

REQUEST FOR QUALIFICATIONS (RFQ) FOR ENERGY
CONSERVATION DESIGN-BUILD SERVICES

Issued by:

Gilroy Unified School District

Issued Date: 8am, February 15, 2019

Due Date: Noon, March 19, 2019

Gilroy Unified School District
ENERGY CONSERVATION DESIGN-BUILD SERVICES
REQUEST FOR QUALIFICATIONS (RFQ)

RESPONSE DEADLINE FOR PROPOSALS: Noon, March 19, 2019

All Requests for Information must be submitted no later than: 8am, March 1, 2019

I. DESCRIPTION OF PROJECT

NOTICE IS HEREBY GIVEN THAT Gilroy Unified District (District) issues this Request for Qualifications (RFQ) and invites the submittal of Statements of Qualification from Energy Services Companies (ESCO) that meet the minimum requirements contained herein and can serve the District's needs for Energy Conservation Design-Build Services. It is necessary for Respondents to read the information contained in this RFQ to understand how to submit, what documents must be included and what legal obligations the Respondent is submitting by providing a successful statement of qualification. Any Respondent that wishes to be considered must submit the information requested in this RFQ and, if invited, participate in an interview. Proposals must be received by Gilroy Unified School District by **Noon, March 19, 2019**

Gilroy Unified School District desires to pursue a district-wide, design-build energy conservation program, including an initial ASHRAE Level 2 Audit of all campus buildings, identification of Energy Conservation Measures (ECMs) as defined in Government Code Section 4217.11 that would be cost-effective and subject to award of one or more agreements pursuant to Government Code Sections 4217.10 through 4217.18, design and engineering of such ECMs, installation and construction of such ECMs, and project management of the installation and construction of ECMs.

All proposals must be **mailed** to:

**Gilroy Unified School District Office
Attention Purchasing
7810 Arroyo Circle, Gilroy CA 95020**

Received no later than noon on **March 19, 2019**

Each proposal must conform to the requirements in this Request for Qualifications.

The District reserves the right to reject any or all RFQ responses, in whole or in part, and to waive any irregularities or informalities. The selection of one or more companies/individuals will be solely at the discretion of the District. The District reserves the right to negotiate contract fees, terms, and conditions and to terminate such negotiations at any time, and to not enter into contract with any or all RFQ responders.

II. PROJECT GOALS

Respondents shall support the District's goal by offering a turn-key comprehensive energy efficiency program that accomplishes the following:

- Reduces energy costs and maximizes the net economic benefit to the District by identifying and

installing qualified energy conservation measures (ECM's) that support the District's goals and meets specifications

- Achieves an annual guarantee for cost savings for each year of the contract that requires zero impact on the General Fund
- A Performance Contract that pays for the entire designed project with zero out of pocket costs
- Prepares a long-term strategic approach that maximizes the ongoing benefits of energy conservation measures (ECM's)
- Leverages all other available funding sources to reduce project costs
- Meets any and all requirements with Title 24 and the California Building Code
- Provides required measurement and verification (M&V) of implemented ECMs
- Upgrades old and/or inefficient systems
- Maintains consistent and reasonable levels of occupant comfort
- Maintains building functionality and compatibility with existing comfort
- Improves utilization of technology to achieve optimum performance and savings
- Provides additional benefits that directly result from energy related services & capital improvements, reduced maintenance needs, improved indoor air quality, building improvements, reduced greenhouse gases, etc.
- Minimizes financial and technical risk to the Gilroy Unified District
- Provides training to employees on maintenance and repair of equipment and/or controls
- Provides comprehensive funding solutions
- Promotes private job sector creation

III. PROPOSED TIMELINE

February 15, 2019, 8 am	RFQ Released and Publicized
March 1, 2019, 8 am	Questions Due
March 11, 2019, 8 am	Questions & Answers Released
March 19, 2019, Noon	RFQ Responses Due
March 26, 2019	Interviews at Districts Discretion
April 19, 2019	Respondents Notified

IV. MINIMUM REQUIREMENTS FOR SUBMITTAL

Respondents must prequalify with the minimum requirements to participate in the District's RFQ process:

- Accredited by the National Association of Energy Services Companies (NAESCO). (Optional)
- Successfully implemented at least five (5) energy savings performance contracts for the public sector in California in the last five (5) years.
- Extensive experience in successful analysis and development of energy efficiency measures; including auditing, savings calculations, project costing, strategic planning, design specifications, construction oversight, commissioning, maintenance and energy management.

- Be licensed in the State of California to design and construct any project listed in the ESCO's Proposal and possess the requisite design licensing and engineering qualifications. Any such licenses must be in good standing at the time of Proposal submission.
- Be able to meet any applicable bonding, insurance, non-collusion, and criminal records check requirements, at the District's request.
- No pending or recent litigation in the past five (5) years associated with the savings performance and/or measurement and verification (M&V) of a guaranteed energy savings project. Provide an acknowledgment letter stating such, signed by an officer of the company. Please include title of company officer. Failure to provide accurate and complete information as requested is grounds for disqualification.
- Experience in securing all available grants, rebates, incentives and financing available through Federal, State, local and utility company programs.

