



**PUBLIC BUILDING
COMMISSION** of Chicago



HOUSEKEEPING ITEMS

While we wait...

Please **MUTE** your computers and/or cellphones

- Press *6 to unmute (if asked to speak)

Please **CHANGE** your screen name

- Use 'Your Name (Company Name (or Initials))'
EXAMPLE: James B (PBC)

Please **ADD** your name to Chat

- Use 'Your Name|Company Name (or Initials)'
(EXAMPLE: James Borkman (PBC))

Please **WAIT** for Q&A to ask questions

- Q&A session will be at the end of each meeting
- Feel free to use the 'Chat' feature





Energy Performance Analysis and Contracting Services PS3066

Pre-Submission Conference
January 4, 2023 at 11:00am

AGENDA

Introductions

Program Overview

Procurement Details

Evaluation & Selection Process

Compliance



Introductions



**PUBLIC BUILDING
COMMISSION** of Chicago

INTRO

PBC

CPS

Consultants

Potential Respondents

Sub-Contractors/Suppliers



Program Overview

Program Overview

General PBC Program Overview

Goals and Objectives of this RFP

- Broad based Energy Conservation
- Multi-Year
- Multi-Facility
- Multi-Agency
- Anticipated Size of Program
- Task Order Based

General CPS Program Overview

Goals and Objectives

- Identify locations for potential Energy Conservation
- ASHRAE level-1 preliminary energy efficiency facility assessments and report
- Investment Grade Audit (IGA) services
- Guaranteed Energy Savings Performance contracting services



Procurement Details

REQUEST FOR PROPOSALS OVERVIEW

General Information for this Procurement

- Timeline
 - Pre-Submission Conference
 - Semi-Finalist Interviews
 - Board Approval
- Term
 - 5 Years with 5 one-year optional extensions
- Contract Value
 - \$15M (NOT a guarantee)

Issue RFP	December 21, 2022
Pre-Submission Conference (Virtual)	January 4, 2023 at 11:00am
Questions Deadline	January 11, 2023 at 4:00pm Central Time
Submission Deadline	January 18, 2023 at 11:00am Central Time
Oral Presentations/Interviews (Tentative)	January 31-February 7, 2023
Successful Respondent Appointment (Tentative)	March PBC Board Meeting

Procurement Details

AVAILABILITY OF DOCUMENTS & DUE DATE

RFP Availability
[PBC Website – Current Opportunities](#)

Due Date/Time

January 18th, 2023 at 11:00 a.m.
(Subject to Change via Addendum)

Current Opportunities


As the PBC marks the successful completion of a number of projects that are bringing new resources, opportunities and jobs to our communities, we are offering contracting or professional services opportunities to Chicago area businesses.

Those interested in working with the PBC are encouraged register for PBC Alerts – your direct connection to upcoming contracting opportunities with the PBC. This free service notifies you by email each time a contracting or pre-qualification opportunity becomes available. Upcoming opportunities are listed below.

Sign up for PBC Alerts!

your direct connection to the Public Building Commission

▶ Click here to sign up



Search Opportunities

Description

Year▼

Bid Type▼

Submit

Reset

Viewing Result 1-25 of 238

Date Due	Description	Type	Status
01/18/2023	RFP for Energy Performance Analysis and Contracting Services	RFP	Current
11/03/2022	Advertisement for Bids: Contract C1602 – Kenwood Academy High School Link and Mechanical Project	AFB	Past
10/06/2022	Advertisement for Bids: Contract C1603 – Works Progress Administration ("WPA") Street Reconstruction (Medill Avenue)	AFB	Past
03/24/2022	RFP for Construction Management at Risk Services for AIS Capital Improvement Projects (NPV Buildings and Lakeview)	RFP	Past
03/22/2022	RFP for Construction Management at Risk Services for AIS Capital Improvement Projects (Juvenile and Pershing Upgrades)	RFP	Past

Procurement Details

REQUEST FOR INFORMATION (RFI'S)

