



## Request for Qualifications

### RFQ 24-008

#### DISTRICTWIDE ENERGY EFFICIENCY, RENEWABLE ENERGY, & WATER CONSERVATION PROJECT for San Bernardino City Unified School District

**RFIs:** Questions related to this RFQ are due by May 16, 2024 at 4:00 pm

Address all Requests for Information to:

[facilities\\_contracts+RFP2408@sbcusd.k12.ca.us](mailto:facilities_contracts+RFP2408@sbcusd.k12.ca.us)

**Requests for Qualifications (SOQs) Due:** May 21, 2024 at 4:00 pm

**Submittal Instructions:** RFQ responses must be delivered in PDF format and submitted electronically to Dawn Metz at: [facilities\\_contracts+RFP2408@sbcusd.k12.ca.us](mailto:facilities_contracts+RFP2408@sbcusd.k12.ca.us) no later than the date and time specified. In your email submission please include in the body of the email:

*Confidential: Request for Qualifications for Districtwide Energy Efficiency, Renewable Energy, & Water Conservation Project*

RFQ 24-008

**Issue Date:**  
April 25, 2024

**Issued by:**  
San Bernardino City Unified School District

**NOTE: Late submittals will not be accepted.**

## REQUEST FOR QUALIFICATIONS (RFQ) NO. 24-008

Districtwide Energy Efficiency, Renewable Energy, and Water Conservation Project  
San Bernardino City Unified School District  
956 West 9th Street  
San Bernardino, CA 92411

### PURPOSE OF THE REQUEST

San Bernardino City Unified School District is seeking a qualified firm to provide a turnkey solution to design and implement energy conservation, energy efficiency, renewable energy, water conservation and energy related capital improvement services for the District. San Bernardino City Unified School District expects a reduction in its annual utility and operations and maintenance costs through the implementation of these services. It is our intent to enter into an agreement with the successful firm to conduct a Districtwide conservation/efficiency audit and award a contract to implement cost-effective energy retrofits. San Bernardino City Unified School District intends to implement a design-build program consistent with the provisions of California Government Code sections 4217.10-4217.18.

Upon award, the San Bernardino City Unified School District will select a company to identify, design, construct, and implement District-wide energy conservation measures. The awarded respondent shall help identify funding sources including grants, utility rebates, low-rate public-sector lease financing, and other applicable incentives. In addition to project development and project implementation, it is San Bernardino City Unified School District's intent to have the awarded respondent manage post-implementation Measurement & Verification (M&V).

San Bernardino City Unified School District, at its sole discretion, may select the awarded respondent for subsequent energy conservation phases. The San Bernardino City Unified School District reserves the right to reject any or all respondents.

### BACKGROUND

San Bernardino City Unified School District consists of 74 District-owned facilities and will focus these services on a large number of these sites, but not all 74 facilities:

- Ramona-Alessandro Elementary School - 670 Ramona Ave, San Bernardino, CA 92411
- Arrowhead Elementary School - 3825 N Mountain View Ave, San Bernardino, CA 92405
- Barton Elementary School - 2214 Pumalo St, San Bernardino, CA 92404
- Belvedere Elementary School - 2501 Marshall Blvd, Highland, CA 92346
- Bradley Elementary School - 1300 Valencia Ave, San Bernardino, CA 92404
- Salinas Elementary School - 2699 N California St, San Bernardino, CA 92407
- Cole Elementary School - 1331 Cole Ave, Highland, CA 92346
- Cypress Elementary School - 26825 Cypress St, Highland, CA 92346
- Davidson Elementary School - 2844 Davidson Ave, San Bernardino, CA 92405
- Del Rosa Elementary School - 3395 Mountain Ave, San Bernardino, CA 92404
- Emmerton Elementary School - 1888 Arden Ave, San Bernardino, CA 92404
- Fairfax Elementary School - 1362 Pacific St, San Bernardino, CA 92404
- Highland-Pacific Elementary School - 3340 Pacific St, Highland, CA 92346
- Hillside Elementary School - 4975 N Mayfield Ave, San Bernardino, CA 92407
- Hunt Elementary School - 1342 Pumalo St, San Bernardino, CA 92404
- Inghram Elementary School - 1695 W 19th St, San Bernardino, CA 92411
- Kendall Elementary School - 4951 N State St, San Bernardino, CA 92407
- Kimbark Elementary School - 18021 W Kenwood Ave, San Bernardino, CA 92407
- Lankershim Elementary School - 7499 Lankershim Ave, Highland, CA 92346
- Lincoln Elementary School - 255 W 13th St, San Bernardino, CA 92405
- Lytle Creek Elementary School - 275 S K St, San Bernardino, CA 92410
- Marshall Elementary School - 3288 N G St, San Bernardino, CA 92405
- Monterey Elementary School - 794 E Monterey Ave, San Bernardino, CA 92410

