



## Request for Qualifications

IN PREPARATION FOR ASSESSING AND IMPLEMENTING COMPREHENSIVE  
ENERGY CONSERVATION AND ENERGY RELATED  
CAPITAL IMPROVEMENT SERVICES

**RFIs:** Questions related to this RFQ are due by 8/10/18

Address all Requests for Information to both:  
Steve Brennan [sbrennan@ltusd.org](mailto:sbrennan@ltusd.org)  
Billy Wessell [bwessell@ltusd.org](mailto:bwessell@ltusd.org)

**Statements of Qualification (SOQs) Due:** 8/24/18 at 10:00AM

**Submittal Instructions:** SOQs must be delivered to the below address in a sealed envelope *prior* to the date and time specified. In addition to your complete firm name and address, please annotate the envelope(s) as follows:

*Confidential: Statement of Qualifications for Districtwide Energy Efficiency Project –*

*RFQ NO. 2018-02*

**Issue Date:**

8/3/18

**Issued by:**

Lake Tahoe Unified School District  
1021 Al Tahoe Blvd., South Lake Tahoe, CA 96150

## REQUEST FOR QUALIFICATIONS (RFQ) NO. 2018-02

Districtwide Energy Efficiency Project  
Lake Tahoe Unified School District  
1021 Al Tahoe Blvd.,  
South Lake Tahoe, CA 96150

The Lake Tahoe Unified School District (LTUSD) is seeking qualified Firm(s) capable of designing and implementing energy conservation, energy efficiency, renewable energy, and energy related capital improvement services as described within this Request for Qualifications (RFQ). LTUSD expects reduction in annual utility costs through the implementation of these services. It is our intent to enter into an agreement with the successful firm to conduct a Districtwide Energy Conservation / Efficiency Audit, and award contract(s) to implement cost-effective energy retrofits.

The awarded respondent shall identify funding sources including utility rebates, low rate municipal lease financing, California Clean Energy Job Act (Proposition 39) funds, grants, and other applicable incentives.

In addition to project development and project implementation, it is the District's intent to have the awarded respondent manage the associated Proposition 39 grant application process and comply with any and all applicable pre-installation, 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 respondents.

### BACKGROUND

The District consists of ten (10) facilities, most of which have received building interior/exterior lighting upgrades recently utilizing Prop39 funding. Because of these upgrades, prospective project scopes may vary significantly from site to site. The District sites are:

1. South Tahoe High School – 1735 Lake Tahoe Blvd.
2. South Tahoe Middle School – 2940 Lake Tahoe Blvd.
3. Tahoe Valley Elementary School – 943 Tahoe Island Dr.
4. Sierra House Elementary School – 1701 Remington Trail
5. Lake Tahoe Environmental Science Magnet School
6. Bijou Community School – 3501 Spruce Ave.
7. Mt Tallac Continuation High School - 1735 Lake Tahoe Blvd.
8. Al Tahoe Learning Center – 1100 Lyons Ave
9. District Office – 1021 Al Tahoe Blvd.
10. Bus Barn – 1021 Al Tahoe Blvd.

All SOQs must be received on or before **8/24/18, no later than 10:00 AM. at 1021 Al Tahoe Blvd., South Lake Tahoe, CA 96150**

Contact Steve Brennan at <[sbrennan@ltusd.org](mailto:sbrennan@ltusd.org)> to request RFQ packet

## **PROJECT GOALS**

The District's ultimate goal is to redirect 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 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 utilization of technology to achieve optimum performance and savings
- Provides additional benefits that directly result from energy related services & capital improvements, reduced maintenance needs, improved indoor air quality, building improvements, reduced greenhouse gases, etc.
- Minimizes financial and technical risk to the Owner
- Provides enhanced training to employees on maintenance and repair of equipment and controls
- Provides value added services through educational opportunities for the students and staff of the District
- Provides comprehensive funding solutions
- Promotes private sector job creation

## **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)
- Included on the U.S. Department of Energy's (DOE) Qualified List of Energy Service Companies
- Successfully implemented at least three (3) energy performance contracts for the K-12 public sector of at least \$3 million each in California in the last 5 years
- Active General Contractor's license in the state of California for a minimum of 24 months
- 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 may be necessary

## **SCOPE OF WORK**

Upon award, the selected respondent will be required to perform bill analysis, audit reviews and energy surveys at the (10) District facilities to evaluate facility infrastructure improvements as part of an energy master plan for the District. The District Sustainability and Projects Supervisor, Steve Brennan, PE, CEM, will assist the awarded respondent's team in defining the scope of work.

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 (including Steam boiler systems)
- Boiler Replacements
- Electrical system optimization, retrofit, upgrade, or replacement
- Solar PV Generation
- Battery Storage
- Interior and exterior lighting retrofit or replacement with controls
- Building envelope upgrades
- EV Charging Infrastructure
- Other infrastructure improvements
- Irrigation Controls
- Other training, remote monitoring services, and on-going support services as a value-added service that will ensure the efficiency, maintenance and educational objectives of the program are met

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, and warranty service.

The respondent will manage the associated Proposition 39 grant application process and comply with all applicable pre-installation verification, benchmarking, project reporting and post-implementation Measurement & Verification (M&V) requirements as defined by the CEC.

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.

