

**HILLSBOROUGH CITY SCHOOL DISTRICT**

**REQUEST FOR STATEMENT OF QUALIFICATIONS**  
**AND**  
**REQUEST FOR PROPOSAL**

**FOR**  
**Energy Services Design-Build Contractor**  
**For Proposition 39 Funded**  
**Energy Efficiency & Conservation**  
**Lighting Projects**

**RFQ/P # 17-01**

Prepared for:  
**Hillsborough City School District**  
**300 El Cerrito Avenue**  
**Hillsborough, CA 94010**

Prepared by:  
**Capital Program Management, Inc.**  
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**February 10, 2017**

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Exhibit “A” ENERGY SERVICES AGREEMENT

Exhibit “B” SCOPE OF WORK

## **Section 1: Overview and Objective**

HILLSBOROUGH CITY SCHOOL DISTRICT (“LEA”) is located at 300 El Cerrito Avenue, Hillsborough, California 94010 and serves more than 1,400 students. The District has four school sites and one District office.

The DISTRICT had an energy study performed by Capital Engineering Consultants, Inc. (CECI) and Capital Program Management (CPM) in 2014. From this study, an Energy Expenditure Plan (EEP) was prepared and submitted to the California Energy Commission (CEC) for review. The EEP was approved in May, 2016. The DISTRICT would like to implement the interior and exterior lighting projects with LED technology and occupancy controls.

Through this Request for Statement of Qualifications and Request for Proposal (RFQ/P), the DISTRICT is seeking qualifications and a proposal in order to identify and select the most qualified Energy Services design-build contractor (“CONTRACTOR”) for design and implementation of projects at the five District sites within the DISTRICT (collectively, the “Project”) based on the designated Scope of Work attached hereto as Exhibit “B”. For the Project, the CONTRACTOR will be responsible for ensuring compliance with all aspects of the California The Clean Energy Jobs Act (Proposition 39), as well as Division of the State Architect processes and regulations, Office of Public School Construction processes, California Department of Education reporting and the 2016 Building Energy Efficiency Standards for Residential and Non-Residential Buildings (Title 24).

It is the DISTRICT’s intent to partner with the selected CONTRACTOR to negotiate and execute an Energy Services Agreement based on the criteria provided in this response to design and construct the PROJECTS and provide a guarantee of savings as outlined in Exhibit “A”. The DISTRICT’S Board ultimately makes all decisions on the strategic direction and budgetary allocations for all energy services programs. Therefore, all initiatives and plans laid out will require ultimate approval of the Board. The DISTRICT reserves the right at its sole discretion to not move forward with a project even after selecting a Company through this RFQ/P. Each responding Company to this RFQ/P should be prepared and equipped to provide full service to the DISTRICT in an expeditious and timely manner and on relatively short notice so as to enable the DISTRICT to meet critical time deadlines and schedules.

## **Section 2: Solicitation Process**

- 2.1 Responses to this RFQ/P must be submitted in writing and signed by an authorized officer of the respondent. The DISTRICT reserves the right to deem any proposal as non-responsive and to give it no further consideration. The DISTRICT also reserves the right to request clarification and/or additional information from any respondent.
- 2.2 The DISTRICT also reserves the right to:
  - Cancel the Request for Qualifications/Proposals (RFQ/P)
  - Modify any requirements contained within the RFQ/P and request a revised response from all respondents.
  - Establish other evaluation criteria determined to be in the best interest of the DISTRICT.
- 2.3 Responses to the RFQ/P are due no later than Thursday, March 9, 2017 at 2:00 p.m. Responses submitted after this date and time cannot be accepted, and responses that are incomplete or do not conform to the requirements of this RFQ/P will not be considered. It is

the responsibility of the Proposer to submit its Response by the stated deadline. No oral, telegraphic, facsimile or telephone statements will be considered. Responses received after the deadline will not be considered. Responses shall consist of one (1) signed original and two (2) printed copies and a PDF file saved on compact disc or USB thumb-drive. Responses shall be delivered to:

Anthony Ranii, Superintendent  
Hillsborough City School District  
300 El Cerrito Avenue,  
Hillsborough, CA 94010

2.4 Responses will be evaluated per Section 8: DISTRICT's Evaluation & Selection Process and respondents will be notified of results.

**Section 3: Communications Regarding This RFP**

3.1 Questions and requests for clarification on this Request for Qualifications / Proposal must be submitted in writing via e-mail with subject line: HCSO Energy Services RFQ/P # 17-01 by Tuesday, February 28, 2017 at 2:00 p.m. No inquiries after this date and time nor verbal inquiries will be addressed.

