

Morgan County



MORGAN COUNTY, MCCONNELSVILLE, OHIO

Request for Qualifications (RFQ)
for an Energy Savings Performance Contracting Project

DATE: FEBRUARY 2026

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I. purpose of solicitation

Background: The intent of this Request for Proposal on Qualifications (RFQ) is to solicit qualifications from interested firms. Morgan County is requesting Qualifications from firms for an energy savings performance contracting project which may include Facility and Energy Efficiency Improvements on a Performance Contracting basis that is accordance with Ohio Revised Code §307.041.

For the purpose of this RFQ, “ESCO” or Energy Services Company, refers to any company that is qualified to provide a turnkey energy conservation program that includes all services listed in this RFQ. Responses to this RFQ shall describe the ESCO’s capability to identify the need for, design, install, maintain, monitor, and arrange the financing of a comprehensive facility improvements and energy conservation program.

Morgan County intends to use this RFQ to qualify and select a firm to conduct an Investment Grade Audit and award contract(s) to perform facility improvements and cost-effective energy conservation retrofits.

Deadline: Responses to this RFQ must be received by 10:00 AM on March 4, 2025 at the address below. Five (5) paper copies and one (1) electronic copy of the response must be sealed and delivered to:

Morgan County Commissioners’ Office

Sheila Welsh

Commissioners’ Clerk

155 E. Main Street

McConnelsville, OH 43756

Phone: 740.962.3171

Email: engineer@morgancountyohio.gov

Please Note:

Morgan County reserves the right to reject as non-responsive any proposers that do not contain the information requested in Section VII and Appendix A of this RFQ.

- Additionally, Morgan County reserves the right to reject as non-responsive any proposers which are not organized and formatted as described in this RFQ.
- Morgan County reserves the right to reject any and all responses resulting from this RFQ. Late responses will not be accepted and will be returned to the submitting company unopened.

- Morgan County is not liable for any cost incurred by any person or firm responding to this RFQ.

Questions: All questions will be answered by email to all applicants. Any and all questions regarding this RFQ and the program it represents must be submitted in writing to:

Sheila Welsh

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II. background

Morgan County has six (6) facilities totaling 77,643 square feet.

Morgan County proposes to address all energy and water/sewage utility uses in all of its facilities for this conservation program. Additionally, Morgan County intends to upgrade outdated and obsolete building equipment and perform property improvements through the program.

Morgan County anticipates a major reduction in annual utility costs through the implementation of this energy conservation program. The ESCO will provide a written guarantee of all utility reductions and provide assistance for services regarding financing (if requested by Morgan County) for the project. The contract life of the program is expected not to exceed 20 years. Morgan County intends to structure the program's implementation schedule in a manner to minimize the programs financed capital needs.

Morgan County requires that reductions in annual utility costs meet or exceed annual project expenditures. ESCO must guarantee energy savings. In the event that guaranteed energy savings do not meet the annual projections, a check will be written to Morgan County to cover the shortfall.

Respondents to this Request for Qualifications (RFQ) shall identify their experience and qualification to design, install, and manage a major energy conservation project that involves energy conservation measure (ECM) retrofits which address the following building components and applications: lighting, space heating, ventilation, air-conditioning, building envelope, heat recovery, energy management systems, environmental system controls, motors, domestic water heating, fuel switching, air distribution systems, and water consumption systems.

Morgan County is also interested in the respondents' experience related to programs designed to train building occupants and maintenance workers in energy conservation awareness.

III. Services requested

For this RFQ, Morgan County is interested in Companies for the identification, engineering, design, installation, training, maintenance and financing of approved facility and Energy Conservation Measures (ECMs) in a fixed cost scenario for all of its facilities.

All ECMs considered shall be proven, commercially available and result in verifiable energy savings.

All equipment provided by the ESCO for this program shall have a history of successful operating experience in similar installations and shall be in new and unused condition. This equipment shall be state-of-the-art with readily available replacement parts.

IV. Selection process

RFQ Qualifications Evaluation

Interested ESCOs responding to this RFQ with a proposal must provide the information requested in Section VII and Appendix A. Morgan County will evaluate submittals and choose an ESCO who meets the qualifications of this RFQ to develop an Investment Grade Audit.

Engineering Proposal

Upon completion of the response evaluation, Morgan County will select an ESCO to conduct an Investment Grade Audit. When approved by Morgan County, the IGA (Investment Grade Audit) will allow the ESCO to proceed with the energy analysis, feasibility study, conceptual engineering design and permitting plan for a comprehensive facility improvement and energy conservation program.

