

REQUEST FOR PROPOSALS (RFP) NO. # 001-17
Comprehensive Utility Savings Program

The following RFP is seeking proposals from qualified design-build firms capable of providing comprehensive energy, gas, & water infrastructure improvements utilizing Proposition 39, utility budget savings, other grants, and utility programs for Cloverdale Unified School District

RESPONSE DEADLINE FOR PROPOSALS: October 14, 2016

RFP Contact for Questions & Submission:

Patricia Mills, CBO

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97 School Street, Cloverdale, CA 95425

I. RFP PROCESS

The District intends to select a qualified provider for the development, implementation, and monitoring of a comprehensive utility savings program. Upon award, the District will enter into a professional services agreement for a Utility Conservation Study. Prior to entering into a contractual agreement for project implementation, an agreed upon scope of work and project pricing will require separate board approval.

In addition to utilizing Prop 39 grant funds, the awarded respondent shall identify additional funding sources to address infrastructure needs that exceed Prop 39 requirements for measures such as water conservation. Additional funding sources may include utility programs, federal & state grants, and low rate municipal lease financing.

The awarded respondent shall manage the associated funding application processes and be responsible for ensuring compliance with California Energy Commission (CEC) Guidelines for the Prop 39 Clean Energy Jobs Act, as well as Division of the State Architect processes and regulations, Office of Public School Construction processes, California Department of Education reporting and Title 24 code compliance. The District intends to implement a design-build program consistent with the provisions of California Government Code sections 4217.10-4217.18 that will provide sustained efficiencies and energy cost savings.

The District, at its sole discretion, may select the awarded respondent for subsequent utility conservation phases of work. The District, at its sole discretion, also reserves the right to reject any or all bidders.

II. PROJECT GOALS

The District's ultimate goal is to utilize financial savings realized from more efficient buildings towards other upgrades and programs that enhance student learning. Respondents shall support the District's goal by developing, implementing, and monitoring a turn-key utility savings program that accomplishes the following:

- Achieves long-term cost savings through reduced energy, gas & water usage

- Upgrades old and/or inefficient systems
- Maintains consistent and reasonable levels of occupant comfort
- Maintains building functionality and compatibility with existing equipment
- Improves utilization of technology to achieve optimum performance and savings
- Minimizes financial and technical risk to the Owner
- Provides training to employees on maintenance and repair of equipment and controls
- Provides comprehensive funding solutions
- Promotes private sector job creation

III. MINIMUM REQUIREMENTS

Respondents must meet the following minimum requirements to participate in the District's RFP process:

- Have five (5) CA K-12 customer references for which the respondent provided turn-key responsibility of similar utility conservation design-build services in the past three (3) years
- Current accreditation by the National Association of Energy Services Companies (NAESCO), and be included on the U.S. Department of Energy's (DOE) Qualified List of Energy Service Companies
- Active G.C. license in California
- Minimum of \$5 Million in bonding capacity

IV. SCOPE OF WORK

Upon award, the selected respondent will be required to perform site walks at each of the District's facilities to evaluate infrastructure improvements in order to develop a Utility Conservation Study tailored for its needs.

Specifically, the awarded respondent will evaluate and propose applicable conservation measures including but not limited to:

- Heating Ventilation & Air Conditioning (HVAC) system optimization, retrofit, upgrade or replacement
- Interior and exterior lighting retrofit or replacement
- Building Automation System (BAS) installation, upgrade, or expansion leveraging existing technology
- Water conservation measures
- Building envelope upgrades
- Other infrastructure improvements
- Other training, remote monitoring services, and on-going support services that will ensure objectives of program are met over the term of the agreement

The selected respondent will then implement an agreed upon scope of work. All proposed infrastructure improvements must be provided on a turn-key basis including all necessary permits, engineering, Division of the State Architect (DSA) requirements, delivery, installation, commissioning, training, warranty service, and CEC compliance.

After the scope of work has been fully implemented the selected respondent will be required to provide M&V services to monitor post-retrofit utility usage and track energy savings. M&V services are to be provided in accordance CEC guidelines for project tracking and reporting.

V. PROPOSED TIMELINE

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|--------------------|--------------------------------------|
| September 23, 2016 | RFP Released |
| September 30, 2016 | Questions Due |
| October 7, 2016 | Questions & Answers Released |
| October 14, 2016 | RFP Responses Due |
| October 28, 2016 | Respondent Awarded |
| November 18, 2016 | Utility Conservation Study Completed |

VI. PROPOSAL INSTRUCTIONS

Ink or Typewritten

All information, prices, notations, signatures, and corrections must be in ink or typewritten. Mistakes may be crossed out and corrections typed or printed adjacent to the mistake and initialed in ink by the person signing the proposal.

Signature Verification

To be considered for award, each proposal must be signed by a legally authorized representative of your company.

Proposal Documents

Failure to completely execute and submit the required documents before the bid submittal deadlines will render a proposal non-responsive.

Informed Respondent

It will be your responsibility to be fully informed as to the conditions, requirements, and specifications before submitting proposals. Failure to do so will be at your firm's own risk and relief cannot be secured on the plea of error.

