

REQUEST FOR QUALIFICATIONS

Energy Audit Services

6/8/2012



INTRODUCTION

Invest Atlanta seeks to support the [Atlanta Better Buildings Challenge](#) ("Atlanta BBC") by 1) providing select Downtown building owners with investment-grade audits of resource consuming systems and 2) access to capital for implementation of energy efficiency projects.

Invest Atlanta has been created and is existing under and by virtue of the Development Authorities Law, activated by a resolution of the Council of the City of Atlanta, Georgia (the "City") and currently operates as a public body corporate and politic and instrumentality of the State of Georgia. Invest Atlanta was established to promote the revitalization and growth of the City and serves as the City's redevelopment agency pursuant to the Redevelopment Powers Law for the purpose of implementing redevelopment initiatives within the City's ten tax allocation districts ("TADs").

The Atlanta BBC seeks to address issues of functional and economic obsolescence by encouraging investment in efficiency improvements. The Atlanta BBC is part of the Better Buildings Initiative launched by President Barack Obama in February 2011 to make America's buildings more energy efficient. Atlanta BBC seeks to encourage substantive building upgrades in Downtown Atlanta toward the goal of improving participating buildings' energy and water performance a minimum of 20% by 2020, while creating jobs and decreasing vacancy rates.

Invest Atlanta will allocate Westside Tax Allocation District ("Westside TAD") tax increment to qualified building owners wishing to implement building energy savings projects as participants in the Atlanta BBC ("Atlanta BBC Participants") toward substantive retrofits of office buildings in Downtown within the boundaries of the Westside TAD. Objectives of the Westside TAD Redevelopment Plan include increasing investment in the area and overcoming impediments to development. The Westside TAD also seeks to increase employment through job retention and creation, grow the tax base and remove blighted conditions created by vacant and under-utilized buildings by funding rehabilitation, repair, remodeling and renovation. These objectives will be advanced by facilitating participation in the Atlanta BBC, which is expected to attract more businesses, residents and investors to Downtown.

Westside TAD tax increment will be allocated for both investment-grade audits and project implementation. Atlanta BBC Participants can apply for audits and/or implementation grants. During the audit, companies will provide a model of energy use characteristics of both the existing facility and the effects of adopting each energy conservation measure identified. The building model is calibrated against actual utility data to provide a realistic baseline against which to compute operating savings for proposed measures. Once all audits are complete, Invest Atlanta will invite qualified Atlanta BBC Participants to apply for implementation grants in order to complete specific energy and water efficiency upgrades identified in the audit. Atlanta BBC Participants who have previously completed an audit will be eligible to apply for implementation grants.

Invest Atlanta seeks Statements of Qualifications ("SOQ") from experienced companies interested in providing audits to Atlanta BBC Participants ("Consultants").

RESPONSE DEADLINE

Any response to this Request for Qualifications ("RFQ") must be submitted in hard copy (one original and three copies) and on CD in Adobe Acrobat format by no later than 5:00 p.m., Friday, July 6, 2012. SOQs received after this time and date will not be considered. Please address SOQs to:

Amanda Rhein
Senior Project Manager, Redevelopment
Invest Atlanta
86 Pryor Street SW, Suite 300

Atlanta, Georgia 30303
arhein@investatlanta.com

INQUIRIES

All inquiries regarding this RFQ must be received via email, in writing. Questions should be submitted to:

Amanda Rhein
Senior Project Manager, Redevelopment
Invest Atlanta
arhein@investatlanta.com

All such written inquiries must be delivered by 5:00 p.m., Monday, June 18, 2012. All Consultants will be provided access to or a copy of all received written inquiries and Invest Atlanta's responses to those inquiries.

SCOPE OF SERVICES

In the event an audit has been previously conducted by the Atlanta BBC audit team, the Consultants will build upon work already completed. The scope of services to be provided by the selected Consultants will be developed in partnership with Invest Atlanta and may include the following elements:

