



**ALHAMBRA**  
**UNIFIED SCHOOL DISTRICT**

**REQUEST FOR QUALIFICATIONS**

**# 1211-18/19**

**FOR**

**ENERGY CONSULTING SERVICES**

Issue Date: November 27, 2018

Mandatory Pre-Bid Conference: December 4, 2018 at 10:00 A.M.  
1515 West Mission Road, Alhambra, CA 91803

Submit by: January 10, 2019 at 10:00 A.M.  
Purchasing Department – Mission Building  
1515 West Mission Road, Alhambra, CA 91803

Contact: Vivien Watts, Director of Business Services  
[Watts\\_vivien@ausd.us](mailto:Watts_vivien@ausd.us) (626) 943-6590

**ALHAMBRA UNIFIED SCHOOL DISTRICT  
REQUEST FOR QUALIFICATIONS – RFQ #1211 – 18/19  
FOR ENERGY CONSULTING SERVICES**

**OVERVIEW AND SUBMISSION GUIDELINES**

The Alhambra Unified School District (“District”) is requesting qualified persons, firms, partnerships, corporations, associations, or professional organizations to provide comprehensive energy management consulting services to include energy management planning and strategies, goal development, ASHRAE audit review, energy program support services, construction coordination, utility bill management services, building commissioning services, water conservation and ongoing related services for the District.

Respondents to this Request for Qualifications (“RFQ”) should mail or deliver three (3) bound copies, one (1) unbound copy, and one (1) electronic copy on CD or flash drive of their Statement of Qualifications (“SOQ”) as further described herein, to:

**Purchasing Office  
Alhambra Unified School District  
1515 W. Mission Rd., Alhambra, CA 91803**

**ALL RESPONSES ARE DUE BY 10:00 A.M., ON THURSDAY, JANUARY 10, 2019. FAX OR EMAIL RESPONSES WILL NOT BE ACCEPTED.**

**Questions must be submitted in writing to Vivien Watts, Director of Business Services, [watts\\_vivien@ausd.us](mailto:watts_vivien@ausd.us), on or before FRIDAY, DECEMBER 21, 2018 AT 10:00 A.M.**

**Answers will be posted on the District website at [www.ausd.us](http://www.ausd.us) on MONDAY, JANUARY 7, 2019**

Each SOQ must conform and be responsive to the requirements set forth in this RFQ.

The District reserves the right to waive any informalities or irregularities in received Submittals. Further, the District reserves the right to reject any and all SOQ’s and to negotiate contract terms with one or more respondent firms for one or more of the work items.

## **INSTRUCTIONS**

### **I. INTRODUCTION**

The Alhambra Unified School District (“District”) is a public K-12 school district that serves the City of Alhambra and sections of Monterey Park and Rosemead. Currently, the District operates 18 school sites serving a student population of more than 17,000 students.

The District is seeking Statements of Qualifications (“SOQ”) in response to this Request for Qualifications and Proposal (“RFQ”) from experienced energy consulting firms/entities to provide comprehensive energy consulting services. This program is intended to result in the creation of a comprehensive District Energy Master Plan that will result in:

- **Reduce Energy Expenditures**
- **Reduce Greenhouse Gas Emissions**
- **Improve Quality and Sustainability of District Facilities**

The District has currently completed several Energy Efficiency Measures (EEM) including LED lighting retrofits at 7 sites and HVAC replacement at 6 sites utilizing Proposition 39 Funds. The District has also partnered with the Southern California Regional Network to perform energy audits of the 13 K-8 Elementary sites, 4 High School sites, 1 auxiliary site that houses multiple programs. This effort has identified Energy Efficiency Measures (EEM) that results in capturing of current utility incentives.

### **A. LIMITATIONS**

The District reserves the right to contract with any entity responding to this RFQ. The District makes no representation that participation in the RFQ process will lead to an award of contract or any consideration whatsoever. The District shall in no event be responsible for the cost of preparing a response to this RFQ. The awarding of a contract, if at all, is at the sole discretion of the District.

