

**Huntington Beach City School District**

**Request for Qualifications**

**For**

**Energy Efficiency, Clean On-Site Energy Generation and Facilities  
Modernization Program**

**Huntington Beach City School District  
20451 Cramer Lane  
Huntington Beach, CA 92646**

**Jon M. Archibald  
Assistant Superintendent, Administrative Services  
(714) 378-2050  
jarchibald@hbcasd.us**

**Proposals are due by:**

**May 6, 2014  
2:00 PM Pacific Daylight Time (PDT)**

**Huntington Beach City School District**

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Date: April 14, 2014

## **Huntington Beach City School District**

### **REQUEST FOR QUALIFICATIONS for Energy Efficiency, Clean On-Site Generation and Facilities Modernization Program**

#### **I. INTRODUCTION**

This solicitation is a Request for Qualifications (RFQ). The purpose is to solicit proposals from Energy Services Companies (ESCOs) to identify, design, install, maintain, and monitor a comprehensive energy efficiency, renewable energy and facilities modernization program to be funded by the approved annual allocations under Proposition 39. This program includes the services listed in this request pursuant to the provisions of California law. For the purpose of this RFQ, “ESCO” refers to any entity that is qualified to provide a turnkey energy program that includes the services listed in this request and meets the California Energy Performance Contracting Requirements. The DISTRICT intends to select the best qualified ESCO to perform the objectives stated within this document.

Qualified ESCOs interested in providing the specified services should respond in writing to the Huntington Beach City School District (DISTRICT). Final selection will be made in accordance with the policies and administrative directives of the DISTRICT and other statutory provisions.

#### **II. DISTRICT BACKGROUND**

The DISTRICT is located in Orange County and serves the residents of the cities of Huntington Beach and Fountain Valley. The DISTRICT currently operates 7 elementary schools, and 2 middle schools, and 1 District Office.

The DISTRICT’s mission is to support the academic and personal development of every student so that each student becomes a responsible, well-rounded individual who achieves success and fulfillment in a global environment. Currently, the DISTRICT’s top focus areas are energy cost savings and improved educational environments and the DISTRICT seeks an energy partner that will help address these.

The DISTRICT proposes to address as many energy efficiency, renewable energy opportunities and infrastructure upgrades as practical in its facilities. Therefore, the DISTRICT intends to implement a design-build program that will provide sustained efficiencies and energy cost savings. To the extent consistent with this intention, the DISTRICT may upgrade outdated and obsolete building equipment and perform operational improvements through the program.

The DISTRICT anticipates major reductions in annual energy, utility and operational costs, through the implementation of this program. The ESCO will provide a written guarantee of energy production and assist DISTRICT to complete the documentation needed under the Proposition 39 guidelines issued by the California Energy Commission.

### **III. SERVICES REQUESTED**

The DISTRICT requests the following services to be incorporated into a comprehensive program:

1. Energy efficiency
2. Clean on-site energy generation
3. Facilities and infrastructure upgrades
4. Ongoing monitoring, verification and reporting
5. Performance guarantee

ESCOs should demonstrate a tiered approach to reducing energy usage by implementing measures in this order:

1. Energy efficiency and energy conservation measures (ECMs)
2. Clean on-site generation
3. Nonrenewable energy generation projects

Such ECM components and applications may include lighting, space heating, ventilation, air-conditioning, building envelope, heat recovery, energy and water management systems, environmental system controls, motors, domestic water heating, fuel switching, air quality or other energy improvements or equipment including improvements and process equipment.

All equipment provided by the ESCO for this program will have a history of successful operation in similar installations and shall be in new and unused condition.

### **IV. ESCO CAPABILITIES**

The DISTRICT seeks an ESCO which has demonstrated technical and managerial experience to comprehensively analyze our building energy systems and to provide a full range of energy services. Proposals will be considered only from ESCOs that can demonstrate all of the following minimum qualifications:

1. Proven track record of at least five (5) years in operation as an energy service company in California.
2. Experience implementing comprehensive energy conservation measures in a minimum of ten (10) California K-12 Public School Districts. The contract amount of each of these projects should be a minimum of \$2 million.

