



**2455 Carmichael Drive
Chico, CA 95928**

**Using the Authority Granted by
California Education Code Section 17406**

RFQ for Energy Engineering and Expenditure Planning Services

**RFQ Issued: March 10, 2014
Statements Due: March 24, 2014 @ 2:00p.m.**

NOTICE IS HEREBY GIVEN that the Chico Unified School District (“District”) is issuing this Request for Statements of Qualifications (RFQ). The District seeks statements of qualifications from interested, independent, established and experienced energy engineering consultant firms (“Firms”), to be received no later than **March 24, 2014**.

The District intends to engage a qualified engineering firm to facilitate the development of cost-effective energy projects for the District’s facilities. Qualified firms shall be free from conflicts of interest arising from financial relationships with potential suppliers, constructors, financiers, or owners of related projects or products.

The District shall be the sole judge of the qualifications and services to be offered and its decision shall be final.

1.1 District Facilities and Energy Projects Background

The District is a public school district located in Butte, California. The District serves nearly 13,000 students. The District’s existing facilities include 19 schools and 1 administrative office and support buildings.

The District’s Facilities Department has been engaged in multiple projects, including additions, modernizations, and energy conservation improvements to existing facilities, such as HVAC and lighting fixture upgrades. The District currently has 7 solar plants constructed with an additional 9 plants in planning.

1.2 Solicitation Background

The District plans to complete energy-savings projects at existing facilities in accordance with potential funding and guidelines from Proposition 39 during an initial period of five (5) years (collectively, the “Projects”). The District was allocated funding of approximately \$544,000 for the fiscal year 2013-2014.

The District seeks the support of a Firm in the development of its Energy Expenditure Plan(s) towards the installation of cost-effective energy-savings projects. Energy Expenditure Plan development may include the following services consistent with CEC Proposition 39 Guidelines:

- Electric and gas usage billing: Data collection and analysis
- Benchmarking analysis
- Complete energy auditing and identification of energy projects
- Energy project development including feasibility, energy savings calculations, and cost estimating toward Cost-Effectiveness Determination
- Prioritization of sites and energy projects
- Develop sequencing of facility improvements
- Consideration of the long-term strategic interests of the District
- Preparation of Energy Expenditure Plan(s) meeting District needs and CEC requirements
- Leveraging Award Funding: Identification and application for resources and incentives available to the District, including:
 - The Energy Commission’s Bright Schools Program “no-cost” technical services
 - California Conservation Corps “no-cost” and “low-cost” energy efficiency data collection and energy efficiency surveys.

- Local programs
- Utility rebates and incentives
- The Energy Commission's ECAA Loan Program

The District may also engage selected Firm to provide independent support of later stages of energy projects, including:

- Development of project specifications and bid documents
- Assistance with management of bid processes and selection of contractors and vendors
- Technical quality oversight of constructed projects
- Measurement and Verification (M&V) of project savings
- Commissioning and retro-commissioning to confirm correct project installation achieving maximum savings
- Energy-related training of District personnel
- Energy Manager services to ensure and maintain savings

The District intends to contract with a Firm that has the following minimum qualifications:

- A. Free from conflicts of interest arising from financial or other relationships with potential suppliers, constructors, financiers, or owners of related projects or products
- B. Personnel dedicated to this contract with extensive experience in the successful analysis and development of energy efficiency measures; including auditing, savings calculations, project costing, strategic planning, design specification, construction oversight, commissioning, maintenance and energy management.
- C. Personnel dedicated to this contract with experience working with school districts in regard to energy efficiency and renewable energy programs
- D. Personnel dedicated to this contract with experience in securing all available services, grants, incentives and financing available through Federal, State, local and Utility Company programs
- E. Personnel dedicated to this contract with knowledge and understanding of applicable California Building Codes; including current Title 24 Energy Code and CAL Green
- F. Ability to provide timely, effective communication and support to the District

The District intends to use the responses to this RFQ 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. The Firm's ability to develop a rapport and working relationship with District personnel will be considered. The District will, at its own discretion, select one or more Firms after receipt of Responses; the District also reserves the right to not select any Firm. The District may also request that one or more Firms participate in an interview process or the District may implement a combination of these and/or other methods for selection.

