

REQUEST FOR QUALIFICATIONS / PROPOSAL: (“RFQ/P”)

For

Proposition 39 Energy Planning & Management Services

The **Visions in Education** (“Charter”) is seeking Statements of Qualifications with Proposal (“Responses”) from interested, independent, established, and experienced Firms (“Firm”) to perform Proposition 39 – California Clean Energy Jobs Act Energy Planning & Management Services. The selection for services for this RFQ/P will be qualification based for best value. Responses shall be received no later than:

2:00pm on Thursday, September 13, 2018

Interested Firms are invited to submit their Response, in accordance with this RFQ/P to:

Tom Tafoya
Chief Operations Officer
Visions in Education
5030 El Camino Avenue
Carmichael, CA 95608
ttafoya@viedu.org

Questions regarding this RFQ/P may be directed to Tom Tafoya at the above address. Questions related to this RFQ/P will not be accepted unless they are submitted in writing by email and are received by **11:00am on Thursday, September 6, 2018**. Answers to all questions will be distributed via email to all Firms expressing an interest in submitting on this RFQ/P.

The Charter intends to use the responses to this RFQ/P to assist in the possible selection of one or more Firms for the Charter’s potential energy projects. The Charter will evaluate each Firm based on the information set forth in the Responses submitted, together with other information available to the Charter from any other sources. The Charter will, at its own discretion, select one or more Firms after receipt of Responses; the Charter also reserves the right to not select any Firm. The Charter may also request that one or more Firms participate in an interview process or the Charter may implement a combination of these and/or other methods for selection. This RFQ/P is solely a solicitation for Responses. Neither this RFQ/P, nor any Response to this RFQ/P shall be deemed or construed to: (i) create any contractual relationship between the Charter and any Firm; (ii) create any obligation for the Charter to enter into a contract with any Firm or other party; or (iii) serve as the basis for a claim for reimbursement for costs associated with submittal of any Response.

If the Charter selects a Firm for the Charter’s potential energy projects, the Charter shall have the right to negotiate any and all of the final terms and conditions of any agreement with the Firm and nothing in this RFQ/P or any Response shall be deemed or construed as a limitation of such rights.

The selected Firm will not be permitted to perform inspections, or construction work as a general contractor or subcontractor, and shall not be allowed to self-perform any trade work, nor contract with affiliates to perform such work.

1. DISTRICT BACKGROUND

- 1.1 The Visions in Education is located at 5030 El Camino Avenue, Carmichael, CA 95608 (37,730 SF). The Charter has an approved EEP for lighting, mechanical and solar measures. The approved EEP may need to be amended for scope, energy savings and project cost.
- 1.2 This building is not under DSA review but will require review and approvals with the County of Sacramento and other authorities having jurisdiction.
- 1.3 The Charter's approved EEP will be funded with the funding available through the Prop 39 program and possibly with some Charter augmentation.

2. MINIMUM REQUIREMENTS

- 2.1 The Charter intends to contract with a Firm that has the following mandatory minimum qualifications:
 - A. Experience in the successful analysis and development of energy efficiency measures including: benchmarking, auditing, savings calculations, project cost estimating, strategic planning, program management, project management, construction management, commissioning, training, and energy management for California K-12 public school districts.
 - B. Knowledge and understanding of the California Energy Commission's (CEC) Proposition 39: California Clean Energy Jobs Act - 2013 Program Implementation Guidelines and all applicable California Building Codes including current Title 24 Energy Code, CAL Green, Title 5, and Field Act.
 - C. Experience with the California Department of Education (CDE) and experience in securing all available services, grants, incentives, and financing available through Federal, State, local, and utility company programs.
 - D. Experience planning and implementing Program Implementation Plans for California K-12 public school districts including, scope, schedule and budget for concurrent projects on multiple sites with multiple funding sources over multiple years.
 - E. Proven ability to successfully plan and deliver projects for on schedule and within budget.
 - F. Free from conflicts of interest arising from financial or other personal relationships with the Charter and potential suppliers, constructors, financiers, or owners of related projects or products.

3. DESCRIPTION OF SERVICES

- 3.1 The Charter intends to engage a qualified Firm to perform all of the necessary Proposition 39 "energy planning activities" and related services. These services include without limitation: 1) evaluation of the approved energy expenditure plan; 2) completing and submitting an amendment to the approved energy expenditure plan and necessary follow-up including potential revisions to ensure approval by the CEC if needed; 3) assist with developing design/build documents for qualifications and proposal for project implementation; 4) assist with bid and award; 5) construction oversight as needed and project close out.

