

SANTA BARBARA UNIFIED SCHOOL DISTRICT

REQUEST FOR QUALIFICATIONS

PROPOSITION 39 ENERGY CONSERVATION AND ENERGY EFFICIENCY SERVICES

OWNER

**SANTA BARBARA UNIFIED SCHOOL DISTRICT
720 Santa Barbara Street
Santa Barbara, CA 93101**

SEALED SUBMITTALS MUST BE RECEIVED BY February 3rd, 2014 AT 4:00PM.

**SANTA BARBARA UNIFIED SCHOOL DISTRICT
ENERGY CONSERVATION AND ENERGY EFFICIENCY SERVICES
REQUEST FOR QUALIFICATIONS**

OVERVIEW

Santa Barbara Unified School District (SBUSD) seeks submittals 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). SBUSD 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 all services required for maximum use of available proposition 39 funds. This includes support in developing, bidding, and awarding contract(s) to implement cost-effective energy retrofits.

BACKGROUND

Santa Barbara Unified School District is home to 22 schools. Our students range from Pre-Kindergarten through 12th grade. A list of sites and District information is available on the District Web Site (www.sbunified.org/schools/). Charter Schools may be included in the program/project.

QUALIFICATIONS

SBUSD 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 in the long-term best interest of the District. To be considered for this project a provider must demonstrate knowledge and experience in similar projects including the following:

- Adequate financial resources to support the range of alternatives anticipated
- California K-12 reference 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 perform the work
- Credentialed, trained, and knowledgeable staff
- Competent management support at all levels
- Ability to effectively communicate with SBUSD Board, administration, staff, students, and community as needed

SBUSD reserves the right to investigate the qualification 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

SBUSD is interested in the identification, engineering, design, installation, training, maintenance, and funding of approved Energy Conservation Measures for all its facilities utilizing Proposition 39 funding.

Upon selection, the Provider shall perform Energy Audits as required by Proposition 39 guidelines of the specified facilities.

The following technologies and/or energy management approaches serve as examples of solutions to be considered under this RFQ:

- Energy management and control systems
- Lighting replacements and retrofits
- Motion sensors
- Day lighting
- HVAC replacements/upgrades/modifications/commissioning
- Variable speed drives
- High efficiency motors
- Alternative energy sources, i.e., photovoltaics

Other energy conservation measures proposed by Provider may 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 replacement parts. All equipment/fixtures used for this program shall be approved by SBUSD 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. SBUSD 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 managing 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.
 - a. Describe your firm's expertise in applying/securing funding for energy conservation/efficiency infrastructure improvements for CA K-12 clients.
9. Describe any unique capabilities of the Provider that would be useful to the specific needs of the district/project.
10. Provide a description of your firm's commitment to and experience with obtaining OPSC Project Closure stats, as well as experience with DSA, for public school projects.
11. 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.
12. 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.
13. 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 a separate attachment to the response to this RFQ.
14. Provide a draft scope of work and pricing for the 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.

SBUSD reserves the right to:

- Reject any or all submittals at its sole discretions.
- 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 SBUSD.
- Contract with any of the firms responding to the RFQ based solely upon its judgment of the qualifications and capabilities of the firm.

This RFQ does not commit SBUSD to negotiate a contract. SBUSD 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.

Responder shall furnish one original and 6 copies of the submittal

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.

SUBMITTAL INFORMATION

Deadline for submission of your SOQ is 4:00 PM, February 3, 2014. SOQs received after the deadline will not be opened. All submittals become the sole property of SBUSD and the content will be held confidential until the selection of a firm is made. Any proprietary information must be designated clearly and should be bound separately and labeled with words "PROPRIETARY INFORMATION". An entire submittal marked as such will not be accepted.

Submit sealed SOQs clearly marked "SBUSD Proposition 39 RFQ Energy Conservation Services" to the following location:

Santa Barbara Unified School District
Attention: David J. Hetyonk
Director of Facilities & Operations
720 Santa Barbara Street
Santa Barbara, CA 93101

Questions or clarification may be submitted via e-mail to dhetyonk@sbsdk12.org.

Questions must be received no later than noon on January 23, 2014.

Questions and answers will be posted on the district website facilities page on January 27, 2014.