Sole Point of Contact

James Borkman, Contract Officer

james.borkman@cityofchicago.org

Deadline

Current: January 11th by 4:00 p.m. CST

Addenda

None issued to date



Evaluation & Selection Process

Procurement Details

Evaluation and Selection Criteria

Evaluation Criteria – Section VII

- 1) Cover Letter and Table of Contents (Tab 1)
 - a. Cover Letter –LIMITED TO 2 PAGES (does NOT count toward overall 15-page limit)
 - b. Table of Contents (does NOT count toward overall 15-page limit)
- 2) ESCO Description and Company Overview (Tab 2) **(20%)**
- 3) Energy Performance Analysis and Contracting Services Approach (Tab 3) **(30%)**
- 4) Prior Project Performance and Experience (Tab 4) **(20%)**
- 5) References (Exhibit H) (Tab 4) **(5%)**
- 6) Anticipated Cost Proposal Schedule A (Tab 5) **(5%)**
- 7) MBE and WBE Participation (Tab 6) **(15%)**
- 8) Financial Statements (Submitted under separate cover) **(5%)**

Additional Information Required

- Additional Forms (Exhibits) (Tab 7)

Procurement Details

Other Forms & Information

Anticipated Cost Proposal Schedule A

SCHEDULE A – ANTICIPATED COST PROPOSAL SCHEDULE FOR ENERGY PERFORMANCE ANALYSIS AND CONTRACTING SERVICES

Anticipated Cost Proposal Schedule for PS3066 Energy Performance Analysis and Contracting Services			
Please note: 1. Pricing is required. Please include ALL personnel / services related to this RFP in addition to those listed below.			
LINE #	DESCRIPTION OF PERSONNEL / SERVICES	Lump Sum Cost	Hourly Rate Cost
1	Energy Engineer	\$	\$
2	Senior Project Manager	\$	\$
3	Project Manager	\$	\$
4	Commissioning Agent	\$	\$
5		\$	\$
6		\$	\$
7		\$	\$
8		\$	\$
9		\$	\$
10		\$	\$
11		\$	\$
12		\$	\$
13		\$	\$
14		\$	\$

Notes:

The Respondent's anticipated rates are for reference and will serve as a guide for Task Order reviews, negotiations, and approvals.

The Hourly Rate table provides various hourly rates for the staff who will work on the projects. The hourly rate shall include typical overhead (except the "Reimbursable Expenses") for each staff member such as driving to and from PBC job sites or meetings, cell phone and computer usage, vehicles, mileage, [taxi cab](#) fares, parking, tolls, insurance, marketing and any other costs incurred.

The PBC reserves the right to modify, change, revise, and/or amend the above rates in accordance with the Contract Documents

Procurement Details

RFP SUBMISSION REQUIREMENTS

If Electronic Submission (Strongly Encouraged)

- **One** complete copy of RFP document
- Include all information requested, including separate Financial Information in PDF format sent separately in the same email
NOTE: ALL these documents should be submitted in searchable PDF form and not a scanned copy.
- Email to:
bids@pbcchicago.com **AND** james.borkman@cityofchicago.org

If Hardcopy Submission

- **One** signed, single-sided, bound ORIGINAL (marked as such)
- Include **two**, double-sided unbound paper copies
- **Seven** electronic copies on USB Flash Drives – Must be in a single searchable .pdf document
- **One** single-sided, bound copy of Financial Statements (separate envelope labeled as such)
- Label envelope as directed in Instructions to Bidders Section 5 A (3)
- Mail or hand-deliver/messenger to:
Public Building Commission of Chicago (PBC)
50 West Washington Street, Suite 200
Chicago, Illinois 60602
- PBC offices will **only** be open from 9:30a.m. to 11:00a.m.

NOTE: Mail has been sporadic due to COVID-19. The PBC recommends firms submit their bid electronically





Compliance



**PUBLIC BUILDING
COMMISSION** of Chicago

Compliance Highlights

MBE/WBE PARTICIPATION

MBE/WBE Goal

32% MBE/WBE

MBE/WBE Certifications

- City of Chicago
- Cook County

MBE/WBE Special Conditions

Book 2, Article 23



Compliance Highlights

BOOK 1 AND BOOK 2 HIGHLIGHTS

Respondents and Joint Venture Opportunities

- Schedule B – Joint Venture Affidavit
- (Book 1, Page 25)
 - ❖ JV Agreement
 - ❖ Certification Letter

SCHEDULE B - Joint Venture Affidavit (1 of 3)

This form is not required if all joint venturers are MBE/Non-MBE or WBE/Non-WBE firms. In such case, however, a written joint venture agreement among the MBE/Non-MBE or WBE/Non-WBE firms should be submitted. Each MBE/WBE joint venturer must also attach a copy of their current certification letter.

