

COTTONWOOD UNION SCHOOL DISTRICT  
& COTTONWOOD CREEK CHARTER  
SCHOOL

REQUEST FOR QUALIFICATIONS  
PROPOSITION 39 ENERGY CONSERVATION AND  
ENERGY EFFICIENCY SERVICES

OWNER

COTTONWOOD UNION SCHOOL DISTRICT  
20512 West First Street  
Cottonwood, CA 96022

SEALED SUBMITTALS MUST BE RECEIVED BY [dalexander@cwusd.com](mailto:dalexander@cwusd.com)

ENERGY CONSERVATION AND ENERGY EFFICIENCY SERVICES  
REQUEST FOR QUALIFICATIONS

ALL CONTACT REGARDING THIS REQUEST FOR QUALIFICATIONS MUST BE MADE TO: David Alexander, Ed.D. at 20512 West First Street, Cottonwood, CA 96022 or [dalexander@cwusd.com](mailto:dalexander@cwusd.com) AND RECEIVED BEFORE JANUARY 6, 2017.

## **OVERVIEW**

COTTONWOOD UNION SCHOOL DISTRICT, here in referred to as THE DISTRICT, and COTTONWOOD CREEK CHARTER SCHOOL, here in referred to as the CHARTER SCHOOL, seeks submittal of qualifications (SOQ) from interested firms capable of designing and implementing energy conservation, energy efficiency, and energy related capital improvement services as described within this Request for Qualifications (RFQ). The District and the Charter School 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.

## **BACKGROUND**

COTTONWOOD UNION SCHOOL DISTRICT is home to 2 school sites. THE COTTONWOOD CREEK CHARTER SCHOOL is home to 1 school site currently being leased from the district. Our students range from Transitional Kindergarten through 8th grade. A list of sites is attached in Appendix A.

## **QUALIFICATIONS**

THE DISTRICT and THE CHARTER SCHOOL 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 is in the long-term best interest of the District and the Charter School. 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 self-perform the work
- Credentialed, trained, and knowledgeable staff
- Competent management support at all levels
- Ability to effectively communicate with THE DISTRICT Board, administration, staff, students, and community as needed

THE DISTRICT and THE CHARTER SCHOOL 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

THE DISTRICT and the CHARTER SCHOOL is interested in the identification, engineering, design, installation, training, maintenance, and financing of approved Energy Conservation Measures for all of its facilities utilizing Proposition 39 funding and/or energy savings generated. If THE DISTRICT and THE CHARTER SCHOOL contracts project financing through the Provider, financing shall be structured so that annual payments do not exceed annual energy cost savings. Services will be required to provide the financing in such a manner as to ensure that costs are paid for from the utility cost savings and/or Proposition 39 funding associated with the energy conservation program. The District and the Charter School 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 THE DISTRICT's Governing Board.

THE DISTRICT and THE CHARTER SCHOOL 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:

- Energy management and/or local HVAC control systems (must be "open platform" and not proprietary)
- Lighting replacements and retrofits
- Motion sensors
- Day lighting
- HVAC replacements/upgrades/modifications/commissioning
- Variable speed drives
- High efficiency motors
- Central plant replacements
- Potential Future Solar Generation

Other energy conservation measures 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 THE DISTRICT prior to installation.

## **SUBMITTAL 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. THE DISTRICT and THE CHARTER SCHOOL 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 projects locally. If this project is to be managed and/or administered by a different office location, provide the location of the office(s), areas of responsibility, and the division of duties.
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 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 Conservation Design/Build references for projects in California public schools in which your firm was the Engineer of Record. 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.

### **PROPOSAL 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.

THE DISTRICT and THE CHARTER SCHOOL 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 THE DISTRICT and/or CHARTER SCHOOL.
- Contract with any of the firms responding to this RFQ based solely upon its judgment of the qualifications and capabilities of the firm.

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

### **RESPONSE FORMAT AND COMMENTS**

A Statement of Qualifications (SOQ) 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.

All SOQs will be reviewed and evaluated by a District Selection Committee. The District at its sole discretion may interview finalists, or select a firm or firms to perform work based solely on the evaluation of the SOQ.