The District reserves the right to reject any or all SOQ’s, to waive any irregularities or informalities not affected by law, to evaluate each SOQ submitted, and to award contracts, if any, according to the SOQ which best serves the interest of the District at a reasonable cost to the District. The Respondent’s SOQ package, and any other supporting materials submitted to the District in response to this RFQ will not be returned and will become the property of the District unless portions of the materials are designated as proprietary at the time of submittal and are specifically requested to be returned.

### **B. FULL OPPORTUNITY**

The District hereby affirmatively ensures that Disadvantaged Business Enterprises (“DBE”), Small Local Business Enterprises (“SLBE”), Small Emerging Local Business Enterprises (“SELBE”), Disabled Veterans Business Enterprises (“DVBE”), and minority business enterprises shall be afforded full opportunity to submit SOQ’s in response to this RFQ and will not be discriminated against on the basis of race, color, gender, sexual orientation, political affiliation, age, ancestry, religion, marital status, national origin, medical condition or disability in any consideration leading to the award of the contract. No qualified disabled person shall, on the basis of disability, be excluded from participating in, be denied the benefits of, or otherwise be subjected to discrimination in any consideration leading to the award of contract.

**C. RESTRICTIONS ON LOBBYING AND CONTACTS**

From the period beginning on the date of the issuance of this RFQ and ending on the date of the selection of the firm, all requests for information or clarification of this project should be made in writing to the contact person only at [watts.vivien@ausd.us](mailto:watts.vivien@ausd.us). No person, or entity responding to this RFQ, nor any officer, employee, representative, agent, or consultant representing such a person or entity shall contact through any means or engage in any discussion regarding this RFQ, the evaluation or selection process/or the award of the contract(s) with any member of the District's Governing Board ("Board"), selection committee members, or with any employee of the District except for clarifications and questions during a consultant interview or at follow up interviews. Any such contact shall be grounds for the disqualification of the entity submitting a SOQ.

**II. SCOPE OF SERVICES**

Any firm selected based on this RFQ process must be capable of providing Consulting Services through the design, construction, and close-out phases of various projects. The consulting firm chosen will be asked to provide energy management related services for the district as follows:

**A. Energy Management Planning and Strategies**

1. **Consulting/Auditing/Energy Management Solutions** - This includes the strategic planning, energy assessments e.g. feasibility, vulnerability and other detailed assessments, developing and executing of energy audits, audit plans, renewable energy surveys and energy management solutions.
2. **Concept Development and Requirements Analysis**- This includes the analysis of the audit results and outlined requirements to design a detailed energy management project concept.
3. **Implementation and Change Management** - This includes the implementation and integration of more energy efficient practices and systems and training in using them effectively.
4. **Measurement and Verification** - This includes the performance assessment and measurement of the effectiveness and energy efficiency of the project and can include long term monitoring, verification of savings and benchmarking.

**B. Energy Program Support Services (Utility Bill Management)**

Including, but not limited to, energy choice analysis and/or feasibility studies; billing and management oversight to include utility bill auditing; utility bill data base set up and management; reporting; bill itemization and allocation; bill payment and assistance in preparing energy services related agency statements of work. Utility programs such as Edison Critical Peak Pricing, Demand Response and other related services.

**C. Construction Coordination and Building Commissioning Services**

Construction coordination including developing RFP/RFQ's in support of Energy Efficiency construction projects. Submittal review and responses. Comprehensive building commissioning services on new construction, major modernization projects, and existing energy consuming buildings and facilities designed to ensure the building systems are designed and built to operate as efficiently as possible. This includes recommissioning and retro-commissioning services.

**D. Energy Audit Services**

Including, but not limited to, developing, executing, and reporting on audit plans and/or performing energy and water audit services. Energy audits may range from cursory to comprehensive. Including, but not limited to data collection, data analysis, benchmarking with tools such as Energy Star, and written recommendations of suggested upgrades of electrical and mechanical infrastructure, including their impact on energy consumption and pollution can include recommendations for using alternative Energy Sources.

Audit services can include computerized control systems using analytical software and a network of electronic devices to assist Federal agencies with achieving energy conservation goals. Energy efficient buildings certification programs such as LEED may be included.

