

EAST MISSISSIPPI COMMUNITY COLLEGE
OFFICE OF OPERATIONS, FACILITY PLANNING AND PROJECT MANAGEMENT
8731 South Frontage Road, Post Office Box 100
Mayhew, Mississippi 39753
Phone: 662-243-1902

REQUEST FOR QUALIFICATIONS
FOR
PROFESSIONAL SERVICES

1. GENERAL: East Mississippi Community College (EMCC or the College) will contract for professional energy services with a qualified Energy Services Provider (ESP) capable of providing a comprehensive energy services contract that will reduce energy and operational costs across the College's facilities, as identified in the proposed project. The selected ESP will provide a copy of their Certificate of Insurance before final execution of the contract with EMCC.

Section 31-7-14 of the Mississippi Code defines Energy services provider and Energy services contract as the following:

“Energy services provider” means a person or business with a successful record of documented energy savings projects that is experienced in the design, implementation and installation of energy conservation measures; has the technical capabilities to verify that such measures generate energy and operational cost savings or enhanced revenues; has the ability to guarantee the savings; has the ability to secure or arrange the financing necessary to support the implementation of the energy conservation measures; and is approved by the division.

“Energy services contract” means an agreement to provide energy services which include, but are not limited to, the design, installation, financing and maintenance or management of the energy systems or equipment in order to improve its energy efficiency. Payments for the contract are not contingent upon the actual savings realized from the equipment.

At a minimum, the ESP must have met the following qualifications:

- Licensed in the State of Mississippi
- An approved general contractor by the State of Mississippi
- An approved ESP by the Mississippi Development Authority Energy & Natural Resources Division
- An ESP that is headquartered in Mississippi will be given preference as allowed by law.

2. RESULTS DESIRED: EMCC seeks a broad range of services and capital improvements in order to reduce the consumption and related costs of energy use across the College's facilities and infrastructure. A primary facility and infrastructure focus of the services, but not necessarily the only focus of the services, will be the renovation of **Keyes-Currie Gymnasium**. These services and capital improvements will be provided and financed through an energy services contract under which EMCC
 - a. incurs no initial capital costs;
 - b. achieves significant long-term savings;
 - c. achieves energy savings and operations and maintenance (O&M) savings which can include material, labor and avoided future equipment replacements (All proposed O&M savings must be clearly documented and will be rigorously reviewed by EMCC); and
 - d. obtains consistent levels of occupant comfort and building functionality.

EMCC seeks to maximize energy savings and related improvements. Within the framework of available financing, the successful ESP will advocate the installation and implementation of improvements providing the greatest possible energy and O&M savings. Essential services and improvements sought are those that will reduce energy consumption in the College's facilities, upgrade capital energy-related equipment, improve building operations and save costs through fuel switching or improved demand management, and aid in meeting environmental management responsibilities.

The payback period for the energy services contract shall not exceed eight (8) years. The capital cost avoidance coupled with the energy savings achieved by the installed energy efficiency measures (EEMs) need to be sufficient to cover all project costs for the duration of the contract term including any desired annual maintenance and monitoring at a minimum, the capital cost avoidance as well as the energy and O&M savings should be structured to correspond to the annual financing costs associated with the project.

3. REQUIRED SYSTEMS AND SERVICES CAPABILITIES: The successful ESP must have the demonstrated technical and managerial capabilities to address a broad range of building energy systems and provide a comprehensive set of energy services. Energy systems include, but are not limited to, heating, ventilation and air conditioning systems, lighting, windows, insulation and energy management controls, life safety measures that provide long-term, operating-cost reductions, building operation programs that reduce operating costs, other energy-conservation-related improvements, including improvements or equipment related to renewable energy, and other natural resources conservation, including accuracy and measurement of water distribution and/or consumption, and other equipment, services and improvements providing energy efficiency.

