

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

**REQUEST FOR PROPOSALS FROM CONSULTANTS
for
ESTABLISHMENT OF A POWER PURCHASE AGREEMENT TO IMPLEMENT A
DISTRICT-WIDE RENEWABLE ENERGY INFRASTRUCTURE**

Responses Due: December 6, 2019 at 4:00PM

The Santa Barbara Unified School District (“District”) is requesting proposals (“RFP”) from consulting firms or individuals (“Vendors”) for consulting services to assist the District in securing a contract for a power purchase agreement (“PPA”) for the development of a renewable energy infrastructure and its related systems. Through a well-developed PPA, the District seeks to create, install and operate an integrated system of solar energy panels, battery storage, and electrical vehicle charging stations across select District sites.

The purpose of this RFP is to obtain proposals that allow for the District to differentiate among Vendors and ascertain which firms will best fit the District’s needs based on, among other things, the Vendor’s track record, experience, protocols, philosophy, staffing, time commitment and cost in providing the required services. Vendors responding to this document should tailor their proposal for services to meet the District’s specific needs.

SUBMISSION OF PROPOSALS

Sealed proposals shall be delivered to Lucia Gonzalez, Planning Specialist, Santa Barbara Unified School District, 720 Santa Barbara Street, Santa Barbara, CA 93101, and must be received no later than December 6, 2019, at 4:00 p.m. The District reserves the right to reject any proposals that do not meet the submission requirements and to waive any irregularities in the proposal process.

Questions regarding this proposal shall be sent in writing to Steve Vizzolini, Santa Barbara Unified School District. Neither District staff nor members of the Board of Education are to be contacted by Vendors. All communication between proposing Vendors and the District shall be through the designated contact person in writing until the final selection and contract award has been made.

PROFILE OF THE SANTA BARBARA UNIFIED SCHOOL DISTRICT

The District provides elementary instruction in the City of Santa Barbara and secondary instruction in both the City and surrounding areas, stretching from Montecito to Goleta. The combined District serves approximately 15,000 students at 20 different sites. More detailed information regarding the District is available at www.sbunified.org.

1. Vendor Qualifications

- 1.1 In order to identify the most suitable Vendor, proposals will only be considered from Vendors that demonstrate the following qualifications:
 - 1.1.1 Knowledge of local and state codes applicable to the District's facilities is desired;
 - 1.1.2 Appropriate and valid State of California issued license(s) or registration(s) to practice in the area of discipline;
 - 1.1.3 Experience and knowledge related to energy efficiency systems and renewable projects generally and in a school district or other local agency context specifically;
 - 1.1.4 Experience and knowledge in identifying and securing funding for energy related projects, including a thorough understanding of utility company and governmental grant and incentive programs that could be of benefit to the District;
 - 1.1.5 Experience and knowledge in contract negotiations and key contract terms for PPAs and solar, battery and EV installation projects generally;
 - 1.1.6 Experience and knowledge of planning and design review services for energy related projects.
 - 1.1.7 Knowledge of the various PPA providers with whom the District might engage that have proven track records.
- 1.2 Vendors should identify any financial relationship with, or contractual benefits from, any future PPA provider, supplier or installer of renewable products.

2. Scope of Work

- 2.1 The District will expect the selected Vendor to provide professional, expert consulting services in areas including, but not limited to:
 - 2.1.1 Analysis of the District's site conditions, including a preliminary determination of the appropriate size and capacity for renewable installations at each identified site;
 - 2.1.2 Assistance with engineering, technical and other analyses required to transition to renewable energy and integrate renewable energy sources into the existing power grid;
 - 2.1.3 Analysis of the submitted proposals and recommendations to the District on the most qualified and cost-effective proposal;
 - 2.1.4 Assistance with the development and negotiation of PPA contract documents, including the negotiation of favorable escalation, buyout and contract length terms;
 - 2.1.5 Provision of project management services to coordinate and implement the PPA

(including through system(s) installation and operational trouble shooting phases, as applicable).

3. Proposal Submission Requirements

The Vendor should submit eight (8) complete copies of the proposals, as well as an electronic version in .pdf format. The written proposals must be in sealed envelopes bearing on the outside the name of the consulting firm and the title “PPA Consultant Proposal.” It is the sole responsibility of each Vendor to see that the proposal is received in proper time. Any proposal received after the scheduled closing time for receipt of proposals may be returned to the consulting firm unopened. The proposal must be signed by an official authorized to make representations on behalf of the Vendor.