V. SCOPE OF WORK

Upon award, the selected respondent will be required to perform site walks at the District's facilities to evaluate facility infrastructure improvements. Specifically, the awarded respondent will evaluate and propose applicable energy conservation measures (ECMs) including but not limited to:

- Detailed analysis of energy consumption to quantify base loads, seasonal variation, and effective energy costs
- Evaluation of solar, battery storage, lighting, air quality, temperature, ventilation, humidity, and other conditions that may affect energy performance
- Heating Ventilation & Air Conditioning (HVAC) system optimization, retrofit, upgrade or replacement
- Interior lighting retrofit or replacement
- Building Automation System (BAS) installation, upgrade, or expansion leveraging existing technology
- 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
- Work with District staff to explore potential problem areas, and clarify financial and non-financial goals of the program

All proposed ECM's must be provided on a turn-key basis including all necessary permits, engineering, delivery, installation, commissioning, training and warranty service.

VI. PROPOSAL INSTRUCTIONS

Ink or Typewritten

All information, prices, notations, signatures, and corrections must be typewritten.

Signature Verification

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

Examination of Contract Documents

It is the responsibility of your firm to thoroughly examine and be familiar with the contract documents. The failure or neglect of the company to receive or examine any of the contract documents shall in no way relieve them from any obligations with respect to the RFQ. No claim will be allowed for additional compensation that is based upon a lack of knowledge of any solicitation document.

Proposal Documents

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

Formation of Contract

The formation of a contract will be completed upon affirmative Board action on the Contract Agreement. The District's Board requires contracts to be signed, signaling agreement to the terms of the contract prior to board action. The contract is not finalized until Board approval, and until an authorized District signer countersigns the Contract Agreement.

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

One (1) electronic copy of the proposal shall be submitted in the format contained in the RFQ. 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 M&V report) and include the following:

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 RFQ. **Please describe how the respondent meets the minimum requirements as described in Section IV of the RFQ.**

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.

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.

Tab 1: Background, Financial Capacity & Management Structure

- a. Provide general information on the respondent including: Brief history of the firm, key differentiating factors and areas of expertise, length of time performing services, location of main office, telephone number, contact name, and local resources.
- b. Provide a statement of the respondent's financial capacity and capability to perform to the terms of this solicitation request. Include a statement if the ESCO holds the guarantee or if it is held by a third party.
- c. Provide three (3) years of audited financials along with the name, address, and the telephone number of firm(s) that prepared Financial Statements.
- d. Provide proof of insurance showing coverage and limits in place at the time of this RFQ.
- e. Identify the key members of the project team and describe the management structure of the responding firm. Provide resumes illustrating qualifications and experience of the key personnel to be used on this project.

Tab 2: Energy Project References

- a) Provide detailed project history for five (5) public sector California clients for which the respondent has contracted with for similar energy savings performance contracting services in the last five (5) years. Include the following (**All information is required**):
 - Owner's name, address, telephone number, and contact person
 - Description of the scope of work
 - Start/ completion date
 - Services and equipment provided
 - Energy savings guarantee amount
 - Project cost and funding description
 - Post Project Support Services
 - Contract term
 - Additional benefits to the client

For one (1) the projects listed above, provide the measurement & verification report, where the International Performance Measurement and Verification Protocol (IPMVP) Option C method was used.

- b) Provide a complete list of projects that in the last five (5) years have experienced a savings shortfall, include the amount of the shortfall and method in which it was remedied under your firm's savings guarantee.

- c) Provide a complete list of all projects that in the last five (5) years:
- Have a performance contract with the respondent cancelled or non-appropriated (list reason); or
 - Have past or pending lawsuits or litigation regarding performance contract with a customer (list reasons); or
 - Have past “out of court” settlements regarding a performance contract (list reasons).
- d) Provide an acknowledgment letter signed by an officer of the respondent company affirming the statements in this section (Tab 2. Energy Project References) are true and correct. (Please include title of company officer). **Failure to provide accurate and complete information as requested is grounds for disqualification.**

Tab 3: 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 and procedures for minimizing occupant disruptions.
- c. Describe how the respondent ensures construction deadlines are met.
- d. Describe the steps taken by the respondent during and after the implementation process to ensure successful project implementation and continued savings.
- e. Describe the training program available for District employees.
- f. Describe the respondent’s experience in securing all available grants, rebates, incentives and financing available through Federal, State, local and utility company programs.

Tab 4: Savings

- a. Describe the experience and qualifications of your measurement and verification team, along with an organizational chart of M&V team members and structure.
- b. Describe the respondent’s approach to projecting and proving energy and operational savings.
- c. Provide a description of the monitoring services after installation to ensure continued savings.
- d. Provide a sample of your firm’s energy savings guarantee documents.
- e. Describe the reconciliation process of the guarantee.

Tab 5: Pricing

- a. Provide a proposed profit markup percentage your firm will apply to any and all subcontracted services resulting from this contract. Professional services fees may be negotiated separately upon partner selection. All subcontractors must be prequalified.
- b. Discuss your firms approach to change orders.

Tab 6: Value-Added Elements

Please describe any value-added elements your firm provides as part of the comprehensive energy program.

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 their response to the RFQ and/or who cannot clearly demonstrate to the satisfaction of the District their ability to satisfactorily perform the work in accordance with the RFQ requirements will not be considered. Respondents who do not meet the minimum requirements will not be considered.

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

Category	Point Value
Background, Financial Capacity & Management Structure Local office support, financial capability and solvency, strength of proposed team	15
Energy Project References Strength of past energy savings performance contracts, quality of client service provided	30
Project Approach Project management and implementation approach, ability to minimize disruptions to occupants, approach to training staff	20
Guaranteed Savings & Pricing – Option C Only Savings approach, measurement & verification team, transparency of energy savings calculations and pricing information	20
Value-Added Elements Respondents value-added elements	15
Total Possible Points	100