1. Determine the building's gross conditioned floor area and classify the primary use of the building.
2. Assemble copies of utility bills and summarize them for at least a one-year period, preferably for a two- or three-year period. Review the monthly bills for opportunities to lower costs by taking advantage of different utility rate classes, taking into account peak electric demand patterns. Review the monthly patterns for irregularities. Note if a bill is missing or if it is estimated rather than an actual consumption value. Collect occupancy rate for one to three years. Collect previous energy audits reports if available.
3. Complete the energy performance summary to develop the Energy Utilization Index ("EUI") and the Energy Cost Index ("ECI") for each fuel or demand type and their combined total.
4. Compare the EUI and ECI with those of buildings having similar characteristics using the ENERGY STAR Portfolio Manager of the U.S. Environmental Protection Agency. Comparison should also be made with publicly available energy indices of similar buildings.
5. Derive target energy, demand, and cost indices for a building with the same characteristics as the building being analyzed.
6. Compare the energy and cost savings for each fuel type if the building were to reach the target EUI. Using these values, determine whether further engineering analysis is recommended.
7. Perform an on-site survey of the facility to become familiar with its construction, equipment, operation and maintenance. Observe the roof and exterior of the building. Inspect the accessible common areas, maintenance and plant areas and a representative sample of the occupied spaces.
8. Meet with the owner/operator and occupants to learn of special problems or planned improvements of the facility and any operation or maintenance issues. Determine whether any maintenance problems and/or practices affect efficiency.
9. Perform a space function analysis and determine whether efficiency may be affected by functions that differ from the original functional intent of the building.
10. Identify low-cost/no-cost changes to the facility or to O&M procedures and estimate the approximate savings that will result from these changes.
11. Identify potential capital improvements for further data collection and engineering analysis and provide an initial rough estimate of potential costs and savings.

12. Review mechanical and electrical system design, installed condition, maintenance practices and operating methods.
13. Describe and analyze the energy-using systems of the building, resulting from on-site observation, measurement, and engineering calculations of the following systems: envelope, lighting, plug loads, HVAC, domestic hot water, laundry, food preparation, refrigeration, conveying, pools/saunas/spas, process loads and others.
14. Review existing O&M problems and logs. Review planned building changes or improvements and estimate their costs.
15. Provide a narrative discussion of recommended changes to operation and maintenance procedures.
16. Measure key operating parameters and compare them to design levels, for example, operating schedules, heating/cooling water temperatures, the supply air temperature, the space temperature and humidity, ventilation quantities and task lighting levels.
17. Prepare a breakdown of the total annual energy use into end-use components.
18. List all possible modifications to equipment and operations that will save energy. Select those that might be considered practical by the owner/operator. Perform preliminary cost and savings estimates.
19. Review the list of practical modifications with the owner/operator and select those that will be analyzed further. Prioritize the modifications in the anticipated order of implementation.
20. Create integrated bundles of measures where successive efficiency measures have significant interactive effects. Measures should be packaged together to achieve different levels of whole-building energy use reduction and financial performance. Package measures together to reduce loads to lower equipment capital costs and increase interactive energy savings. Capture interactions in at least one package that meets the project's financial criteria or savings goals.
21. For each practical measure, estimate the potential savings in energy costs and the building EUI. To account for interaction between modifications, assume that modifications with the highest operational priority and/or best return on investment will be implemented first. A number of calculation methods are available, ranging from simplified manual calculations to iterative computer simulations.
22. Estimate the implementation cost of each practical measure.
23. Estimate the impact of each practical measure on building operations, maintenance costs and non-energy operating costs.
24. Estimate the combined energy savings from implementing recommended bundles of measures and compare the estimated savings to the potential savings derived in the previous analysis. It should be clearly stated that savings from each modification are based on the assumption that all previous modifications have already been implemented and that the total savings account for all of the interactions between the modifications.
25. Prepare a financial evaluation of the estimated total potential investment using the owner's/operator's chosen techniques and criteria. These evaluations may be performed for each practical measure or for combinations of practical measures.
26. During the development of the report, meet with the owner/operator to discuss priorities and to help select measures for implementation or further analysis.
27. Expand the definitions of all modifications requiring further data collection and engineering analysis. Consider system interactions to create integrated packages of recommendations.
28. Review measurement methods and perform additional testing and monitoring as required to allow determination of feasibility.
29. Perform accurate modeling of proposed modifications. Ensure that modeling includes system interaction.
30. Prepare a schematic layout of each of the modifications.
31. Estimate the cost and savings of each modification and each integrated bundle of modifications. Perform a LCCA to inform decision making.
32. Meet with the owner/operator to discuss/develop recommendations.
33. Provide a written energy audit report for a comprehensive and sustainable energy conservation program.

ELIGIBILITY CRITERIA

Each SOQ must include one company already approved by the Georgia Environmental Finance Authority ("GEFA") for the Guaranteed Energy Savings Performance Contracting ("GESPC") prequalification list. The initial GESPC prequalification list includes: AECOM, Chevron Energy Solutions, ConEdison Solutions, Constellation Energy, Eaton-EMC, Energy Systems Group, Honeywell, Johnson Controls, Linc Mechanical, NEXtera Energy Solutions, Noresco, Pepco Energy Services, Schneider Electric, Siemens and Trane.