4. Proposal Content Requirements

To enable the District to conduct a uniform review process of all responses and to meaningfully distinguish among Vendors, it is requested that each proposal contain the following detail:

4.1 Vendor Profile

- 4.1.1 An overview of the Vendor; street and email addresses, telephone and fax numbers; whether company is a local, regional, or national firm; areas of specialization.
- 4.1.2 The length of time the Vendor has been in business under the present name and structure, any other names under which the Vendor has done business, dates it operated under each name, and the locations at which it operated under each name.
- 4.1.3 An outline of the Vendor’s background, history and overall qualifications and experience in assisting in the development and implementation of renewable energy plans. Please provide information on the licenses(s) held, including the current status of those licenses, as well as proof of insurance.
- 4.1.4 The personnel to be used to complete the contract, the name of the Vendor’s representative who will be responsible for supervising this project, as well as staff who will be assigned direct work on this project. Details of their qualifications, education, and work experience and a narrative description of the work experience of each shall be included.
- 4.1.5 A description of the Vendor’s experience in securing renewable energy systems for government agencies or other entities.
- 4.1.6 A description of the Vendor’s experience in developing and negotiating PPAs and related contracts for the supply, installation and operation of solar or renewable projects.
- 4.1.7 A list of all renewable energy projects on which the Vendor consulted or was engaged in the past five (5) years. The list should include the following

information for each project:

- 4.1.7.1 Name of project;
- 4.1.7.2 Scope of project and description of services provided;
- 4.1.7.3 Contact person, telephone number and e-mail address;
- 4.1.7.4 Dollar value of each project;
- 4.1.7.5 Any litigation (including administrative actions) or disputes arising out of the project. If any, please describe details.
- 4.1.8 A minimum of three client references, including complete addresses and telephone numbers of each.
- 4.1.9 Evidence of financial stability.
- 4.1.10 Identify whether the Vendor has been involuntarily terminated under any engagement, had any claims asserted against it, or has been subject to litigation during the last five years (Vendor may refer to information provided under Section 4.1.7 above as necessary). To the extent this section applies to Vendor, please provide details of the termination, claims and/or litigation.

4.2 Proposed Work Plan

- 4.2.1 Give a detailed, comprehensive description of the approach to be used by the Vendor to accomplish the tasks detailed in the Scope of Work.
- 4.2.2 Give description of any unique or distinctive characteristics of the Vendor or the services offered by the Vendor that make the Vendor stand out in comparison to competitors.
- 4.2.3 Discuss the methods to be used by the Vendor to communicate and work with District administration and staff.
- 4.2.4 Describe the methods Vendor will employ and the process Vendor will follow to obtain comprehensive, thorough and reliable information about prospective providers so that the District officials will have the best information obtainable.

4.3 Fee Structure

- 4.3.1 Submit a proposal to perform the complete services requested in the Scope of Work.
- 4.3.2 Submit the hourly billing rates of all personnel to be assigned to the project. This information may be used to negotiate modifications to work contained in the Scope of Work.

- 4.3.3 Submit any other pricing/cost data necessary to carry out this project. Specify any reimbursable costs to be billed in addition to fees quoted.
- 4.3.4 Describe any limitations on the number of visits to District and/or Board/community meetings.

5. EVALUATION FACTORS

- 5.1 The evaluation of proposals and the selection of the Vendor will be based on the review and analysis of all factors which will include, but not be limited to, the following:
 - 5.1.1 The Vendor's detailed proposal for conducting the requested services.
 - 5.1.2 References of work done of a similar nature.
 - 5.1.3 The District's determination regarding the Vendor that will most effectively engage with the District and that will provide the highest level of service in developing, negotiating and implementing a PPA.
 - 5.1.4 The Vendor's commitment to spending the requisite amount of time assisting the District in pre-planning the PPA process and executing it, solicitation of providers, finalizing provider selection, negotiation of contract documents and execution and implementation of the PPA.
 - 5.1.5 All other factors that indicate the Vendor's capability and commitment to perform satisfactorily, including responsiveness and availability.
- 5.2 The District may negotiate final terms, conditions, and pricing of the agreement with the selected Vendor.

6. INTERVIEWS

In person interviews of invited potential Vendor(s) will be scheduled for December 12, 2019. Notification to Vendor(s) selected for an interview will be made on December 10, 2019. All key Vendor team members who will potentially be engaged by the District are expected to attend.

7. ADDITIONAL TERMS

- 7.1 Costs of preparation, duplication, and delivery of proposals will be borne by the Vendor.
- 7.2 A contract is not assignable by the Vendor either in whole or in part.
- 7.3 By responding to this RFP, the Vendor warrants that all applicable Federal and State statutes and regulations and/or local ordinances and District policies will

be complied with in connection with the delivery of the services offered.

- 7.4 Price, terms, and conditions of Vendor proposals are valid for a minimum of sixty (60) days, from date of proposal opening.
- 7.5 The Vendor shall maintain and shall require all subcontractors, if any, to take out and maintain:
 - 7.5.1 Public Liability Insurance for injuries to persons or property in an amount not less than \$1,000,000 per person and \$2,000,000 in the aggregate;
 - 7.5.2 Worker's Compensation Insurance in an amount adequate to cover all employees;
 - 7.5.3 Professional Liability Insurance (errors and omissions) in an amount not less than \$1,000,000;
 - 7.5.4 Automobile insurance with liability limit of not less than \$1,000,000.
- 7.6 The District reserves the right to reject all proposals.
- 7.7 By submitting a proposal, the Vendor agrees not to seek proposals submitted by competing Vendors.