

**Request for Qualifications**

**Guaranteed Energy Savings Contract:**

**South Bend Central Fire Station &**

**MLK Dream Center Solar PV**

**City of South Bend, Indiana**

**CITY OF SOUTH BEND, INDIANA  
BOARD OF PUBLIC WORKS  
REQUEST FOR QUALIFICATIONS**

Proposals shall be received no later than **9:00 a.m., EST, on January 28<sup>th</sup>, 2025**, at [bpwbids@southbendin.gov](mailto:bpwbids@southbendin.gov)

**PUBLIC WORKS GUARANTEED ENERGY SAVINGS CONTRACT QUALIFICATIONS**

**SUMMARY:**

The Board of Public Works of the City of South Bend (“City”), is soliciting proposals from qualified vendors for the following:

**Project description:**

This solicitation is a Request for Qualifications (RFQ). The purpose is to solicit qualifications from Energy Service Companies (ESCOs) that describe their capabilities to identify, design, install, maintain, and monitor a comprehensive energy generation and utility conservation program for the City of South Bend’s Central Fire Station located at 1222 S Michigan St, South Bend, IN and Martin Luther King Dream Center located at 1522 Linden Ave, South Bend, IN.

This RFQ is the first step in a multi-step process to identify one or more qualified ESCOs. This RFQ details the requirements for response, deadlines, and directions for submittal in subsequent sections. The City of South Bend (“Owner”) intends to select an ESCO and award one or more contracts to provide utility conservation measures to the facilities described herein. For the purpose of this RFQ, “ESCO” refers to any entity that is qualified to provide a turnkey utility conservation program.

The project will be referred to as a “Guaranteed Energy Savings Contract” (GESC), although it may include non-energy activities. The project will conform to Indiana statute for GESCs with municipal governments, therefore all procurement, design, and installation activities will be pursuant to IC 36-1-12.5.

**Proposals must meet the minimum expectations as provided in the City’s Request for Qualifications in order to be considered.**

**How the Proposals will be evaluated and scored for selection.**

The person/firm making a proposal shall submit an explanation of how they comply with the requirements of this RFQ. Exceptions to any requirements mentioned in this RFQ must be clearly noted. The information submitted will be scored by City staff from Public Works and Sustainability according to the following 100-point system.

<b>Technical approach to energy production and use reduction</b>	<b>25 Points</b>
<b>Project management approach, including design, implementation, cost to the owner, and ongoing service</b>	<b>25 Points</b>
<b>Depth and relevance of GESC project experience</b>	<b>15 Points</b>
<b>Technical, Business, and Personnel Qualifications</b>	<b>15 Points</b>
<b>Financial Qualifications, Guarantees, and proposed ROI</b>	<b>10 Points</b>
<b>Measurement and Verification Approach</b>	<b>10 Points</b>

Upon selection, the City will then be given the approval to negotiate the terms of a final agreement. Following negotiations, the City’s Board of Public Works will be asked to review and approve the proposed written agreement and if approved, the agreement will be executed.

The successful proposal respondent(s) shall comply with the City’s ordinance and all other federal, state and local laws and regulations governing nondiscrimination in employment.

The City reserves the right to accept, negotiate scope or reject any or all proposals.

**Complete Proposal Request packages and instructions are available for download by visiting the City of South Bend’s web page at [www.southbendin.gov](http://www.southbendin.gov):**

- X Click on “Business”
- X Click on “Submit A City Contract Bid”
- X Under “Request for Proposals, Vehicles, Equipment and Miscellaneous Bids” heading
- X Click on “Registration Form” and register your company to receive updated information
- X Select specification to download
- X Print the specification or save it to your computer

There is no charge for the documents. Questions should be directed by email to Lidya Abreha at [labreha@southbendin.gov](mailto:labreha@southbendin.gov).

The City reserves the right to review and audit all documents related to this proposal and to request additional information as determined necessary. Failure to comply with the City’s request may be deemed grounds for dismissing the proposal.