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.

1.3 District Goals

The District intends to achieve the following goals through, and in connection with, the implementation of energy programs and installation of energy efficiency measures and (possibly) renewable energy generation systems at District facilities:

- A. To reduce energy costs and maximize the net economic benefit to the District by installing energy efficiency measures and renewable energy generation systems.
- B. To comply with Prop39 planning requirements towards ensuring receipt of all of the District's funding allocations.
- C. To prepare a long-term strategic approach to maximize the ongoing benefits of energy projects funded through Prop 39 and other funding sources.
- D. To educate students and local community about the benefits of energy conservation and renewable energy generation.
- E. To reduce the cost of developing energy projects by investing in multiple common projects.
- F. To facilitate the investment in energy projects by industries and businesses within the region, to increase energy diversity and to reduce dependence on fossil fuels.
- G. To enhance the economic value of District assets by developing and improving the performance of these assets in a manner that supports District goals.
- H. To provide structures aesthetically compatible with District facilities and surrounding neighborhoods.

1.4 Response Content Requirements

A. **General:** Each Response must be in writing and should be concise, well organized, and tailored to this RFQ. Each response shall demonstrate the Firms understanding of District goals and the objectives of the District's energy projects. Firms will be evaluated based on the information submitted in accordance with this Section 1.4, together with other information as may be available to the District. Responses must include all of the information specified in this Section 1.4, and be set forth in the same order as outlined below.

B. **Executive Summary:** Include an overview of the Response (maximum one page) describing the highlights of the Response, specifying the name, title, address, telephone number, and e-mail address of a single Firm representative to contact regarding the Response.

C. **Firm Information:** Specify or provide all of the following information:

- Legal name and address of Firm
- Name and address of the Firm's principal place of business
- Firm's legal form of entity (sole proprietorship, partnership, corporation, joint venture, etc.) and state of incorporation or other organization. If Firm is a joint venture or partnership, identify all members of the joint venture or partnership and provide all information required pursuant to this Paragraph C for each member
- Firm's engagement model and fee structure

- 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

D. Assigned Personnel Relevant Qualifications and Experience: Provide all of the following information, as applicable.

Please mark “N/A” only if such information/experience is non-existent:

- Names of qualified energy professionals on staff to be assigned to support District projects, and number of years of experience for each.
- Number of energy audits and project feasibility studies completed by Firm’s assigned personnel in past 5 years at educational facilities
- Estimated percentage of energy audits and project feasibility studies completed which resulted in implementation of recommended projects
- Total cost in dollars of energy projects installed as a result of the assigned personnel’s engineering and program management efforts
- List the typical energy efficiency measures implemented in connection with past projects
- Total annual energy saved or generated by energy projects implemented or installed to date through projects developed by the assigned personnel at public education facilities in California

E. Project References: Provide five (5) references related to similar energy engineering services provided in California in the last five years, including for each:

- Customer name and contact information
- Exact role proposed personnel performed for project
- Type of project and short description
- Location of project
- Date installed and date deemed operational
- Project cost (includes construction cost and all applicable soft costs)
- Annual energy savings (peak kW, annual kWh and annual therms)

F. Proposed Firm Team: Provide all of the following information:

- Name of Firm’s proposed project manager and a description of such person’s experience as relevant to the District’s proposed energy projects
- Names, roles and responsibilities of team members who would be dedicated to the District’s energy projects
- Brief description of team’s ability to implement a successful energy program (history, performance of similar scope of services, etc.)
- Resumes for key members of the Firm’s proposed team, including key personnel of any subcontractors that Firm proposes to use (resume package may be submitted as an attachment to the Response)
- Describe each circumstance in which the Firm ever had a contract terminated for cause or convenience and include the reasons for termination

G. Firm’s History: Indicate whether there has been, within the preceding five years, any occurrence of the situations described below and, if yes, then describe in detail the circumstances surrounding each such situation and the outcome. Failure by a Firm to disclose any such

situations may result in a determination that the Firm is ineligible to bid on, contract for, or perform any work in connection with any future District projects.

