

Dixon Unified School District

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CONTRACT DOCUMENTS

FOR

REQUEST FOR PROPOSAL (RFP)

RFQ / RFP 1415-02

PROPOSITION 39

ENERGY CONSULTING SERVICES

TO INCLUDE:

**DATA COLLECTION, BENCHMARKING, ASHRAE LEVEL 2 AUDITS, EUI
MEASURES, IMPLEMENTATION MEASURES, DEVELOPMENT OF AN ENERGY
EXPENDITURE PLAN**

NOVEMBER 10, 2014

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1. SUMMARY AND BACKGROUND

NOTICE IS HEREBY GIVEN that the Dixon Unified School District (“DUSD”) or (“District”) is issuing this Request for Qualifications (RFQ) for Prop 39 Data Collection, Benchmarking, ASHRAE Level 2 Audits, EUI Measures, and Implementation Measures per requirements. The qualifications from interested, independent, established and experienced energy engineering consultant firms (“Firms”) must be received no later than 2:00 pm on December 3rd, 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, contractors, financiers or owners of related projects or products. District may award a contract to the firm that in its sole opinion is the most capable of providing the range of services described and anticipated by this RFQ. To be considered for these services, a provider must demonstrate knowledge and experience in the following areas:

- Energy efficiency
- Proposition 39 Program guidelines and implementation schedule
- Energy audits, energy expenditure plans, data analytics, monitoring and benchmarking
- Recommendations to achieve district-wide energy efficiency
- California K-12 references that can attest to the quality of the firm’s past work
- Established record of technical performance on similar projects in California
- Credentialed, trained and knowledgeable staff

The purpose of this Request for Proposal (RFP) is to solicit proposals from various organizations, conduct a fair and extensive evaluation based on criteria listed herein, and select the organization which to award the contract. The District is seeking submission of qualifications from interested firms that are capable of conducting energy audits, preparing benchmarking data, designing and implementing an energy conservation capital improvement program and providing expert guidance in accordance with the Proposition 39 Program Guidelines.

2. SUBMITTAL FORMAT:

The submittal shall not exceed 25 pages, excluding brochures. The minimum should include all of the following information in the order given with tab sections identifying topics:

- a. Firm’s name, address, telephone number, and year of establishment. Include information as to the location of the Consultant’s headquarters, and the address and contact information for the local contact office and the primary contact person for the Consultant.

- b. A summary of the Consultant's relevant professional expertise and experience related to energy efficient services in Northern California in general and the Sacramento Valley Region in particular.
- c. A summary of the Consultant's relevant professional expertise and experience related to the Division of State Architect (DSA).
- d. Identification of the Consultant's project team and their specific expertise and experience in providing energy efficiency work, including a listing of all licenses and professional designations held. If applicable, a list of sub-consultants to be used and their relevant expertise.
- e. A summary of Consultant's knowledge and expertise in the Proposition 39 program reporting requirements and implementation schedule.
- f. An appropriately detailed description of projects the Consultant has worked on within the last four (4) years which demonstrates Consultant's relevant experience and successes respecting energy efficiency work of the type and scope require by the District.
- g. Name and contact information for three (3) energy efficiency/generation with a brief description of work done for these clients.
- h. Strategic or tactical plan for completing the scope and conducting a thorough energy usage research.
- i. Proposed method to maintain quarterly reports to The California Energy Commission (CEC) project tracking to include eligible and ineligible expenditures, estimated energy savings, nameplate rating of equipment installed as well as other reporting requirements to comply with Prop 39 compliance.
- j. Proposed method to perform both site level energy savings and project level energy savings twelve (12) months after completion as required by Prop 39 reporting requirements.
- k. Billing rates for all personnel and/or categories of employees. Overhead and Profit mark-up percentage as well as any other special charges.

The District shall not be responsible in any manner for the cost associated with the preparation or submission of the response. The submittal, including all drawings, plans, photos and narrative materials shall become the property of the District upon the receipt. The District shall have the right to copy, reproduce, publicize and/or dispose of each RFQ submittal in any way that the District may choose.

