



REQUEST FOR QUALIFICATION (RFQ) No. 122

**Energy Service Company for
Campus Wide Energy Conservation Performance Contract**

**Date Requested: August 23rd, 2010
Time: 2:00 P.M. PST**

**Please submit your response to RFQ 122 to:
900 Otay Lakes Road, Chula Vista, CA 91950
Attn: Henry Amigable
Bond Program Manager Office Building 1688**



SOUTHWESTERN COMMUNITY COLLEGE DISTRICT (District) announces a Request for Qualifications (RFQ) competition as authorized in California Government Code 4217 from interested Energy Service Companies (ESCO) capable of providing comprehensive energy conservation and energy related capital improvement services. The District invites interested firms to submit their qualifications to provide services as described herein. Qualifications should be delivered to the District by 2:00 P.M. PST August 23, 2010 at the Bond Program Manager's Office. The intent of this request is to identify and select an ESCo to develop and assist the District in implementing energy savings projects. The purpose of the project is to make the District's buildings more energy efficient, reduce utility and operating costs, and reduce dependence on grid-based power procurement.

1. RFQ TIMELINE.

A. RFQ Due: 2:00 PM August 23, 2010

900 Otay Lakes Road, CA 91910 Building 1688
Bond Program Manager's Office

B. Mandatory Pre-Conference Meeting: 3:00 PM August 16, 2010

900 Otay Lakes Road, CA 91910 Building 1688 Conference Room
Bond Program Manager's Office

C. Last day for questions: 12:00 PM, August 18, 2010

D. Shortlist Announcement: August 24, 2010

E. Anticipated Interview Date: August 30, 2010

F. Board Approval: October 13, 2010

2. SERVICES REQUESTED. The District is interested in implementing a comprehensive range of energy services and energy related capital improvements using a performance-based contract with guaranteed savings or similar type of approved agreement. This acquisition tool shall require no capital cost to the District. The energy services the District envisions and requires may include but are not limited to: a primary energy conservation study, an in-depth investment grade energy conservation audit, financing options, design build capabilities, installation personnel, project management, measurement and verification capabilities, and the necessary training in the operation of new equipment or systems. The goal of the project includes but is not limited to significantly reducing energy consumption associated with the heating, ventilation



and air conditioning systems, chilled water systems, hot water boiler systems, mechanical systems, lighting systems, water consumption, utility distribution and any other energy using devices located at District facilities.

The annual savings from the new energy conservation measures shall be capable of financing the project at a term that is favorable to the District. The District reserves the right the pay for the project from the Bond funds. The cost savings achieved by the installed improvements need to be sufficient to cover all project costs including annual maintenance and monitoring fees for the duration of the contract term. The district may require the annual energy savings to be guaranteed by the installing ESCo.

It may be necessary for the successful ESCo to either provide funding or arrange third party funding for the performance-based contracting project. The District currently has \$5 million allocated in the first Phase of Proposition R Bond Program. Payments for the financed cost of the project, including any debt service, will be made from reductions in energy consumption costs (except where funded by Bond dollars). **The ESCo will pay the District any shortfall in guaranteed energy cost saving.** The ESCo's experience in providing financing and delivering energy cost savings to other building owners via performance contracting will be evaluated by the District in the selection process.

The District expects the following services to be provided by the ESCo:

A. Comprehensive Energy Analysis. The ESCo will perform a Comprehensive Energy Analysis of the District's facilities to determine what potential energy savings are available.

The analysis will identify and individually list Energy Conservation Measures (ECMs) and outline a precise implementation cost, the energy savings and the funding and payback method and timeframe for each. The ESCo will indicate which ECMs are recommended. After reviewing the list of ECMs and considering the ESCo's recommendations, the District will select a combination of ECMs for design and implementation by the ESCo.

If the ESCo cannot provide the District with a project, which can be paid for from energy savings during a period not to exceed fifteen years, the District can choose to terminate the contract at the end of the Comprehensive Energy Analysis at no cost. If the ESCo provides the District a project that is viable, the District will either choose to move forward with the project's design and implementation or pay the ESCO for the cost of the Comprehensive



Energy Analysis. In any case, the Comprehensive energy Analysis becomes the property of the District. The cost of the Comprehensive Energy Analysis will be quoted to the District prior to its commencement.

- i. Under a separate tab, include the cost of a Comprehensive Energy Analysis in the response. See No. 4 Proposal Format and Content.

B. Financing. The ESCO should provide or arrange financing of the project, but the District reserves the right to provide its own funding or financing for the project.

C. Engineering Design. The ESCo should provide a complete design of the systems selected by the District. The design must be performed or supervised by a professional engineer registered in the State of California. The ESCo will secure approvals from required local, state, and federal agencies and will comply with all applicable codes and statutes. This will also include obtaining all permits and licenses prior to installation.