The ESCO will develop a program that meets Morgan County's requirements. Morgan County and the ESCO will sign the agreement, thereby requiring the ESCO to proceed. If during this phase, it is determined that the program options identified by the ESCO do not fall within mutually agreed upon acceptable financing requirements and project scope, the Investment Grade Audit will be terminated with no financial liability to Morgan County.

Negotiating and Signing of Contract

Upon completion of the Investment Grade Audit and the determination that the project is feasible and acceptable to Morgan County, an Energy Savings Performance Contracting (ESPC) Agreement will be drawn up between Morgan County and the ESCO. All engineering, design

and permitting cost incurred by the ESCO under the Investment Grade Audit will be incorporated into the ESPC Agreement. Upon acceptance of the ESPC Agreement by the Organization's Administration, the ESPC Agreement will be signed and the program will commence.

V. Schedule of events

The following time frame is expected to be followed during the procurement period of this RFQ.

This is a tentative schedule, and dates are subject to change.

- Release of RFQ – February 11, 2026
- RFQ proposal received – March 4, 2026
- Invitation to Selected ESCO to develop Investment Grade Audit – March 25, 2026

Please note that responses to this RFQ must be received by March 4, 2026 @ 10:00 a.m. at the address below. Five (5) hard copies and one (1) electronic copy of the response must be delivered to:

Morgan County Commissioners' Office

Sheila Welsh

Commissioners' Clerk

155 E. Main Street

McConnelsville, OH 43756

Phone: 740.962.3171

Email: engineer@morgancountyohio.gov

“Proposals Enclosed – Guaranteed Energy Savings Contract”

VI. selection criteria

Qualification of all business entities that respond to this solicitation will be evaluated using the following selection criteria.

Organization & Supplemental Information

- Submission conforms to the requirements of this solicitation.
- Supplemental information is pertinent to the goals and objectives of this procurement.

Personnel Qualifications

- Quality of personnel assigned to this project and degree of pertinent experience.

Project Plan

- Comprehensiveness and rationale of the ESCO's project management plan.
- Method employed to establish baseline energy use in individual buildings and facility-wide
- Method of measurement and verification used to demonstrate energy use reduction and cost savings as guaranteed
- Provide examples of annual measurement and verification shortfall checks issued to past project clients.
- Explain your engineering methodology of selecting equipment. If your firm manufactures or distributes equipment, provide examples of projects you developed whereby you recommended and installed and competitor's manufactured/distributed products.
- Your financial plan demonstrates your ability to help meet our needs and goals

Prior Project Performance

- Experience with implementing the project plan you are recommending for Morgan County
- Experience taking responsibility for the full range of roles contemplated for this project (e.g. identification and analysis of ECMs, design, installation, operation, training, financing, savings verification, etc.)
- References from prior and current clients.

Business and Financial Qualifications

- Business unit dedicated to providing facility improvements and guaranteed energy savings programs.
- Business unit dedicated to ensuring project performance
- Business must be at least 10 years in business
- How many employees do you have in Ohio
- Financial viability of entity proposed to provide technical and financial guarantees
- NAESCO Accreditation
- ESCO corporate headquarters must reside within the 50 United States
- Has a physical service location or branch office within 100-mile radius of Morgan County with a minimum of 10 personnel in such office. PO Boxes and home offices do not qualify.
- ESCO shall provide audited financial statements including income statement, balance sheets and statements of cash flow for the two (2) most recent completed fiscal periods.

VII. response format and comments

Responses must be submitted in the format outlined in this section. Each response will be reviewed to determine if it is complete prior to actual evaluation. Morgan County reserves the right to eliminate from further consideration any proposal which is deemed to be substantially or materially unresponsive to the requests for information contained in this section. The intent of the Owner is that all responses follow the same format in order to evaluate each respondent fairly.

Each Respondent will provide the Owner five (5) copies of the RFQ response and one (1) electronic copy.

A) TABLE OF CONTENTS:

1. Responses shall include a Table of Contents properly indicating the appropriate sections.

B) EXECUTIVE SUMMARY:

1. Responses shall include a concise abstract of no more than three (3) pages stating the respondent's understanding of the owner's goals and objectives. The ESCO's submission should identify unique qualifications and capabilities for this project that satisfy these goals and objectives.

