

Saratoga Union School District



REQUEST FOR QUALIFICATIONS FOR DESIGN/BUILD IMPLEMENTATION OF PROPOSITION 39 ENERGY EFFICIENCY PROJECTS

REQUEST FOR QUALIFICATIONS SUBMITTAL DEADLINE

April 26, 2017 3:00 p.m.

SUBMIT TO

Saratoga Union School District
Attention: Director of Facilities
20460 Forrest Hills Dr
Saratoga, CA 95070

NOTICE IS HEREBY GIVEN that the Saratoga Union School District (SUSD) acting by and through its Governing Board, is soliciting and issuing this Request for Qualifications (RFQ) and will receive up to, but no later than April 26, 2017 3:00 p.m. statements of qualifications from interested, established and experienced Firms for Integrated Design-Build Energy Services.

This solicitation is intended to establish a qualified contractor with whom the SUSD will enter into a Design/Build Prop 39 CA Clean Energy Jobs Act Implementation contract. The selected contractor shall be a qualified provider of services for assessment, development, planning, and installation of Proposition 39 energy saving projects and have experience with successfully completing all the proposition 39 administrative requirements including but not limited to approved Energy Expenditure Plans (EEP's), annual progress reporting, energy savings verifications and construction contract procurement.

BACKGROUND & OBJECTIVES

The SUSD is a public school located in Santa Clara County that includes three elementary schools, one middle school, a District Office and Maintenance Yard / Warehouse.

The District expects to receive approximately \$350,000.00 of Prop 39 funding over the five (5) year program duration.

SUSD has an approved 3 - year \$218K EEP of which \$47k has been spent. The District intends to work with a FIRM to submit an amendment to create a 5 - year EEP no later than August 25, 2017. The Firm will evaluate the remaining EEP projects and identify additional energy savings projects that will be selected based on their energy saving potential and facilities improvement benefits. It is the District's expectation that all the projects on the 5 year EEP will be completed in an appropriate manner and within the allotted timeframe and with all the necessary reporting to fully use all the Prop 39 program funding allocated to the District.

The District intends to contract with Firms that have all of the following:

- Extensive experience in the successful development of energy efficiency measures and systems; including design specification, project finance development, bid process, project construction and oversight, operations, maintenance and asset management;
- Experience working with K-12 school districts in regard to Prop 39 energy program development, implementation and reporting;
- Experience in securing all available credits and incentives through Federal, State, local and Utility Company programs;
- Experience in working with the California Division of State Architect (DSA) in regard to energy project plan approvals;
- Knowledge and understanding of applicable California Building and Electrical Codes;
- Ability to provide timely, effective communication and support to the District representatives through multiple means;

The SUSD intends to use the responses that it receives to assist in the possible selection of one or more Firms for the District's potential energy projects. The District will evaluate each Firm based on the

information set forth in the Response submitted, together with other information available to the District from any other sources. In addition to any other criteria specified in this RFQ, the evaluation criteria will include, among others, the Firm's experience, qualifications and ability to meet District criteria and project costs range, the Firm's ability to develop a rapport and working relationship with District personnel, other mechanical, electrical and plumbing (MEP) firms and the District's established consultants.

District will have the discretion to select one or more Firms after receipt of Responses; the District also reserves the right to not select any Firm.

This RFQ is solely a solicitation for Responses. Neither this RFQ, nor any Response to this RFQ shall be deemed or construed to: (i) create any contractual relationship between District and any Firm; (ii) create any obligation for District to enter into a contract with any Firm or other party; or (iii) serve as the basis for a claim for reimbursement for costs associated with submittal of any Response.

If the District selects a Firm for District's potential energy projects, the District shall have the right to negotiate any and all of the final terms and conditions of any agreement with the Firm and nothing in this RFQ or any Response shall be deemed or construed as a limitation of such rights.

CONTENT OF RESPONSES

Responses shall be typewritten, tailored to the requirements of this RFQ and demonstrate the capability to meet the District's needs. Responses shall not exceed 35 pages (with no less than 11-point font size) inclusive of all attachments, appendix, resumes and supporting documents.

Firms are to provide 3 bound copies of the response and one electronic copy on USB/Flash Drive in PDF format submitted in a sealed envelope with the words "Request For Qualifications For Design/Build Energy Efficiency And Proposition 39" clearly marked on the outside, no later than April 26, 2017 3:00 p.m. to the following address:

SUSD District Office
Attention: Director of Facilities
20460 Forrest Hills Dr
Saratoga, CA 95070

RFQs received later than the aforementioned date and time will be returned to Vendor unopened. Facsimile (FAX) copies or e-mailed RFQ will not be accepted.

All questions are to be directed to Jerry Peth the Director of Facilities Jerry Peth at jpeth@saratogausd.org no later than April 11, 2017 by 3:00pm.

The District reserves the right to accept or reject any or all RFQs, to select a qualified vendor with or without interviews and to negotiate with any or more than one of the responsible submitters. Submitters shall be responsible for any and all expenses that they may incur in preparing proposals. Responses received from this RFQ will be used as the foundation for the development of an agreement and contract with specific provisions subject to review, negotiations and approval of the Board.

In order to control information disseminated regarding this Request for Qualifications, vendors interested in submitting responses are directed **not** to make personal contact with members of the Board of Trustees or any other District Representative or employee. Failure to do so, may result in the revocation of the submitted proposal from review.