3. Experience implementing renewable energy measures in a minimum of five (5) California K-12 Public School Districts.
4. Experience guaranteeing energy savings for California K-12 Public School Districts.
5. Experience designing and submitting projects for approval of the California Division of State Architect (DSA), and experience obtaining DSA certification at close-out of project.
6. Experience procuring utility incentives.
7. Experience creating strict job-site safety programs, and training and enforcing adherence to safety policies.
8. Have a local office in Southern California staffed by employees dedicated to comprehensive energy services. Employees should include California licensed mechanical and electrical engineers.
9. Have a minimum bonding capacity of \$20 million.

## **V. PROCUREMENT PROCESS**

### **A. DISTRICT PUBLISHES RFQ**

The RFQ or notice of availability of the RFQ will be published in accordance with state law. The RFQ details the requirements for response, deadlines, and directions for submittal in subsequent sections.

### **B. REQUEST FOR QUALIFICATIONS**

An evaluation committee consisting of representatives from the DISTRICT will review each proposal based on the information submitted in response to this RFQ, and the evaluation criteria identified in Section VII. Based on the review, the committee will select a candidate that best meets the DISTRICT's evaluation criteria.

### **C. ESCO SELECTION**

Upon completion of the RFQ evaluation, the DISTRICT will select the best qualified ESCO. The DISTRICT intends to pursue Proposition 39 funding for the ECMs developed by the ESCO during the assessment phase of the program. Accordingly, following the assessment the ESCO will assist the DISTRICT to follow the eight-step participation process outlined in the California Energy Commission's Guidelines (including complying with the prioritization factors). The ESCO must also be prepared to assist the DISTRICT to conduct a best-value process, in accordance with Public Resource Code §26235(c), for the Proposition 39 scope of work. Proposition 39 funds will only be awarded in the manner permitted by the Guidelines.

Once selected, the ESCO must outline the steps to be followed to reach project implementation, including any commitments the DISTRICT needs to make to the ESCO prior to the detailed facilities assessment (i.e., contracts, letters of authorization, payments, etc.) and any costs the DISTRICT may incur for such assessment if the DISTRICT chooses not to pursue the energy program once the assessment has been completed.

Upon approval of projects by the California Energy Commission a Request for Proposal will be issued to allow ESCOs qualified through the RFQ process to submit proposals for implementation of specific projects.

**D. NEGOTIATION AND SIGNING OF CONTRACT**

Upon the evaluation of the proposals timely submitted in response to this RFQ, a recommended ESCO will be selected. A contract will be drafted between the DISTRICT and the selected ESCO to perform the agreed upon scope of services contemplated by this RFQ, and upon approval by the Board of Trustees, the DISTRICT will issue a Notice to Proceed. The successful ESCO pursuant to this RFQ is encouraged to participate in the subsequent RFP process to implement the approved eligible energy projects.

**VI. SCHEDULE OF EVENTS**

Listed below are the dates and times by which stated actions must be taken or completed. If the DISTRICT determines that it is necessary to change any of the dates and times, Addenda to this RFQ will be issued. All times are applicable local times for Huntington Beach, California.

DATE / TIME	ACTION
April 14, 2014	Advertising of Request for Qualifications
April 14, 2014	Request for Qualifications documents released to potential ESCO energy partners
May 6, 2014, 2:00 PM Pacific Time	Deadline for submittals
May, 21, 2014	DISTRICT notifies ESCO that has been selected as the DISTRICT’s energy partner

Please note that responses to the RFQ must be received on or before May 6, 2014, 2:00 PM, Pacific Time. DISTRICT requests that a **30 page** response limit, excluding the appendix, be strictly adhered too. One (1) original and one (1) copy of the proposals must be sealed and delivered to:

Huntington Beach City School District  
20451 Cramer Lane  
Huntington Beach, California, 92646  
(714) 378-2050  
Re: ENERGY SERVICES, CLEAN ON-SITE GENERATION  
AND FACILITIES MODERNIZATION PROGRAM

Late responses will not be accepted and will be returned unopened to the submitting ESCO. The DISTRICT is not liable for any cost incurred by any ESCO responding to this RFQ. Faxed and emailed proposals will not be accepted.

Once submitted, the proposal and any supplementary documents become the property of the DISTRICT.

The DISTRICT reserves the right to reject, as non-responsive, any proposals that do not contain the information requested in Section VIII of this RFQ. Additionally, the DISTRICT reserves the right to reject, as non-responsive, any proposals that are not organized and formatted as described in this RFQ.