Proposal Evaluation Process

1. Providers will be evaluated and given preference to the firm that demonstrates superiority, range of services, innovative approaches, technical and contractual solutions, additional services and flexibility in developing and implementing successful projects.
2. The District reserves the right to:
 - a. Cancel the RFQ process at anytime
 - b. Modify any requirements contained within the RFQ and request a revised submission from all consultants
 - c. Establish other evaluation criteria determined to be in the best interest of the District.
 - d. Contact with any of the firms responding to this RFQ based solely upon its

judgment of the qualifications and capabilities of the firm.

3. Although not necessarily exhaustive of the criteria to be utilized by the District, the District intends to use the following evaluation criteria in selecting Consultants:
 - a. Timeliness and completeness of response. To receive maximum consideration, a Consultant's response must be received by the deadline. In addition, Consultant's response will be evaluated with respect to organization, clarity, completeness and responsiveness to this RFP.
 - b. Technical qualifications and competence. This includes experience and expertise in successful analysis and development of energy efficiency measures; including auditing, savings calculations, project costing, strategic planning, and design specification, construction over site, commissioning, maintenance and energy management. Experience in securing all available services, grants, incentives and financing available through Federal, State, local and Utility Company programs. Knowledge and understanding of applicable California Building Codes; including current Title 24 Energy Code, CAL Green, Title 5, and Field Act. Ability to provide timely, effective communication and support to the District.
 - c. Record of Past Performance. This includes work quality, completion of work on schedule and budget, and response of references provided by the Consultant or any other references identified by the District. Experience working with school districts in regard to energy efficiency programs.
 - d. Approach to Work. This includes project management, coordination methodologies, analysis and research approaches and ability to respond to emergencies and delays.
 - e. Cost Control. This includes cost control procedures, preliminary cost estimates, personnel utilization, billing rates for personnel and Consultant's policies respecting the pass-through to the District of overhead cost.
 - f. Availability. This includes firm location and availability to perform services in a timely and efficient manner.

3. Submission Requirements

1. Proposals must be delivered to the district offices and will not be accepted electronically.
2. All proposals shall be labeled with Prop 39 Energy Engineering Services.
3. Request for Information (RFI's) regarding this RFQ should be in writing and sent via e-mail to John Calise, Manager of Maintenance and Operations @ john.calise@dixonusd.org
 - a. Email subject line must read RFI Prop 39
 - b. Deadline for RFI's is November 25, 2014

4. Schedule of Events

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

- RFI Deadline – November 25, 2014
- Proposals Due – December 3, 2014 @ 2:00
- Interview with “Short” listed firms – Week of December 8, 2014
- Contract Award – At the next scheduled Board Meeting

5. Additional Information

1. No Guarantee of Award of Contract
2. All Responses and other materials submitted to this RFQ shall become the property of the District.
3. Firm is responsible for any and all costs in preparation of this RFQ
4. Firms may withdrawal proposal any time prior to award without penalty
5. Firms must provide certificates of insurances with endorsements indicating the District, its employees, agents and consultants as additional insured and must remain in effect at all times

6. District Property and Energy Usage Information

1. The District has a total of 10 sites
2. The combined square footage of the sites is 546,827 sq. ft.
3. Total electric usage for FY14: 1,777,435 kwh
4. Total gas usage for FY14: 51,850 therms

7. Other Contractual Requirements

1. The contract 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 compliance with District policies, fingerprinting and background checks W9 with business license
2. If submissions are not approved for Prop 39 Funds or are not ready for project submissions on the basis of the reports provided, District reserves the right to hold back up to 30% of the payment until these objectives has been reached. This shall be completed within 30 days from receiving the Notice to Proceed.

This Request for Proposal represents the requirements for an open and competitive process. Proposals will be accepted until 2pm PST December 3rd, 2014. Any proposals received after this date and time will be returned to the sender. All proposals must be signed by an official agent or representative of the company submitting the proposal.

Contract terms and conditions will be negotiated and agreed upon in writing upon selection of the winning bidder for this RFQ. All contractual terms and conditions will be subject to review by the DUSD and must be signed by a DUSD official prior to the execution of any work. Contracts must include scope, budget, schedule, and other necessary items pertaining to the project.

Each bidder must submit their proposal to the address below by December 3, 2014 2pm PST:
Dixon Unified School District
180 South First Street
Suite 11
Dixon CA. 95620
Attn: John Calise
Manager of Maintenance and Operations