**E. Renewable Energy (Solar)**

Innovative approaches to renewable energy. These might include, but are not limited to, new developments or improvements in providing renewable energy and managing energy through, solar energy, fuel cells, geothermal energy, wind power or other sources, and the maintenance of renewable energy systems. These approaches should be capable of providing renewable and/or sustainable energy and sustainability services that are more carbon-neutral, thereby lessening dependence on traditional nonrenewable, fossil fuel sources of energy such as coal, oil, natural gas and propane.

**F. Water Conservation**

Water Conservation: Services and consulting related to the reduction of water usage, reduction of potable water consumption intensity, reduction of industrial, landscaping and agricultural water consumption, promoting, and implementing water reuse strategies, recycling of water for multiple purposes, retention of water, improvement of water quality and water flow. Also includes consulting on storm water run-off and property hydrology maintenance and restoration. These services can include, but are not limited to, consultation, facility water audits, water balance, and water system analysis.

**G. Meetings & Deliverables**

Firms will be expected to establish energy consumption baselines for all electrical, gas and water meters. Firms will be expected to present measures and verifications based on the conservation models on a monthly basis in person with the District's representatives. It is expected that firms will help the District identify anomalies in consumption and help with subsequent investigations and corrective measures. Models and projections should take into consideration ongoing Energy Efficiency Measures, Demand Response and low cost/no cost measures. Firms will be expected to deliver monthly reports and a bi-annual presentation that can be presented to the Board of Education and Stakeholders. Firms will be expected to create and provide outreach materials to individual schools on a monthly basis. Occasional in person presentations may be required.

**H. CONSULTANT QUALIFICATIONS**

The ideal consultant team will have the following characteristics:

- Have successful experience providing Energy Consulting Services for California K-12 school districts for the past five (5) years.
- Provide staff with adequate experience and resources to ensure high quality of Consulting Services provided.
- Have reasonable proximity to the City of Alhambra in order to provide: (1) team working/review sessions; (2) ease of team coordination meetings; (3) minimal cost to attend District meetings; and (4) quick response to issues.
- Have an established Quality Assurance/Quality Control program.
- Work collaboratively with District and District's Authorized Representative(s).

- Be flexible in nature with positive attitudes and solution-oriented creativity.
- Be organized, effective and efficient. Exercise professional integrity and prioritization skills.
- Utilize current web based software and technology.
- Be proactive and prepared, working in advance of deadlines.
- Be mindful and tenacious about budgets and schedules. Make decisions that support District goals and objectives.
- Communicate potential issues early and often. Provide thoughtful recommendations where applicable.

### III. REQUIREMENTS FOR SUBMITTAL OF PROPOSAL

#### A. **FORMAT REQUIREMENTS**

Firms submitting SOQ's in response to this RFQ must follow the format below. Material must be in 8-1/2 x 11-inch format, font size between 10 to 12 point, not to exceed 50 pages. Each SOQ shall include a Front Cover stating the following: "Statement of Qualifications for [FIRM NAME] in Response to Alhambra Unified School District's RFQ #1211 – 18/19 for Energy Consulting Services."

Each SOQ shall include a table of contents and divider tabs labeled with the boldface headers below (e.g. the first tab would be entitled "Cover Letter," the second tab would be entitled "Business Information," etc.) Total submittal length shall not exceed fifty (50) pages including resumes and samples of work.

**Provide three (3) bound copies, one (1) unbound copy, and one (1) electronic copy of the Statement of Proposal.**

The unbound copy shall be marked "Copy for Reproduction", and shall be formatted as follows:

- No divider sheets or tabs.
- Any pages with proprietary information removed.
- A cover sheet listing the firm's name, the total number of pages, and identifying any pages that were removed due to proprietary information.

The electronic copy will only be accepted via flash drive in the following programs: **Microsoft Word (preferred) or Adobe PDF.**

Each submission package will be reviewed to determine its completeness prior to the actual evaluation. If a respondent does not respond to all categories requested, the respondent may be disqualified from further consideration.