An optional Pre-Response Conference will be held on **Monday, January 6<sup>th</sup>, 2025** at 1:00 PM virtually at <https://tinyurl.com/Pre-Response-Conference>

Any questions about response conditions must be addressed to the Owner via email no later than 5:00 PM on **Wednesday, January 8<sup>th</sup>, 2025** to Lidya Abreha at [labreha@southbendin.gov](mailto:labreha@southbendin.gov).

**Proposals must include the Non-Collusion Affidavit, Non-Debarment Affidavit, Employment Eligibility Verification, and Non-Discrimination Commitment Form.**

BOARD OF PUBLIC WORKS  
Theresa Heffner, Clerk

Publish two (2) times: December 20<sup>th</sup>, 2024  
December 27<sup>th</sup>, 2024

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## **A – INSTRUCTIONS TO RESPONDENTS**

- Interested respondents MUST complete registration form at <https://www.southbendin.gov/RFP> to receive updates or addenda.
- Review the required Non-collusion form also at <https://www.southbendin.gov/RFP>. Do not submit qualifications if these terms are not acceptable.
- Optional pre-response meeting will be held on Monday **January 6<sup>th</sup>, 2025** at 1:00 PM virtually at <https://tinyurl.com/Pre-Response-Conference>.
- Questions are welcome and appreciated. Questions should be asked at the pre-response meeting or by email to [labreha@southbendin.gov](mailto:labreha@southbendin.gov). Questions are due by 5PM on Wednesday, **January 8<sup>th</sup>, 2025** to Lidya Abreha at [labreha@southbendin.gov](mailto:labreha@southbendin.gov).
- Answers to all questions will be provided in writing to all **registered** respondents.
- If the City determines any new information, question, or concern alters the RFQ, an addendum will be issued to revise the RFQ.
- Electronic responses must be submitted to the Board of Public Works no later than **9:00 a.m., EST, on January 28<sup>th</sup>, 2025**, at [bpwbids@southbendin.gov](mailto:bpwbids@southbendin.gov). Subject line should be “SBFD & MLK Guaranteed Energy Savings Contract Qualifications”.
- Late responses will not be accepted and will be returned to the submitting company unopened.
- Owner is not liable for any cost incurred by any person or firm responding to this RFQ.
- Owner reserves the right to reject as nonresponsive any responses that do not contain the information requested in this RFQ and in the form outlined in this RFQ.

## **B – PROJECT**

### 1. Purpose of Solicitation

This solicitation is a Request for Qualifications (RFQ). The purpose is to solicit qualifications from Energy Service Companies (ESCOs) that describe their capabilities to identify, design, install, maintain, and monitor a solar photovoltaic energy generation system for the City of South Bend’s Fire Department Central Fire Station and Martin Luther King Dream Center.

This RFQ is the first step in a multi-step process to identify one or more qualified ESCOs. This RFQ details the requirements for response, deadlines, and directions for submittal in subsequent sections. The City of South Bend (“Owner”) intends to select an ESCO and award one or more contracts to provide utility conservation measures to the facilities described herein. For the purpose of this RFQ, “ESCO” refers to any entity that is qualified to provide a turnkey utility conservation program.

The project will be referred to as a “Guaranteed Energy Savings Contract” (GESC), although it may include non-energy activities. The project will conform to Indiana statute for GESCs with municipal governments, therefore all procurement, design, and installation activities will be pursuant to IC 36-1-12.5.