Each Firm must disclose each of the following:

- Debarment (of either the Firm or any of its principal officers or owners) by any Federal, State, County, Municipal or other local agency
- Involvement as a party in any litigation, arbitration or mediation associated with an energy project (not including any action filed to validate a transaction)
- Any convictions of the Firm or any of its principal officers or owners for violation of any Federal or State antitrust law (e.g., bid rigging, collusion, or otherwise restricting competition between bidders) or other law relating to bidding or performance of public works
- Determination by a governmental or public authority, which became final or unappealable, that the Firm or any of its principal officers or owners: (i) knowingly concealed any deficiency in the performance of any contract or project; (ii) falsified any information or made deceptive or fraudulent statements in connection with any contract or project; or (iii) willfully disregarded applicable laws, regulations, rules or contractual requirements in connection with any contract or project
- The Firm has filed any claims and/or lawsuits against any public agencies in connection with any contracts or projects of such public agencies and, if yes, identify the public agency and describe the nature and the outcome of such claim and lawsuit.

Failure by a Firm to disclose any such claims and/or litigation may result in a determination that the Firm is ineligible to bid on, contract for, or perform any work in connection with District projects.

H. Approach: Provide a summary discussion (maximum 2 pages) of your approach to accomplish the energy expenditure planning work described in Section 1.2.

I. Fee Schedule and Reimbursable Expenses: Respondents shall state their proposed hourly rates offered on a time-and-materials basis.

Note: the District will reimburse reasonable expenses at-cost.

1.5 Additional RFQ Information

A. Schedule of Events: 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, to alter its anticipated schedule as related to this RFQ or any project.

Event Anticipated Dates:

- RFQ Available: March 10, 2014
- Deadline for Request for Information (RFI): March 17, 2014 before 2:00 PM
- Response for RFI: March 20, 2014
- Responses Due: March 24, 2014 before 2:00 PM
- Recommendations to District Board: March 26, 2014

B. Addenda to RFQ: 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.

C. No Guarantee of Award of Contract: This RFQ does not create any obligation whatsoever, either expressed or implied, for the District to award any contract to any Firm or other party. The District at all times retains the sole and absolute right to select the Firm that best meets the District's needs, or to not select any Firm based on Responses to this RFQ. The award of any contract to a Firm is subject to approval by the Governing Board of the District ("Board").

D. Privacy: The District will open and review Responses privately to assure confidentiality and to avoid disclosure of the contents to competing Firms prior to and during the review, evaluation and negotiation process. However, District may, upon applicable request, disclose any Response to the extent it is a public record in accordance with California law.

E. Ownership of Documents: All Responses and other materials submitted in response to this RFQ shall become the property of the District.

F. Responsibility for Costs: Each Firm (and not the District) shall be responsible for any and all costs that it incurs in connection with this RFQ, including, without limitation, costs associated with preparation and submission of a Response, and expenses associated with travel to any presentation, interview or other meeting. In no event will the District reimburse any Firm for any such costs or expenses.

G. Modification or Withdrawal of Response: 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.

H. Insurance Requirements: The District will require that the selected Firm have insurance in effect at all times during the term of this agreement and that the Firm provide certificates of insurance indicating the District, its employees, agents, and consultants as additional insured, and copies of policies as evidence that the insurance is in effect. The applicable insurance requirements and limits will be established by the District during negotiations with the Firm.