Energy services include, but are not limited to, an investment grade technical energy audit and report; the design, acquisition, installation, modification maintenance, commissioning, monitoring and training in the operation of new and/or existing energy systems which will reduce energy consumption associated with the heating, ventilation

and air conditioning system, the lighting system, building envelope, water usage, and other energy using devices, as well as for savings which would not reduce consumption per se, but are aimed at cost savings related to energy use, such as sewage, solid waste collection, fuel switching or demand reductions.

Any stipulated energy and/or non-energy cost savings that may be attributed to this project will be rigorously reviewed and, if agreed to, will be limited to those that can be thoroughly documented and verified by the ESP and approved by the Customer. Additional services may include continuing O&M for all improvements and/or training of the Customer's staff on routine maintenance and operation of systems as well as training of occupants. Monitoring and verification (M&V) services include appropriate measurement and reporting of the performance and savings from improvements.

4. OVERVIEW OF TERMS AND CONDITIONS:

Contract Term. No payback period shall exceed eight (8) years in duration and is subject to annual appropriations.

Financial Review. Detailed financial projections of project benefits are dependent upon the scope of technical retrofits finally selected and installed. It is premature to place a major emphasis on projected financial benefits prior to the completion of a detailed engineering study and negotiation of the project structure. During contract negotiations, the ESP shall disclose cost markups which will be applied during the subsequent technical energy analysis and energy services contract. Open book pricing during the construction stage will be required, such that pricing information or bids on individual products and services will be available for review by the Customer. Respondents are encouraged to carefully review the evaluation criteria in the RFQ under Financial Approach and to respond as fully as possible.

O&M Savings. Any O&M cost savings proposed by the selected ESP will be rigorously reviewed and, if agreed to, will be limited to those that can be thoroughly documented and approved by EMCC.

Investment Grade Technical Energy Audit Report. The technical energy audit report must include estimates of savings for each measure and must include an estimate of all costs including design, engineering, installation, maintenance, repairs and debt service.

5. DESCRIPTION OF THE PROCUREMENT PROCESS: It is anticipated that the process for procurement of these energy services will proceed in three stages.

Stage 1. SUBMISSION OF WRITTEN QUALIFICATIONS: EMCC, through its designated representatives, will review and evaluate the written responses to this Request for Qualifications (RFQ) in accordance with the evaluation criteria identified in Attachment B. EMCC will either select the most qualified ESP or request oral interviews from a shortlist of candidates of the procurement process.

Stage 2. ORAL INTERVIEW: If so desired following the review of the RFQ packages, a shortlist of qualified firms may participate in an oral interview to more fully discuss how their qualifications to this project satisfy the evaluation criteria set forth in Attachment B. ESPs will be required to answer questions posed by the Project Evaluation Team. It will be the sole responsibility of the Project Evaluation Team to make the final selection of an ESP based upon the evaluation of written responses to the RFQ, client reference checking, and the oral responses received during the interview process.

Stage 3. SELECTION OF ESP TO ENTER INTO INVESTMENT GRADE AUDIT AGREEMENT: Based on the consensus of the Project Evaluation Team and approval by EMCC, the best qualified ESP will be selected to perform the requested services. EMCC and the selected ESP shall enter into an Investment Grade Audit Agreement. The ESP's proposed contract terms must include a complete set of proposed energy improvements, the timetable for completing engineering and construction work, a detailed description of services to be provided, specific financing arrangements and terms, and an estimate of energy savings, as well as special conditions offered by the company. EMCC intends to negotiate a final Energy Services Agreement (ESA) for these services. If EMCC decides not to enter into a contract after the audit report has been accepted, the Customer agrees to pay the cost of the audit as stated in the contract, provided that all contract terms and conditions of the audit have been met by the ESP. If an acceptable contract cannot be reached within 90 days from the date of ESP selection, negotiations with the second-ranked ESP may be initiated.

6. **RESTRICTION OF CONTACT:** From the issue date of this RFQ until EMCC selects a respondent for award, the contact person listed below is the sole point of contact concerning this RFQ. Any violation of this condition may be cause to reject the offending ESPs submission. If it is discovered that the ESP has engaged in any violations of this condition, the offending ESPs response may be rejected or contract award rescinded. ESPs must agree not to distribute any part of their submissions. An ESP that shares information contained in its submission with other College personnel and/or competing ESP personnel may be disqualified.