A. Name of joint venture _____

B. Address of joint venture _____

C. Phone number of joint venture _____

D. Identify the firms that comprise the joint venture

1. Describe the role(s) of the MBE/WBE firm(s) in the joint venture. (Note that a "clearly defined portion of work" must here be shown as under the responsibility of the MBE/WBE firm.)

2. Describe very briefly the experience and business qualifications of each non-MBE/WBE joint venturer.

E. Nature of joint venture's business

F. Provide a copy of the joint venture agreement.

G. Ownership: What percentage of the joint venture is claimed to be owned by MBE/WBE? _____ %

H. Specify as to:

1. Profit and loss sharing _____ %

2. Capital contributions, including equipment _____ %

3. Other applicable ownership interests, including ownership options or other agreements which restrict ownership or control.

Compliance Highlights

MBE/WBE COMPLIANCE

Documentation and Monitoring

- B2Gnow: MBE/WBE Compliance monitoring
- Established Business, Manufacturers, Suppliers, and Brokers
- Schedule D
- Schedule C

Compliance Highlights

MBE/WBE COMPLIANCE

Schedule D



PUBLIC BUILDING COMMISSION OF CHICAGO

SCHEDULE D - Affidavit of General Contractor Regarding MBE/WBE Participation (1 of 2)

Name of Project: _____

STATE OF ILLINOIS }
 } SS
COUNTY OF COOK }

In connection with the above-captioned contract, I HEREBY DECLARE AND AFFIRM that I am the

Title and duly authorized representative of

Name of General Contractor whose address is

in the City of _____, State of _____
and that I have personally reviewed the material and facts submitted with the attached Schedules of MBE/WBE participation in the above-referenced Contract, including Schedule C and Schedule B (if applicable), and the following is a statement of the extent to which MBE/WBE firms will participate in this Contract if awarded to this firm as the Contractor for the Project.

Name of MBE/WBE Contractor	Type of Work to be Done in Accordance with Schedule C	Dollar Credit Toward MBE/WBE Goals	
		MBE	WBE
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
		\$	\$
Total Net MBE/WBE Credit		\$	\$
Percent of Total Base Bid		%	%

The General Contractor may count toward its MBE/WBE goal a portion of the total dollar value of a contract with a joint venture equal to the percentage of the ownership and control of the MBE/WBE partner.

PUBLIC BUILDING COMMISSION OF CHICAGO

SCHEDULE D - Affidavit of General Contractor Regarding MBE/WBE Participation (2 of 2)

The Undersigned will enter into a formal agreement for the above work with the above-referenced MBE/WBE firms, conditioned upon performance as Contractor of a Contract with the Commission, and will do so within five (5) business days of receipt of a notice of Contract award from the Commission.

Additionally, the Undersigned certifies to the best of its knowledge and belief that it, its principals and any subcontractors used in the performance of this contract, meet the Agency requirements and have not violated any City or Sister Agency policy, codes, state, federal or local laws, rules or regulations and have not been subject to any debarment, suspension or other disciplinary action by any government agency. Additionally, if at any time the Contractor becomes aware of such information, it must immediately disclose it to the Commission.

BY:

Name of Contractor (Print)

Date

Phone

IF APPLICABLE:

BY:

Joint Venture Partner (Print)

Date

Phone/FAX

Signature

Name (Print)

Signature

Name (Print)

MBE ____ WBE ____ Non-MBE/WBE ____

Compliance Highlights

MBE/WBE COMPLIANCE

Schedule C

PUBLIC BUILDING COMMISSION OF CHICAGO

SCHEDULE C - Letter of Intent from MBE/WBE (1 of 2)
To Perform As
Subcontractor, Subconsultant, and/or Material Supplier

Name of Project: _____

Project Number: _____

FROM: _____

MBE _____ WBE _____

(Name of MBE or WBE)

TO: _____

_____ and Public Building Commission of Chicago
(Name of Bidder)

The undersigned intends to perform work in connection with the above-referenced project as (check one):

_____ a Sole Proprietor _____ a Corporation

_____ a Partnership _____ a Joint Venture

The MBE/WBE status of the undersigned is confirmed by the attached Letter of Certification, dated _____. In addition, in the case where the undersigned is a Joint Venture with a non-MBE/WBE firm, a Schedule B, Joint Venture Affidavit, is provided.