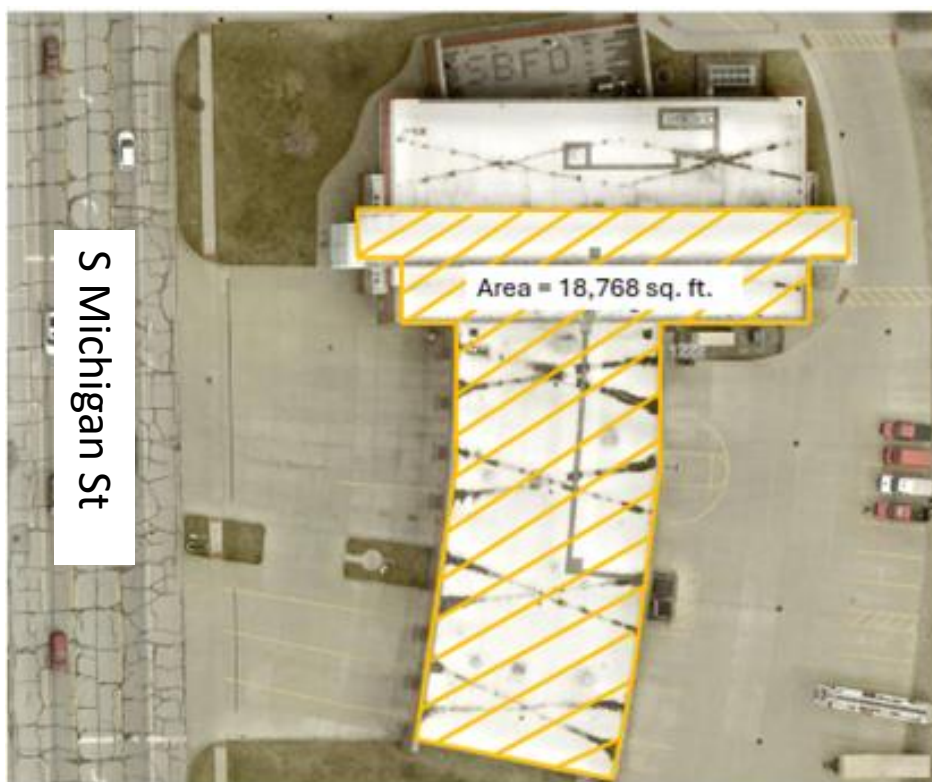
## 2. Owner Background

The **City of South Bend**'s mission is to deliver services that empower everyone to thrive. This delivery is in line with the City's values of excellence, accountability, innovation, inclusion, and empowerment. The City has an annual budget of over \$400 million. The City maintains a high credit rating of "AA."

The City of South Bend has utilized a performance contract to convert traffic signals to LED and to perform a large GESG for the South Bend Century Center and Morris Performing Arts Center. The City anticipates implementing additional GESG projects in the near future.

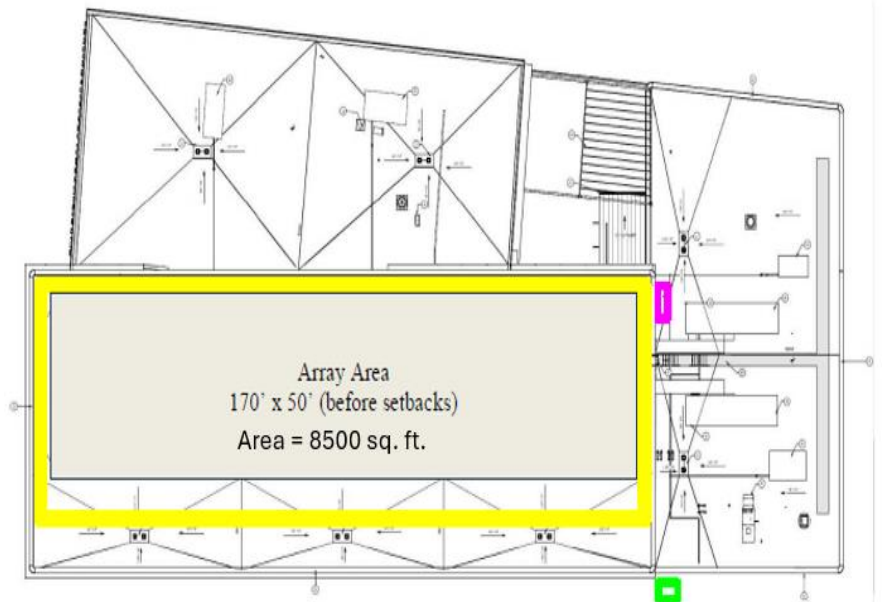
The **Office of Sustainability (OOS)** is a division of the City's Department of Community Investment. The mission of the Office is to mobilize the community to address climate emergency. The Office works towards achieving its mission by illuminating ways to reduce pollution and adapt to a changing environment, collaborating with the community, and designing, developing, and delivering climate solutions.