Invest Atlanta strongly encourages all Consultants to promote opportunities for local and diverse businesses, including Minority Business Enterprises ("MBE"), Female Business Enterprises ("FBE") and Small Business Enterprises ("SBE") to compete for business as subcontractors, sub-consultants and/or suppliers. For an MBE, FBE or SBE to participate on the contract, said MBE, FBE or SBE must be certified for inclusion in the City's Equal Business Opportunity (EBO) and/or SBE Programs with the Office of Contract Compliance. Eligible companies must be located within one of the following twenty county areas to be considered for certification in the City's EBO and SBE Programs: Barrow, Bartow, Carroll, Cherokee, Clayton, Coweta, Cobb, DeKalb, Douglas, Fayette, Forsyth, Fulton, Gwinnett, Henry, Newton, Paulding, Pickens, Rockdale, Spalding and Walton counties.

Engineering Services SBEs (NAICS Code 541330) are defined by the U.S. Small Business Administration as businesses not exceeding \$14 million in average annual receipts over the latest three completed fiscal years. Receipts means "total income" (or in the case of a sole proprietorship, "gross income") plus "cost of goods sold" as these terms are defined and reported on Internal Revenue Service tax return forms. The term does not include net capital gains or losses; taxes collected for and remitted to a taxing authority if included in gross or total income, such as sales or other taxes collected from customers and excluding taxes levied on the concern or its employees; proceeds from transactions between a SBE and its domestic or foreign affiliates; and amounts collected for another by a travel agent, real estate agent, advertising agent, conference management service provider, freight forwarder or customs broker.

Companies interested in obtaining applications for certification should contact:

Hubert Owens, Director
Office of Contract Compliance
55 Trinity Avenue
Atlanta, Georgia 30303
404.330.6010
howens@atlantaga.gov

Consultants must be registered or certified prior to the submittal of the Response.

Invest Atlanta is an Equal-Opportunity Employer. Invest Atlanta reserves the right to reject any and all SOQs, to amend the RFQ and the process itself, or to discontinue the process at any time.

SUBMISSION FORMAT AND CONTENT

SOQs should include a cover letter providing an introduction to the company or team and the areas of expertise of the firm. The letter should also state the full name; address; and phone and fax numbers of the organization and the branch office or other subordinate entity that will perform or assist in performing the services described therein. If responding as a team, the lead firm should be designated with a project manager identified as the single point of contact. Indicate the type of firm ownership (individual, partnership or corporation) and explain any proposed joint venture relationships. Include the state(s) in which the firm is incorporated and/or licensed to operate and provide a valid insurance certification.

Firms will be evaluated on the basis of overall experience and depth of resources. It is imperative that responses contain all information requested.

Submittals must include one (1) original of the SOQ, three (3) hard copies of the SOQ, and one CD containing the SOQ in pdf format. Every effort should be made to make proposals as concise as possible. The body of the SOQ shall include a maximum of twenty (20) pages – although the Consultant should not feel compelled to fill the 20-page allowance. An appendix of no more than fifteen (15) pages in length may also be provided with materials highlighting previous work and resumes.

A. Section I – Cover Letter

- Name, address and telephone number of the firm (or firms) submitting the SOQ
- Summary of the firm's interest in the project, and the name of one or more individuals authorized to represent the firm in its dealings on a contractual basis.

B. Section II – Corporate Information

- History of the firm, including present ownership and key management individuals. Describe any anticipated or recent changes in overall corporate management ownership.
- Location of corporate headquarters and other divisional offices. Specify which office or offices will be involved in this engagement. Include contact names, addresses and phone numbers.
- A company organization chart showing authority structure and depth of resources.
- Resumes of any personnel anticipated to be assigned to the study.
- List any litigation the firm was involved in during the last five (5) years.
- List any current, pending or threatened litigation and provide a description.
- A disclosure statement listing all potential conflicts of interest related to this RFQ. This disclosure statement must be addressed specifically in your response, even if no conflict exists.
- A current audited balance sheet and income statement.

C. Section III – Commitment to Small and Locally Owned Businesses

- An overview of the firm's relationships with MBEs, FBEs and SBEs. Please indicate if any proposing firm or joint venture partner is certified under any of these categories by the City.

D. Section IV – Experience

- The firm's current annual business volume and average volume during the past five (5) years.
- Provide details of past experiences, references for similar work, planning/budget/schedule activities, talents applicable to respective service to be provided, documentation method, project tracking method and work product delivery methods that have proven successful. Also, include any experience or work completed on behalf of the City, Invest Atlanta, Atlanta BeltLine, Inc., BeltLine Partnership Inc., etc.
- Provide the following information for no more than three (3) current or recently completed projects:
 - Project Name
 - Project Location
 - Project Scope and Description
 - Contract Amount
 - Actual or Expected Completed Date
 - Actual Duration
 - Members from Project that will be assigned to Invest Atlanta
 - Owner Name and Contact Information
- Provide information regarding any accounts from which the Consultant was terminated for cause within the last three (3) years including the reason for the termination.