C) COMPANY BACKGROUND:

1. Company Information / History of Organization
2. Provide verification of corporate headquarters residing within the 50 United States
3. Provide verification of 10 years in business
4. Provide NAESCO accreditation
5. Project Organization Chart
6. Resumes of Individuals that will be working on the Morgan County project
7. Contractor Profile Form – Attachment A
8. Provide your two (2) most recent Annual Reports or Audited Financials

D) COMPANY EXPERIENCE:

1. Provide a minimum of at least three (3) references of Energy Savings Programs your organization has completed in Ohio. All References will be contacted. Provide the owner's name, address, telephone number and contact person for each reference. Only references for projects which are complete through the installation of all equipment and systems are acceptable

2. Provide Case Studies of at least three (3) projects you have completed. Case Study information shall include project costs, scope of work, and savings associated with the project.

E) FINANCIAL APPROACH

1. Provide a detailed description on your firm's possible arrangements for financing of this project – what bank(s) are involved, responsibilities of each party and any special conditions associated with financing this project.
2. Provide a detailed description of the type of financial guarantees that can be offered through your organization and what is typically used by your organization. Specifically what methodologies, technologies, etc. are used to create baselines and overall savings objectives and reporting of the guarantee? What sorts of guarantees (IPMVP: A, B, C, D) are offered by your company and what will you recommend to Morgan County? Provide sample bonding form and bonding limits.
3. Provide examples of annual measurement and verification shortfall checks issued to past project clients.

F) SOLUTION DEVELOPMENT PROCESS

1. Responses shall include your organization's solution development process. How will you audit the facilities and develop your solutions. At what level will Morgan County be involved in the selection of measures? What is your process of forecasting future costs and how does that affect the guarantee?

G) PROJECT MANAGEMENT

1. Responses shall include your organizations approach to project management. Specifically explain your ability to overcome obstacles and keep the project on-time. Explain your methodology of communicating with the client. How does your firm handle warranty issues? Provide a description of the services to be performed by full-time employees of the ESCO, i.e. which services are self-performed vs contracted.

H) LEGAL DOCUMENTS

1. Provide a sample contract for both the project and the annual guarantee.

D) ON-GOING SUPPORT AND SERVICES

1. **What ongoing services can your firm provide?** Describe your service capabilities and customer service department including hours of operation and emergency dispatch procedures. List no less than three (3) commercial references within Ohio to indicate the service quality of the responding firm. In the event your firm doesn't provide ongoing services, how do you propose handling warranty issues or service needs? Each reference shall demonstrate local facility service and repair experience. Provide the owners name, address, telephone number, and contact person for each reference.
2. **Customer Satisfaction:** Describe the type of ongoing customer satisfaction reports available to the owner. Provide a sample report with owners name, address, telephone number and contact person. The owner may be contacted to verify accuracies.
3. **Environmental Services:** Describe your ability to provide professional environmental services, specifically in regard to Indoor Air Quality and Energy Star Certification.
4. **Training:** Describe the type of training available to the Owner.
5. **Energy Auditing Services:** Describe how you would perform an energy audit.

ATTACHMENT A

Energy Contractor Profile Form

In paragraph format, please include the following information in the order it is requested (This attachment is not intended to be used as a form).

A. OVERVIEW OF FIRM

1. **Firm Name, Business Address, City, State, County, Zip Code**
2. **Names and titles of two contact people**
3. **Please provide a statement of how many employees your firm has in the State of OH**
4. **Outline your Company History**
5. **What is your firm's Core Business? (as described in Business Journals).**
6. **If your firm manufactures/distributes a product (such as chillers, HVAC equipment, facility controls, etc.) and such products are being recommended on this project, will you consider other manufacturers?**
 - **Describe a prior Guaranteed Energy Savings Program you have implemented and where a competitor's manufactured/distributed products were installed.**
 - **Describe the evaluation and bidding process used**
 - **Were the bidding tabulation sheets shared with the Owner?**
7. **Provide any corporate background on misconduct. Provide a list of all projects nationally where there was a criminal investigation, indictment or a conviction relating to the conduct of a performance contract. This includes officers and representatives of the company as well as public officials connected with the project.**
8. **Provide an explanation if a dispute with a client has ever gone to arbitration or litigation over a Guaranteed Energy Savings Agreement. What was the outcome?**
9. **Federal Employee Identification Number**