- Mt. Vernon Elementary School - 1271 W 10th St, San Bernardino, CA 92411
- Muscoy Elementary School - 2119 Blake St, San Bernardino, CA 92407
- Newmark Elementary School - 4121 N 3rd Ave, San Bernardino, CA 92407
- North Park Elementary School - 5378 N H St, San Bernardino, CA 92407
- North Verdemon Elementary School - Elementary School - 3555 W Meyers Rd, San Bernardino, CA 92407
- Norton Elementary School - 1747 N Mountain View Ave, San Bernardino, Ca, 92401
- Oehl Elementary School - 2525 Palm Ave, Highland, CA 92346
- Palm Avenue Elementary School - 6565 Palm Ave, San Bernardino, CA 92407
- Parkside Elementary School - 3775 N Waterman Ave, San Bernardino, CA 92404
- Riley Elementary School - 1266 N G St, San Bernardino, CA 92405
- Rio Vista Elementary School - 1451 N California St, San Bernardino, CA 92411
- Roberts Elementary School - 494 E 9th St, San Bernardino, CA 92410
- Roosevelt Elementary School - 1554 Garner Ave, San Bernardino, CA 92411
- Thompson Elementary School - 7401 Church Ave, Highland, CA 92346
- Urbita Elementary School - 771 S J St, San Bernardino, CA 92410
- Vermont Elementary School - 3695 Vermont St, San Bernardino, CA 92407
- Warm Springs Elementary School - 7497 Sterling Ave, San Bernardino, CA 92410
- Wilson Elementary School - 2894 Belle St, San Bernardino, Ca9 2404
- Anton Elementary School - 1501 Anton Ct, San Bernardino, CA 92404
- Jones Elementary School - 700 N F St, San Bernardino, CA 92410
- George Brown Jr. Elementary Elementary School - 2525 North G St, San Bernardino, CA 92405
- Bing Wong Elementary School - 1250 E 9th St, San Bernardino, CA 92410
- Holcomb Elementary School - 1345 West 48th St, San Bernardino, CA 92407
- Graciano Gomez Elementary School - 1480 West 11th St, San Bernardino, CA 92411
- Dalton Henry Elementary School - 1250 West 14th St, San Bernardino, CA 92411
- Dominguez Elementary School - 135 South Allen St., San Bernardino, CA 92408
- Cajon High School - 1200 W Hill Dr San Bernardino, CA 92407
- Pacific High School - 1020 Pacific St, San Bernardino, CA 92404
- San Bernardino High School - 850 N E St, San Bernardino, CA 92405
- San Gorgonio High School - 2299 Pacific St, San Bernardino , CA 92404
- Arroyo Valley High School - 1881 W Base Line St, San Bernardino, CA 92411
- Indian Springs High School - 650 North Del Rosa Dr, San Bernardino, CA 92410
- San Andreas High School - 3232 Pacific St, Highland, CA 92346
- Sierra High School - 570 E 9th St, San Bernardino, CA 92410
- Middle College High School - 1260 W Esperanza St, San Bernardino, CA 92410
- Arrowview Middle School - 2299 N G St, San Bernardino, CA 92405
- Curtis Middle School - 1050 N Del Rosa Drive , San Bernardino, CA 92410
- Del Vallejo Middle School - 1885 E Lynwood Dr, San Bernardino, CA 92404
- Golden Valley Middle School - 3800 N Waterman Ave , San Bernardino, CA 92404
- Dr. Martin Luther King Jr/ Middle School - 1250 Medical Center Dr , San Bernardino, CA 92411
- Richardson Prep Hi School Middle School - 455 S K St , San Bernardino, CA 92410
- Serrano Middle School Middle School - 3131 Piedmont Dr , Highland, CA 92346
- Shandin Hills Middle School - 4301 Little Mountain Dr , San Bernardino, CA 92407
- Chavez Middle School Middle School - 6650 Magnolia Ave San Bernardino, CA 92407
- Rodriguez Prep Academy Middle School - 1985 N Guthrie St San Bernardino, CA 92404
- Paakuma' K-8 - 17825 Sycamore Creek Loop, San Bernardino, CA 92407

