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PROJECT DESCRIPTION

A. Overview

The School District of Horicon (the "District") requests detailed responses regarding the implementation of a Performance Contract for guaranteed energy saving improvements including the upgrading of lighting, HVAC, and other systems in the District.

Please note that the District is also in the process of reviewing the potential consolidation of our school district with the Mayville School District. Any projects considered as part of this RFQ could be affected by the outcome of the consolidation efforts. Any potential qualified providers should be aware of this issue prior to your consideration of offering a proposal.

It is the District's intent to leverage this partnership to get the best possible value on these projects for the taxpayers of our District. To that end, prospective firms are encouraged to look for innovative and creative ways to accomplish the projects including using District staff and resources where possible. Respondents must ensure that they will allow the District direct purchasing for tax savings as requested. Respondents must also ensure open book pricing and provide a transparent response showing all mark-ups, fees, and other costs associated with the project.

This Request for Qualifications (RFQ) will provide a competitive means by which to select a Qualified Provider (per §66.0133) to provide the Performance Contract.

B. Components

In general, the components of the program are to:

1. Provide energy and operations savings and improved indoor environmental quality through the installation, modification or replacement of HVAC equipment and controls in the District.
2. If selected, the Respondent must include, as part of the program, a minimum written guarantee of energy and/or operational savings.

C. Scope

The Scope of Work shall be the design, oversight of, and savings guarantee for energy and/or operational savings associated with energy efficiency improvements in the District. The estimated cost of projects will be determined at a later date.

The selected respondent must be able to develop a comprehensive report showing firm, guaranteed costs and savings projections for the energy efficiency improvements in the
District. The scope of work for the selected provider may include, but is not limited to, the following tasks:

1. Final project scope definition, engineering, and design.
2. Project Management: The Respondent should indicate how they will partner with the District in managing and supervising the project.
3. Minimum written guarantee of energy and/or operation savings.
4. Equipment and System Commissioning: The respondent should include a sample commissioning plan, outlining the approach, expected subcontractors and key performance metrics for the anticipated projects.
5. Equipment and System Training. The respondent should include a sample training plan, outlining the training schedule and approach for the anticipated projects.
6. Measurement and Verification of Actual Savings: The respondent should include sample project approach, expected subcontractors and savings metrics for the anticipated projects.

D. Equipment Purchasing

The District intends to realize all reasonable and practical sales tax savings through the use of owner direct purchases wherever possible.

E. Incentives/ Rebates

It is expected that the Performance Contractor will work with the District to pursue and obtain any and all possible/practical rebates, grants or other funding for the projects outlined in the Scope of Work and the detailed report prepared by the Performance Contractor in order to minimize the impact on the District taxpayers wherever possible.

RESPONSE FORMAT

Responses shall be submitted in the format outlined in this section. Each proposal will be reviewed to determine if it is complete prior to actual evaluation. The District reserves the right to eliminate from further consideration any proposal deemed to be substantially or materially unresponsive to the requests for information contained herein.

A. Contractor Qualifications

Each proposal must include the following information regarding your Firm's qualifications:

1. Provide the general background information of your company including address, contact information, firm type, tax identification numbers, and the year established.
2. Provide a complete overview of your firm including personnel assigned to this project. To include but not be limited to their responsibility, individual backgrounds, industry experience, etc.
3. Provide your firm's expertise in assisting school districts on low cost energy savings projects.
4. Provide your firm's expertise in managing environmental hazards and how your firm will manage any environmental issues that arise during the project.
5. Provide three (3) references of projects performed by the Respondent for school districts in the last three years including proof of relationships of longevity with school districts.

B. Project Staffing and Management

1. The Respondent should indicate how they will partner with the District in managing and supervising the project.
2. The respondent should include a sample commissioning plan, outlining the approach, expected subcontractors and key performance metrics for the anticipated projects.
3. Generally describe the types of services (both professional and construction services) that you offer in-house and the services you offer through subcontractors, and describe the strategy behind in-house vs. subcontractor use. Identify each category below as work to be performed in-house vs. subcontractor.

<table>
<thead>
<tr>
<th>Project Category</th>
<th>In-House or Subcontractor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment Grade Audit</td>
<td></td>
</tr>
<tr>
<td>Design/ Engineering – Lighting</td>
<td></td>
</tr>
<tr>
<td>Design/ Engineering – Plumbing</td>
<td></td>
</tr>
<tr>
<td>Design/ Engineering – HVAC</td>
<td></td>
</tr>
<tr>
<td>Design/ Engineering – Controls/ Building Automation System</td>
<td></td>
</tr>
<tr>
<td>Design/ Engineering – Roofing/ Building Shell</td>
<td></td>
</tr>
<tr>
<td>Procurement/ Supply of Equipment</td>
<td></td>
</tr>
<tr>
<td>Construction Management</td>
<td></td>
</tr>
<tr>
<td>Construction – Lighting</td>
<td></td>
</tr>
<tr>
<td>Construction – Plumbing</td>
<td></td>
</tr>
<tr>
<td>Construction – HVAC</td>
<td></td>
</tr>
<tr>
<td>Construction – Controls/ Building Automation Systems</td>
<td></td>
</tr>
<tr>
<td>Construction – Roofing/ Building Shell</td>
<td></td>
</tr>
<tr>
<td>Measurement and Verification</td>
<td></td>
</tr>
</tbody>
</table>

4. The respondent should include a sample training plan, outlining the training schedule and approach for the anticipated projects
5. The respondent should include a sample Measurement and Verification Plan with metrics and sample calculations for typical measures.
C. Project Financials

The tables below are used to compare project pricing. The format is required and must be completed in its entirety. Use only the categories provided. Unexplained ranges for markups are not acceptable. The use of margins in lieu of markups is not acceptable.