The undersigned is prepared to provide the following described services or supply the following described goods in connection with the above-named project.

The above-described services or goods are offered for the following price, with terms of payment as stipulated in the Contract Documents.

PUBLIC BUILDING COMMISSION OF CHICAGO

SCHEDULE C - Letter of Intent from MBE/WBE (2 of 2)
To Perform As
Subcontractor, Subconsultant, and/or Material Supplier

PARTIAL PAY ITEMS
For any of the above items that are partial pay items, specifically describe the work and subcontract dollar amount:

If more space is needed to fully describe the MBE/WBE firm's proposed scope of work and/or payment schedule, attach additional sheet(s).

SUB-SUBCONTRACTING LEVELS*

_____ % of the dollar value of the MBE/WBE subcontract will be sublet to non-MBE/WBE contractors.

_____ % of the dollar value of the MBE/WBE subcontract will be sublet to MBE/WBE contractors.

***If MBE/WBE subcontractor will not be sub-subcontracting any of the work described in this Schedule, a zero (0) must be filled in each blank above. If more than 10% percent of the value of the MBE/WBE subcontractor's scope of work will be sublet, a brief explanation and description of the work to be sublet must be provided.**

The Undersigned (Contractor) will enter into a formal agreement for the above work with the Bidder, conditioned upon its execution of a contract with the Public Building Commission of Chicago, and will do so within five (5) working days of receipt of a notice of Contract award from the Commission.

Additionally, the Undersigned certifies to the best of its knowledge and belief that it, its principals and any subcontractors used in the performance of this contract, meet the Agency requirements and have not violated any City or Sister Agency policy, codes, state, federal or local laws, rules or regulations and have not been subject to any debarment, suspension or other disciplinary action by any government agency. Additionally, if at any time the Contractor becomes aware of such information, it must immediately disclose it to the Commission.

BY:

_____	_____
Name of MBE/WBE Firm (Print)	Signature
_____	_____
Date	Name (Print)
_____	_____
Phone	
IF APPLICABLE:	
BY:	
_____	_____
Joint Venture Partner (Print)	Signature
_____	_____
Date	Name (Print)
_____	MBE _____ WBE _____ Non-MBE/WBE _____
Phone	

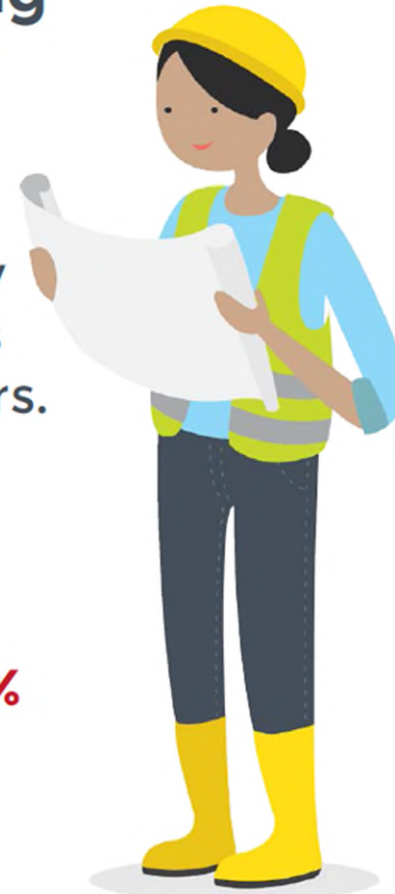
Compliance Highlights

MBE/WBE HIGHLIGHTS

City Residency & Compliance: Community Hiring

PBC encourages the creation of career opportunities for residents of a project's surrounding community areas, both in the construction trades as well as skilled and unskilled workers.

- ☑ **City residency goal:** at least **50%** of project labor performed by residents of the city of Chicago



PBC CONTACT

James Borkman

james.borkman@cityofchicago.org



Q&A