

McCabe Union Elementary School District

REQUEST FOR QUALIFICATIONS & PROPOSALS

Infrastructure Modernization, Air Quality & Utility Savings Program

The intent of this RFQ is to seek qualifications and proposals from qualified design-build firms capable of providing comprehensive energy, gas and water infrastructure modernizations. It is the intent of the District to improve the overall health and efficiency standards of its classrooms and facilities through indoor air quality (IAQ) improvements, utility savings measures, and other operational efficiencies. To fund the program, the District intends to utilize state programs, such as AB 841, utility incentive programs, federal programs, and/or other budget neutral funding solutions.

RESPONSE DEADLINE FOR RFQ/RFP'S: Monday, May 24th, 2021 at 2:00pm

District Representative contact info for questions & submissions:

MCCABE UNION ELEMENTARY SCHOOL DISTRICT
Nicholas Curry - Manager, Maintenance & Operations
701 W. McCabe Road, El Centro CA 92243
(760) 335-5202
nick.curry@muesd.net

I. RFQ/RFP PROCESS:

The District intends to select a qualified provider for the development, implementation (design, construction, installation, commissioning, monitoring and reporting of a comprehensive infrastructure modernization, air quality and utility savings program. Upon RFQ/RFP award, the selected respondent shall conduct District-wide site assessments for determining a potential scope of work. Site assessments must be conducted in accordance with the funding guidelines for AB 841 or other such funding sources pursued.

Prior to considering the program for implementations, and agreed scope of work and funding plan will require separate approval by the District's Board of Trustees.

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

II. PROJECT GOALS:

The District's ultimate goals are to: 1) improve the health and safety of the classrooms and facilities in its care, 2) promote efficient facilities operations through reduced utility, operation and maintenance costs, and 3) utilize funding alternatives to relieve budget pressure. Respondents shall support the District's goals by developing implementing and monitoring a comprehensive program that accomplished the following:

- ✓ Achieves long-term cost savings through reduced energy, gas and water use. Respondent must have prior experience in energy savings reports for State funded programs such as Proposition 39 and AB 841.
- ✓ Creates general fund relief through reduced operating expenditures.
- ✓ Helps prepare facilities for safe operations during the current global health pandemic and to assist the District with a continued post-pandemic safe operations plan.
- ✓ Meets current health guidelines for Indoor Air Quality (IAQ) and ventilation standards.
- ✓ Upgrades antiquated and inefficient equipment within the guidelines of AB 841 or other funding sources pursued or available to the District.
- ✓ Maintains or improves building functionality and compatibility with existing equipment.
- ✓ Improves utilization of technology to achieve optimum performance and savings.
- ✓ Minimizes financial and technical risk to the District and the District's Maintenance Staff.
- ✓ Provides training to District employees on the maintenance and repair of equipment and controls.
- ✓ Provides 24/7 on-call maintenance and repair of equipment and controls.
- ✓ Provides comprehensive funding solutions including application preparation and reporting requirements in accordance with AB 841 requirements. Must be available to work with the District through multiple application processes throughout the AB 841 grant funding lifespan.

III. MINIMUM REQUIREMENTS:

Respondents must meet the following minimum requirements in order to participate in the District's RFQ/RFP process.

- ✓ Have five (5) K-12 Schools (all in California) customer references for which the respondent has provided turnkey energy services in the past five (5) years. At least one (1) reference must include two (2) years of verified utility savings performance.
- ✓ Accreditation by the National Association of Energy Services Companies (NAESCO) as an Energy Services Provider (ESP or Energy Services Company (ESCO), is preferable.
- ✓ Currently on the U.S. Department of Energy's (DOE) Qualified List of Energy Service Companies.
- ✓ Must possess and active General Contractor's license in the State of California.
- ✓ Must have a minimum of five million dollars (\$5,000,000) in bonding capacity.
- ✓ No pending or recent litigation associated with the savings performance and/or measurement and verification of a guaranteed energy savings project.
- ✓ Must maintain a staff of licensed professional and qualified testing personnel as required for applicable funding programs such as AB 841.

IV. SCOPE OF WORK:

Upon award, the selected respondent will be required to perform a District-wide site assessment to evaluate the current infrastructure needs and develop a scope of work tailored to meet the District's objectives. Specifically, the awarded respondent will evaluate and propose applicable efficiency, indoor air quality and sustainability measures including, but not limited to:

- ✓ Heating, Ventilation & Air Conditioning (HVAC) modernizations.
- ✓ Ventilation improvements; including window modernization.
- ✓ Air cleaning (NPBI, Ozone, HEPA) technologies.
- ✓ Building Automation System (BAS) installation, upgrade and/or expansion.
- ✓ Water conservation; including touchless faucets and toilet flush valve replacements.
- ✓ Building envelope upgrades, such as Title 24 compliant roofing.
- ✓ Other related infrastructure improvements.
- ✓ Other training, remote monitoring services and ongoing support services that will ensure that the objectives of the program are met over the term of the agreement.

