

**REQUEST FOR PROPOSALS (RFP) NO. 022-01**  
**Comprehensive Infrastructure Modernization, Sustainability, and Utility Savings Program**

The following RFP is seeking proposals from qualified design-build firms capable of providing comprehensive energy, gas, & water infrastructure improvements.

**RESPONSE DEADLINE FOR PROPOSALS: Sep 15, 2022**

RFP Contact for Questions & Submission:

Steven Ramos

530-842-3561

sramos@yrekausd.net

309 Jackson Street, Yreka, CA 96097

**I. RFP PROCESS**

The District intends to select a qualified provider for the development, implementation, and monitoring of a comprehensive infrastructure modernization and utility savings program. Upon award, the District will enter into a professional services agreement for a districtwide site assessment. Prior to entering into a contractual agreement for project implementation, an agreed-upon scope of work and project pricing will require separate board approval.

The District intends to implement a design-build program consistent with the provisions of California Government Code sections 4217.10-4217.18 that will provide sustained efficiencies and energy cost savings.

The District, at its sole discretion, may select the awarded respondent for subsequent phases of work. The District, at its sole discretion, also reserves the right to reject any or all bidders.

**II. PROJECT GOALS**

The District's ultimate goal is to utilize financial savings realized from more efficient buildings towards other upgrades and programs that enhance student learning. Respondents shall support the District's goal by developing, implementing, and monitoring an infrastructure modernization and utility savings program that accomplishes the following:

- Achieves long-term cost savings through reduced energy, gas & water usage
- Upgrades antiquated and inefficient equipment
- Provides a comfortable and safe learning environment
- Maintains building functionality and compatibility with existing equipment
- Improves utilization of technology to achieve optimum performance and savings
- Minimizes financial and technical risk to the Owner
- Provides training to employees on maintenance and repair of equipment and controls
- Provides comprehensive funding solutions

### **III. MINIMUM REQUIREMENTS**

Respondents must meet the following minimum requirements to participate in the District's RFP process:

- Have five (5) California K-12 customer references for which the respondent has provided turn-key responsibility including guaranteed energy savings in the past five (5) years. Of those five (5) references, at least two (2) need to have two (2) years of verified energy savings performance.
- Current accreditation by the National Association of Energy Services Companies (NAESCO) as an Energy Services Provider (ESP) or Energy Services Company (ESCO)
- Currently on the U.S. Department of Energy's (DOE) Qualified List of Energy Service Companies
- Active G.C. license in California
- Minimum of \$10 Million in bonding capacity
- No pending or recent litigation associated with the savings performance and/or measurement and verification (M&V) of a guaranteed energy savings project.

### **IV. SCOPE OF WORK**

Upon award, the selected respondent will be required to perform site assessments at each of the District's facilities to evaluate infrastructure improvements in order to develop a scope of work tailored for its needs. Specifically, the awarded respondent will evaluate and propose applicable conservation measures including but not limited to:

- Solar, battery storage, and other renewable technology
- Heating Ventilation & Air Conditioning (HVAC) system optimization, retrofit, upgrade or replacement
- Interior & exterior lighting upgrades
- Building Automation System (BAS) installation, upgrade, or expansion
- Water conservation and irrigation system improvements
- Building envelope upgrades
- Other related 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

The selected respondent will then implement an agreed upon and Board-approved scope of work. All proposed infrastructure improvements must be provided on a turn-key basis including all necessary permits, engineering, Division of the State Architect (DSA) requirements, delivery, installation, commissioning, training, warranty service, and compliance with any applicable funding programs. After the scope of work has been fully implemented the selected respondent will be required to provide M&V services to monitor post-retrofit utility usage and track energy savings.

**V. PROPOSED TIMELINE**

August 15 2022	RFP Released
<1 weeks post release date>	Questions Due
<1.5 weeks post release date>	Questions & Answers Released
<2 weeks post release date>	RFP Reponses Due
September 14 2022	Respondent Awarded

**VI. PROPOSAL INSTRUCTIONS**

Ink or Typewritten

All information, prices, notations, signatures, and corrections must be in ink or typewritten. Mistakes may be crossed out and corrections typed or printed adjacent to the mistake and initialed in ink by the person signing the proposal.

Signature Verification

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

Proposal Documents

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

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**

Five (5) hard copies (one marked "original") and one (1) electronic copy of the proposal shall be submitted in the format contained in the RFP. The original proposals shall be submitted in a three (3) ring loose-leaf binder or report cover. It is critical that all responses follow the same format to allow equal and fair evaluation of each response. Responses should be limited to forty (40) pages (not including table of contents, cover letter, or sample contracts/agreements) and include the following:

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.

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.

## 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 RFP. Please describe how the respondent meets the minimum requirements as described in section III of the RFP.