The District has completed the following previous energy efficiency and/or renewable projects:

- Proposition 39 – Energy Management System for HVAC Units

All RFQs (SOQs) must be received on or before **May 21, 2024 no later than 4:00 pm** and must be delivered in PDF format and submitted electronically to: [facilities\\_contracts+RFP2408@sbcusd.k12.ca.us](mailto:facilities_contracts+RFP2408@sbcusd.k12.ca.us)

All written questions contact or communication with San Bernardino City Unified School District staff/representatives regarding this RFQ are to be directed to the contact above only. **Any contact regarding this procurement outside of this District-designated representative will be grounds for disqualification.**

## **PROJECT GOALS**

Respondents shall support San Bernardino City Unified School District's goal by developing, implementing, and monitoring a turnkey energy efficiency and renewable energy savings program that:

- Achieves persistent long-term cost savings through reduced energy and water use and related operating cost savings
- Upgrades old and/or inefficient systems
- Maintains consistent and reasonable levels of occupant comfort
- Maintains building functionality and compatibility with existing equipment
- Improves use of technology to achieve optimum performance and savings
- Provides additional benefits that directly result from energy-related and water-related services and capital improvements, reduced maintenance needs, improved indoor air quality, building improvements, reduced greenhouse gases, etc.
- Minimizes financial and technical risk to San Bernardino City Unified School District
- Assist with identifying and developing comprehensive funding solutions
- Provides enhanced training to employees on maintenance and repair of equipment and controls
- Provides value added services through educational opportunities for the residents, students, and staff of San Bernardino City Unified School District, or other value-added services

## **MINIMUM REQUIREMENTS**

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

- Accredited by the National Association of Energy Service Companies (NAESCO) as an Energy Services Provider (ESP) or Energy Services Company (ESCO)
- Included on the U.S. Department of Energy's (DOE) Qualified List of Energy Service Companies
- Successfully implemented at least five (5) energy performance contracts for the public sector of at least \$5 million each in California in the last seven years
- Active and valid A, B and C-46 Contractor's Licenses with the California State Contractors License Board for a minimum of 24 months
- Local office within 80 miles of San Bernardino City Unified School District
- Minimum of \$30 million in bonding capacity for a single project
- No pending or recent litigation in the past five (5) years associated with the savings performance and/or M&V of a guaranteed energy savings project
- Proven ability to provide a team of California licensed mechanical, electrical, structural, and civil engineers as necessary for the successful development and implementation of the project
- California-based full-service support office with designers, energy engineers, project managers, project finance managers, and construction managers within 80 miles of the District.
- Experience with the design, planning and installation of Electric Vehicle charging infrastructure
- Extensive experience with the Office of Public School Construction (OPSC), CDE, DSA, the public-school construction building and design codes, including but not limited to California Building and Electrical Codes, and Title 24 of the California Code of Regulations, is mandatory.

## Proposed Schedule

RFQ Issued	April 25, 2024
Advertisement Week #1	May 2, 2024
Advertisement Week #2	May 9, 2024
Pre-Proposal Conference (non-mandatory)	May 14, 2024
Request for Information Deadline	May 16, 2024
Addendum Issued	May 17, 2024 by 4:00 p.m.
Interviews, if needed (at District's discretion)	May 28, 2024
SOQ Submission Deadline	<b><u>May 21, 2024 by 4:00 p.m. (via email)</u></b>
Board Agenda for Approval	July 2, 2024

## SCOPE OF WORK

San Bernardino City Unified School District is interested in the identification, engineering, design, installation, training, maintenance, and financing of approved energy and water conservation and renewable energy measures for all its facilities using rebates, grants, and energy savings generated. Upon selection, the provider shall perform an assessment of San Bernardino City Unified School District's facilities and propose a cost-effective energy program.