#### B. **SOQ CONTENT REQUIREMENTS**

##### 1. **TAB 1 - COVER LETTER** (maximum of 1 page)

- Provide a letter of introduction signed by an authorized officer of the firm. If the firm is a joint venture, duplicate the signature block and have a principal or officer also sign on behalf of each party to the joint venture.
- Include a brief description of why your firm is well suited for, and can meet, the District's needs.
- Clearly identify the individuals) who are authorized to speak for the firm during the evaluation process.

- d) Must include the following statement:  
**“[INSERT FIRM’S NAME] acknowledges the District’s indemnity provisions and professional liability insurance provisions contained in Exhibit 1 (Agreement) and Exhibit E (Insurance Requirements) attached hereto. If given the opportunity to contract with the District, [INSERT FIRM’S NAME] has no objections to the use of these terms and an agreement in substantially the form provided in the District’s Agreement for Consulting Services and in the Exhibits to the District’s Agreement for Consulting Services.”**
- e) Respondent shall certify that no official or employee of the District, nor any business entity in which an official of the District has an interest, has been employed or retained to solicit or assist in the procuring of the resulting contract(s), nor that any such person will be employed in the performance of any/all contract(s) without immediate divulgence of this fact to the District.
- f) Respondent shall certify that no official or employee of the firm has ever been convicted of an ethics violation.

**2. TAB 2 – BUSINESS INFORMATION**

Please provide the following information:

- a) Firm/Company name.
- b) Address.
- c) Telephone.
- d) Fax.
- e) Website.
- f) Type of Consulting Performed
- g) Name and email of main contact.
- h) Federal Tax I.D. Number.
- i) License or Registration Number.
- j) Type of organization/business structure (ownership, legal form, i.e. corporation, partnership, etc., and senior officials of company). If a joint venture, describe the division of responsibilities between participating companies, offices (location) that would be the primary participants, and percentage interest of each firm.
- k) Certificate(s) of Insurance identifying the firm’s current insurance coverage.
- l) A brief description and history of the firm, including number of years the firm has been in business and date firm was established under its given name.
- m) Number of employees (licensed professionals, technical support.)
- n) Location of office where the bulk of services solicited will be performed and distance from City of Alhambra.
- o) Any State of California certification for your firm of Small Business or Disabled Veteran Business Enterprise status.
- p) How sub-consultants are generally used by your firm and to what extent work is performed in-house versus by a sub-consultant.
- q) Provide similar information for proposed sub-consultants. Place in Appendix so as not

to be tabulated towards the maximum fifty (25) page count.

### **3. TAB 3 – PROJECT APPROACH AND FIRM QUALIFICATIONS**

- a) Provide a statement demonstrating your firm's or team's ability to accomplish the *Scope of Services* in a comprehensive and thorough manner in order to meet the District's goals.
- b) A brief written summary of the firm's philosophy related to the planning of and provision of services regarding energy efficiency measures and continuing energy management services.
- c) Discuss your firm's solar development expertise including financial analysis expertise.
- d) Discuss your firm's HVAC, Lighting and Energy Management systems expertise.
- e) Discuss the software and approach to energy modeling and analysis.
- f) Describe and elaborate on your firm's approach to Utility Bill Management. Please provide screenshots and/or demo if using proprietary software.
- g) Describe your firm's approach to Commissioning and Retro-Commissioning.
- h) Describe your firm's approach to Title XXIV requirements and conformance with applicable code requirements including DSA.
- i) Please describe your firm's methods and processes in regards to Evaluation Measurements and Verifications (EM&V) so that planned results can be achieved with greater certainty and future activities can be more effective.
- j) Demonstrate your firm's flexibility in adapting to the changing needs and priorities of a K-12 school district.
- k) Identify established methods and approaches utilized by your firm to successfully meet completion deadlines, and provide examples demonstrating effective use of stated methods and approaches.

### **4. TAB 4 – RELEVANT K-12 PROJECT EXPERIENCE AND REFERENCES**

Provide project information about prior facility Energy related consulting services prepared by your firm in the last five (5) years for California K-12 public school districts. For each project include:

- a) Name of the School District
- b) Project/Measures descriptions
- c) Calculated Energy Savings (BTU or KWA)
- d) Calculated Total Dollar savings

### **5. TAB 5 – TEAM SUMMARY AND QUALIFICATIONS**

The selected firm shall employ, at its expense, professionals properly licensed and skilled in the execution of the functions required for the provision of facility energy engineering services as described herein.