1. Provide your company's proposed charges for the Investment Grade Audit (IGA) and project design and development below. If the company performs this work under a percentage of the total project costs fee, mark N/A in the table below and indicate this in the appropriate category in the Fee Component table.

<table>
<thead>
<tr>
<th>Investment Grade Audit and Project Development</th>
<th>$ per Sq Ft</th>
</tr>
</thead>
<tbody>
<tr>
<td>Investment Grade Audit</td>
<td></td>
</tr>
<tr>
<td>Project Design/Development</td>
<td></td>
</tr>
</tbody>
</table>

2. Fee component

<table>
<thead>
<tr>
<th>Fee Component</th>
<th>Percentage of Project Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overhead</td>
<td></td>
</tr>
<tr>
<td>Profit</td>
<td></td>
</tr>
<tr>
<td>Bond</td>
<td></td>
</tr>
<tr>
<td>Project Management</td>
<td></td>
</tr>
<tr>
<td>Measurement and Verification/Reports</td>
<td></td>
</tr>
<tr>
<td>Energy Guarantee Risk/Insurance</td>
<td></td>
</tr>
<tr>
<td>All other General Conditions</td>
<td></td>
</tr>
</tbody>
</table>

3. Provide your company's proposed maximum allowable markups in the schedule below for each category listed on the schedule.

<table>
<thead>
<tr>
<th>Category of Mark Up</th>
<th>Mark Up Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Design, Engineering, Consulting, etc</td>
<td></td>
</tr>
<tr>
<td>Sub consultants Design, Engineering, Consulting, etc</td>
<td></td>
</tr>
<tr>
<td>Internal Labor</td>
<td></td>
</tr>
<tr>
<td>Equipment Supplied or Purchased</td>
<td></td>
</tr>
<tr>
<td>Material Supplied or Purchased</td>
<td></td>
</tr>
<tr>
<td>Subcontractor Labor</td>
<td></td>
</tr>
<tr>
<td>Subcontractor Materials Supplied or Purchased</td>
<td></td>
</tr>
<tr>
<td>Subcontractor Equipment Supplied or Purchased</td>
<td></td>
</tr>
</tbody>
</table>

4. Clearly describe how self-performed work will be charged (billed hourly, billed as a markup of equipment and labor costs, etc.). If self-performed work will be billed hourly, include markups proposed to be applied to the hourly rate:
5. Describe how potential change order situations will be evaluated and the associated fees and markup schedule.

The District also reserves the right to accept a proposed set fee amount for work to be performed.

SELECTION PROCESS

A. Timetable

The District expects to undertake the selection process described below according to the following schedule:

1. Release Request for Qualifications November 18, 2015
2. Optional Pre-Bid Meeting December 1, 2015
4. Selection of Qualified Provider January 18, 2016
5. Exemption Resolution TBD
6. Award of Contract TBD

The dates listed above may be changed at the discretion of the District.

B. Pre-Bid Meeting

An optional pre-bid meeting will be held on Tuesday, December 1, 2015 at 10:00 a.m. in the District Office located at 611 Mill St., Horicon, WI 53032. This will provide the opportunity for respondents to tour the buildings and ask questions.

Mr. Gary Berger
School District of Horicon
611 Mill St.
Horicon, WI 53032
920-485-2898 x241
gberger@horicon.k12.wi.us

C. Proposal Evaluation

Responses will be evaluated on the basis of the following criteria:

1. Contractor Qualifications
   Preference will be given to Respondents that have demonstrated success providing the technical services being requested by the District and that can provide the services to the District the most efficiently and cost effectively.
2. **Project Management**
   Preference will be given to Respondents that outline clear approaches to project management and supervision, commissioning, training and measurement and verification.

3. **Project Financials**
   Preference will be given to the proposals that responsibly maximize the net economic benefit to the District and responsibly minimize the risk to the District.

**INSTRUCTIONS FOR SUBMITTING PROPOSALS**

**A. Requests for Further Information**

Questions concerning this RFQ and the procedures for responding to the RFQ should be directed to:

Mr. Gary Berger  
School District of Horicon  
611 Mill St.  
Horicon, WI 53032  
920-485-2898 x241  
gberger@horicon.k12.wi.us

**B. Submission of Proposals**

Firms shall submit sealed, written Qualification Responses by 3:00 p.m on Wednesday, January 6, 2016 at 611 Mill St., Horicon, WI 53032, Attn: Gary Berger. Late responses will not be accepted. The District reserves the right to disqualify from consideration proposals which do not substantially provide all of the information requested in this RFQ.

**C. Right to Reject**

In submitting a Qualifications Response, it is understood by the Respondent that the right is reserved by the District to accept any response in any and all parts, to reject any and all responses, and to waive any irregularities or informalities, which are in the best interest of the District.

**D. Cost of Proposal Preparation**

The cost of preparing a response to this RFQ will not be reimbursed by the District.
RESPONDENT ACKNOWLEDGMENT OF RFQ REQUIREMENTS

The undersigned declares that he/she has carefully examined the instructions and specifications contained in the RFQ and will furnish the properties and services set forth in its sealed response.

Name of Company: ______________________________________________________

Address: ______________________________________________________________

City/State/Zip: __________________________________________________________

Phone/Fax: _____________________________________________________________

Representative/Title: ____________________________________________________

Signature: ______________________________________________________________

Date: __________________________________________________________________