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

- Interior and exterior lighting retrofit or replacement with controls
- Heating Ventilation & Air Conditioning (HVAC) system optimization, retrofit, upgrade, or replacement
- Boiler replacements
- Electrical system optimization, retrofit, upgrade, or replacement
- Solar PV Generation
- Power resiliency - Battery storage/microgrid
- Guarantee long-term cost savings through reduced energy and water use, reduced maintenance costs, and fixed energy costs
- Maintain building functionality during construction and assure compatibility with existing equipment
- Provide options for charging via renewable energy
- Provide options for smart charging and data analytics
- Provide financing and funding options for the District to consider
- Minimize financial and technical risk to the District
- Building envelope upgrades
- EV charging infrastructure
- Other infrastructure improvements
- Domestic water retrofits
- Other training, remote monitoring services, and on-going support services as a value-added service that will ensure the efficiency, maintenance and training objectives of the program are met
- Other energy conservation measures proposed by District and Firm will also be considered.

Designs, products, components, construction, and installations must comply with applicable codes, standards, and rating methodologies. All plans and estimates shall be compliant with District-permitting guidelines, applicable California building and electrical codes, Title 24 of the California Code of Regulations, and Government Code section 4217, *et seq.*, and other applicable law.

All equipment provided by the Proposer for this program shall have a history of successful operating experience in similar installations and shall be in new, unused condition. This equipment shall be current technology with readily available non-proprietary replacement parts.

The selected respondent will then implement an agreed upon scope of work. All proposed ECM's must be provided on a turnkey basis including all necessary permits, engineering, delivery, installation, commissioning, training, and warranty service. The respondent will also manage post-implementation Measurement & Verification (M&V) of energy savings to monitor post-retrofit utility usage and track energy savings.

## REQUESTS FOR INFORMATION

Requests for Information (RFIs) concerning the RFQ must be submitted via e-mail no later than the date shown in the RFQ timeline. Please direct all questions to Dawn Metz at:

[facilities\\_contracts+RFP2408@sbcusd.k12.ca.us](mailto:facilities_contracts+RFP2408@sbcusd.k12.ca.us)

Following the RFI deadline, all questions and answers will be summarized and posted on the District's website at <https://sbcusdfacilities.com/> **Any contact with District staff or Elected officials outside of this representative will be grounds for disqualification**

## RESPONSE FORMAT AND COMMENTS

RFQ's should be prepared in a way that provides a straightforward and concise description of the respondent's capabilities to satisfy the requirements of the project. Emphasis should be placed on completeness and clarity of content. All submittal requirements listed below should be addressed in full. The RFQs must contain all requested information about the firm and must be on no larger than 8 ½ x 11 paper and **no more than forty (40) pages in length**. Cover pages, tabs, the table of contents, and sample contracts are excluded from page count maximum.

## SUBMITTAL INFORMATION

RFQ responses must be delivered in PDF format and submitted electronically to Dawn Metz at [facilities\\_contracts+RFP2408@sbcusd.k12.ca.us](mailto:facilities_contracts+RFP2408@sbcusd.k12.ca.us) **no later than 4:00 pm, May 21st, 2024**. RFQs received after the deadline will not be accepted. All submittals become the sole property of **San Bernardino City Unified School District** and the content will be held confidential until the selection of a firm is made. Any proprietary information must be designated clearly and should be bound separately and labeled with words "PROPRIETARY INFORMATION". An entire submittal marked as such will not be accepted.

Submit RFQ Responses clearly marked "Confidential: Request for Qualifications for Districtwide Energy Efficiency, Renewable Energy, & Water Conservation Project" to Dawn Metz at [facilities\\_contracts+RFP2408@sbcusd.k12.ca.us](mailto:facilities_contracts+RFP2408@sbcusd.k12.ca.us)

Questions regarding this request for Request for Qualifications (RFQ) may be directed to Dawn Metz at [facilities\\_contracts+RFP2408@sbcusd.k12.ca.us](mailto:facilities_contracts+RFP2408@sbcusd.k12.ca.us)

## SUBMITTAL REQUIREMENTS

RFQs should include the 5 sections listed below. This will assist the evaluating team in identifying items and information submitted with the RFQ.