The **South Bend Fire Department (SBFD)** provides rapid and efficient response to emergency medical incidents, fires, hazardous materials incidents, and complex rescue situations to safeguard the life and property of citizens. SBFD is comprised of 11 Fire Stations and provides staffing for several specialized areas. Station 1 is located at 1222 S. Michigan St. Station 1 consumes annual average of 465,024 kWh. The re-roofing of this building is anticipated to be completed by end of May, 2025.



**Figure 1:** South Bend Fire Department – Station 1 Available Roof Area

The **Martin Luther King Jr. Dream Center** in South Bend has been a vital community resource since its founding on November 11, 1973. Located at 1522 Linden Avenue on the city's West Side, the Center has long been a hub for growth, learning, and connection, offering inter-generational programs that serve the area's diverse population. Currently, the Center is undergoing a transformative renovation set to be completed by January 2025, aimed at revitalizing its facilities and grounds to better serve the community in the years to come.



**Figure 2: MLK Dream Center – Available Roof Area**

### 3. Services Requested

Owner requests design and installation of a turn-key solar energy system on the roof of the South Bend Fire Department Central Fire Station and The MLK Dream Center. The selected ESCO will perform analysis, measure selection, development of engineering plans and specifications, installation, commissioning, monitoring and verification of savings, and management of a multi-subcontractor GESC. The Owner seeks to maximize the Return on Investment (ROI) for each facility.

Owner anticipates a major reduction in annual utility consumption and associated operations and maintenance costs. A contract must include monitoring and verification of utility savings and any guaranteed operational savings. Respondents agree that 100% of all energy and operational savings over the term of the contract shall be retained by the Owner.

Additionally, the Owner requests the ESCO provide the following services:

- Comply with all requirements and provide all information requested by the Owner in applying for utility incentives and rebates payable to Owner, including the Inflation Reduction Act Rebate. The ESCO should also be willing to follow the Owner's direction on any items that need to be done to be eligible for the IRA rebate.
- Submit any state or other required reports throughout the performance period.
- Comply with City Ordinance 14.5, requiring participation goals for minority and woman owned businesses. Participation goals will be set by the city. It will be the selected ESCO's responsibility to meet or exceed the pre-determined participation goals or to seek good faith effort waiver of such goals.

- Work with Owner to schedule program's implementation to minimize disruption to facility operations.
- Provide training to facility operators and may provide awareness education to facility operators or the public.
- Transparent financial reporting on budgeting and expenditure of project dollars.
- Manufacturer-independent recommendations except when a specific manufacturer provides demonstrable benefits to Owner (e.g. interoperability with existing equipment, substantially better warranty). Any relationship between the ESCO and a manufacturer must be disclosed during project design.

Owner requires all respondents to be “Qualified Providers” as defined by IC 36-1-12.5-3 and appear on the Indiana Department of Local Government Finance’s *Qualified Guaranteed Energy Savings Contract Providers* list. <http://www.in.gov/dlgf/9476.htm>

#### 4. Project Description

The scope of the contract will cover energy cost savings at the South Bend Fire Department and MLK Dream Center through a combination of measures. The ESCO will develop a plan to generate solar photovoltaic energy and, if feasible, will consider distributed generation, load shifting/peak shaving, energy storage, or fuel switching. Ancillary improvements to energy generation such as electrical service upgrades may be included in the scope of the project.

