



SCOPE OF SERVICES

Solicitation Number: CLMP345

Project Name: Infrastructure Energy Savings Assessment and Retrofit

PROJECT FOR:

CITY OF AUSTIN, BUILDING SERVICES DEPARTMENT, THROUGH ITS FSD-CAPITAL CONTRACTING

PROJECT TITLE:

Infrastructure Energy Savings Assessment and Retrofit

OBJECTIVES OF THE PROJECT:

The Building Services Department (BSD) has selected approximately seven (7) core facilities within its portfolio that are in need of infrastructure evaluation and equipment replacement. Utilizing an Energy Savings loan, we aim to create an approximate \$5M loan package through The State of Texas' LoanSTAR program whose energy efficiency savings will pay back the principal on the loan.

BACKGROUND:

The City of Austin is requesting a submittal of qualifications to provide prime professional services from Energy Service Companies (ESCOs) that describe their team's Design-Build capabilities to conduct Utility Assessment Reports (UAR), design, installation, and construction management for comprehensive utility conservation retrofit(s). For the purpose of this RFQ, "ESCO" refers to any entity that is qualified to provide a turnkey utility conservation program that includes the services listed in this solicitation and meets the requirements of the State Energy Conservation Office (SECO) LoanSTAR Program. Owner intends to select one or more firms to perform cost-effective utility conservation retrofits for the selected groups of facilities.

The Building Services Department (BSD) maintains and operates City-owned property inventory including office space, warehouse and service facilities, parking garages and surface lots located throughout the City of Austin. BSD provides property management, repair, renovation, routine and deferred maintenance services, and utility services for this inventory. BSD has selected approximately seven (7) core facilities within its portfolio that are in need of infrastructure evaluation and equipment replacement.

BSD has several previously performed studies that may be useful in laying the ground-work for work to be included in the LoanSTAR mandated UAR:

In 2016, BSD had several of its core properties evaluated as candidates for retro-commissioning (RCx). Retrofits and replacements were additionally identified in the RCx evaluations.

In 2018, BSD was the recipient of a “Facility Preliminary Energy Assessment and Recommendations,” provided with grant funds through the SECO.

In 2021 an Investment Grade Audit was completed to determine Energy Conservation Measures (ECMs) to achieve energy and water savings, address resiliency and end of life equipment replacement, address deferred maintenance to reduce operational expenses.

BSD in coordination with the Financial Services Department (FSD) has decided to utilize the LoanSTAR program as its energy savings parameters and fiscal vehicle to move these previous years’ efforts forward.

ANTICIPATED SERVICES:

The consultant should expect to provide:

- Recommendations for best use of LoanSTAR funds package approximating \$5M
- Utility Assessment Report (UAR) as prescribed by State of Texas LoanSTAR standards
- Design specifications for all equipment, RCx, software and any other parameters indicated in UAR
- Selection of subconsultants who will perform work
- Oversight of construction phase of project
- Provide for BSD staff training of any and all new technology such as BAS, HVAC or other building systems
- Hand-off of all necessary paperwork, deliverables, specifications

Loan Application, and Utility Assessment Report Preparation: Services shall be offered with the understanding of full compliance with non-discrimination requirements of the City of Austin (COA). The ESCO will assist COA in securing a Texas LoanSTAR (Saving Taxes and Resources) Revolving Loan and shall provide the UAR to secure the loan. The UAR shall outline all cost and savings for turnkey project completion. The UAR may need to be updated in response to COA and SECO review comments. The ESCO is responsible for all costs and will not be paid unless the UAR is accepted, the loan is approved, and the contract is executed. COA will not be liable for compensation to the ESCO for the UAR if the UAR is rejected by SECO and the loan is not approved.

Contract and Project Funding: COA and the funding source (SECO) shall sign a contract for the loan after acceptance of the UAR. With funding committed, the contract between COA and the ESCO will be executed.

Implementation: Upon SECO’s review and COA’s acceptance of the UAR and execution of the contract, the ESCO shall be given the notice to proceed with the design phase. The ESCO will complete the design under the supervision of COA, and COA’s designated review agent. The ESCO shall submit design documents to SECO at 50 & 100% of design completion phases for review and approval. After the design phase is completed, COA will review and approve the design documents. COA will issue a written Notice to Proceed for the implementation of all approved Utility Cost Reduction Measures (UCRMs) specified for the Project with a construction schedule approved by COA. All construction and commissioning activities will be

coordinated with the Owner's Project Manager. Sufficient training will be provided by the ESCO for building maintenance personnel and occupants to successfully operate all UCRMs at maximum efficiency.