Direct all inquiries concerning this RFQ to:

R. Paul Miller, PhD
Vice President of Operations
East Mississippi Community College
8731 South Frontage Road
Mayhew, MS 39753
pmiller@eastms.edu
662-243-1902

7. **SUBMITTAL FORMAT:** Companies who wish to be considered by EMCC must submit an original and four (4) copies of Attachment D (the ESP Profile Form and ESP Qualifications & Approach to Project). All submissions become the property of EMCC and will not be returned to the ESP.

EMCC reserves the right to reject any or all submissions and to waive informalities and minor irregularities in submissions received and to accept any submissions if deemed in its best interest to do so. All costs associated with submission preparation will be borne by the submitting company.

8. OVERVIEW OF ATTACHMENTS: To aid ESPs in their response to this request, the following items are attached:

Attachment A: Schedule

Attachment B: Evaluation Criteria

Attachment C: Contract Terms and Conditions

Attachment D: ESP Profile Form and Approach to Project

ATTACHMENT A

SCHEDULE

The following schedule for the RFQ is proposed. If changes are deemed necessary, all potential respondents will be notified.

Activity	Dates
Advertise/Issue RFQ	January 19-26, 2024
Written Qualifications Due	February 7, 2024
Written Qualifications Reviewed/Evaluated	February 12-16, 2024
Oral Interviews and Presentations (if necessary)	February 19-28, 2024
ESP Selection and Approval	March 11, 2024
Preliminary Contract Negotiations	March 18-22, 2024
Investment Grade Audit Executed	March 25-April 5, 2024
Investment Grade Audit Report Submitted	May 3, 2024
Negotiations and Execution of Energy Services Agreement	May 9, 2024

ATTACHMENT B

EVALUATION CRITERIA

The criteria listed below will be used in the evaluation of written submissions, interviews with previous ESP clients, and the responses of ESPs during oral interviews, as appropriate. These criteria will be applied and interpreted solely at the discretion of EMCC. Written responses should include all necessary information that is pertinent to these evaluation criteria. Additional information required for the proper assessment of written submissions may be requested from the ESP at the discretion of EMCC. EMCC reserves the right to reject any and all submissions.

The criteria are not ranked in order of importance.

Minimum Requirements

ESP will not be considered for Energy Services with EMCC if the following minimum qualifications are not met:

Check if Met

Business located in the State of Mississippi	
A licensed general contractor in the state of Mississippi	
A pre-qualified ESP by the MS-MDA Energy & Natural Resources Division	

Supplemental Documentation

(Scoring weight: 25%)

Rating 1-10
(worst-best)

Quality of Sample Investment Grade Audit	
Quality of Audited Financial Statements	
Quality of Client Questionnaire 1	
Quality of Client Questionnaire 2	
Quality of Client Questionnaire 3	

Experience

(Scoring weight: 20%)

Rating 1-10
(worst-best)

1	Company history and number of years in business	
1a	ESPs experience with implementing energy related projects (specific branch office team members assigned to this project, single technology projects will not be considered).	

Personnel Information**(Scoring weight: 10%)**Rating 1-10
(worst-best)

2a	Qualifications and experience of ESPs personnel.	
2b	Demonstration of in-house design, construction, and measurement and verification capabilities.	
2c	Clear assignment of responsibility for various tasks to specific individuals.	

Project History**(Scoring weight: 15%)**Rating 1-10
(worst-best)

3a	Diversity of Energy Conservation Measures included	
3b	History of product neutrality.	
3c	Quality of Project History documentation	
3c	Ability to manage construction and complete all phases of the project on schedule.	
3c	Documented energy savings on previous projects.	
3c	Reliability of equipment performance on past projects.	

Financial References**(Scoring weight: 10%)**Rating 1-10
(worst-best)

4	Financial soundness and stability of the ESP.	
4d	Company does not owe State of Mississippi any taxes.	
4e	Company is not currently under suspension or debarment by the State of Mississippi, any other state or the federal government.	