This project’s primary focus is the Central Fire Station at 1222 S. Michigan St and MLK Dream Center at 1522 Linden Ave. A “desk study” by a local solar company indicated feasibility of a sizeable rooftop installation at these facilities with the available funding. Project is to primarily consider solar photovoltaic systems for generation of electricity. However, recommendations could also include related renewable energy, distributed generation, load shifting/peak shaving, energy storage, or associated non-energy measures such as electrical system repairs or software/hardware for monitoring and displaying renewable energy production, within the guidelines of the GESC statute.

The Central Fire Station’s roof replacement is expected to be completed by mid-2025. MLK Dream Center construction is also expected to be completed by early/mid-2025.

The Owner may award a project for only one of the facilities or both. However, the Owner requires that bidders submit proposals for both facilities.

The ESCO may consider indoor and outdoor facility components and applications, including

- indoor, outdoor, and specialty lighting;
- dehumidification and air distribution systems;
- space heating, ventilation, and air-conditioning;
- heat recovery;
- energy and environmental management systems and controls;
- pumps, motors, drives, and air compressors.



The final scope will be determined collaboratively between ESCO and Owner based on cost, scale of opportunity, urgency of replacement, and strategic value of measure.

Firms that have registered at <https://www.southbendin.gov/RFP> will be provided with energy usage information, rooftop record drawings, and other supplementary information to the extent the information is available.

## 5. Overview of Procurement Process

### a) Request for Qualifications Issued by Owner

This Request for Qualifications (RFQ) is the first step in a multi-step process to identify one or more qualified ESCOs. This RFQ details the requirements for response, deadlines, and directions for submittal in subsequent sections. This process must conform to provisions of IC 36-1-12.5. Owner will not reimburse any respondent for costs incurred in developing the RFQ. See “Notice to Respondents” and “Instructions to Respondents”.

### b) Selection of Short-list of Providers

A multi-department committee will review the responses. Based on selection criteria described in this document, the committee may select up to three of the most qualified respondents to comprise a short-list for the next stage of review. Owner may also determine that no qualified submittals have been received and reject all submittals.

### c) Facility Walk-Through Led by Owner

The short-listed respondents will walk through Central Fire Station & MLK Center together with the Owner to develop an understanding of those facilities and opportunities for solar photovoltaic energy generation and efficiency upgrades.

### d) Interviews

Oral presentations will be required of each of the short-listed respondents covering their general qualifications in the field of performance contracting for solar energy generation and utility efficiency improvements. The selection committee will also interview the respondents’ team. Owner requests that the proposed project manager attend all interviews and presentations. Instructions will be provided to short-listed firms.

### e) \*\*Selection of ESCO(s) by the City\*\*

The review team will provide a recommendation to the Board of Public Works for approval via resolution. The Board’s approval will be sent to Common Council for acceptance. The Owner may select one or more respondents.

### f) Negotiate Agreement for Project Development

Selected respondent(s) will develop a preliminary project proposal. The City and the selected ESCO(s) will negotiate the terms of contract for the ESCO to evaluate and recommend specific solar energy generation and conservation measures for implementation (sometimes called “investment-grade audit”,

“utility assessment report”, or “project proposal). The development of this report will be at no cost to the City contingent upon subsequent execution of a master performance contract.

g) Preparation of Final Project Proposal

It is expected that selection of measures for this proposal will involve close collaboration with Owner’s Departmental staff and incorporate priority projects and Owner’s preferred design criteria.

h) Submittal of Final Project Proposal

The ESCO will provide a final proposal for the Owner’s GESC project. The final proposal will include a list of all conservation measures and energy generation proposed, documentation of potential utility and operational savings, detailed project engineering design, and all associated implementation costs and savings guarantees. It must also include a Measurement and Verification Plan and a Sample Periodic Savings Report.

i) Review and Recommendation of Final Proposal

The Owner’s review committee will review the final proposal and either accepts the proposal, accept the proposal with exceptions or modification, or rejects the proposal at the Owner’s expense.

j) Negotiate Master Performance Contract

After the Final Proposal is accepted, the selected respondent and the Owner will negotiate a master implementation contract which will include the proposal and all terms and conditions, procedures, timelines, forms, and points of contact for the contract period.

k) Board of Public Works and Common Council Approval

Contracts and other formal agreements related to the project will be executed by the City of South Bend Board of Public Works and Common Council as deemed appropriate by the City Legal Department and state procurement and GESC statutes.

l) Perform Project

Once the Contract is approved and executed, and funding has been secured, the ESCO will be issued a notice to proceed and can commence construction/installation.