VII. PROPOSAL SUBMISSION REQUIREMENTS

Five (5) hard copies (one marked "original") and one (1) electronic copy of the proposal shall be submitted in the format contained in the RFP. The original proposals shall be submitted in a three (3) ring loose-leaf binder or report cover. It is critical that all responses follow the same format to allow equal and fair evaluation of each response. Responses should be limited to thirty-five (35) pages (not including table of contents, cover letter, or sample contracts/agreements) and include the following:

SECTION TABS

Proposals should be divided by tab sections according to items in the index. This will assist the evaluating team in identifying items and information submitted with the proposal.

TABLE OF CONTENTS

The table of contents of the proposal should include a clear and complete identification of the materials submitted by tab section and page number.

COVER LETTER

A signed letter of interest (no more than two (2) pages), stating the respondent's interest and qualifications in providing the services as outlined in the RFP. Please describe how the respondent meets the minimum requirements as described in section III of the RFP.

Tab 1: Background, Financial Capacity & Management Structure

Provide general information on the respondent including: a brief history of the firm, key differentiating factors and areas of expertise, length of time performing services, and location of California offices.

Provide a statement of the respondent's financial capacity and capability to perform to the terms of this solicitation request.

Describe the management structure of the responding firm and include an organizational chart. Provide resumes for personnel to be used on this project and describe their qualifications and experience with projects of a similar size and scope.

Tab 2: Litigation Disclosure

Describe any involvement as a party in any formal litigation, arbitration or mediation associated with savings performance on an energy savings contract or specifically related to an Investment Grade Audit (IGA) agreement in the last five years, along with a description of the nature and outcome of such litigation.

Tab 3: References

Provide detailed project histories for a minimum of five (5) California K-12 districts for which the respondent provided turn-key responsibility of similar utility savings programs in the past three years. Describe the scope of work of the project indicating start/completion date, services and equipment provided, project size, total project savings, and funding sources.

Tab 4: Project Approach

- a) Provide a description of the respondent's approach to performing audits, and identifying improvement measures.
- b) Provide a description of the respondent's approach to managing the project implementation and procedures for minimizing occupant disruptions.
- c) Describe the steps taken by the respondent during and after the turnover process to ensure successful project implementation.
- d) Describe training programs available for district employees.

Tab 5: Savings

- a) Describe the respondent's approach to projecting and proving utility savings.
- b) Describe the methodology and formulas utilized for reporting of the savings.
- c) Provide a description of monitoring services after installation to ensure continued savings.

Tab 6: Additional Benefits and Value Added Elements

Please describe any additional benefits that may result from implementation of the utility savings program and the respondent's added value elements in providing products/services for utility savings projects.

Tab 7: Contracts & Forms

Provide sample contracts for the planning study, project installation, Measurement & Verification (M&V) including terms and conditions. Complete and include enclosed acknowledgement form.

VIII. PROPOSAL EVALUATION CRITERIA

The District will evaluate qualifications based on the scoring criteria outlined in this section. Respondents who are not actively engaged in providing services of the nature proposed in this RFP and/or who cannot clearly demonstrate to the satisfaction of the District their ability to satisfactorily perform the work in accordance with the RFP requirements will not be considered, nor will respondents who do not meet the minimum requirements.

The District shall be the sole judge of the qualifications and services to be offered, and its decision shall be final. Discussions may be conducted with respondents who submit qualifications determined to be reasonably acceptable of being selected for award:

Scoring Criteria

- a) **Background:** i.e. qualifications, experience, resources, financial solvency. (20 points)
- b) **Litigation Disclosure** (25 points)
- c) **Project Team & Management Structure:** i.e. amount of work self-performed, strength of proposed team, trainers, and management structure. (25 points)
- d) **Project History & References:** i.e. relevant past project experience. (50 points)
- e) **Project Approach:** i.e. approach to audits, project management, training, etc. (25 points)
- f) **Additional Benefits & Added Value:** i.e. additional benefits resulting from implementation and respondent's added value elements. (10 points)
- g) **Savings:** i.e. savings approach and track record. (35 points)
- h) **Contracts & Forms:** i.e. sample contracts, terms & conditions & completed Acknowledgement Form (30 points)
- i) **Response:** responsiveness and compliance with the requirements of the proposal. (5 points)

Total Maximum Point Valuation: 225

ACKNOWLEDGEMENT FORM

RFP # 001-17 Comprehensive Utility Savings Program

Pursuant to and in compliance with your Notice Requesting Proposals and all other documents relating thereto, the undersigned respondent, having familiarized himself with the terms and conditions of the proposal documents, hereby proposed and agrees to perform the work to be done and to provide all labor and materials necessary to perform the work.

Name of Respondent: _____

ACKNOWLEDGEMENT OF AMENDMENTS:

The respondent acknowledges receipt of issued amendments to **RFP # 001-17:**

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|------------------|--|--|--|--|--|--------------|
| Amendment Number | | | | | | Initial Here |
| Date | | | | | | |