Each Firm shall be solely responsible for ensuring that its Response is received by the District prior to the deadline specified in this RFQ. The District will not be required to consider any Response received by the District after the submittal deadline specified in this RFQ.

All responses are to be organized with a table of contents that is tabbed/marked in the same order set forth below:

COVER LETTER

Provide an opening introduction to your firm. Not to exceed two pages.

EXECUTIVE SUMMARY

Provide an overview describing the unique capabilities, accomplishments and highlights of firm that are specific to Proposition 39 projects. Not to exceed two pages.

Indicate the person that will provide the district with additional information as well as the person who will negotiate on behalf of the firm (if different). Include their name, title, address, telephone number, and e-mail address.

Also specify the firms:

- Legal name and address of Firm’s principal place of business,
- Firm’s legal form of entity (sole proprietorship, partnership, corporation, joint venture, etcetera) and State of incorporation or other organization. If Firm is a joint venture or partnership, identify all members of the joint venture or partnership, roles and responsibilities, (3) three examples of previous engagements.
- Number of years Firm has been engaged in energy projects
- Evidence that Firm is authorized to conduct business in the State of California
- If company is a subsidiary or affiliate of another company or companies, identify such other company or companies

METHODOLOGY

Provide in detail the firms methodology to implement the work and adhere to all Prop 39 requirements. Include a process overview of how the firm will approach development, design, and implementation of the project scope of work including the important dates that Prop 39 work and reporting must be completed.

TECHNICAL CAPABILITIES AND QUALIFICATIONS

Demonstrate capabilities and qualifications for the firm to perform Design/Build projects. 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.

PROJECT EXPERIENCE

- 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. Include (2) two letters of reference for any of the project experiences provided.
- Provide (2) two California Energy Commission (CEC) approved Prop 39 final reports submitted by your Firm.
- Provide (3) three Energy Expenditure Plans (EEP’s) approved by the CEC and submitted by your Firm.
- Provide (1) one annual progress reporting document accepted by the CEC and submitted by your Firm.

PERSONNEL & PROJECT MANAGEMENT

- Provide an organizational chart with the key positions that will be assigned to work on this project.
- Specify key personnel, role and attach a resume of relative experience.
- Outline the project/contract management process the design/build firm will utilize for this project.

LICENSE AND INSURANCE INFORMATION

Specify and provide proof of all licenses and any certificates that qualify your firm for this design/build project including, but not limited to, California State License Board, Disabled Veteran Business Enterprise and Minority Owned Business.

Provide sample Certificate(s) of Insurance of contractors: General Liability, Workers Compensation and Auto Insurance.

FEE SCHEDULE AND REIMBURSIBLE EXPENSES

Describe, in detail, the method and process for determining fees and costs for providing the services that will meet the SUSD and Proposition 39 requirements, including, without limitation, an itemization of fees and costs.

ADDITIONAL INFORMATION

The District anticipates that the schedule of events in connection with this RFQ will be as set forth below. However, District reserves the right, in its sole discretion and at any time prior to entering into an agreement for a District energy project, to alter its anticipated schedule as related to this RFQ or any project.

RFQ Published:	April 5, 2017
Request for Information (RFI) Due:	April 19, 2017
RFI Responses:	April 21, 2017
RFQ Responses Due:	April 26, 2017

Recommendations to District Board:
Contract Approval:

May 11, 2017
May 25, 2017

The District in its discretion may, at any time, issue one or more addenda to this RFQ and the District will provide such addenda to each Firm that is known by the District to have received a copy of this RFQ. Each Firm is solely responsible for and must, in its Response, acknowledge each addendum that it has received. The District will send each addendum to the last known addresses of the Firms, but in no event shall the District be responsible or liable for any failure of a Firm to receive any such addendum.

The District may, upon applicable request, disclose any Response to the extent it is a public record in accordance with California law.

All Responses and other materials submitted in response to this RFQ shall become the property of the District. A Firm may at any time withdraw its Response by providing written request for withdrawal to the District. At any time prior to the deadline for submittal of Responses specified in this RFQ, a Firm may modify its Response by submitting the modified Response together with a written request to withdraw the original Response and replace it with the modified Response.

The contract(s) for each of the District's energy projects will set forth additional provisions applicable to work on the project by the selected Firm, including, without limitation, requirements for: (i) compliance with District policies, such as those prohibiting use of alcohol and illegal drugs on District property; and (ii) fingerprinting and background checks in accordance with California Department of Justice (DOJ) procedures.

EVALUATION, AWARD AND AGREEMENT

The District will determine which, if any, statements of qualifications are in the District's overall best interest to accept. The District may request one or more respondents to participate in a presentation and/or interviews in regard to their qualifications and project experience. Evaluation criteria will include but not be limited to:

- General thoroughness and responsiveness of the submittal.
- Capability of personnel/firm; demonstrated experience
- Knowledge of project requirements; comprehensiveness of approach; responsiveness to specific concerns in the RFQ; flexibility to accommodate needs of SUSD; ability to communicate effectively with District staff and related parties.
- References; quality of past projects; demonstrated ability to complete work tasks within project timelines and budget; quality of submitted work samples.

The District reserves the right to conduct negotiations with any number of respondents, as determined by the District, for entering into contract agreements.

Appendix A: List of Saratoga Union School District Sites included in its approved EEP.

District Warehouse	\$13,042.00
District Office	\$8,422.00
Argonaut Elementary	\$19,547.00
Foothill Elementary	\$2,677.00
Redwood Middle School	\$103,412.67
Saratoga Elementary	\$71,379.00