6. Anticipated Timeline for ESCO Selection

1 <sup>st</sup> Publication	December 20 <sup>th</sup> , 2024
2 <sup>nd</sup> Publication	December 27 <sup>th</sup> , 2024
Pre-Response Meeting	January 6 <sup>th</sup> , 2025
Questions Due (in writing)	January 8 <sup>th</sup> , 2025
Opening of Responses	January 28 <sup>th</sup> , 2025
Short List Announced	February 11 <sup>th</sup> , 2025
Facility Walk-Through	(tentative)
Interviews	(tentative)
Recommendation of selection to Board of Works; Approval of selection by Board of Works	(tentative)
Begin contract negotiations	(tentative)

## 7. Evaluation

Respondent must be listed on the Indiana Department of Local Government Finance's *Qualified Guaranteed Energy Savings Contract Providers* list. <http://www.in.gov/dlgf/9476.htm>

### a) Selection Committee

The evaluation of all responses shall be performed by a selection committee consisting of:

- Director of Public Works
- Director of Sustainability
- Fire Chief – Fire Department
- Assistance Chief of Services – Fire Department
- VPA Representative
- City Engineer
- Project Manager - Engineering

### b) Scoring Criteria

Scoring shall be based on a total of 100 points. Scores for each category will be determined collaboratively by the selection committee. The scoring will be based on the following evaluation criteria:

<b>Technical approach to energy production and use reduction</b>	<b>25 Points</b>
<b>Project management approach, including design, implementation, cost to the owner, and ongoing service</b>	<b>25 Points</b>
<b>Depth and relevance of GESC project experience</b>	<b>15 Points</b>
<b>Technical, Business, and Personnel Qualifications</b>	<b>15 Points</b>
<b>Financial Qualifications, Guarantees, and proposed ROI</b>	<b>10 Points</b>
<b>Measurement and Verification Approach</b>	<b>10 Points</b>

### c) Oral Presentation and Interview

Up to three finalists will be invited for an oral presentation and interview. Specific presentation instructions and criteria will be provided to invited firms.

## **C – RESPONSE FORMAT FOR RESPONDENT’S SUBMITTAL**

*Maximum page numbers are listed in each section. Responses should not exceed 18 pages. Shorter responses are appreciated. Include required attachments as appendices to the response.*

### 1. Cover Page

*Page count: 1 page*

- a. Include name of company, address, and primary and secondary contact person, including name, email, and phone number.
- b. Provide a concise executive summary providing an overview of the ESCO’s qualifications.

### 2. Table of Contents

*Page count: 1 page*

### 3. Company Background and Qualifications

*Page count: 3 pages plus attachments*

- a. Provide a statement about company mission, vision, and values.
- b. Describe the complete range of utility services and capabilities your firm offers: such as engineering, design, auditing, energy equipment selection and installation, operation and maintenance, commissioning, monitoring and verification, and training.
- c. List any awards and accreditations. If Provider is not nationally-accredited as an ESCO, explain why.
- d. Provider’s Engineering Qualifications and Management
  - i. Number of years company has operated in Indiana
  - ii. Number of employees residing in Indiana
  - iii. Company officers
  - iv. Identify Professional Engineers directly employed by the Provider responsible for this project. Include License number of the person responsible for the project.
  - v. List the personnel employed by the Provider responsible for this project. Identify Professional Engineer(s) directly employed by the ESCO responsible for this project and include their License number(s) Attach a resume (1 page or less) on each person listing education, experience, work history, and responsibilities on this project.
- e. The most recent audited Financial Report.
- f. The Provider must be certified and meet the requirements of IC 4-13.6-4 and the RFQ submitted must attach a copy of the firm's certification of qualification issued under IC 4-13.6-4.
- g. Describe if the Provider is a manufacturer, contractor, or engineering firm. Clearly delineate what services or products the Provider is including from their own company as part of the project.