Please direct all questions regarding this RFQ and the program it represents to the DISTRICT's Representative below. Unless otherwise contacted directly by the DISTRICT, ESCOs are prohibited from contacting anyone at the DISTRICT other than this Representative during the selection process, and all questions will be answered simultaneously via addenda.

**Jon M. Archibald**  
**Assistant Superintendent, Administrative Services**  
**(714) 378-2050**  
**jarchibald@hbcasd.us**

## **VII. EVALUATION CRITERIA**

The DISTRICT may award a contract to the ESCO that, in its sole opinion, provides the best value for the range of services described by this RFQ. To be considered for this opportunity, the ESCO must demonstrate capabilities to design and construct such a program.

Proposals of all business entities that respond to this RFQ will be evaluated using the following criteria. While scoring the proposals, the DISTRICT will be keeping the supporting points (marked a, b, c, etc.) in mind.

1. **ESCO's K-12 Energy Project Experience** [15 points]
  - a. Quantity and quality of K-12 energy projects in California
  - b. Proven track record of completing successful projects

- c. Strength of K-12 references
- d. Description of standard energy savings guarantee
- 2. **ESCO's Price and Life Cycle Cost** [15 points]
  - a. Provide a proposed scope of work with corresponding price that includes a list of energy conservation measures, renewable energy measures and other cost savings measures that can be implemented at the DISTRICT.
  - b. Provide at least two financing scenarios for the scope of work – one where the DISTRICT pays for the project with Proposition 39 funds, and the second where the DISTRICT finances the project and uses Proposition 39 funds to buy down the project.
  - c. Calculate the lifecycle cost for each scenario. Lifecycle cost is defined as the total cost of ownership, including the cost of acquiring, operating, maintaining, supporting, and disposal (if applicable).
- 3. **ESCO's Ability to Assist DISTRICT to comply with the CEC's Eight-Step Process and additional requirements of Proposition 39 Program Guidelines** [15 points]
  - a. Clear plan and demonstrated ability to understand and apply the requirements laid out in the guidelines
- 4. **Safety Record and Ability to Safely Work on K-12 School Sites** [15 points]
  - a. Proven strategies and innovative solutions to reduce risk of incidents on construction sites and to minimize interference with normal school site operations
- 5. **Proposed Project Team's Experience** [15 points]
  - a. Overall experience in successfully completing K-12 energy projects
  - b. Breadth of capabilities to support successful implementation of project
  - c. Description of local office and local engineering capabilities
- 6. **ESCO's Financial Strength and Stability** [10 points]
  - a. Overall financial strength of firm
  - b. Bonding capacity
- 7. **Educational Support Services** [10 points]
  - a. Capabilities to train and/or support an Energy Manager(s)
  - b. Ability to link energy project with classroom learning
- 8. **Additional Services** [5 points]
  - a. Track record of delivering additional services that support DISTRICT goals

The DISTRICT reserves the right to investigate the qualifications of all ESCOs 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.

## **VIII. RESPONSE FORMAT AND CONTENTS**

The responses to this Request for Qualifications will consist of specific areas that must be completed and returned in the order indicated below. The DISTRICT may, during the course of the evaluation process, request additional information to supplement and/or clarify the information provided by any ESCO.

### **1. COVER LETTER (maximum of three pages)**

Include a cover letter at the beginning of your proposal. In the cover letter, provide an overview of your firm's history and commitment to education; a summary of how your firm works with K-12 public school districts; highlights of unique offerings that your firm has developed for, and successfully provided to, K-12 district customers; and a description of how the proposed energy project can meet the DISTRICT's proposed goals. Also, provide the names and contact information of persons at your firm authorized to provide any clarification required by the DISTRICT.

### **2. TABLE OF CONTENTS (not included in page count)**

### **3. RFQ CONTENT (maximum of 30 pages)**

#### **A. ESCO's K-12 Energy Project Experience**

- i. Summary of your firm's K-12 experience in California, including experience with energy savings guarantees.
- ii. Provide a minimum of three (3) case studies demonstrating your firm's K-12 energy project experience in California. Please provide the following information for each project listed:
  - a. District name and location
  - b. Project size and scope
  - c. Additional services (i.e. monitoring, guarantee)
  - d. Historical performance of the project versus guarantee, if applicable
  - e. District reference(s), including phone and email address
- iii. Describe your experience working with California Division of State Architect and detail your approach to streamlining the approval process.
- iv. Describe your experience assisting K-12 districts to secure utility incentives.
- v. Provide a summary of all settled adverse claims, disputes, or lawsuits between a California K-12 public school district and any member of your firm during the five years preceding the date of this RFQ, in which the claim, settlement, or judgment exceeds fifty thousand dollars (\$50,000).

