

SAN BERNARDINO CITY USD

RFP 24-007

CalSHAPE HVAC Assessment Services



FACILITIES PLANNING & DEVELOPMENT
SAN BERNARDINO CITY USD
777 North F Street
San Bernardino, CA 92410

**NOTICE INVITING PROPOSALS
REQUEST FOR RFP 24-007 CALSHAPE HVAC
ASSESSMENT SERVICES**

The San Bernardino City Unified School District (“District”), Facilities Planning & Development, is requesting proposals from those interested in providing professional services for **RFP 24-007 CALSHAPE HVAC ASSESSMENT SERVICES**. Copies of the Request for Qualifications (“RFQ”) can be obtained via e-mail, when requested to the email address indicated below, or from the District’s web sites:
www.sbcusdfacilities.com

OR

facilities_contracts+RFP2407@sbcusd.k12.ca.us

All qualified providers of services described in the RFP, including the local firms/individuals are encouraged to participate in this process and submit proposals. The District, at its sole discretion, reserves the right to reject any proposals received after the deadline stated herein. The proposals must be received at the email address indicated below no later than **Thursday April 11, 2024 by 4:00 P.M. Pacific Time.**

**The subject line of your email should clearly state:
RFP 24-007 CALSHAPE HVAC ASSESSMENT SERVICES**

SAN BERNARDINO CITY UNIFIED SCHOOL DISTRICT
Facilities Planning & Development
956 West 9 th Street
San Bernardino, California 92411

Email:
facilities_contracts+RFP2407@sbcusd.k12.ca.us

Date: March 21, 2024

Advertised: March 21, 2024

San Bernardino City USD
REQUEST FOR QUALIFICATIONS/ PROPOSALS

CalSHAPE HVAC Assessment Services

Date Issued: March 21, 2024

Proposals due on: April 11, 2024

Submit completed proposals to: facilities_contracts+rfp2407@sbcusd.k12.ca.us

INTRODUCTION

The San Bernardino City USD (“District”) is requesting qualifications and proposals from qualified firms for HVAC assessments and reports, including assessment and verification reports, engineering review, and documentation (“Services”) to be funded by the California Schools Healthy Air, Plumbing, and Efficiency (“CalSHAPE”) Ventilation Program under the School Energy Efficiency Stimulus Program (“SEES”) enacted under Assembly Bill 841. This solicitation does not include the installation of filters or carbon dioxide monitors, or the performance of repairs, upgrades or replacement of HVAC units deemed necessary during the assessment process.

<https://www.energy.ca.gov/publications/2023/california-schools-healthy-air-plumbing-and-efficiency-ventilation-program-0>

Proposals **must be received by 4:00 pm on April 11, 2024**. Submittals received after this date and time will not be accepted. Please submit your completed proposal to the above email address.

OVERVIEW

The District is requesting proposals from qualified firms for HVAC Assessment and Design Services to be funded under the CalSHAPE Ventilation program. The goals of the project are to:

- Complete the HVAC assessments, assessment reports, adjustment of ventilation rates, and all documentation for reporting under the requirements of the CalSHAPE Ventilation program as described in the Ventilation Program Commission Guidelines adopted June 8, 2022. **(Exhibit B)**

REQUIRED QUALIFICATIONS

To comply with the requirements of the CalSHAPE Ventilation program, the following qualifications are required for the firm providing the Services. The qualifications must be met by staff as described below:

- Qualified testing personnel, meaning either:
 - An HVAC acceptance test technician certified to complete the forms set forth in subparagraph (B) of paragraph (1) of subdivision (b) of Section 10-103.2 of Part 1 of Title 24 of the California Code of Regulations by an Acceptance Test Technician Certification Provider (ATTCP) that is approved by the Energy Commission to provide that certification.
 - Or, a certified testing, adjusting, and balancing (TAB) technician: A technician certified to perform testing, adjusting, and balancing of HVAC systems by the Associated Air Balance Council (AABC), the National Environmental Balancing Bureau (NEBB), or the Testing, Adjusting and Balancing Bureau (TABB).

- Qualified adjusting personnel, meaning either:
 - A certified TAB technician, as defined above.
 - A skilled and trained workforce under the supervision of a TAB technician.
- A Licensed Professional on staff or under subcontract to review the HVAC assessment, meaning a professional eligible under Division 3 (commencing with section 5000) of the Business and Professions Code in the applicable classification to perform system design, construction, or installation of features, materials, components, or manufactured devices for mechanical systems.

