

COVINA-VALLEY UNIFIED SCHOOL DISTRICT



REQUEST FOR PROPOSAL

ENERGY PERFORMANCE CONTRACTING SERVICES

RFP NO. 15-16-105

REQUEST FOR PROPOSAL SUBMITTAL DEADLINE

NOVEMBER 6, 2015 AT 11:00AM

SUBMIT TO:

COVINA-VALLEY UNIFIED SCHOOL DISTRICT
Purchasing Office
519 E. BADILLO STREET, COVINA, CA 91723
(626) 974-7600 ext. 2128
Attention: Robin Harbert

REQUEST FOR PROPOSALS (RFP) NO. 15-16-105

Energy Performance Contracting Services

NOTICE IS HEREBY GIVEN that the Covina-Valley Unified School District (C-VUSD) acting by and through its Governing Board, is soliciting and issuing this Request for Proposals (RFP) and will receive up to, but no later than **[November 6, 2015 at 11:00AM]** proposals from interested, established and experienced Firms ("Firms").

The Covina-Valley Unified School District (C-VUSD) is a public school district located in Los Angeles County, California. C-VUSD serves approximately 12,000 K-12 students as well as over 8,000 Adult Education students at (17) seventeen K-12 schools, a Children's Center, (6) six Adult Education schools. The District's other facilities include District Offices and Support Buildings.

The Covina-Valley Unified School District ("District") purpose for this Request For Proposal ("*RFP*") is to solicit proposals from qualified vendors to provide a solution to meet the objective stated in the RFP. The solution is subject to all terms, conditions, and specifications in this RFP. All proposal(s) submitted will be reviewed and chosen based on the evaluation criteria included in the proposal documents. The objective is to provide qualified vendors with the necessary information and specifications to allow them to respond with a solution that they determine best meets those requirements.

RESPONSE DEADLINE FOR PROPOSALS: November 6, 2015

Sealed proposals must be delivered to the CVUSD Purchasing Department on or before **11:00 a.m., on the 6th Day of November, 2015**. All proposals shall be submitted separately and sealed in a package plainly marked with the appropriate title for each proposal. The Board reserves the right to reject any or all proposals and to waive irregularities in any proposals received. No vendor may withdraw his proposal for a period of Ninety (**90**) calendar days after the date set for the receipt of proposals. Refer to the formal bid documents and specifications for additional information, terms, and conditions.

In accordance with School District Procurement Rules in the California Administration Code promulgated by the State Board of Education pursuant to CA-4217, the Covina-Valley Unified School District is requesting sealed proposals for Energy Performance Contracting Services.

I. RFP PROCESS

The District intends to select a qualified provider for the development, implementation and monitoring of an energy efficiency program. Upon award, the District will enter into a professional services agreement for a Prop 39 planning study. Prior to the District entering into a contractual agreement for project implementation, an agreed upon scope of work and project pricing will require separate board approval.

The awarded respondent shall identify funding sources including utility rebates, low rate municipal lease financing, Prop 39 funds, grants and other applicable incentives.

In addition to project development and project implementation, it is the district's intent to award a respondent to manage the associated Prop 39 grant application process and comply with any and all applicable pre-installation verification, benchmarking, project reporting and post-implementation Measurement & Verification (M&V) requirements as defined by the California

Energy Commission (CEC).

The District, at its sole discretion, may select the awarded respondent for subsequent energy conservation phases.

The District reserves the right to reject any or all bidders.

II. PROJECT GOALS

The District's ultimate goal is to utilize financial savings realized from more efficient buildings towards other upgrades and programs that enhance student learning. Respondents shall support the District's goal by developing, implementing, and monitoring a turn-key energy savings program that accomplishes the following:

- Achieves persistent long-term cost savings through reduced energy usage
- Upgrades old and/or inefficient systems
- Maintains consistent and reasonable levels of occupant comfort
- Maintains building functionality and compatibility with existing equipment
- Improves utilization of technology to achieve optimum performance and savings
- Minimizes financial and technical risk to the Owner
- Provides training to employees on maintenance and repair of equipment and controls
- Provides comprehensive funding solutions
- Promotes private sector job creation

III. MINIMUM REQUIREMENTS

Respondents must meet the following minimum requirements to participate in the District's RFP process:

- Accredited by the National Association of Energy Services Companies (NAESCO) or included on the U.S. Department of Energy's (DOE) Qualified List of Energy Service Companies
- Five (5) California K-12 customer references for which the respondent provided turn-key responsibility of similar energy performance contracting services in the past three years
- Active G.C. license in California
- DIR Contractor Registration
- Minimum of \$10 Million in bonding capacity for a single project
- **Insurance Requirements:** The District will require that the selected Firm have insurance in effect at all times during the term of this agreement and that the Firm provide certificates of insurance indicating the District, its employees, agents, and consultants as additional insured, and copies of policies as evidence that the insurance is in effect. The applicable insurance requirements and limits will be established by the District during negotiations with the Firm.
- **Other Contractual Requirements:** The contract(s) 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: (i) compliance with District policies, such as those prohibiting use of alcohol and illegal drugs on District property; and (ii) fingerprinting and background checks in accordance with California Department of Justice (DOJ) procedures.

IV. SCOPE OF WORK

Upon award, the selected respondent will be required to perform site walks at District facilities to evaluate facility infrastructure improvements as part of an energy master plan for the District.

Specifically, the awarded respondent will evaluate and propose applicable energy conservation measures (ECMs) including but not limited to:

- Heating Ventilation & Air Conditioning (HVAC) system optimization, retrofit, upgrade or replacement
- Interior and exterior lighting retrofit or replacement
- Building Automation System (BAS) installation, upgrade, or expansion leveraging existing technology
- Building envelope upgrades
- Other infrastructure improvements
- Other training, remote monitoring services, and on-going support services that will ensure objectives of program are met over the term of the agreement

The selected respondent will then implement an agreed upon scope of work. All proposed ECM's must be provided on a turn-key basis including all necessary permits, engineering, Division of the State Architect (DSA) requirements, delivery, installation, commissioning, training, warranty service, and CEC compliance.

After the scope of work has been fully implemented, the selected respondent will provide M&V services to monitor post-retrofit utility usage and track energy savings. M&V services are to be provided in accordance CEC guidelines for project tracking and reporting.

V. PROPOSED TIMELINE

October 22, 2015	RFP Released
October 29, 2015	Questions Due
November 2, 2015	Questions & Answers Released
November 6, 2015	RFP Responses Due
January 19, 2016	Energy Partner Awarded
March 31, 2016	ASHRAE Level II Audit Completed
April 22, 2016	Energy Expenditure Plan Submission
Summer 2016	Project Implementation

VI. PROPOSAL INSTRUCTIONS

Ink or Typewritten

All information, prices, notations, signatures, and corrections must be in ink or typewritten. Mistakes may be crossed out and corrections typed or printed adjacent to the mistake and initialed in ink by the person signing the proposal.

Signature Verification

To be considered for award, each proposal must be signed by a legally authorized

representative of your company.

Proposal Documents

Failure to completely execute and submit the required documents before the bid submittal deadlines will render a proposal non-responsive.

Informed Respondent

It will be your responsibility to be fully informed as to the conditions, requirements, and specifications before submitting proposals. Failure to do so will be at your firm's own risk and relief cannot be secured on the plea of error.

VII. PROPOSAL SUBMISSION REQUIREMENTS

One (1) original and (1) electronic copy of the proposal shall be submitted in the format contained in the RFP. The original proposal shall be submitted in a three (3) ring loose-leaf binders or report cover. It is critical that all responses follow the same format to allow equal and fair evaluation of each response. Responses should be limited to thirty-five (35) pages (not including table of contents, cover letter, sample contracts/agreements or M&V report) and include the following:

SECTION TABS

Proposals should be divided by tab sections according to items in the index. This will assist the evaluating team in identifying items and information submitted with the proposal.

TABLE OF CONTENTS

The table of contents of the proposal should include a clear and complete identification of the materials submitted by tab section and page number.

COVER LETTER

A signed letter of interest (no more than two (2) pages), stating the respondent's interest and qualifications in providing the services as outlined in the RFP. Please describe how the respondent meets the minimum requirements as described in section III of the RFP.

Tab 1: Background, Financial Capacity & Management Structure

Provide general information on the respondent including: a brief history of the firm, key differentiating factors and areas of expertise, length of time performing services, and location of California offices.

Provide a statement of the respondent's financial capacity and capability to perform to the terms of this solicitation request.

Provide a list of the personnel to be used on this project and describe their qualifications and experience with projects of a similar size and scope. Describe the management structure of the responding firm and include an organizational chart.

Tab 2: Energy Project References

Provide detailed project history for a minimum of five (5) California K-12 districts for which the respondent provided turn-key responsibility of similar energy performance contracting services

in the past three years. Describe the scope of work of the project indicating start/completion date, services and equipment provided, project size, total project savings, and funding sources.