ESP Qualifications and Approach to Project**(Scoring weight: 20%)**Rating 1-10
(worst-best)

7.2	Quality of proposed training for facility staff.	
7.3	Reasonableness of proposed audit costs.	
7.4	Quality of baseline energy calculations.	
7.5	Quality of approach to open-book pricing.	
7.6	Quality of approach to savings calculations and measurement.	
7.7	Demonstrated ability to arrange project financing.	

ATTACHMENT C

CONTRACT TERMS AND CONDITIONS

The minimum conditions EMCC will accept from the selected ESP are described below. This section defines the scope of services related to the technical requirements that will be included in any final contract. It also defines the key contractual provisions.

1. **Scope of Services** (Technical Requirements)

The Scope of Services must be included in any energy services contract EMCC enters into, and must include the following items at a minimum:

- a. **Investment Grade Technical Energy Audit and Report.** The ESP's proposed contract terms must include the performance and presentation of results from a detailed investment grade technical energy audit and report of acceptable quality to EMCC. If EMCC decides not to enter into a contract after the audit report has been accepted, EMCC agrees to pay the cost of the audit as stated in the submitted response to this RFQ, provided that all contract terms and conditions of the audit have been met by the ESP. Note: These conditions have been described previously and can be negotiated into the audit contract. Debt service for each measure is not likely to provide useful information unless there is something specific to MS law that requires it.
- b. **Standards of Comfort.** Specific standards of comfort, safety and functionality will not be degraded from the existing condition and/or shall meet minimum established industry standards. The ESP will be responsible for maintaining the levels of comfort for each building. Persistent failure to maintain the defined climate and lighting conditions will constitute a default.
- c. **Professional Engineer Involvement.** A registered professional engineer must, at a minimum, review and approve design work done under this contract.
- d. **Annual Interest Rate.** The annual rate of interest paid under any lease-purchase agreement entered into by EMCC shall not exceed the maximum interest rate to maturity on general obligation indebtedness permitted under §75-17-101 of the Mississippi Code.
- e. **Construction Management.** The ESP will be required to work with current building management and maintenance personnel in order to coordinate construction and provide appropriate training in operations and maintenance of all installed improvements. No equipment or other improvements will be installed that would require EMCC to hire additional personnel unless contract negotiations produce an explicit exemption for a specific installation.
- f. **Equipment Standardization.** All equipment installed that is comparable to similar equipment at other sites operated by EMCC shall be of the same manufacturer for standardization of equipment agency wide, unless otherwise accepted by EMCC.
- g. **Maintenance Manuals.** At least two (2) maintenance manuals for each site will be provided for all equipment replacements and/or upgrades at each location. Manuals are subject to approval of EMCC.
- h. **As-Built Drawings.** Where applicable, ESP must provide mylar, reproducible "as built" and record drawings (or such electronic equivalents as may be agreed to with EMCC) of

all existing and modified conditions associated with the project, conforming to typical engineering standards. These should include architectural, mechanical, electrical, structural, and control drawings and operating manuals within 30 days of completion of installation.

- i. **Maintenance Services.** Maintenance services shall be negotiated between EMCC and ESP and described in detail in the final contract.
- j. **Customer Activities.** EMCC reserves the right to make energy improvements to the work sites and to monitor the performance of the installations independently of the ESP.

2. Contractual Provisions

Key elements that must be provided in any energy services contract that EMCC enters will, at a minimum, include the following:

- a. **Written Submissions.** The contents of the ESPs submissions in response to this solicitation will become part of any final agreement between EMCC and the contractor.
- b. **Meeting Project Schedule.** The ESP must provide a final schedule of project milestones including equipment-servicing and preventive maintenance provisions that may become part of any final contract. The ESP is responsible for meeting schedule deadlines. In the event any milestone or service provision is not met as scheduled without prior approval from EMCC, the College reserves the right to consider it a default and withdraw from all contractual obligations without penalty.
- c. **Owner Inspection.** EMCC must have the right to inspect, test and approve the work conducted in the facilities during construction and operation. EMCC shall have the reasonable right and access to the account books, records, and other compilations of data that are related to and pertain to the performance of the provisions and requirements of this agreement. This is covered below by the open book pricing requirement. Records shall be kept on a generally recognized accounting basis, and calculations will be kept on file in legible form and retained for three years after close-out. EMCC retains the right to have its representative visit the site during the analysis and implementation phases of the project, and to attend relevant on-site or off-site meetings of the ESP and/or its subcontractors.
- d. **Final Approval of Owner.** EMCC retains final approval over the scope of work and all end-use conditions.
- e. **Repayment of Project Financing.** The repayment obligation and term of the financing for this project must be arranged to coincide with the acceptance by EMCC that the project is fully installed and functioning.
- f. **Property of Drawings, Reports and Materials.** All drawings, reports and materials prepared by the ESP specifically in performance of this contract shall become the property of EMCC and will be delivered to EMCC as needed or upon completion of construction.
- g. **Compliance.** All work completed under this contract must be in compliance with all applicable federal, state and local laws, rules and regulations such as building codes and appropriate accreditation, certification and licensing standards. Work must be in accordance with sound engineering and safety practices and in compliance with all EMCC regulations relative to the premises. The ESP and its subcontractors will be

responsible for obtaining any and all required governmental permits, consents and authorizations, and for payment of any and all state and city required taxes and fees which result from this contract. The contract must comply with the statutory provisions of §31-7-14 of the Mississippi Code.

- h. **Handling of Hazardous Materials.** All work completed under this contract must be in compliance with all applicable federal, state and local laws, rules and regulations regarding waste disposal and treatment/disposal of any hazardous materials that could result from this project. Work must also be in accordance with sound engineering and safety practices, and in compliance with all reasonable EMCC rules relative to the premises. In the event the ESP encounters any such hazardous materials, the ESP shall immediately notify EMCC and stop work pending further direction from EMCC. The State may, in its sole discretion, suspend work on the project pending removal of such materials or terminate this Agreement.
- i. **Methodology to Adjust for Changes.** The contract must contain a mutually acceptable clause whereby unanticipated changes in facility use, occupancy, schedule and/or utility rates can be accommodated in a fair manner agreeable to both parties.
- j. **Hiring and Wage Requirements.** The ESP will comply with all requirements for the payment of prevailing wages, and for minority and women-owned business enterprises.
- k. **Subcontractor Approval.** EMCC retains the right to approve any ESP selected subcontractor prior to its commencement of work on this project.
- l. **Bonding Requirements.** The ESP will provide to EMCC assurance of completion in the form of separate performance and labor and material payment bonds, each in the sum of 100 percent of all subcontracts.
- m. **ESP Insurance.** Prior to the commencement of work, the ESP must provide evidence of the required levels of insurance for both the construction and operations phases of the project.
- n. **Applicability of O&M savings.** Any O&M cost savings related to maintenance and operation of the facilities will be rigorously reviewed and, if agreed to, will be limited to those that can be thoroughly documented and approved by EMCC.
- o. **Open Book Pricing.** Open book pricing will be required, such that the ESP will fully disclose all costs.
- p. **Disclosure of Cost Markups.** The pricing methodology and individual cost markups disclosed during preliminary contract negotiations will be required to be applied to any measures included in any subsequent technical analysis or energy services contract.
- q. **Annual Reconciliation.** Annual savings will be reconciled and verified each year as specified in the final contract.
- r. **Contract Term.** No payback period shall exceed eight (8) years in duration and is subject to annual appropriations.
- s. **Contract Expiration and Renegotiation.** At the time of contract expiration, EMCC will have the option either to renegotiate the contract or terminate it without penalty.
- t. **Contract Renegotiation.** EMCC reserves the right to renegotiate the awarded contract if warranted, due to changes in the regulatory or utility climates or in the College's use of energy.
- u. **Post-Contract Preventive Maintenance Schedule.** Upon completion of the contract, the ESP shall provide EMCC a single comprehensive schedule of necessary preventive maintenance for all installations for the five (5) years following contract close-out.