3.2 Communication with the DISTRICT, the Selection Committee, or others associated with the RFQ/P with regard to this Request for Qualifications / Proposal is prohibited. All questions related to this RFQ/P shall be directed to:

Sharon Thomas, Program Manager  
Capital Program Management, Inc.  
1851 Heritage Lane, Suite 210  
Sacramento, CA 95815  
[sharont@capitalpm.com](mailto:sharont@capitalpm.com)

**Section 4: Proposed Program Development Timeline**

4.1 The program development is expected to progress according to the following timeline, but the DISTRICT reserves the right to change key dates and actions as the need arises:

**RFQ/P Timeline**

Task	Date/Time
<b>Mandatory Pre-Bid Conference and Site Visit</b> Location: Hillsborough City School District 300 El Cerrito Avenue, Hillsborough, CA 94010	Wednesday, February 22, 2017 at 2:00 p.m.
<b>Deadline for submitting questions</b>	Tuesday, February 28, 2017 at 2:00 p.m.
<b>Last Addendum Issued</b>	Thursday, March 2, 2017
<b>Deadline for submission of proposals</b>	Thursday, March 9, 2017 at 2:00 p.m.
<b>Selection of the Contractor (NOITA) on or about</b>	Wednesday, March 15, 2017

### RFQ/P Timeline (Continued)

Task	Date/Time
Anticipated approval of contract on or about	Tuesday, April 18, 2017
Issue Notice to Proceed on or about	Wednesday, April 19, 2017
Construction Start	Monday, June 12, 2017
Construction Finish	Friday, August 4, 2017

NOTE: The dates put forth in this timeline represent a tentative schedule of events. The DISTRICT reserves the right to modify these dates at any time, with appropriate notice to prospective Contractors.

#### Section 5: Minimum Requirements

- 5.1 The selection criteria for CONTRACTOR will be based on the total score with consideration given to company background, office location, experience, and references. Following are the mandatory minimum qualifications:
- A. Experience in energy conservation projects design and implementation.
  - 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 Division of the State Architect (DSA).
  - D. Proven ability to successfully deliver design-build energy conservation projects for California K-12 public school districts on schedule and within budget.
  - E. Free from conflicts of interest arising from financial or other personal relationships with the District and other potential suppliers, constructors, financiers, or owners of related projects or products.
  - F. Familiarity with utility rebate programs.

#### Section 6: Submittal Requirements

- 6.1 All responses must be typewritten, concise, straightforward, and must address each requirement and question in the order listed. Provide references to actual examples, experiences, and/or case studies whenever possible.
- 6.2 Provide one (1) original, two (2) copies on bond, and (1) electronic copy in PDF format with bookmarks of the Response.
- 6.3 Responses must be in 8 1/2" x 11" format with a minimum font size of 11 point.
- 6.4 Responses are limited to no more than twenty-five (25) pages, not including cover page(s), table of contents, cover letter and resumes.
- 6.5 Response is to include the following:

A. Cover Letter:

- (a) Each respondent's proposal should include a cover letter signed by a party authorized to sign binding agreements for the project described by this RFQ/P. The cover letter shall acknowledge that the cost and pricing provided in the proposal is in response to the scope of work described in Exhibit "B" and will be used in the Energy Savings Performance Agreement.
- (b) Include in the Cover Letter a brief statement of Company's experience indicating the qualifications, background and qualities of the Company, its personnel, and what will make the Company uniquely qualified to provide the services.
- (c) The letter shall clearly indicate that the respondent has carefully read all the provisions in the RFQ/P and meets the minimum requirements.

B. Company Information: Provide Company Information including:

- (a) Legal name and address of local office, including principal place of business if there are multiple locations.
- (b) Company's legal form of entity (sole proprietorship, partnership, corporation, joint venture, etc.) and state of incorporation or other organization. If Company 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) Company background to include number of employees, years in business, years' experience with K-12 schools, types of licenses held and license numbers, primary business types, market areas and website address. Identify contact person including phones, fax and email.
- (d) Demonstrate your Company's financial capacity to successfully carry out this project. Include company bond rating, bond limits, and evidence of insurability.
- (e) Number of employees, focusing on building efficiency in California (full time employees, excluding subcontractors or consultants).

C. Company's Relevant Qualifications and Experience:

- (a) Provide references and brief descriptions for three (3) of the Company's similar energy conservation projects, preferably for California K-12 public school districts.
- (b) Describe Company'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 Company's experience with DSA.

- (d) Provide number and type of licensed California professionals on staff and available to support DISTRICT's projects.

D. Proposed Services:

(a) Construction Experience

- 1) Describe your process for construction, project management, inspection and project close out.
- 2) Describe Company's approach in implementing the approved design and working on occupied school campuses. Be specific about your methods of coordination and internal quality control.
- 3) Describe Firm's ability to perform and keep projects within defined scope and budgets.

(b) Warranty and Service

- 1) Describe how warranty issues are handled.
- 2) Describe your ability to perform service and maintenance on either an as-needed or on-going basis.

E. Cost and Pricing:

- (a) Each respondent shall propose the cost to design and build the scope of work as described in Exhibit "B".
- (b) Provide a statement of equipment and material proposed for implementation of the Performance Specifications as described in Exhibit "B" including manufacturer's technical specifications and performance data.
- (c) Provide a statement expressing the features of the proposed energy conservation measures and the value proposition of such features.
- (d) If subcontractor's will be engaged for work, respondent to submit list of subcontractor's, license number, & DIR registration number.

