



Office of the State Engineer
523 East Capitol Ave. Pierre, South Dakota 57501
605.773.3466 / <http://boa.sd.gov/state-engineer>

September 30, 2024

RE: REQUEST FOR STATEMENT OF INTEREST
CAMPUS WIDE, GUARANTEED ENERGY SAVINGS PERFORMANCE CONTRACT
SOUTH DAKOTA STATE UNIVERSITY
BROOKINGS, SOUTH DAKOTA
OSE# R0324--27X

The State is looking for firms interested in providing professional Engineering services for the project referenced above. The scope of the project will involve the audit, design, bid and construction for Campus Wide Energy Conservation Measures at the South Dakota State University in Brookings, South Dakota, OSE # R0323--27X.

This comprehensive energy audit of the South Dakota State University campus shall include, but not be limited to, mechanical, electrical, water, sewage, and building envelope systems. The purpose of this SOI is to select a qualified engineering firm to complete the audit and implement the projects utilizing South Dakota State Energy Plan Savings, also known as an ESCO project.

Firms desiring to be considered for providing professional services for this project should send a statement of interest that outlines qualifications and experience for this project. Statements of Interest should at a minimum include the following:

1. Specialized expertise, capabilities, experience in commissioning similar facilities, and technical competence as demonstrated by the team's capabilities, proposed approach and methodology to meet the project requirements. (20%)
2. Resources available to perform the work, including any specialized services, within the specified time limits for the project. Include resumes of all personnel, including sub-consultants who will be assigned to this project for the entire duration. (7%)
3. Record of past performance, including price and cost data from previous projects, quality of work, ability to meet schedules, cost control, and contract administration. (36%)
4. Availability to project locale. (1%)
5. Familiarity with project locale. (1%)
6. Proposed project management techniques. (33%)
7. Ability and project history in handling special project constraints. (02%)

A technical review committee will review the proposals and select a firms based on the above criteria. Explanation of the above criteria is provided at the end of this document.


Copies of the statement of interest must be submitted by **4:00 PM on Tuesday, October 22, 2024**. Please send electronic copies as an e-mail attachment to "Names" using the following addresses:

Todd Baack
Office of the State Engineer
4900 S Minnesota Ave, Suite 104
Sioux Falls, SD 57108
Phone: 605.280.4360
E-mail: Todd.Baack@state.sd.us

Mark Rizkalla, Project Manager
South Dakota State University
Facilities & Services Bldg. 100, Box2150
Brookings, SD 57007
Phone: 605.688.4136
E-mail: Mark.Rizkalla@sdstate.edu

Firms wanting additional site/project information should contact the OSE Project Manager, Todd Baack. To schedule a site visit contact Mark Rizkalla at 605.688.4136. Thank you for your interest in this project; we look forward to working with you.

Respectfully,



STACY WATTERS, P.E.