- v. **Non-Appropriations Clause.** Payments will be subject to annual appropriation in accordance with the provisions contained in §31-7-14 of the Mississippi Code, as amended.

ATTACHMENT D

ESP PROFILE FORM AND ESP QUALIFICATIONS AND APPROACH TO PROJECT

Written Submittal Information

General Information:

- Failure to complete any question in whole or in part, or any deliberate attempt by the respondent to mislead EMCC, may be used as grounds to find the proposing ESP ineligible.
- All submissions become the property of EMCC and will not be returned to the ESP.
- All costs associated with submission preparation will be borne by the submitting ESP.
- Please use double-sided copying where possible to reduce paper use.

Submit the Following:

- Attachment D: "Client Questionnaire", "ESP Profile Form" and "ESP Qualifications and Approach to Project"
Quantity: Four (4) including original.
- Companies are required to submit four (4) copies of the following documents:
Sample Investment Grade Energy Audit
Audited Financial Statements
- Cover Sheet to accompany each of the above submittal, as given below.

To: East Mississippi Community College
Attention: **Dr. Scott Alsobrooks, President**
RE: Response to RFQ - Energy Services

Date: _____
From: _____

Firm Name: _____
Address: _____
General Phone Number: _____

Contact Person Name: _____
Title: _____
Phone: _____
Fax: _____
E-mail Address (if applicable): _____

<p>Submit To: ATTN: Dana Mordecai, Office Manager Administration Office Operations Center Building East Mississippi Community College PO Box 100 8731 South Frontage Road Mayhew, MS 39753</p>	<p>Due Date: Submittal must be received at the referenced address no later than 4:30 p.m. on or before Wednesday, February 7, 2024</p>
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CLIENT QUESTIONNAIRE

NOTES:

- *ESP may request an electronic copy of this form for easier preparation.*
- *ESP must address all questions. If not applicable, enter "N/A. "*

DIRECTIONS:

- *ESP must provide a Client Questionnaire for 3 different clients to be considered.*
- *Label the Client Questionnaires as Client Questionnaire 1, Client Questionnaire 2 and Client Questionnaire 3.*

CLIENT QUESTIONNAIRE

Contractor Name: (Insert name of ESP)

Project Title:

1. Was the project completed on schedule?
2. Did the contract involve energy savings performance guarantees? If so, describe performance guarantees (e.g., annual energy or cost savings).
3. Did the installed project achieve energy savings and/or demand reduction projected or guaranteed by the contractor?
4. Was the method(s) used by the contractor to determine annual energy savings and/or demand reduction acceptable for the type of energy conservation measures installed?
5. Did the contractor provide satisfactory operations, maintenance and repair services, if any?
6. Were rebates from the utility in your area available to you?
7. Did the contractor provide or arrange satisfactory project financing?
8. What was the capital investment in the energy project?
9. Provide an overall rating of the quality and timing of services provided by the contractor. If your answers to questions 1-7 were all "yes," please briefly explain your reasons for giving a "Fair" or "Poor" rating, as applicable.

- ___ **Excellent** - Exceeded expectations, highly recommend contractor.
- ___ **Good** - Met all requirements, recommend contractor.
- ___ **Fair** - Achieved project objective, room for improved quality and performance recommend contractor.
- ___ **Poor** - Significant shortfall in performance and quality, would not recommend contractor.

Remarks:

Client name, address, phone and fax numbers:

Client Signature, Title and Date

ESP PROFILE FORM

NOTES:

- *ESP may request an electronic copy of this form for easier preparation.*
- *ESP must address all questions. If not applicable, enter "N/A. ".*

General Firm Information

FIRM'S NAME:		
MAILING ADDRESS:		
PHYSICAL ADDRESS:		
CITY:	STATE:	ZIP:
COUNTY:		
PHONE:		
FAX:		
E-MAIL:		
WEBSITE:		

Names, Titles and Phone Number of two principal contact persons:

NAME	TITLE	PHONE

Submittal is for: Parent Company Division Subsidiary Branch Office

List any Division or Branch Offices that will participate materially in the development of the submission, and/or in the conduct of any services provided.