The District intends to utilize pre-retrofit utility bill versus post-retrofit utility bill comparisons (i.e. International Performance Measurement & Verification Protocol (IPMVP) Option C) to validate energy savings. Option C is the IPMVP M&V approach that most closely follows CEC Prop 39 guidelines for project tracking and reporting.

Submit an actual M&V report utilizing IPMVP Option C for one of the five (5) references.

Tab 3: Project Approach

- a) Provide a description of the respondent's approach to performing audits, and identifying improvement measures.
- b) Provide a description of the respondent's approach to managing the project implementation and procedures for minimizing occupant disruptions.
- c) Describe the steps taken by the respondent during and after the turnover process to ensure successful project implementation.
- d) Describe training program available for district employees.

Tab 4: Savings

- a) Describe the respondent's approach to projecting and proving energy savings.
- b) Describe the methodology, formulas and reporting of the savings and the associated IPMVP option used to quantify savings.
- c) Provide a description of monitoring services after installation to ensure continued savings.

Tab 5: Additional Benefits and Value Added Elements

Please describe any additional benefits that may result from ECM implementation and the respondent's added value elements in providing products/services for energy projects.

Tab 6: Contracts & Forms

Provide sample contracts for the planning study, project installation, Measurement & Verification, and terms and conditions. Include completed pricing proposal form and signed addenda.

VIII. PROPOSAL EVALUATION CRITERIA

The District will evaluate qualifications based on the scoring criteria outlined in this section. Respondents who are not actively engaged in providing services of the nature proposed in their response to the RFP and/or who cannot clearly demonstrate to the satisfaction of the District their ability to satisfactorily perform the work in accordance with the RFP requirements will not be considered. Respondents who do not meet the minimum requirements will not be considered.

The District shall be the sole judge of the qualifications and services to be offered and its decision shall be final. Discussions may be conducted with respondents who submit qualifications determined to be reasonably acceptable of being selected for award:

Scoring Criteria

- a) **Background:** ie. qualifications, experience, resources, financial solvency. (20 points)
- b) **Project Team & Management Structure:** ie. amount of work self-performed, strength of proposed team, trainers, and management structure. (25 points)
- c) **Project History & References:** ie. relevant past project experience. (20 points)
- d) **Project Approach:** ie. approach to audits, project management, training, etc. (25 points)
- e) **Additional Benefits & Added Value:** ie. additional benefits resulting from ECM implementation and respondent's added value elements. (10 points)
- f) **Savings:** ie. savings approach, Measurement & Verification practices, etc. (35 points)
- g) **Contracts & Forms:** ie. sample contracts, terms & conditions & completed pricing proposal (60 points)
- h) **Response:** responsiveness and compliance with the requirements of the proposal. (5 points)

Total Maximum Point Valuation: 200

IX. REQUEST FOR INFORMATION (RFI) AND/OR CLARIFICATION

Request for information, regarding this proposal, must be submitted in writing and faxed to the attention of: **Robin Harbert** at (626) 974-7032 or via email to **rharbert@cvusd.k12.ca.us** on or before 4:00 P. M. October 29, 2015. There will be no response to questions received after the deadline. The Purchasing Department will not be responsible for RFI's sent to the wrong department, nor will it be the responsibility of the receiving department to forward your request to the Purchasing Department. All RFI's will be responded to in the form of an Addendum within the timeframe indicated in the timeline.

X. PREVAILING WAGES & DAVIS BACON WAGES

The District has obtained from the Director of the Department of Industrial Relations the general prevailing rate of per diem wages and the general prevailing rate for holiday and overtime work in the locality in which the work is to be performed for each craft, classification or type of work needed to execute the contract. These per diem rates, including holidays and overtime work, as well as employer payments for health and welfare, pension, vacation, and similar purposes, are on file at the District, and are also available from the Director of the Department of Industrial Relations. Pursuant to California Labor Code Sections 1720 et seq., it shall be mandatory upon the Contractor to whom the contract is awarded, and upon any subcontractor under such Contractor, to pay not less than the said specified rates to all workers employed by them in the execution of the contract and to comply with the District's Labor Compliance Program. In accordance with 1773.2 of the California Labor Code, the Contractor shall post a copy of the determination of prevailing rate of wages at each job site.

Davis Bacon Act – The Contractor and/or Subcontractor(s) will be required to pay the higher prevailing wage between the State Prevailing Wage Determination and the Davis Bacon Wage Determination for Federal funded projects. Reference the Wage Determination Online.Gov website: <http://www.wdol.gov> for more information. The District does not intend to use Federal Funds on this project.