## PROPOSED TIMELINE

August 3, 2018	RFQ Released
August 10, 2018	Requests for Information Due
August 17, 2018	Addenda Issued
<b>August 24, 2018; 10:00 AM</b>	<b>SOQs Due</b>
August 29, 2018	Energy Consultant Awarded
October 31, 2018	Scope of Work Submittal
November 23, 2018	M&V Plan Submittal
December 11, 2018	Board Approval for Project Implementation
June 2019	Project Implementation/Construction Start
August 2020	Project Implementation/Construction Complete

## 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 above should be addressed in full. The Request for Qualifications must contain all requested information about the firm and must be on no larger than 8 ½ x 11 paper and **no more than thirty-five (35) pages in length.**

## SUBMITTAL INFORMATION

Deadline for submission of one (1) hard copy and one (1) USB drive/CD of your SOQ is **August 24, 2018 at 10:00 am.** The SOQ shall be submitted in a sealed envelope bearing the complete name and return address of the offeror. RFQs received after the deadline will not be accepted; however, the District, in its sole discretion, may elect to accept a late response upon a showing of good cause. All submittals become the sole property of LTUSD 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 sealed SOQs clearly marked "Confidential: Statements of Qualifications for Districtwide Energy Efficiency Project –" to the following location:

**Lake Tahoe Unified School District**  
**1021 Al Tahoe Blvd. South Lake Tahoe, CA 96150**  
**Attn: Steve Brennan, PE, CEM - Sustainability and Projects Supervisor**

Questions regarding this request for Request for Qualifications (RFQ) may be directed to Steve Brennan at [sbrennan@ltusd.org](mailto:sbrennan@ltusd.org).

## SUBMITTAL REQUIREMENTS

One (1) hard copy and one (1) electronic copy of the SOQ shall be submitted in the format outlined in this section. The hard copy shall be provided in a 3-ring binder 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 35 pages (not including TOC, cover letter or sample contracts/agreements, M&V Report and Tab7: Fee Proposal) and include the following:

### **Section Tabs**

SOQs 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 RFQ. *Section tabs and covers (front and back) are not included in page count.*

### **Table of Contents**

The table of contents of the SOQ should include a clear and complete identification of the materials submitted by tab section and page number. *Section not included in page count.*

### **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. The signature must be that of a legally authorized representative for the respondent's firm.**

Tab 1: Background, Financial Capacity & 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, location of main office, 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 who would likely be assigned to projects associated with the District. Specifically define the role of each person and outline his or her individual experience and responsibilities. Indicate the name of the person(s) who would serve as the primary contact(s) for the District. Include an organizational chart.

Tab 2: Energy Project References

Provide detailed project history for a minimum of three (3) public sector K-12 clients in California that the respondent has contracted with for similar energy efficiency projects. Describe the scope of work of the project, indicating start/completion date, services and equipment provided, savings performance history, project cost, funding description, contract term, educational tools/services provided, and additional benefits to the client. Provide the owner's name, address, telephone number, and contact person for each reference and type of products/services provided.

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 Proposition 39 guidelines for project tracking and reporting. Submit an actual M&V report utilizing IPMVP Option C for one of the three (3) references. *M&V report is not included in the page count.*

Tab 3: STEM Education References

Ability to design and implement a customized K-12 STEM education program, related to the energy services program, that ties into the District's unique goals. Provide at least three (3) project references that served K-12 public sector clients including the scope of work, details on the customized STEM education programming, use of technology for data collection and display (energy savings, renewable energy generation, etc.), and tenure of engagement.

Tab 4: 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.
- Describe the proposed safety plan for the project.
- Describe enhanced training program available for District employees to ensure continued savings.

- Describe the steps taken by the respondent during and after the turnover process to ensure successful project implementation.

Tab 5: 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.

Tab 6: Additional Benefits and Value-Added Elements

Please describe any additional benefits that may result from ECM implementation including, but not limited to, the potential greenhouse gas emission reductions, educational enrichment opportunities for District students and staff, and the number of jobs created. Discuss the respondent's added value elements in implementing Proposition 39 energy program.

Tab 7: Fee Proposal

Include the completed form titled "Tab 7: Overhead and Profit Markup Proposal" (attached to this RFQ).

**REQUEST FOR QUALIFICATIONS EVALUATION CRITERIA**

- **Background:** i.e., qualifications, experience, resources, and financial solvency (20 points)
- **Project Team & Management Structure:** i.e., amount of work self-performed, strength of proposed team, trainers, and management structure (25 points)
- **Project History & References:** i.e., relevant past project experience and information obtained from references (20 points)
- **STEM Education:** i.e., relevant STEM education programs and related to energy services program (20 points)
- **Project Approach:** i.e., approach to audits, savings monitoring, training, etc. (25 points)
- **Additional Benefits and Added Value:** i.e., additional benefits resulting from ECM implementation and respondent's added value elements (20 points)
- **Savings:** i.e., sample past performance on energy savings (35 points)
- **Contracts, Forms, and Markup Proposal:** i.e., sample contract terms & conditions and overhead & profit markup proposal (30 points)
- **Response:** responsiveness and compliance with the RFQ requirements. (5 points)

Maximum Point Valuation: 200

**Tab 7: OVERHEAD AND PROFIT MARKUP PROPOSAL**  
**RFQ-NO. 2018-02 Districtwide Energy Efficiency Project**

Name of Respondent: \_\_\_\_\_

**ESCO MARKUP FEES:**

If selected to implement 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 % \_\_\_\_\_