

# CALIENTE UNION ELEMENTARY SCHOOL DISTRICT

## REQUEST FOR QUALIFICATIONS PROPOSITION 39 ENERGY CONSERVATION AND ENERGY EFFICIENCY SERVICES

### OWNER

CALIENTE UNION ELEMENTARY SCHOOL DISTRICT  
12400 Caliente Creek Road  
Caliente, CA 93518

SEALED SUBMITTALS MUST BE RECEIVED BY October 9, 2015 AT 3:00 P.M.

**CALIENTE UNION ELEMENTARY SCHOOL DISTRICT  
ENERGY CONSERVATION AND ENERGY EFFICIENCY SERVICES  
REQUEST FOR QUALIFICATIONS**

ALL CONTACT REGARDING THIS REQUEST FOR QUALIFICATIONS MUST BE MADE TO KATHLEEN HANSEN, SUPERINTENDENT AT 12400 CALIENTE CREEK ROAD, CALIENTE, CA 93518, AND RECEIVED BEFORE 3:00 P.M. ON October 9<sup>th</sup>.

**OVERVIEW**

Caliente Union Elementary School District (CUESD) seeks submittal of qualifications from interested firms capable of designing and implementing energy conservation, energy efficiency, energy generation and other energy related capital improvement services as described within this Request for Qualifications (RFQ). CUESD expects major reduction in annual utility costs through the implementation of these services. It is our intent to enter into an agreement with the successful firm to conduct a District-Wide Energy Conservation/Efficiency Audit, and award contract(s) to implement cost-effective energy retrofits.

**SCHEDULE**

Date	Event
September 10, 2015	RFQ Issued
RFQ Issued + 1 Weeks	Deadlines for questions and information requests
RFQ Issued + 2 Weeks	RFQ Due Date
RFQ Issued + 3 Weeks	Interviews (At District's Discretion)
RFQ Issued + 4 Weeks	Announcement of Award

*Site Walks will provided upon request. Please contact Jeannie Seno to R.S.V.P.*

**BACKGROUND**

The Caliente Union Elementary School District is home to one school sites. Our students range from Kindergarten through 8<sup>th</sup> grade. A list of sites is attached in Appendix A.

**QUALIFICATIONS**

CUESD may award a contract to the Energy Services Company (Provider) that, in its sole opinion, is the most capable of providing the range of services described in the RFQ, and in the long-term best interest of the District. To be considered for this project a provider must demonstrate knowledge and experience in similar projects:

- Adequate financial resources to support the range of alternatives anticipated
- California K-12 references that can attest to the quality of the Provider's past work
- An established record of technical performance on typical projects within California
- A proven record of on-time and on-budget performance

- Excellent safety record
- Established records of the Provider's ability to complete the work
- Credentialed, trained, and knowledgeable staff
- Competent management support at all levels
- Ability to effectively communicate with CUESD Board, administration, staff, students, and community as needed

CUESD reserves the right to investigate the qualifications of all Providers under consideration and to confirm any part of the information furnished, or to require other evidence of managerial, financial, or technical capabilities that are considered necessary for the successful performance of the possible energy design-build services.

### **SERVICES REQUESTED**

CUESD is interested in the identification, engineering, design, installation, training, maintenance, and financing of approved Energy Projects for all of its facilities. If CUESD contracts project financing through the Provider, financing shall be structured so that costs are paid by the utility cost savings and/or Proposition 39 funding associated with the energy conservation program. The District will choose the amount financed, if any.

Upon selection, the Provider shall perform an Investment Grade Energy Audit of the specified facilities. The audit must be of acceptable quality to CUESD's Governing Board and meet Proposition 39 mandated requirements.

CUESD shall have 45 working days in which to accept the energy audit or to request changes or additions to it. Changes or additions will be negotiated in good faith. If the parties cannot agree to the content of the audit within 60 working days from the date the request for change is made, the Governing Board, at its sole discretion, may cancel negotiations with the Provider, terminate the contract, and enter into negotiations with other Providers.

The following technologies and/or energy management approaches serve as examples of solutions to be considered under this RFQ:

- Packaged HVAC Equipment Replacements
- HVAC Controls Retrofits
- Interior/exterior lighting system fixture retrofits/replacements.
- Solar Generation

Other Energy Projects proposed by Provider will also be considered. All equipment provided by the Provider for this program shall have a history of successful operating experience in similar installations and shall be in new, unused condition. This equipment shall be current technology with readily available non-proprietary replacement parts. All equipment used for this program shall be approved by CUESD prior to installation.

## **SUBMIT ALL REQUIREMENTS**

The submitting firms must have demonstrated technical and managerial capability across a broad range of energy, analysis, design, construction, funding, operations, and maintenance areas. CUESD will consider the following background and experience factors in the evaluation of all submittals.