**B. ESCO's Price and Life Cycle Cost**

- i. Scope of work to be implemented using Proposition 39 funds
- ii. Price
- iii. Life cycle cost

**C. ESCO's Ability to Assist DISTRICT to comply with the CEC's Eight-Step Process and additional requirements of Proposition 39 Program Guidelines**

- i. For each of the steps outlined in the California Energy Commission's eight-step process to secure funds, detail what your firm will do in order to assist the DISTRICT to meet each step and provide one example of where you have done that work in the past.
- ii. Explain what your firm will do in order to assist the DISTRICT in using the best-value criteria described in Public Resources Code §26235(c) for the Proposition 39 scope of work.

**D. Safety Record and Ability to Safely Work on K-12 School Sites**

- i. Summarize your firm's safety record and provide your firm's OSHA safety rating.
  - a. Has your firm had any prior serious or willful violation of the California Occupational Safety and Health Act or the federal Occupational Safety and Health Act, settled against any member of your firm?
- ii. Describe your firm's safety practices for working on K-12 school sites.
- iii. Provide a list of steps your firm typically takes to minimize interference of construction on daily operation of school sites.
- iv. Provide any additional information that you feel demonstrates your firm's commitment to safe construction practices on K-12 school sites.

**E. Proposed Project Team's Experience**

- i. Provide an overview of the proposed project team for the DISTRICT, including roles and responsibilities for each proposed team member.
- ii. Include an organizational chart showing the reporting structure of your team.
- iii. Include resumes for key team members in the appendix (not included in the page count).
- iv. Provide a description of your local office and the breadth of capabilities you can provide locally.

**F. ESCO's Financial Strength and Stability**

- i. Summarize your firm's financial strength and stability and why this is important for the long-term success of a K-12 energy project.
- ii. Describe any instances in which your firm, or its owners, officers, or managing employees, defaulted on a construction contract?

- iii. Provide your insurance information and credit rating.
- iv. Provide proof of bonding capacity.
- v. Provide audited financial statements for the past three (3) years as an Appendix (not included in page count).
  
- vi. Detail your firm's expertise in structuring a financial solution to fund the energy project and explain how you use a variety of funding sources to maximize program impact. Provide five examples of recent K-12 energy projects that your firm has structured a financing for and describe the solution and sources of funds

**G. Educational Support Services**

- i. Explain your existing energy education program and demonstrate internal expertise to successfully deliver an educational program that uses the energy project to provide learning opportunities for students.
- ii. Describe your capabilities and past experience in hiring, training and/or supporting school district energy managers.
- iii. Provide three examples of your firm's experience in providing energy education programs to K-12 districts in California.

**H. ESCO's Additional Services**

- i. Describe any other valuable services the ESCO can provide to the DISTRICT.

**4. RIGHT OF REJECTION**

The DISTRICT reserves the right to reject any or all proposals received as a result of this RFQ. The DISTRICT will not pay for any information contained in the proposals of participating ESCOs. The DISTRICT is not liable for costs incurred by ESCOs prior to issuance of a contract. The DISTRICT may also negotiate separately with any ESCO in any manner necessary to serve the best interest of the DISTRICT. Selection (if made) will be based on the criteria set forth in Section VII of this RFQ.

**5. METHOD OF SELECTION**

After reviewing the proposals, the DISTRICT may choose to conduct interviews with qualified ESCOs. If the DISTRICT chooses to conduct interviews, it will notify selected ESCOs after the proposal deadline to arrange a time. The criteria used to evaluate the proposals will be based on the ability for the ESCO to meet the criteria set forth within this document.

6. **CRIMINAL RECORDS CHECK**

The successful RFQ Respondent will be required to comply with the applicable requirements of Education Code Section 45125.1 with respect to fingerprinting of employees and must complete the District's Criminal Records Check Certification.