- a) Identify and provide resumes for key members within your firm that you would assign to the team and their roles. List license numbers, dates, and office addresses. Resumes shall include specific qualifications and recent related experience and shall include a list of references with contact names and phone numbers.



- b) Identify roles and qualifications of sub-consultants if applicable (i.e., Mechanical, Electrical (high and low voltage), Plumbing, Civil, Structural, Landscape, Cost Estimators).
- c) Each SOQ must include evidence that the firm is legally permitted and properly licensed for the scope of work for which the SOQ is submitted and to conduct business in the State of California.
- d) The District expects that the team shall remain intact through the duration of the Project(s). If a team member must leave, the District reserves the right to approve that team member's replacement.

**6. TAB 6 – LITIGATION HISTORY**

Provide a comprehensive five (5)-year summary of the firm's litigation, arbitration and negotiated/settled history with previous clients. State the issues in the litigation, the status of the litigation, names of parties, and outcome. A SOQ failing to provide the requested information on lawsuits or litigation, and responses which assert attorney-client privilege and fail to provide the information requested, will be considered non-responsive, disqualified from the selection process, and will not be evaluated.

**7. TAB 7 – FEES. INCLUDE A DETAILED FEE SCHEDULE**

The District requires each respondent to provide a fee schedule for the types offered. Refer to **Exhibit B**. Firm shall provide the same fee for both contract and extra services.

**IV. SELECTION CRITERIA**

**A. EVALUATION**

The SOQ will be reviewed for responsiveness and evaluated pursuant to the specific criteria set forth in this RFQ, including, without limitation

- The firm's experience and performance history with similar services for California K-12 school districts.
- Knowledge of state laws and regulations, ASHRAE and Title 24, and other governmental requirements for K-12 school districts.
- Experience in Information Technology systems used in schools.
- Experience, results, professional and technical expertise of proposed personnel & sub-consultants.
- Acceptable and verifiable references from clients contacted by the District, including:
  - Firm's reputation;
  - Satisfaction of previous clients (client relationships);
  - Timeliness of work and ability of the firm to meet schedules; and
  - Accuracy of cost estimates.
- Overall responsiveness of the SOQ.
- Location of office and accessibility to the District.
- Proposed fee schedule.

A Selection Committee will evaluate all submissions. Each SOQ must be complete. Incomplete SOQs may be considered non responsive and grounds for disqualification. The District retains the sole discretion to determine issues of compliance and to determine whether respondents are responsive, responsible, and qualified. Based upon the information presented in the SOQ's, the

District's Selection Committee will choose the most highly qualified firms to be interviewed and then potentially selected.

**B. DISTRICT INVESTIGATIONS**

The District may perform investigations of responding parties that extend beyond contacting the references identified in the SOQ. The District may request a firm to submit additional information pertinent to the review process. The District also reserves the right to investigate and rely upon information from other available sources in addition to any documents or information submitted.

**V. RFQ RESPONSE and IMPLEMENTATION SCHEDULE SUMMARY:**

The District reserves the right to change the dates and time on the schedule without prior notice.

<b>Date</b>	<b>Event</b>
November, 27, 2018	Release of RFQ
November 27, 2018	RFQ documents Available on AUSD Website
December 21, 2018 by 10 a.m.	Deadline for submitting written questions
January 7, 2019	Final Addendum Posted on District Website
January 10, 2019 by 10 a.m.	Deadline for Submitting Proposal
January 14, 2019	Tentative Interview of Qualified/Short Listed Consultants
January 29, 2019	Tentative Date for School Board Approval

**VI. ATTACHMENTS:**

- A. Exhibit 1 - Agreement**
- B. Exhibit A - Fee Schedule**
- C. Exhibit B - Insurance Requirements**
- D. Exhibit C - Workers' Compensation Certification**
- E. Exhibit D - Iran Contracting Act Certification [if required]**
- F. Exhibit E - Criminal Background Investigation Certification**

**THANK YOU FOR PARTICIPATING IN THIS SELECTION PROCESS.**