Name of Office: _____

Address: _____

Name and Address of Parent Company (if applicable)

Name: _____

Address: _____

Former Name(s) of Firm (if applicable)

Name: _____

Address: _____

Date Prepared: _____

Type of Firm: Corporation Partnership
 Sole Ownership Joint Venture

Federal Employer Identification Number: _____

Year Firm was Established: _____

Please indicate if your firm is:

- Business Licensed in the State of Mississippi
- A licensed general contractor in the State of Mississippi
- A pre-qualified ESP by the MS MDA's Energy & Natural Resources Division

1. CORPORATE BACKGROUND / HISTORICAL DATA

- a. How many years has your firm been in business under its present business name?
Years _____
- b. Indicate all other names by which your organization has been known and the length of time known by each name.

- c. How many years has your firm been involved in energy-related business?
Years _____
- d. Please identify all states in which your firm is legally qualified to do business.

- e. Discuss your firm's local business footprint (years in business, annual revenues, number of employees, etc.) _____
- f. List your firm's previous or current business association with [CUSTOMER]
- g. Cumulative energy service contract values for projects implemented and currently under contract by your firm over the last five years (2015 - 2019). Limit your response to ONLY those projects that have been managed directly by the specific branch division, office or any individual in such branch division or office that will be specifically assigned to this project.

2. PERSONNEL INFORMATION

- a. Please indicate the number of full-time personnel employed by your firm and the percent available to work on this project.
- b. Briefly describe the relevant experience, qualifications and educational background for each individual team member employed by your firm and assigned to this project using the format provided on the following page. **Do not include individual resumes in lieu of this information.** Do not include any subcontractors.

Personnel Information	
Name of project team member:	
Current job title: Job responsibilities: Number of years with ESP: Primary office location:	
Employment History Company name: Primary job responsibilities: Number of years with firm:	
Educational Background List all academic degrees, certifications, professional affiliations, relevant publications and technical training.	
List all energy related projects this individual has been involved with; include project location, type of facilities, year implemented and dollar value of installed project costs.	
Describe the specific role and responsibilities this individual had for each listed project.	
Provide a detailed description of the role and responsibilities this individual will have for the duration of this project.	
Indicate the total years of relevant energy-related experience for this individual.	

- c. Submit an organizational chart that clearly identifies the roles and relationships of all key team members.

3. PROJECT HISTORY

- a. List all energy services provided (lighting upgrades, controls, etc.) and year services were implemented by your firm.
- b. Are you vendor neutral for all energy services? (No exclusive manufacturer's reps agreements.)
- c. Using the following forms, list at least 3 successful energy service projects that your firm has completed. *Limit your response to ONLY those projects that have been managed directly by the specific branch, division, office or any individual in such branch, division or office that will be specifically assigned to this project.* Projects with installed costs of less than \$500,000.00 or single technology projects (e.g. lighting only, controls only, etc.) will not be considered. Attach additional sheets as necessary. Please put an asterisk by those project references involving buildings similar to the building(s) described in the technical appendices. **All information is required.**

Project History	
Project Name and Location	
Type of Facility(s)	
Project Dollar Amount (installed project costs)	
Primary EEMs Installed	
Construction Start Date Completion End Date	
Contract Start & End Dates	
Project Schedule. Indicate if the project was completed on schedule. If not, please explain.	
Dollar Value of Projected Annual Energy Savings	
Dollar Value of Actual Annual Energy Savings	
Identify all ESP personnel associated with this project and their specific role(s) and responsibility(s)	
Provide current and accurate telephone and facsimile numbers of the owner(s)' representatives with whom your firm did business on this project. You should ensure that all representatives are familiar with this project. (Representatives will be asked about reliability of equipment performance on past projects.)	

4. FINANCIAL REFERENCES

- a. Please attach an audited financial statement or your firm's most recent annual report.
- b. Please attach the most recent year-ending Statement of Financial Conditions, including balance sheet and income statement, dated within twelve months of filing this ESP Profile Form.
- c. Please provide the name, address, and the telephone number of firm(s) that prepared Financial Statements.
- d. Please certify that your company does not owe the State of Mississippi any taxes.