Stacy Watters, PE
State Engineer

CC: Todd Baack, OSE
Robert Milbrandt, SDSU
Barry Mielke, SDSU



EXPLANATION OF CRITERIA

1. Specialized expertise, capabilities, experience in commissioning similar facilities, and technical competence as demonstrated by the team's capabilities, proposed approach and methodology to meet the project requirements. Convey this by detailing ESCO Qualifications below: (20%)
 - a. Name (1%)
Corporation name that will provide ESCO services
 - b. Years in business (1%)
Years in business (as an ESCO or provider of services outlined in this proposal)
 - c. Services (5%)
Services offered by ESCO and its subsidiaries
 - d. Affiliation (2%)
Indicate your company is an active NAESCO member, if applicable
 - e. Financial (3%)
What financial vehicles are available for funding or financing energy conservation measure packages
 - f. History (2%)
History of litigation
 - g. Performance Contracts (3%)
All performance contracts in the last five years
 - h. Measurement & Verification (3%)
Examples of three Measurement & Verification programs that are more than five years in length with operations reconciliations
2. Resources available to perform the work, including any specialized services, within the specified time limits for the project. Include resumes of all personnel, including sub-consultants who will be assigned to this project for the entire duration. Provide this in, or with, a Project Team Organizational Chart. (7%)
 - a. Organizational Chart (5%)
Provide a graphical representation (organizational chart) of the participants listed in your Statement of Interest and their responsibilities in the program. The chart is to be used to demonstrate the relationship of each participant within the program and their relationship with the other participants.
 - b. Resumes (2%)
List the resumes of all personnel, whether with the organizational chart or provided separately.
3. Record of past performance, including price and cost data from previous projects, quality of work, ability to meet schedules, cost control, and contract administration. Provide three example projects relating to Higher Education (or similar) with the following information. (36%)
 - a. Project Identification (3%)
Owner, name, location, and facility type
 - b. Project Dates (3%)
Completion of audit to completion of construction
 - c. Project Size (3%)
Number of buildings and total square footage
 - d. Project Costs (3%)
Contract (financed) amount and installed (capital) amount
 - e. Project Funding Source (3%)



- Source of funds used and your firm's role, if any, in securing those funds
- f. Contract Terms (3%)
Type of contract, duration of contract term, and financing arrangement
 - g. Personnel: Please provide the following personnel information: (6%)
 - i. Their name, position, years with the provider, relevant education and training, location, and related licenses.
 - ii. The tasks that the person performed for the project and the percentage of their time that was spent on the project during each specific phase.
 - iii. List of at least three similar projects in which the person has performed similar tasks.
 - h. List of ECM's (6%)
List of all implemented and recommended ECM's and type (energy/water reduction, operational improvement, O&M reduction, etc.)
 - i. Savings: In a clear and concise graphical format, list the following: (6%)
 - i. Projected annual savings
 - ii. Guaranteed annual savings
 - iii. Actual annual savings (year 1, year 2, year 3, etc)
 - iv. Describe how the guarantee functioned and if the firm was required to pay the difference if savings were not met
 - v. Describe if actual savings were measured or estimated
4. Availability to project locale. (1%)
 - a. Location of office(s) that will provide ESCO services to South Dakota State University (1%)
 5. Familiarity with project locale. (1%)
 - a. Detail familiarity with Brookings South Dakota and South Dakota State University (1%)
 6. Proposed project management techniques. (33%)
 - a. General project management techniques (5%)
Describe project management plans from previous projects relating to higher education detailing staff hierarchy, contractor oversight procedures, contractor procurement and bidding procedures, coordination with South State University owner personnel, equipment ordering, scheduling, etc.
 - b. Training and Support (8%)
Provider shall outline any training available to the University. Provider shall also describe any customer support programs that could be provided to the University. If a Provider has a maintenance program available for on-going support, information must be provided detailing the services.
 - c. Life Cycle Program Management. (8%)
Provide a detailed description of your organization's approach to evaluating the Life Cycle Program Management on the University campus, including methodologies and resources utilized which assist in the process. The Life Cycle should include the life cycle of the physical equipment. A list of three Higher Education examples where Life Cycle Program Management expertise has been utilized shall also be provided.
 - d. Net Economic Impact Methodologies (12%)
Describe, in specific terms:



- i. The method that the Provider will use to develop an economic/energy consumption baseline.
- ii. The process for adjusting the baseline in the event South Dakota State University changes the use of the facility, adds equipment, staff, etc.
- iii. How the Provider will determine operational savings during the term of the contract.
- iv. The reporting mechanism that the Provider will use to communicate and document the net economic impact to the University.
- v. The reporting timetable that the Provider will use to ensure that University personnel are kept informed.
- vi. The recommended process for reconciling discrepancies between guaranteed versus actual net economic impact.

7. Ability and project history in handling special project constraints. (2%)

- a. List any project constraints you think you might encounter on this project, if any. (1%)
- b. Detail any constraints faced in the past and how they were. (1%)