, then the contract will

automatically extend for one more year. In any case, the contract will not be automatically renewed past the 5-year period.

Program Materials

All materials provided by the consultant relating to this program shall remain the property of the school district. No materials will be returned to the consultant at the end of the contract period, including any copyrighted materials. The school district shall have the right to continue using any and all program materials for as long as it desires to do so.

Technical Proposal

Policy and Program Development

Submissions must include the title and a brief description of the types of policies that will be proposed to the school board for adoption and the major components of the energy awareness, education and training program, including who will be trained, the method of training, and the time and frequency that will be required of district employees for attendance at training sessions.

Energy Manager Training

The school district will provide two employees to perform duties as energy managers to execute and monitor the energy awareness, education and training program (including associated office space, furniture, and computer hardware capable of running the data management and accounting software provided by the consultant). They will also monitor the performance of district employees and their success in accomplishing the tasks required of the program. They will also monitor the district's utility consumption to determine the rate of consumption and savings that the program produces. The consultant is expected to assist in the hiring process (developing job descriptions, qualifications, and assisting in the interviewing and recommendations for the selection of applicants).

Staff and Faculty Training

Submissions must include an outline of the kind of subjects that will be included in the training of administrative staff, non-instructional administrative employees, faculty, custodians, food service, and maintenance technicians. It is expected that, although, general topics will apply to all employees, specific subjects relating to the employee categories listed above will be included. Training will be conducted in a way to minimize impacts on district operations.

Management and Reporting of Consumption and Cost Data

The consultant will provide for the use of the district's energy managers a software program that assists in determining the consumption and cost of the utilities that will be included in the scope of the contract. The software should be Metrix, Utility Manager Pro, Energy Cap, or other similar software that is capable of performing the calculations required by Option C of the International Performance Measurement and Verification

Protocol (IPMVP). The following requirements will apply to the use of this software to determine energy savings:

1. All data will be the property of the school district. Access to all data will be unrestricted throughout the term of the contract and beyond.
2. All data and calculations will be available for third party review, evaluation, and verification without prior notice.
3. The program should allow for the entry of data for all metered accounts.
4. The school district will provide the consultant with all necessary utility bills included in the scope of the contract.
5. The base year data to be used to determine savings will be established by the school district. That base year will remain the base year throughout the term of the contract including any extensions if there are any.
6. Modifications made to the base year data will be accomplished by the energy managers upon approval of the school district prior to being applied to the savings calculations. Modifications will generally be allowed for the following reasons:
 - a. Square foot changes that affect the consumption of utilities.
 - b. Significant operational changes that deviate more than 5% from the base year norm (e.g. new administrative policies that are implemented during the program that result in increased energy loads).
 - c. A load creep factor not to exceed 1% per year to account for aging mechanical systems and minor plug load increases.
 - d. The school district will supply procurement information to the consultant to determine significant changes in plug loads, which can then be used to adjust the baseline.
 - e. The consultant will obtain weather data for use by the software program to adjust for weather changes. The data for each account will be "tuned" to the highest R-squared value possible for the data available. Modifications for operational dates and times can be applied to the software to increase the R-squared value for that metered account.
 - f. Significant building modifications that affect energy loads by more than 5%.
 - g. Significant changes in occupancy of more than 10%.
 - h. Any other factor mutually agreed to by the parties and validated by industry standard practice.

Measurement and Verification of Savings

Determination of savings will be based on the industry standard described by the *International Performance Measurement and Verification Protocol (IPMVP), Concepts and Options for Determining Energy and Water Savings Volume I*, Revised March 2002, Option C. The district's energy managers will be trained to accomplish the verification of savings produced by this program. In addition, independent verification by a third party will be accomplished at the end of each program year.

The submission will contain an M&V plan that includes the following elements:

1. Brief description of each school and ancillary facility included in the scope of the contract and a list of all metered accounts associated with it.
2. Utility unit values to be used in calculating consumption (e.g. for electric, the units would be demand and energy consumption).

3. Base year values in utility units of measure (e.g. kilowatts, kilowatt-hours, gallons, etc.)
4. Base year rate schedules for each utility provider.
5. The method of valuating utility units saved (or avoided) will be the utility provider's "rate schedule or appropriate simplification thereof" (see IPMVP, Vol. I, March 2002, Section 4.5). The utility bill reconstruction method allows for marginal rates to be applied to each utility component of the bill (e.g. separate rates for demand and consumption) and will be used for valuation of the utility units saved or avoided. Average unit cost, blended rates, or effective rates, although convenient for budget estimating, are not allowed for use in determining energy cost savings or cost avoidance.
6. Sample report format for monthly savings or cost avoidance.

Resource Conservation Curriculum

The district desires to involve teachers and students in the conservation program. However, it can only do so within the framework of the Florida Sunshine State Standards for curriculum. The consultant will submit sample curriculum materials correlated to the required curriculum for grades 3 through 8. Materials obtained through the National Energy Education Development (NEED) Project or the National Energy Foundation (NEF) or similar content would be appropriate for this submission.

Cost Proposal

Projected Savings

The submission will include projected savings (or cost avoidance) and the rationale for the amount projected.

Savings Guarantee

The submission will include a detailed description of any guarantees of savings over the term of the contract, if any, provided by the consultant.

Fees

The submission will contain an itemized list of all fees and costs associated with the implementation of this program including the salaries of the two energy managers to be hired by the district.

Payment

The district desires a shared savings approach for compensation of consultant's efforts. It is expected that the cost of the program will be paid for by the savings that it generates over the 3-year period of the contract. Therefore the consultant will include in the submission a projection of gross savings, program fees and costs, and net savings resulting from the program based on sound accounting and technical principles.

Termination Costs

The contract shall not contain any termination fees for early termination, except that the consultant will be reimbursed reasonable expenses that are directly associated with

mobilizing and operating the program. Cost for retained use of copyrighted material received by the district up to the time of termination will also be reimbursed.

Selection Criteria

Consultant's Qualifications

The consultant shall be a corporate entity that is regularly engaged in the business of energy awareness, education or training. Company employees that will be used on this project will have at least 5 years of experience in these areas. The consultant shall submit a list of references based on past similar work which can be a combination of professional and client contacts.

Criteria for Selection

Consultants interested in providing some or all of these services must meet, as a minimum the following criteria:

1. Consultant's qualifications described above.
2. Knowledge of the local, state and federal laws governing educational facilities and the use and approval of public lands.
3. Must have a qualified number of personnel to handle the workload for the required scope and schedule.
4. Must submit a written proposal addressing the technical and cost proposals identified above and further detailed below.

Consultant firms responding to this proposal, their agents and/or associates shall not contact or solicit any District official or School Board member regarding this RFP during the selection process. Failure to comply with this provision will result in disqualification of the firm.

Each firm will be required to submit a statement disclosing the names all persons employed by this school district who have received any compensation from the submitting firm for any reason at any time prior or during the solicitation period. If no one, then the statement should so state.

Written Proposal

The consultant will submit a written proposal (not to exceed 20 8.5x11 pages, not counting the front and back cover, not counting the consultant's transmittal letter) that address each item noted above as follows:

1. Statement of consultant's qualifications and experience.
2. Items addressing the technical proposal noted above.
3. Items addressing the cost proposal.

The written proposal should be sent to [name and address] no later than [date and time].