- e. Please certify that your company is not currently under suspension or debarment by the State of Mississippi, any other state, or the federal government.
- f. Please identify your firm's legal counsel for this project. Give the name and address of the primary individual responsible for contract negotiation.

NOTE: All questions must be addressed by the ESP in order for this qualification form to be properly completed. Failure to answer any question or comply with any directive contained in this form may be used as grounds to find a respondent ineligible. If a question or directive does not pertain to your organization in any way, please indicate that fact with the symbol N/A. For additional space attach 8-1/2" x 11" sheets and indicate reference number (i.e., 12a, 12b, etc.) to correspond with each question.

5. AUTHORIZATION

- a. Dated at _____ this _____ day of _____ 19____.
- Name of Organization: _____

- By _____
- Title _____

6. NOTARY STATEMENT

- a. Mr./Ms. _____ being duly sworn deposes and says that he/she is the _____ of _____, ESP, and that answers to the foregoing questions and all statements therein contained are true and correct.
- b. Subscribed and sworn before me this _____ day of _____ 20_____.
- Notary Public _____
- My Commission Expires _____ 20_____

ESP QUALIFICATIONS AND APPROACH TO PROJECT

Please provide answers to each category listed below. Provide your responses on 8-1/2" x 11" sheets of paper and number and title each answer to the corresponding category. A table of contents should be included and all pages in your response to this attachment numbered sequentially. The font size should be no smaller than 10 point. Submissions will be evaluated in light of the material and substantiating evidence presented and not on the basis of what is inferred.

7. General Approach

7.1 Project Summary (not to exceed 5 pages)

Summarize the *Scope of Services* (design, financial, operations, maintenance, training, etc.) that would be offered by your firm for this project. Please include a brief description of your firm's *Approach to Project Management* and the *Specific Benefits* to the Customer.

7.2 Training Provisions

Please describe your firm's capabilities and proposed approach to provide technical training for the Customer's facility personnel. Please describe your firm's involvement in developing training manuals for facility staff and indicate any specific areas of training you may likely recommend for this project. Please describe your firm's approach to implementing and measuring the savings associated with behavior modification strategies.

7.3 Cost of Audit

Estimate the total cost of the investment-grade technical energy audit to the Customer, if no contract is negotiated.

7.4 Energy Baseline Calculation Methodology and Measurement and Verification Plan

Describe the methods used to compute baseline energy use. Describe any computerized modeling programs used by your firm to establish baseline consumption. Please summarize procedures, formulas, and methodologies including any special metering or equipment your firm will use to measure and calculate energy savings for this project. Describe the methods used to adjust the guaranteed level of savings from any material changes that occur due to factors such as weather occupancy, facility use changes, etc. Provide a *project-specific Sample Measurement and Verification Plan*. Indicate any operational cost savings opportunities and how such savings are to be identified, documented, and measured. Describe your firm's proposed approach to treatment of savings achieved during construction and how those savings will be documented and verified.

7.5 ESP Fee Calculation

Describe your firm's overhead, profit, and pricing policies for these types of projects. Describe your firm's approach to and experience in providing open-book pricing.

7.6 Savings Calculations

Describe your procedures and schedule for measuring the project's financial performance, and how the calculations work in the event that project results vary from projections. Describe your firm's methodology for establishing the project's financial performance. Also describe how excess savings will be documented for the Customer's benefit.

7.7 Provision of Financing

Please briefly describe the types of financing arrangements used by your firm for past energy services projects. Describe your firm's preferred approach to providing or arranging financing for this project including a description of the source of funds and the potential dollar amounts currently available to your firm to finance these types of projects. Please indicate what representative interest rates may be available, financing terms, and other variable economic factors associated with each method that you are aware of at the time of this submission. Describe how construction will be financed. Include your firm's bonding references including

company name, address, contact person, telephone number and information on your firm's maximum bonding capability