XI. CERTIFIED PAYROLL RECORDS REQUIRED

- (a) The Contractor and each subcontractor shall maintain Certified Payroll and basic records required under the Labor Code and applicable Industrial Welfare Commission and shall preserve them for a period of three (3) years thereafter for all trade workers working on District project for submittal to the District at times designated in the contract or within ten (10) days upon request. The Contractor shall be responsible for all submittal of payroll records of all its subcontractors. All Certified Payroll Records shall be accompanied by a statement of compliance signed by the Contractor or each subcontractor indicating that the payroll records are correct and complete, that the wage rates contained therein are not less than those determined by the Director of the employee conform with the work performed.
- (b) **Certified Payroll Records must be submitted electronically to the DIR website.**
- (c) In accordance with the California Labor Code Section 1776 (g), if the Contractor fails to comply within the ten (10) day period, he or she shall, as a penalty to the State or Political Subdivision on whose behalf the contract is made or awarded, forfeit twenty-five dollars (\$25) for each calendar day, or portion thereof, for each worker until strict compliance is effectuated.

XII. CALIFORNIA SENATE BILL 854-PUBLIC WORKS CONTRACTOR REGISTRATION

Senate Bill 854, signed into law June 20, 2014, became effectively immediately. It established a new public works contractor registration program which will collect fees to fund compliance monitoring and enforcement, determine prevailing wage and public works coverage, and hear enforcement appeals.

All contractors and subcontractors intending to bid or perform work on public works projects will be required to register, and annually renew, online for the program. The cost to register for the program is currently \$300.00 and is non-refundable.

Contractors or subcontractors submitting bids must be registered. The requirement to use only registered contractors and subcontractors on public works projects, greater than \$1,000, applies to all projects awarded on or after April 1, 2015. No bid can be accepted nor any contract or subcontract entered into nor purchase order issued without proof that the contractor or subcontractor is registered.

Public works refers to construction, alteration, demolition, installation, or repair work (including maintenance) done under contract and paid by public funds. For a more detailed explanation of public works projects, refer to California Labor Code 1720 -1720.6.

Please ensure you are registered with the DIR. The awarded contractor must be registered if a purchase order is generated for the awarded public works services.

More information can be found at The Department of Industrial Relations website; <http://www.dir.ca.gov/Public-Works/PublicWorks.html>.

NOTE: Faxed copies of the Proposal Form or any portion of this bid will not be accepted.

NONCOLLUSION DECLARATION

TO BE EXECUTED BY BIDDER AND SUBMITTED WITH BID

The undersigned declares:

I am the _____ [Title] of _____ [Firm],
the party making the foregoing bid.

The bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or to refrain from bidding. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder. All statements contained in the bid are true. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof, to effectuate a collusive or sham bid and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a bidder that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder.

In signing below, bidder covenants that it has complied with the signature requirements described in Section 4 of the Information for Bidders.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on _____, 20____ [Date],
at _____ [City], _____ [State].

Name of Contractor (Print or Type)

Signature

Signature

Print Name

Print Name

Title

Title

PRICING PROPOSAL

RFP 15-16-105 Energy Performance Contracting Services

Pursuant to and in compliance with your Notice Requesting Proposals and all other documents relating thereto, the undersigned respondent, having familiarized himself with the terms and conditions of the proposal documents, hereby proposed and agrees to perform the work to be done and to provide all labor and materials necessary to perform the work.

Name of Respondent: _____

ESCO MARKUP FEES:

If selected to implement energy conservation measures (ECMs) eligible for Prop 39 funding and/or any additional ECMs, the above respondent will assess the following overhead and profit markup percentages:

Overhead % _____

Profit % _____

ACKNOWLEDGEMENT OF AMENDMENTS:

The respondent acknowledges receipt of amendments to RFP 15-16-105

Amendment Number						Initial Here
Date						

Certification By Bidder:

I hereby certify that I am able to commit the firm to the proposal submitted.

Company Name

Street Name

City State Zip Code

Authorized Signature

Print Name Date

Title

If you are submitting a proposal as a corporation, please submit your corporate seal here:

Note: If FIRM is a corporation the legal name of the corporation shall be set forth with the signature of authorized officers or agents and the document shall bear the corporate seal: if bidder is a partnership, the true name of the firm shall be set forth above together with the signature of the partner or partners authorized to sign contract on behalf of the partnership: and if bidder is an individual his signature shall be placed above.