SCOPE OF SERVICES

The HVAC Services, shall include, but not be limited, to the following:

- The District is requiring proposals to conduct a full assessment, at six (6) sites (**Exhibit A**) of HVAC units and provide all documentation/reporting as required by the CalSHAPE ventilation Program, enacted under AB841.
- Qualified testing personnel, as defined in the section above, must assess all air-handling units, rooftop units, and unitary and single zone equipment in the District's HVAC systems in accordance with the CalSHAPE Ventilation HVAC Assessment Requirements in Chapter 2 Section B of the attached Guidelines for the CalSHAPE Ventilation Program ("Guidelines").
 - Additionally, for areas with Limited or No Mechanical Ventilation, the assessment must also include the requirements as specified in Chapter 2 Section E Part 1 of the Guidelines.
- Record the findings from the assessment in the HVAC Assessment Report as described in Chapter 2 Section F and Appendix B of the Guidelines.
 - Additionally, for areas with Limited or No Mechanical Ventilation, the report shall also include the requirements as specified in Chapter 2 Section E Part 2 of the Guidelines.
- The Licensed Professional shall review the HVAC Assessment report as described in Chapter 2 Section F Subsection 1 of the Guidelines and:
 - Determine what, if any, additional adjustments, or repairs would be necessary to meet the minimum ventilation and filtration requirements.
 - Determine whether any cost-effective energy efficiency upgrades or replacements are warranted or recommended.
 - Additionally, if there is Limited or No existing mechanical ventilation, determine recommendations for adding mechanical ventilation and filtration where none exists or for replacing a mechanical ventilation system where the current system is nonoperational.
- Provide an estimated cost for all identified work and/or recommendations including reimbursement amounts for newly installed units within the allowed CalSHAPE installation timeline.
- Coordinate with the district on the inspection of installed carbon dioxide monitor specifications and placement in compliance with CalSHAPE program requirements. The installation of carbon dioxide monitors will be reimbursed under a separate procurement.
- Upon completion of the work funded by the CalSHAPE Ventilation program, complete the HVAC Verification Report as described in Chapter 2 Section G of the Guidelines.
- Provide documentation for final reporting as described in Chapter 4 Sections B and C of the Guidelines, including:
 - Final invoice and supporting documentation for expended grant funds.
 - Any additional data or information requested to determine GHG reductions and energy savings as described in Chapter 4 Section B of the Guidelines.

GRANT BUDGET

The CalSHAPE Ventilation program will award funds for the amount of the contractor's estimate up to the limit of the Maximum Award for each approved site. The Maximum Award amounts are specified in Chapter 2 Section K of the Guidelines and summarized below. The approved site budget will include a contingency fund for repairs, upgrades, or replacements necessary to make the system functional or more energy efficient. The contingency fund will be calculated by taking 20 percent of the total approved budget for all eligible items, which includes the cost of filters and carbon dioxide monitors that are not part of this solicitation.

The project budget will not exceed the following maximum award amounts for the assessment scope specified in the Guidelines and can be found here:

<https://www.energy.ca.gov/publications/2023/california-schools-healthy-air-plumbing-and-efficiency-ventilation-program-0> :

- \$10,000 per site plus \$1,000 per HVAC system unit for the HVAC Assessment and completion of the HVAC Assessment Report.

The budget for assessments shall not exceed the allowable amount prescribed by the CalSHAPE Guidelines based on the District's total HVAC unit count and shall be fully funded by awarded CalSHAPE grant proceeds.

SUBMITTAL REQUIREMENTS

Your Statement of Qualifications/Proposal shall respond to each item noted below and must follow the format described below. Please limit response information to no more than ten (10) pages and include relevant information only. Submitted materials are limited to 8-1/2 x 11 sized papers. **Late responses will not be accepted.**

A. COVER LETTER/LETTER OF INTEREST

- Must include the name of the firm, address, telephone number, and name of the Principal to contact. The letter must be signed by a representative of the firm with authorization to bind the firm by contract.

B. DESCRIPTION OF FIRM AND KEY SUB-CONSULTANT FIRMS

- Must include name, address, contact numbers, e-mail, website, and summary of the responding firm's experience with public school HVAC projects.
- Type of business entity:
 - Information on the type of entity and its ownership.
 - Size of staff, number of professionals which will perform the work.
 - Location of its principal office.
- History, number of years in business in California.
- All applicable licenses including license numbers and expiration dates.

C. Sub-Consultant Firms

- Describe the relationship of your firm with any sub-consultants
- For each sub-consultant firm, provide the following information:
 - Description of the services the firm will be providing.
 - Location of the office which will perform the work.
 - Size of staff, number of professionals in the office which will perform the work.
 - All applicable licenses including license numbers and expiration dates.
 - Description of extent and duration of prior working relationship with your firm (number and type of projects, number of years).

D. RELEVANT EXPERIENCE

- a. List relevant K-12 school HVAC projects and include:
 - i. Project name and location.
 - ii. Year completed or current project status.
 - iii. Client, contact person, and phone number.
 - iv. Project cost.
 - v. Key consultant firms (structural, mechanical, electrical, civil, etc.)

E. FIRM TRACK RECORD

- a. Has your firm ever been terminated or dismissed by a client or replaced by another firm during any educational and/or related project? If so, explain in detail.
- b. Describe by example your experience in meeting schedules and timelines. Describe an approach you have taken to expedite a schedule.
- c. Describe by example your experience in meeting budgets. Describe by example an approach you have taken to bring a project back into the budget.
- d. Provide a statement of your firm's financial stability.
- e. Does your firm have any current or pending litigation? If so, please describe.
- f. Has your firm defaulted on a contract within the past five (5) years or declared bankruptcy, or been placed in receivership within the past five (5) years?
- g. Name of the prime professional license holder exactly as on file with the requisite licensing authorities.

