**OFFER PROPOSAL REQUIRMENTS**

**PROPOSAL FORMAT**

Utilize the format provided below for proposal responses. Please number and re‐state each subheading and question, followed by your response. Number all pages. Please limit your response to the size limits provided for each subheading as indicated, excluding appendices. Qualified providers that do not include all requested data or include additional unrequested data will be rejected and disqualified from the evaluation process.

**1. EXECUTIVE SUMMARY (2 pages maximum) REVISED (6 pages Maximium)**

Provide a concise summary of your value proposition for this project. State that you meet all minimum requirements of the RFP, or list any applicable exceptions on the included form.. In one page or less, describe your firm’s general approach to energy savings performance contracts, including differentiating characteristics. Include contact information and binding signature by an authorized representative of your company

**2. FIRM PROFILE (8 pages maximum) REVISED (14 pages Maximum)**

2.1. State your firm type (corporation, partnership, sole proprietorship, joint venture).

2.2. State the number of years your firm has been in business under its present name.

2.3. Indicate all other names by which your organization has been known and the length of time known by each name.

2.4. Provide an organizational chart illustrating your overall company structure, including any parent and sister companies. Indicate which branches, divisions, or business units are responsible for providing energy conservation projects.

2.5. List all projects with which your firm has entered into litigation during the past ten years associated with a guaranteed energy savings contract. Provide a brief summary detailing the litigation. Omission of any past litigation will result in disqualification.

2.6. If a guaranteed energy savings contract is approved, the selected qualified provider shall give a sufficient bond to Owner for the installation and faithful performance of all energy conservation measures included in the contract.

2.7. Outline your company’s approach to measuring customer service, and provide your customer service results for projects completed during the previous fiscal year.

2.8. State the number of years the firm has offered design‐build energy conservation projects. County requires a minimum of five years.

2.9. Indicate the types of full‐time, in‐house personnel employed by your firm that provide professional services related to energy conservation projects.

2.10. Identify all full time employees that will serve as key personnel for this project. Provide an organizational chart for the Project Team and indicate the project phases in which each key personnel member will be involved.

2.11. Describe three projects completed or under contract with city or county governments that exemplify the ability to provide the technical and financial services for a project similar to this one. Include the county’s name, description of services provided, project start/end dates, contract value, and contact information for the project reference.

**3. CLIENT REFERENCES (1 page per reference)**

Offeror shall provide a minimum of three (3) references of current clients, and three (3) references of previous clients who the County may contact for a candid appraisal of the firm’s services. The most effective references will come from entities, comparable in size to Winnebago County, for which your firm has provided services very similar to those the County is requesting. References should all preferably be within the last three (3) years.

**4. GENERAL APPROACH (15 pages maximum)**

4.1. Describe your approach for project financing and obtaining other sources of funding for energy conservation projects.

4.2. Describe your recommended approach to the investment grade audit. Include in the appendix a sample investment grade audit report that was prepared by your company in the past 12 months for a similar project.

4.3. Describe your approach for material specifications and subcontractor selection.

4.4. Describe your approach for construction management. Include any in‐house software tools that can be used for project management and reporting.

4.5. Describe your approach for commissioning of new systems

4.6. Describe your approach for providing training on new equipment and systems.

4.7. Describe your approach for managing warranties and maintenance of new equipment.

4.8. Describe your approach for ongoing M&V services over the course of the guarantee period. County requires budget neutrality each and every year of the guarantee term, and does not intend on including capital cost avoidance in the savings guarantee.

4.9. Describe the annual cost for the follow up energy surveys, cost or fee for survey.

4.10. Describe your Project Manager fees or percent to be charged or included in the cost.

**5. CLAIMS AND COMPLAINT HISTORY**

Provide a list any claims filed against the proposer (or its agents or employees) with the proposer’s liability insurance carrier for professional errors and omissions, including the nature and resolution of such claims. List all written complaints filed with local, State or Federal regulatory agencies, business organizations or other outside agencies against the proposer or any of its agents or employees within the past eight years, together with an explanation of their resolution.

**6. CONTRACT AGREEMENT**

Include a copy of your standard contract agreement with your proposal.

**7. IMPLEMATION TIMELINE**

Include in your proposal an implementation plan including dates describing how the qualified provider intends to execute the project that meets the timelines set forth in these specifications.

**8. OTHER (15 Pages)**

**END OF OFFER PROPOSAL REQUIRMENTS**