F. Energy Services Agreement Acknowledgement:

(a) Form of Agreement

- 1) The DISTRICT shall require use of a contract form as attached hereto as Exhibit "A", or substantially similar, subject to negotiation of elements acceptable to DISTRICT, in its sole discretion. Submission of a Proposal indicates substantial acceptance of the attached form as the basis of contract.

- (b) Exceptions
  - 1) Provide a statement accepting the terms of this sample contract form or noting specific exceptions taken to any of the terms and conditions specified in the Energy Services Agreement.

## **Section 7: General Compliance**

7.1 The following will be required if the Company is selected to provide energy conservation services:

- A. Dept. of Industrial Relations (DIR) Registration for Prevailing Wage Rate Compliance: Provide statement that your firm and your firm's subcontractors are registered with the DIR, compliant with the requirements of SB 854, and qualified to perform public work pursuant to Section 1725.5 of the CA Labor Code. Note that in accordance SB 854, the District is required to submit PWC-100 form to the DIR.
- B. Insurance: Company must have the ability to secure insurance coverage and provide proof of insurance, as described below:
  - (a) General Liability insurance One Million Dollars (\$1,000,000) combined single limit per occurrence and Two Million Dollars (\$2,000,000) general aggregate for bodily injury, personal injury and property damage in the form of Comprehensive General Liability and Contractual Liability, including Products Liability and Completed Operations coverage.
  - (b) Automobile Liability Insurance One Million Dollars (\$1,000,000) combined single limit occurrence for any automobile that shall protect the Contractor and the DISTRICT from all claims of bodily injury, property damage, personal injury, death, and medical payments arising performing any portion of the Services by Contractor.
  - (c) Professional liability insurance, for errors and omissions as appropriate to profession of engineer designing system, including contractual liability, with limits of \$1,000,000 per claim.
  - (d) Workers' Compensation Insurance shall be maintained, in accordance with provisions of the California Labor Code, adequate to protect any person, Company, or corporation employed directly or indirectly in connection with the work of the Company from claims under Workers' Compensation Acts which may arise for operations, whether such operations be by any person, Company, or corporation, employed directly or indirectly by the Company upon or in connection with the work.
- C. Fingerprinting Requirement: Unless exempted, the Company shall be required to comply with the requirements of Education Code Section 45125.1 and 45125.2 with respect to fingerprinting of employees who may have contact with students within the District. The Company shall also ensure that its subcontractors on a project also comply with these requirements.



- D. Laws: Contractor will be required to comply with all relevant federal, state, and local statutes, regulations, ordinances, rules, orders, and other laws in any Contract with the LEA, including but not limited to the following, as appropriate:
- (a) Division 2, part 7, chapter 1 (commencing with section 1720) of the California Labor Code, which requires payment of prevailing wages and regulates working hours.
  - (b) Sections 11135 and 12940 of the California Government Code, which prohibit employment discrimination on the basis of race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, marital status, or sex. Workers' safety laws, including but not limited to regulations promulgated by Cal-OSHA.
  - (c) Program Implementation Guidelines of Proposition 39.
  - (d) Contractor is expected to be inclusive in any proposal obtaining all necessary permits, including but not limited to permits required by the State of California; shall pay all taxes and regulatory fees.
  - (e) All products and components incorporated into planning, design or construction must conform to the following standards and rating methodologies and relevant building codes:
  - (f) All equipment provided, where applicable must meet the equipment certification and eligibility requirements of the associated Rebate or grant funding program.
  - (g) Occupational Health and Safety Administration (OSHA) directives.
  - (h) All design and construction work must comply with California's Division of State Architect (DSA) requirements.

## **Section 8: District's Evaluation / Selection Process**

- 8.1 The evaluation shall be a process in which all determinations shall be made within the sole discretion of the DISTRICT. The DISTRICT shall seat a review committee ("Committee") of not less than three DISTRICT personnel and/or consultants determined by the LEA.
- 8.2 Respondents are solely responsible for the clarity and completeness of their Proposal, including, without limitation, the expression of submittal requirements outlined in Section 6. Respondents shall assume that the DISTRICT does not possess specific expertise in energy conservation measures and respondent shall make all information deemed relevant clear and concise without reliance upon any assumptions or inferences that the DISTRICT may or may not draw from the Proposal.
- 8.3 The Company will be selected based on qualifications and demonstrated competence that include relevant experience with public school districts, DSA and a proven

successful track record for these types of Services. The following factors are important for further consideration and evaluation:

- A. Completeness and quality of Response;
- B. Company's information and background;
- C. Technical expertise/competence;
- D. References;
- E. Team experience;
- F. Recent success with similar energy conservation services;
- G. Proximity of offices and availability of qualified staff;
- H. Best Value;
- I. Contract Requirements;
- J. Approach in providing Services.

END OF SECTION