### Tab 1: Background, Financial Capacity & Management Structure

- a. Provide general information on the respondent including: a brief history of the firm, key differentiating factors and areas of expertise, length of time performing services, and location of California offices.
- b. Provide a statement of the respondent's financial capacity and capability to perform to the terms of this solicitation request.
- c. Describe the management structure of the responding firm and include an organizational chart. Provide resumes for personnel to be used on this project and describe their qualifications and experience with projects of a similar size and scope.

### Tab 2: Litigation Disclosure

Describe any involvement as a party in any formal litigation, arbitration or mediation associated with savings performance on an energy savings contract or specifically related to an Investment Grade Audit (IGA) agreement in the last seven years under any previous or current firm names, along with a description of the nature and outcome of such litigation.

### Tab 3: References

Provide detailed project histories for a minimum of five (5) California K-12 districts for which the responding firm provided turn-key responsibility for similar design-build guaranteed savings programs in the past five (5) years. At least two (2) of these must have a minimum of two (2) years of verified energy savings track record. Describe the scope of work, start/completion date, services and equipment provided, project size, total project savings, and funding sources.

### Tab 4: Project Approach

- a) Provide a description of the respondent's approach to performing site assessments and identifying infrastructure improvement.
- b) Provide a description of the respondent's approach to managing the project implementation and procedures for minimizing occupant disruptions.
- c) Describe the steps taken by the respondent during and after the turnover process to ensure successful project implementation.
- d) Describe training programs available for district employees.

### Tab 5: Funding Sources

Describe the respondent's experience with obtaining funding for California K-12 Districts' infrastructure needs and sustainability programs. Please describe specific funding sources that the respondent has facilitated and successfully obtained including any funding solutions or approaches which may be unique or exclusive to the respondent.

Tab 6: Savings

- a) Describe the respondent's approach to projecting and proving utility savings.
- b) Describe the methodology and formulas utilized for reporting of the savings.
- c) Provide a description of monitoring services after implementation.
- d) List any projects/customers in which the guaranteed savings was not met and how each was resolved.

Tab 7: Additional Benefits and Value Added Elements

Please describe any additional benefits that may result from program implementation and the respondent's added value elements in delivering infrastructure modernizations and/or sustainability programs.

Tab 8: Contracts, Pricing and Forms

Provide sample contracts for an investment grade audit, project installation, Measurement & Verification (M&V) including terms and conditions. Complete and include enclosed pricing proposal and acknowledgement form.

**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 this RFP and/or who cannot clearly demonstrate to the satisfaction of the District their ability to satisfactorily perform the work in accordance with the RFP requirements will not be considered, nor will respondents who do not meet the minimum requirements.

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

- a) **Background:** i.e. qualifications, experience, resources, financial solvency. (10 pts)
- b) **Litigation Disclosure** (25 pts)
- c) **Project Team & Management Structure:** i.e. amount of work self-performed, strength of proposed team, trainers, and management structure. (20 pts)
- d) **Project History & References:** i.e. relevant past project experience. (50 pts)
- e) **Project Approach:** i.e. approach to completing study, project management, training, etc. (15 pts)
- f) **Funding Sources:** i.e. funding experience & unique funding sources. (25 pts)
- g) **Additional Benefits & Added Value:** i.e. additional benefits resulting from implementation and respondent's added value elements. (10 pts)
- h) **Savings:** i.e. savings approach and track record. (35 pts)
- i) **Contracts & Forms:** i.e. sample contracts, terms & conditions, pricing proposal, and completed forms. (30 pts)
- j) **Response:** responsiveness and compliance with proposal requirements. (5 pts)

Total Maximum Point Valuation: 225

**PRICING PROPOSAL**

RFP # 022-01

**Infrastructure Modernization, Sustainability & Utility Savings  
Program**

Pursuant to and in compliance with your Notice Requesting Proposals and all other documents relating thereto, the undersigned respondent, having familiarized himself with the terms and conditions of the proposal documents, hereby proposes and agrees to perform the work to be done and to provide all labor and materials necessary to perform the work.

Name of Respondent: \_\_\_\_\_

**INVESTMENT GRADE AUDIT (IGA):**

Does the respondent require an IGA agreement be entered into before a scope of work, price and savings can be finalized?

YES     NO

If an IGA agreement is required, does it include exit fees and/or penalties in the event the District chooses to not implement the IGA findings?

YES     NO     N/A

What is the respondent's price to complete an IGA?

\$ \_\_\_\_\_ per square foot

**IMPLEMENTATION:**

What is the respondent's profit fee for program implementation?

Profit % \_\_\_\_\_

**ACKNOWLEDGEMENT FORM**

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Infrastructure Modernization, Sustainability & Utility Savings  
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Name of Respondent: \_\_\_\_\_

**ACKNOWLEDGEMENT OF AMENDMENTS:**

The respondent acknowledges receipt of issued amendments to RFP022-01:

Amendment Number						Initial Here
Date						