I. Other Contractual Requirements: 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.

J. Unethical Behavior: By submitting a Response, a Firm shall be deemed to represent and warrant that neither it nor any of its agents or other representatives gave or offered to give any gratuity (in the form of entertainment, gifts, or otherwise) to any District officer or employee with the intent or goal of obtaining favorable treatment with respect to the selection of a Firm for the District's energy projects. If the District determines that a Firm has breached or violated such warranty, the District may terminate any agreement with such Firm, in whole or in part, and the Firm shall be responsible and liable for any associated losses and/or damages incurred by the

District. The rights and remedies of the District pursuant to this paragraph are not exclusive and are in addition to any other rights and remedies the District may have pursuant to law or contract.

1.6 Submittal Requirements

A. **Response Length:** A Response must be no more than 10 double-sided pages, in total length, (not including cover page and resume package). The font size of the text included in a Response must not be less than 11 points.

B. **Number of Copies:** Each Firm must submit one (1) digital copy of its Response.

C. **Method of Delivery:** Provide digital copy in PDF format (e.g., Adobe Acrobat or equivalent) by email to Julie Kistle at jkistle@chicousd.org, as described in 1.6.A above to the District prior to the due date and time. The e-mail subject line of the Response should be specified as “Response Regarding RFQ for Energy Engineering Services.”

D. **Responsibility for Delivery of Responses:** 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.

E. **Deadline for Submitting Responses:** The deadline for submitting Responses to this RFQ is the date and time set forth In Section 1.5, Part A of this RFQ.

1.7 Requests for Information (“RFI”) Regarding This RFQ

A. **RFIs:** Questions regarding this RFQ should be set forth in writing and sent via e-mail to Julie Kistle at jkistle@chicousd.org. The e-mail subject line of each such question should be specified as “Question Regarding RFQ for Energy Engineering Services.”

B. **Authorized person to receive RFIs:** No other person is authorized to receive questions relating to this RFQ, and the District shall have no obligation to respond to questions sent to any other person or entity. In its discretion, the District may disregard the Response of any Firm that, in connection with this RFQ, contacts any other District representative including, without limitation, any member of the District Board, Assistant Superintendents, Directors, Assistant Directors, Administrators, Consultants, Managers or any other District personnel.

C. **Responses to RFIs:** The District will, to the best of its ability, respond to RFIs regarding this RFQ. The District will send each question and response to the last known e-mail addresses of the Firms known by the District to have received this RFQ, but in no event shall the District be responsible or liable for any failure of a Firm to receive any such question and response.

D. **Deadline for RFIs:** The deadline for submitting questions regarding this RFQ is as listed in Section 1.5.A above. The District, in its discretion, may determine not to respond to questions submitted after the deadline or may extend the deadline for submittal of Responses so that all Firms will have the benefit of responses to questions submitted after the deadline.

1.8 Evaluation, Award and Agreement

Statements of Qualifications Evaluation:

The District Evaluation Committee will determine which, if any, statements of qualifications are in the District's overall best interest to accept. During the evaluation process, the District may request additional information, clarifications, explanations and answers from any respondent. The District may request any or all respondents to participate in a presentation and/or interviews in regard to their qualifications. The invited respondents must be available for the presentation and/or interviews within seven (7) days of the request, unless another date has been agreed upon.

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

Evaluation Criteria:

The evaluation of statements of qualifications will include but is not be limited to the following criteria:

A. Minimum Qualifications: Firm meets the minimum qualifications outlined in Section 1.2.

B. Statements of Qualifications: Completeness and clarity of qualification content as listed in Section 1.4.

C. Personnel and Staffing Resources: Professional qualifications and specialized experience of the proposed staff, including the quality of the respondent's professional personnel to be assigned to District projects and the relevant experience of the respondent's proposed program manager acting in a program management role for K-12 energy projects.

D. Experience & References: Experience and expertise of the respondent in providing similar services to other school district and public entities of comparable size and scope.