Once a scope of work and funding plan is approved by the District, the selected respondent will obtain all applicable funding sources on the District's behalf. After funding is secure, the selected respondent will provide turnkey implementation services for the approved scope of work including all necessary permits, engineering plans, any Division of the State Architect (DSA) requirements, procurement, 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 measurement and verification services to monitor post-retrofit utility usage and track energy savings.

V. PROPOSED TIMELINES:

Wednesday, May 5 th , 2021	RFQ/RFP Released – Advertisement
Friday, May 14 th , 2021	All Questions/Inquiries Due
Monday, May 17 th , 2021	Questions/Inquiries & Answers posted to website: www.muesd.net
Monday, May 24th, 2021	RFQ/RFP RESPONSES DUE; 2:00pm
Tuesday, June 15 th , 2021	District Board Meeting - Approval

VI. PROPOSAL SUBMISSION REQUIREMENTS:

Proposals are to be submitted by email only to Nicholas Curry at nick.curry@muesd.net and are to be submitted in the format contained in the RFQ/RFP. Please reference "MUESD Infrastructure, IAQ and Utility Savings Program" in the subject box.

It is critical that all responses follow the same format to allow equal and fair evaluation of each response. Responses should be limited to twenty-five (25) pages (not including table of contents, cover letter or sample contracts/agreements) and shall include the following:

LISTING OF SECTIONS:

Proposals shall be divided into 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 shall include a clear and complete identification of the materials submitted by section and page number.

COVER LETTER

A signed letter of interest (no more than one (1) page), stating the respondents interest and qualifications in providing the services as outlined in the RFQ/RFP. Please describe how the respondent meets the minimum requirements as described in Section III of the RFQ/RFP.

Section 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 locations 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.

Section 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 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.

Section 3: References

Provide detailed project histories for a minimum of five (5) California K-12 school districts for which the responding firm provided turnkey responsibility for similar design-build utility savings programs in the past five (5) years. At least one (1) reference must include two (2) years of verified savings performance demonstrated through a measurement & verification report or actual utility bills. Describe the scope of work, start/completion date, services and equipment provided, project size, total project savings, and funding sources.

Section 4: Project Approach

- a. Provide a description of the respondent's approach to performing site assessments, identifying infrastructure improvements and how long this process will take.

- 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.

Section 5: Funding Sources

Describe the respondent's experience with obtaining funding for California K-12 school districts in the areas of energy infrastructure, utility savings, sustainability programs or other facility related improvements. 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.

Section 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 in which savings projections were not met and how each was resolved.

Section 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, sustainability programs and other programs that enhance the health of students and staff.

Section 8: Contracts, Pricing and Forms

Provide sample contracts for an investment grade audit, project installation, measurement and verification, as well as including terms and conditions. Complete and include the enclosed pricing proposal and acknowledgement form.

VII. PROPOSAL EVALUATION CRITERIA

The District will evaluate qualifications based on the scoring criteria outlined in this section. 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:

1. Background: i.e. qualifications, experience, resources, financial solvency (10 points)
2. Litigation Disclosure (10 points)
3. Project Team & Management Structure: i.e. strength of proposed team, trainers and management structure (20 points)
4. Project history and references: i.e. relevant past project experience (45 points)
5. Funding sources: i.e. funding experience and unique funding sources (40 points)
6. Additional benefits and added value: i.e. additional benefits resulting from implementation and respondent's added value elements (10 points)
7. Savings: i.e. savings approach and track record (30 points)
8. Contracts and forms: i.e. sample contracts, terms and conditions, pricing proposals, completed forms (30 points)
9. Response: i.e. responsiveness and compliance with proposal requirements (5 points)

Total Maximum Point Valuation: 200

PRICING PROPOSAL FORM

McCabe USD Infrastructure Modernization & Utility Savings Program

Pursuant to and in compliance with your Notice Requesting Proposals and all other documents relating thereto, the undersigned respondent having familiarized themselves 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 according to best practices, quality workmanship and in compliance with all local, state, educational and federal codes.

Name of Respondent: _____

INVESTMENT GRADE AUDIT (IGA):

1. Does the Respondent require an IGA agreement to be entered into before a scope of work, and price and savings plan be finalized?

YES NO

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

YES NO N/A

3. What is the Respondent's price to complete an IGA?

\$ _____ Lump Sum

IMPLEMENTATION:

1. What is the Respondent's profit fee for program implementation?

Profit Percentage (%): _____

2. What are the Respondent's hourly rates for project and construction management services? (Please attach)

ACKNOWLEDGEMENT FORM

McCabe USD Infrastructure Modernization & Utility Savings Program

Pursuant to and in compliance with your Notice Requesting Proposals and all other documents relating thereto, the undersigned respondent having familiarized themselves 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 according to best practices, quality workmanship and in compliance with all local, state, educational and federal codes.

Name of Respondent: _____