Post Construction Monitoring, Adjusting, and Reviewing of Savings: Where required, for the duration of the contract the ESCO will monitor and adjust all UCRMs implemented during the performance period. The Owner retains the right, at the Owner's discretion, during this phase to discontinue services relieving the ESCO of liability with respect to future savings guarantees.

Third Party Oversight: The project is subject to SECO review (UAR, Design & Construction Phases as per LoanSTAR Guidelines). The ESCO shall cooperate and assist with the SECO assigned third-party review engineer during all phases including, but not limited to, review of the preliminary energy analysis, the UAR, and the design and construction. The Owner, at its discretion, may hire an additional third-party for ongoing evaluation and measurement and verification of the cost savings resulting from the implemented UCRMs.

PROPOSED PROJECT SCHEDULE:

City intends to award contract for full prime professional engineering and energy savings performance contracting services for the term of the project. Services undertaken pursuant to this RFQ will be required to commence within thirty (30) days of delivery of a Notice to Proceed. The contract term for Construction is not to exceed one (1) year, and the contract term for payback is not to exceed fifteen (15) years from final acceptance of construction.

PROPOSED PROCUREMENT SCHEDULE

Issue Date: 12/01/2022

Pre-response Meeting: 12/08/2022

SOQ Due Date: 01/05/2023

Tentative Council Date: April 2023

Contract Execution: June 2023

COST ESTIMATE:

The total LoanSTAR package is expected to be approximately \$5M

The professional services fee is estimated to be \$300,000.00 and the estimated total construction cost is \$5,000,000.00.

MAJOR AND OTHER SCOPES OF WORK:

Below is a list of the major scopes of work that the City has identified for this project. ****There must be representation for all major scopes of work listed in the prime's statement of***

qualifications. The experience of the firms listed to perform the Major Scopes of Work, whether a subconsultant or prime firm, will be evaluated under Consideration Item 6 – Major Scopes of Work – Comparable Project Experience.

In addition, the City has identified Other Scopes of work that MAY materialize during the course of the project. The City does not guarantee that the scopes listed under Other Scopes of work will materialize on this contract. If the prime consultant intends to enter into a sub-consulting agreement on a scope of work not listed below, the prime consultant is required to contact SMBR and request an updated availability list of certified firms in each of the scopes of work for which the prime consultant intends to utilize a subconsultant.

*** Major Scopes of Work**

- 92567 - Mechanical Engineering
- 92535 - Environmental Engineering
- 92522 - Control Systems Engineering

*** Other Scopes of Work**

- 92534 - Energy Management Engineering
- 93629 - Facility Energy Management Systems Maintenance and Repair
- 90628 - Energy Conservation; New Energy Sources (Solar, etc.)

Notes:

- Construction Inspection and Public Information and Communications are **NOT** a subconsultant opportunity. These services will be performed in-house or under a separate contract, if needed, and will be determined when project assignment is made.
- Participation at the prime or subconsultant level may create a conflict of interest and thus necessitate exclusion from future contracting opportunities with the City.
- If the City determines that a conflict of interest exists at the prime or subconsultant level, the City reserves the right to replace/remove the prime or instruct the prime consultant to remove the subconsultant with the conflict of interest and to instruct the prime consultant to seek a post-award change to the prime consultant's compliance plan as described in City Code § 2-9B-23. Such substitutions will be dealt with on a case-by-case basis and will be considered for approval by Small and Minority Business Resources (SMBR) in the usual course of business. The City's decision to remove a prime or subconsultant because of a conflict of interest shall be final.

- A consultant performance evaluation will be performed on all professional services contracts. This evaluation will be conducted at the end of each Design and Construction phase.

CITY OF AUSTIN PUBLIC PARTICIPATION PRINCIPLES:

Accountability and Transparency

The City will enable the public to participate in decision-making processes by providing clear information on the issues, the ways to participate, and how their participation contributes to the decision.

Fairness & Respect

The City will maintain a safe environment that cultivates and supports respectful public engagement and will expect participants to do so in turn.

Accessibility

The City will respect and encourage participation by providing ample public notice of opportunities and resources and accommodations that enable all to participate.

Predictability & Consistency

The City will prepare the public to participate by providing meeting agendas, discussion guidelines, notes, and information on next steps.

Creativity & Community Collaboration

(Inclusivity and Diversity)

The City will use innovative, proven, and customized engagement solutions that are appropriate to the needs of the projects and the participants.

Stewards of Resources

The City will balance its commitment to provide ample opportunities for public involvement with its commitment to delivering government services efficiently and using City resources wisely.