**Address the following items as completely as possible; response to each item is mandatory:**

1. Describe your firm's approach to manage the Energy Projects.
2. Describe your firm's safety program. Include proof of your firm's safety Experience Modification Rating (EMR) or equivalent.
3. Describe your firm's approach to developing a scope of work for the project. How are the various components of a project prioritized and evaluated?
4. Describe in detail your firm's methodology for calculating energy cost savings.
5. Describe your firm's experience with various project delivery methods. Address the areas that are self-performed, sub-contracted, team delivered, etc. The following areas must be addressed: design, engineering, procurement, and installation.
6. Provide a step-by-step description of typical project implementation and the specifications of a typical K-12 project.
7. Describe the qualifications and relevant energy project experience of the Provider, its team, and its staff. Include a clear description of your firm's proposed team with names, resumes, and project responsibilities.
8. Describe your firm's financial capacity to handle the project. Include company bond rating, bond limits, and evidence of insurability.
9. Describe your firm's expertise in applying/securing funding for energy conservation/efficiency/generation infrastructure improvements for CA K-12 clients, including but not limited to:
  - a. Third party funding, including but not limited to state, federal, and utility funds, grants, rebates, incentives, etc.
  - b. Financing options, procurement options, etc.
10. Describe any unique capabilities of the Provider that would be useful to the specific needs of the district/project.
11. Provide a description of your firm's commitment to and experience with obtaining OPSC Project Closure status, as well as experience with DSA, for public school projects.
12. Provide names and contact information for five (5) Energy Project Design/Build references for projects in California public schools in which your firm was the Prime Contractor. Provide a brief description of the work performed for these clients.
13. Provide a brief description of your firm's ability to provide remote monitoring of equipment and utility meters. Describe your firm's stance on open platform vs. proprietary technology for EMS and controls-related systems.
14. Is or has your firm been a party to suits, claims, or similar actions related to:
  - a. Construction claims relating to performance or delay
  - b. OSHA, labor relations, or similar issues affecting the progress of the work
  - c. California State Contractor License suspensions or code violations
  - d. If "yes" to any of the above, provide a summary and current status of the issue under separate attachment to the response to this RFQ.
15. Provide a draft scope of work and pricing for the Investment Grade Energy Audit that meets Proposition 39 mandated requirements.

## SUBMITTAL EVALUATION PROCESS

Providers will be evaluated and preference given to those that illustrate demonstrated range of services, innovative approaches, technical and contractual solutions, additional services, and flexibility developing and implementing successful projects.

CUESD will address the following criteria in evaluation of submittals in order to gauge the ability of the Provider. The same general criteria will be used to judge both the submittal and the interview, should CUESD choose to conduct interviews with Providers.

### **Criteria Explanation Weight**

- 1. Merit of Submittal (10pts)**  
General thoroughness and responsiveness of the submittal.
- 2. Knowledge and Expertise of Personnel/Firm (25 pts)**  
Capability of personnel/firm; demonstrated experience of Provider's team; firm's qualifications.
- 3. Understanding of Project and Technical Approach (25 pts)**  
Knowledge of project requirements; comprehensiveness of approach; responsiveness to specific concerns in the RFQ; flexibility to accommodate needs of CUESD; ability to communicate effectively with District staff and related parties.
- 4. Record of Past Performance and Experience (40 pts)**  
References; quality of past projects; demonstrated ability to complete work tasks within project timelines and budget; quality of submitted work samples.

### **CUESD reserves the right to:**

- Reject any or all submittals at its sole discretion.
- Cancel the Request for Qualifications (RFQ).
- Modify any requirements contained within the RFQ and request a revised submission from all providers.
- Establish other evaluation criteria determined to be in the best interest of CUESD.
- Contract with any of the firms responding to this RFQ based solely upon its judgment of the qualifications and capabilities of the firm.

A Selection Committee, as deemed necessary, will be formed to evaluate the submittals. Composition and creation of this committee, should one be formed, is at the sole discretion of CUESD. The Selection Committee may review the submittals for format to ensure conformance with the requirements of the RFQ and may select finalist to interview with the committee as part of the evaluation process. CUESD does not guarantee that an interview will take place, thus reserving the right to select a Provider based solely on the information provided in the submittals received in response to the RFQ. Should and interview take place, the key personnel responsible for fulfilling the requirements of the project shall be required to be present for the interview. CUESD will take all steps necessary to ensure that any discussions and interviews conducted in connection to this RFQ will done in a fair and impartial manner.

This RFQ does not commit CUESD to negotiate a contract. CUESD will not be responsible for any expenses incurred by any firm in preparing and submitting a proposal or response to this RFQ.

### **SUBMITTAL FORMAT AND COMMENTS**

The submittal should be prepared in a way that provides a straightforward and concise description of the respondent's capabilities to satisfy the requirements of the project. Emphasis should be placed on completeness and clarity of content. All submittal requirements listed above should be addressed in full.

The Provider shall describe any relationships with manufacturers of proposed energy equipment, including those manufactured by the respondent or listed subcontractors. The Provider shall describe any relationships with the organizations providing training, if not provided by the Provider.

Content shall be tabbed and numbered per the items included in the Submittal Requirements.

### **SUBMITTAL INFORMATION**

Deadline for submission of three (3) copies or electronic pdf submission of your submittal is 3:00 PM, October 9. Submittals received after the deadline may be returned. All submittals become the sole property of CUESD and the content will be held confidential until the selection of a firm is made. Any proprietary information must be designated clearly and should be bound separately and labeled with words "PROPRIETARY INFORMATION". An entire submittal marked as such will not be accepted.

Submit sealed submittals clearly marked "RFQ for District-Wide Energy Conservation Services" to the following location:

Caliente Union Elementary School District  
12400 Caliente Creek Rd  
Caliente, CA 93518

Questions or clarifications may be submitted in writing to Kathleen Hansen, at the address listed above or e-mailed [khansen@calienteschooldistrict.org](mailto:khansen@calienteschooldistrict.org).

Appendix A: List of Caliente Union Elementary School District Sites

<b>SITE</b>	<b>ADDRESS</b>	<b>SQUARE FOOTAGE</b>
Caliente School		n/a
Piute Mountain School		13,000