F. COST PROPOSAL

- a. The cost proposal for services referenced herein shall be provided along with the Respondent's current rate sheet for relevant team members associated with this RFQ/P.
- b. The cost proposal shall include a proposed duration for the scope of services referenced herein.

G. PROOF OF INSURANCE

- a. Provide a certificate of insurance, meeting or exceeding the insurance listed in the attached agreement **(Exhibit C)**.

TERMS OF REQUEST FOR PROPOSALS

Costs of Proposals:

The cost of preparing, and submitting a proposal is the sole responsibility of the Proposer and shall not be chargeable in any manner to the District.

Withdrawal or Modifications of Proposals:

Any proposal may be withdrawn or modified by a written request signed by the consultant and received by the District prior to the final time and date for the receipt of proposals.

Proposal Acceptance and Rejection:

The District reserves the right to accept any proposal, to reject any or all proposals, if the rejection is deemed in the best interests of the District, or to call for new proposals.

Waiver of Irregularities:

The District retains the right, at its sole discretion, to waive any irregularities in proposals that do not comply with the strict requirements of this RFQ, and the District reserves the right to award a contract to a consultant submitting any such non-compliant proposal at the District's sole discretion.

SELECTION PROCESS

All Statements of Qualifications received by the specified deadline will be reviewed by the District for completeness, content, experience, and qualifications. For those firms deemed most qualified, further evaluation, reference checks, and interviews may be conducted as part of the final selection process.

However, the District reserves the right to complete the selection process without proceeding to an interview process and may choose to select based on the information supplied in the Statement of Qualifications/Proposals. Award shall be made to the responsive consultant(s) whose proposal is determined to be the most advantageous to the District, taking into consideration price and adherence to the terms and conditions of this RFQ/P. The District may enter into a Contract with the successful Consultant for the specified services. Consultants who are not selected by the District will be notified in writing. Nothing herein shall obligate the District to award a contract to any responding consultant.

The District reserves the right to select the firm(s) whose qualifications, in the District's sole judgment, best meet the needs of the District. **Award of the contract will be contingent on the District being awarded CalSHAPE Ventilation Program funds.**

SELECTION CRITERIA

The following criteria, listed in no order of importance, will be used to select the firm for the above- described work:

- Responsiveness to the RFQ/P – completeness and quality of the response - 15%
- Reasonableness of fees and duration of work - 15%
- Firm and sub-consultant experience and qualifications with school projects - 15%
- Experience of proposed team members - 15%
- Ability to comply with budget - 25%
- Ability to comply with the schedule - 15%

EXHIBIT A

School Site	Address
Northpark Elementary School	5378 N H St., San Bernardino, CA 92407
Riley College Prep Academy	1266 North G St., San Bernardino, CA 92405
Monterey Elementary School	794 Monterey Ave., San Bernardino, CA 92410
Arroyo Valley High School	1881 W Baseline St., San Bernardino, CA 92411
Kimbark Elementary School	18021 Kenwood Ave., San Bernardino, CA 92407
Arrowview Middle School	2299 N G St., San Bernardino, CA 92405

EXHIBIT B

[Ventilation Program Commission Guidelines](#)

EXHIBIT C

1. Insurance Policy Limits

Unless different limits are indicated in the Special Conditions, the limits of insurance shall not be less than the following amounts:

Commercial General Liability	Includes: Bodily Injury, Property Damage, Personal & Advertising Injury, Product Liability and Completed Operations	\$2,000,000 each occurrence; \$4,000,000 general aggregate
Automobile Liability – <u>Any</u> Auto	Combined Single Limit	\$2,000,000 per occurrence
Excess Liability (Umbrella)		\$6,000,000 per occurrence; \$6,000,000 aggregate
Workers Compensation		Statutory limits pursuant to State law
Employers' Liability		\$2,000,000 each incident, each disease; \$2,000,000 policy limit
Sexual Abuse / Molestation		\$1,000,000 each incident; \$2,000,000 policy limit
Builder's Risk (Course of Construction)		Issued for the value and scope of Work indicated herein.
Property of Others	Combined Single Limit General Aggregate	Issued for the value and scope of Work stored off-site.

2. Contract Security – Bonds

1. Contractor shall furnish two surety bonds issued by a California admitted surety insurer as follows:
 1. **Performance Bond:** A bond in an amount at least equal to one hundred percent (100%) of Contract Price as security for faithful performance of this Contract.
 2. **Payment Bond:** A bond in an amount at least equal to one hundred percent (100%) of the Contract Price as security for payment of persons performing labor and/or furnishing materials in connection with the Contract.
2. Cost of bonds shall be included in the Bid and Contract Price.
3. All bonds related to the Project shall be in the forms set forth in the Contract Documents and shall comply with all requirements of the Contract Documents, including, without limitation, the bond forms.