4. PROPOSAL SUBMISSION REQUIREMENTS

- 4.1 All materials submitted to the Charter in response to this RFQ/P shall remain the property of the Charter.
- 4.2 All responses must be typewritten, concise, straightforward, and must address each requirement and question in the order listed.
- 4.3 It is the intent for the fee negotiations to be completed prior to the Firm recommendation for award. See Section 4.7.F for Fee Proposal instructions.
- 4.4 Provide two (2) bond originals and (1) electronic copy in PDF format with bookmarks of the Response.
- 4.5 Responses must be in 8 1/2" x 11" format with a minimum font size of 11 point.
- 4.6 Responses are limited to no more than twenty-five (25) pages, excluding cover letter and resumes.
- 4.7 Response is to include the following:
 - A. Cover Letter:
 - (a) Include in the Cover Letter a brief statement of Firm's experience indicating the qualifications, background and qualities of the Firm, its personnel, and what will make the Firm uniquely qualified to provide the services.
 - (b) The cover letter shall indicate that the individual signed is authorized to bind the respondent to all statements and representations made therein and to represent the authenticity of the information presented.
 - B. Firm Information: Provide Firm Information including:
 - (a) Legal name and address of local office, including principal place of business if there are multiple locations.
 - (b) Firm's legal form of entity (sole proprietorship, partnership, corporation, joint venture, etc.) and state of incorporation or other organization. If Firm is a joint venture or partnership, identify all members of the joint venture or partnership and provide all information required pursuant to this paragraph for each member.
 - (c) If company is a subsidiary or affiliate of another company or companies, identify such other company or companies.
 - (d) Include the same information as above for any sub-consultants that the Firm intends to utilize for these Services.
 - C. Firm's Relevant Qualifications and Experience: Provide all of the following information, as applicable. Please mark "N/A" only if such information/experience is non-existent:
 - (a) Describe Firm's experience in the analysis and development of energy efficiency measures including facility benchmarking, energy audits, energy surveys, energy savings calculations, cost estimating, strategic planning, program management, project management, construction management, commissioning, training, and energy management for California K-12 public school districts.

- (b) Describe Firm's knowledge and understanding of the CEC's Proposition 39: California Clean Energy Jobs Act - 2013 Program Implementation Guidelines and all applicable California Building Codes including current Title 24 Energy Code, Title 5, and Field Act.
 - (c) Describe Firm's experience in securing all available services, grants, incentives, and financing available through Federal, State, local, and utility company programs.
 - (d) Describe Firm's experience planning, implementing including scope, schedule, and budget for concurrent projects on multiple sites, with multiple funding sources, over multiple years.
 - (e) Provide number and type of licensed California professionals on staff and available to support the Charter projects.
- D. Proposed Team: Provide all of the following information:
- (a) Define the role of each key personnel and outline his or her individual responsibilities.
 - (b) Indicate personnel who will serve as primary contact(s) for the Charter.
 - (c) Provide an organizational chart.
 - (d) Provide resumes, in the Appendix, of all proposed personnel who would be performing Services for the Charter.
- E. Proposed Services:
- (a) Describe Firm's approach to evaluate the Charter's facilities and methodology to determine which projects to include for the amended Energy Expenditure Plan (EEP).
 - (b) Include a detailed list of all services that are being proposed to provide to the Charter.
- F. Estimated Fee Proposal:
- (a) Submit an Estimated Fee Proposal in a separate sealed envelope, marked "Estimated Fee Proposal".
- G. Project Examples: Provide project examples related to similar services provided to public California K-12 school districts and/or Charter Schools including for each:
- (a) Name and contact information
 - (b) Exact role Firm performed for project
 - (c) Type of project
 - (d) Location of project
 - (e) Date installed and date deemed operational
 - (f) Project cost (includes construction cost and all applicable soft costs)
- H. References for California K-12 and Charter Schools. Include district name, address, contact name and title, phone number, and email address.

5. DISTRICT'S EVALUATION / SELECTION PROCESS

5.1 Schedule

A.	Monday, August 27, 2018	RFQ/P Released
B.	Thursday, September 6, 2018	Deadline to receive Questions
C.	Tuesday, September 11, 2018	Questions & Answers Released
D.	Thursday, September 13, 2018	RFQ/P Responses Due
E.	September 17 & 18, 2018	Interviews if needed
F.	September 19 – 21, 2018	Contract and Fee Negotiations
G.	Monday, September 24, 2018	Approval
H.	Tuesday, September 25, 2018	Notice to Proceed

5.2 The Charter intends to select one of the Firms – but reserves the right to select none, or more than one Firm – that best meets the Charter's need to perform the Services as described in this RFQ/P. From the Firm(s) that provide a Response to the Charter, the Charter may at its discretion, interview some or all of those Firms. One or more Firms may be selected and recommended to the Charter for approval.

5.3 The Firm will be selected based on qualifications and demonstrated competence that include relevant experience with public agencies and a proven successful record of accomplishment for these types of Services. The following factors are important for further consideration and evaluation:

- A. Ability to meet the minimum requirements outlined in Section 2;
- B. Completeness and quality of Response;
- C. Technical expertise/competence;
- D. References;
- E. Team experience;
- F. Recent success with similar energy efficiency systems;
- G. Proximity of offices and availability of qualified staff;
- H. Best value
- I. Approach in providing Services.