Selection Timeline

Invest Atlanta will ensure that the selected Consultants have access to all necessary files, reports and personnel required to complete the Scope of Services. The following is an approximate project schedule, subject to modification:

- June 8, 2012 RFQ released
- June 18, 2012 RFQ inquiries due to Invest Atlanta
- June 22, 2012 Responses to inquiries posted on Invest Atlanta website
- July 6, 2012 SOQs due to Invest Atlanta
- July 20, 2012 Consultants selected and notified
- July 27, 2012 Atlanta BBC Participants selected
- August 17, 2012 Consulting Services Agreements executed with Invest Atlanta
- September 2012 Audits completed

Selected firm(s) must be prepared to enter negotiations with Invest Atlanta for services outlined in this RFQ.

TERMS AND CONDITIONS

All SOQs and supporting materials as well as correspondence relating to this RFQ become property of Invest Atlanta when received. Any proprietary information contained in the SOQ should be so indicated. However, a general indication that the entire contents, or a major portion, of the proposal is proprietary will not be honored.

A. All applicable Federal and State of Georgia laws, City and Fulton County ordinances, licenses and regulations of all agencies having jurisdiction shall apply to the Consultants throughout and incorporated herein. The contracts with the selected Consultants, and all questions concerning the execution, validity or invalidity, capability of the parties, and the performance of the contract, shall be interpreted in all respects in accordance with the laws of the State of Georgia.

B. Professionals requiring special licenses must be licensed in the State of Georgia, and shall be responsible for those portions of the work as may be required by law.

C. Sub-Consultants must be clearly identified in the SOQ, including roles, resumes of key personnel and project references.

D. No SOQ shall be accepted from, and no contract will be awarded to, any person, firm, or corporation that (i) is in arrears to Invest Atlanta or the City with respect to any debt, (ii) is in default with respect to any obligation to Invest Atlanta or the City, or (iii) is deemed irresponsible or unreliable by Invest Atlanta. If requested, the Consultants shall be required to submit satisfactory evidence that they have the necessary financial resources to provide the proposed services.

E. From the date Invest Atlanta receives the SOQ through the date a contract is awarded to a Consultants, no substitutions, deletions, additions or other changes in the configuration of the SOQ or members of the proposed team shall be made.

Professional Services Insurance Requirements

Statutory Worker's Compensation Insurance

Comprehensive General Liability Insurance: \$2,000,000 limit of liability per occurrence for bodily injury and property damage.

Professional Liability Insurance: Professional Liability Insurance Limit \$1,000,000 per Occurrence / \$2,000,000 per aggregate.

- Insurance company must be authorized to do business in the State of Georgia.
- Dedicated Limits per Project site or location (CG 25 03 or CG 25 04 or some other form).
- Additional insured shall be shown as: The Atlanta Development Authority and the City of Atlanta
- The cancellation provision should provide 30 days' notice of cancellation.
- Insurance Company, except Worker's Compensation carrier, must have an A.M. Best Rating of A-6 or higher. European markets including those based in London and domestic surplus lines markets that operate on a non-admitted basis are exempt from this requirement provided that the contractor's broker/agent can provide financial data to establish that a market is equal to or exceeds the financial strengths associated with the A.M. Best's rating of A-6 or better. Insurance company must be licensed to do business by the Georgia Department of Insurance.
- Certificates of Insurance, and any subsequent renewals, must reference specific bid/contract by project name and if applicable, project/bid number.
- The Consultants shall agree to provide complete certified copies of current insurance policies if requested to verify the compliance with these insurance requirements.
- All insurance coverage required to be provided by the Consultants will be primary over any insurance program carried by Invest Atlanta or the City.
- Consultants shall incorporate a copy of the insurance requirements as herein provided in each and every subcontract with each and every subcontractor in any tier, and shall require each and every subcontractor of any tier to comply with all such requirements. Consultants agree that if for any reason subcontractor fails to procure and maintain insurance as required, all such required insurance shall be procured and maintained by Consultants at Consultants' expense.
- No Consultants or subcontractor shall commence any work of any kind under the contract until all insurance requirements contained in the contract have been complied with and until evidence of such compliance satisfactory to Invest Atlanta as to form and content has been filed. The Accord Certificate of Insurance or a pre-approved substitute is the required form in all cases where reference is made to a Certificate of Insurance or an approved substitute.
- The Consultants shall agree to waive all rights of subrogation against Invest Atlanta, the City, their officers, directors, officials, employees, and volunteers from losses arising from work performed by the Consultants for Invest Atlanta.
- The Consultants shall make available, through its records or records of its Insurer, information regarding a specific claim. Any loss run information available from the contractor or its insurer will be made available to Invest Atlanta upon request.