The table of contents of the RFQ should include a clear and complete identification of the materials submitted by section and page number. *The table of contents is not included against page count requirements.*

### **Cover Letter**

Provide a signed and dated letter of interest (no more than two (2) pages), stating the respondent's interest and qualifications in providing the services as outlined in the RFQ. **Please describe how the respondent meets the minimum requirements as described in the RFQ in this section.**

### **Section 1: Company Background, Differentiators and Team Management Structure**

Provide general information on the respondent including: a brief history of the firm, length of time performing services, key differentiating factors, areas of expertise, safety record, address of main office that would support this project, telephone number, contact name, local resources, etc. Provide a statement of the respondent's financial capacity and capability to perform to the terms of this solicitation request.

Include resumes of key personnel that would perform services for this project should the firm be awarded. Specifically define the role of each person, outline his or her individual experience and responsibilities and office location. Indicate the name of the person(s) who would serve as the primary contact(s) for the District. Include an organizational chart.

### **Section 2: Project References**

Provide detailed project history for a minimum of five (5) public sector clients in California that the respondent has contracted with in the last seven years for similar energy efficiency, renewable energy, and/or eMobility projects. Describe the scope of work of the project, indicating start/completion date, services provided, project cost, funding description, and any additional benefits to the client. Provide the owner's name, address, telephone number, email address and contact person for each reference and type of products/services provided.

### **Section 3: Project Approach**

- Provide a description of the respondent's approach to performing audits/assessments and identifying improvement measures.
- Provide a description of the respondent's approach to managing the project and procedures for minimizing occupant disruptions.
- Proposers shall describe any relationships with manufacturers of proposed energy equipment, including those manufactured by the respondent or listed subcontractors.
- Describe enhanced training program available for District employees to ensure continued savings.
- Describe the proposed safety plan for the project.

### **Section 4: Savings**

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



#### Section 5: Additional Benefits and Value-Added Elements

Please describe any additional benefits that may result from ECM implementation. Discuss the respondent's added value elements in implementing this comprehensive energy program.

#### Section 6: Sample Contract

Please attach a sample energy performance contract. *The sample contract is not included against page count restrictions.*

### **REQUEST FOR QUALIFICATIONS EVALUATION CRITERIA/SELECTION PROCESS**

The District intends to select the firm that best meets the District's needs to perform the services as described in this RFQ. Firms will be evaluated, and preference given to those that illustrate demonstrated range of services, innovative approaches, technical and contractual solutions, additional services, and flexibility developing and implementing successful projects.

San Bernardino City Unified School District reserves the right to:

- Cancel the Request for Qualifications and Proposals (RFQ).
- Establish other evaluation criteria determined to be in the best interest of the District.
- Contract with any of the firms responding to this RFQ based solely upon its judgment of the qualifications and capabilities of the firm.

This RFQ does not commit San Bernardino City Unified School District to negotiate a contract. San Bernardino City Unified School District will not be responsible for any expenses incurred by any firm in preparing and submitting a proposal or response to this RFQ.

All RFQs will be reviewed and evaluated by a District selection committee. The District at its sole discretion may interview finalists or select a firm to perform work based solely on the evaluation of the RFQ.

The following criteria, without limitation, will be used by the District for evaluation:

- **Background:** i.e., qualifications, experience, resources, and financial solvency (30 points)
- **Project Team & Management Structure:** i.e., amount of work self-performed, strength of proposed team, trainers, and management structure (20 points)
- **Project History & References:** Demonstration of experience in comparable projects. Extensive experience with public sector, CEQA and Title 24 Requirements. Quality of previous projects and record of budget and schedule performance. (20 points)
- **Project Approach:** Approach to audits, savings monitoring, training, etc. (15 points)
- **Additional Benefits and Added Value:** i.e., additional benefits resulting from ECM implementation and respondent's added value elements (10 points)
- **Response:** Responsiveness and compliance with the RFQ requirements. (5 points)

Maximum Point Valuation: 100

**AWARD OF CONTRACT**

The Contract will be awarded to a single firm who is the most responsible and responsive proposer whose proposal, conforming to the RFQ, will be most advantageous to the San Bernardino City Unified School District. The San Bernardino Unified School District reserves the right to enter into an agreement without further discussion of the proposal submitted based on the initial offers received.

The San Bernardino City Unified School District reserves the right to reject any or all proposals or any part of the proposal and to waive informalities and minor irregularities in the proposals received.