### 4. Financial Qualifications

*Page count: 2 pages plus attachments*

- a. Describe your ability to provide adequate liability insurance and necessary performance bonding.
- b. Attach the two most recent financial reports or audited financial statements in electronic version via web or file share service links.
- c. Provide amount of total outstanding guarantees and amount of guaranteed shortfalls paid out to customers in past five years.
- d. Attach letter of reference of two subcontractors used on large projects attesting to your firm's fiscal responsibility.

## 5. Cost

*Page count: 1 page*

- a. Provide a comprehensive and detailed breakdown of costs for the scope of work described in this document.
  - i. Include a projected cost per facility based on recently completed projects with similar scope.

## 6. Technical Approach

*Page count: 2 pages plus attachments*

- a. Describe your firm's general approach to guaranteed energy savings contracting, including:
  - i. Immediate and long-term value your firm brings to Owner.
  - ii. Any unique qualities or capabilities of your firm that would benefit the Owner in this project.
- b. Describe the business unit dedicated to performance contracting, including:
  - i. Years in business specifically in guaranteed energy savings contracting;
  - ii. Percentage of total business revenue generated by performance contracting projects or related services; and
  - iii. Any local presence.
- c. Attach summaries (maximum 1 page per project) of four projects completed by this specific branch of your firm, within the past five years, for services similar to this project. Include at least two projects with two years of guaranteed performance history. Include the following specific information for each project:
  - i. Project title and location.
  - ii. Name, address, and phone number of Owner's representative.
  - iii. Nature of your firm's responsibility.
  - iv. Type of contract (guaranteed savings, shared savings, direct cost, etc.)
  - v. Total contract dollar amount and term in years.
  - vi. Scope of work including types of energy generation/utility conservation measures evaluated and installed with type of equipment used.
  - vii. Sources of project funding.
  - viii. Projected and actual project start and end dates; current status.
  - ix. Projected annual utility savings (dollars and energy/water).
  - x. Actual and measured annual utility savings (dollars and energy/water).

## 7. Project Management Approach

*Page count: 3 pages*

- a. Describe how you will manage the project. Discuss minimizing risk to owner, project scheduling and staying on schedule, quality assurance, and working with Owner's facility staff.
- b. Provide a sample timeline indicating the necessary activities for this project, including ongoing service or maintenance following project installation.
- c. Identify which portions of the project you intend to implement with subcontractors and how the subcontractors will interact with the Owner.
- d. Explain any experience you have with IRA rebates or how you intend to maximize direct pay through the implementation of the project.
- e. Explain how you intend to comply with City Ordinance 14.5 related to utilization of minority or women owned businesses.

## 8. Measurement & Verification

*Page count: 2 pages plus attachments*

- a. Describe the methodologies used to calculate baseline utility consumption.
- b. Describe the methodologies likely to be used to verify annual savings.
- c. Describe your firm's approach to accounting for equipment or operational changes that impact savings estimates during the period of performance.
- d. Attach a Measurement and Verification Plan and Annual Savings Report from a recent project.

## 9. Financial Guarantees

*Page count: 3 pages*

- a. Describe your approach to creating and delivering on the savings guarantee. Include:
  - i. Methodology to calculate savings guarantee.
  - ii. Position on stipulated savings.
  - iii. Any non-utility cost savings that will be calculated or estimated (e.g. staff time, materials, deferred maintenance).
  - iv. Explain how these savings are calculated.
  - v. Explain how these savings are monitored and verified.
  - vi. Indicate which non-utility savings types are guaranteed.
  - vii. Describe how you maximize Owner's return on investment.
- b. Identify tax credits, grants, and incentives that may be available to the Owner for funding this project and describe your expertise in securing them.
- c. Disclose any relationships with financial institutions.

[END]