D. Implementation. The ESCo will provide a “turn-key” installation of the selected energy efficiency systems. This will include procurement, installation and all construction management. Removal and disposal of any hazardous substances if encountered will be the responsibility of the District. The type and manufacturer of systems purchased and any subcontractors will be selected and stated by the ESCo in the analysis phase, but shall be approved by the District.

E. Commissioning. The ESCo will provide a commissioning of all systems to assure proper installation and performance.

F. Training. The ESCo will provide training to District personnel on proper operation and maintenance of new and retrofitted equipment and systems. This training should be provided at the commissioning and at regular intervals for the term of the performance contract.

G. Monitoring and Verification. The ESCo shall provide monitoring and verification of energy savings for the term of the performance contract. Provisions to allow the District to cancel any Monitoring Contract, at no cost to the District during the contract period, will also be required.

H. Warranty. The ESCo shall provide a warranty for all installed systems.



3. **ENERGY CONSERVATION MEASURES.** The focus of the ECMs will be to reduce operating costs due to increased energy prices and maintenance costs, upgrade older inefficient equipment, and improve the learning and workplace environment.
4. **PROPOSAL FORMAT AND CONTENT.** The following topics should be covered in the submitted statement of qualifications.
 - A. **Management Plan.** Describe your company's proposed management approach to this project. Include information on project management and scheduling. Describe your company's capabilities in providing the services requested in Section 1 above and the services required to implement retrofit projects on a performance contracting basis.
 - B. **Service and Technologies.** Describe the services provided by your company. Describe some of the technologies the District might expect would be implemented under the project.
 - C. **Personnel.** Provide information describing the capabilities and experience of the people who will be involved in this project. Describe the role which each of these people would play in the management of the project. Provide professional resumes for key people (no more than one page per person). Indicate the education and professional licensing of each person as it relates to this project; e.g., professional engineer, engineer-in-training, professional architect, certified energy manager, etc. Designate an individual as overall project manager. Certify that the team members work exclusively with performance contracting.
 - D. **Verification of Energy Savings.** Describe the methodologies that may be used to verify and guarantee the District's realized energy savings. Include an explanation of how savings calculations will be adjusted to reflect changes in weather, occupancy, and utilization of facility, equipment changes etc.
 - E. **Experience and References.** Provide information that describes your company's experience with design/build delivery method and performance contracting method of providing the services described in this request for qualifications. Also indicate the experience of the key personnel you plan to use on this project. Provide a list of at least five (5) completed California higher education project references implemented by your company as paid from energy savings performance contracting projects. Please use the below



to describe each project and limit your responses to no more than one page per project.

- a. Project title and location
- b. Type of contract
- c. Nature of firm's responsibility
- d. Contract amount
- e. Name, address, and telephone number of contact person
- f. Start date and end date, if complete
- g. Current Status
- h. Energy conservation opportunities implemented

F. California Capabilities. Provide a copy of your company's California contracting license. Indicate how long your company has held this license. Provide a list of professional engineering licenses held in the State of California by full-time employees of your company. Answer the following questions:

- a. What is your company's office address that will serve the District for the duration of the project?
- b. How many employees working directly on energy conservation projects work at that location?
- c. Has your company secured California Energy Commission, SDGE and/or California Public Utilities Commission energy efficiency rebates and incentives? If yes, list the projects and the rebate and or incentive amounts.

G. Comprehensive Energy Analysis. Provide a quote for the services outlined in 2A. Certify that the quote will be valid for 90 days and cannot be withdrawn without a prior approval from the District.

5. Selection. The District will evaluate submitted written qualifications and proposals and invite the ESCo's the District determines are the most highly qualified to participate in oral interviews and presentations. The District will evaluate the participants and select the one best suited to the district's requirements.

Terms and conditions of an Energy Services Agreement will be negotiated with the successful ESCo. If an agreement cannot be reached with the selected ESCo, the District will terminate discussion with that ESCo and commence



negotiations with the ESCo determined to be the next best suited to the District's requirements.

After approval by the District Governing Board, the successful ESCo will proceed with the Comprehensive Energy Analysis of each facility as directed by the District. The ESCo will be provided access to each site on a schedule convenient to the District. The district will provide the ESCo with utility usage data and other reasonably available information as requested by the ESCo to perform the analysis.

6. Evaluation Procedure. Proposals submitted in response to this request for qualifications will be evaluated using Attachment A format based upon the company's responses to the topic described in Section 3 of this request for qualifications. Selected firms will be invited to presentations. Firms will then be ranked according to the combination of their statement of qualifications as submitted and their oral presentations.

7. Other Conditions.

A. RFQ Cost. Cost for responding to the RFQ and making RFQ presentations is entirely the responsibility of the ESCo and shall not be chargeable in any manner to the District.

B. Acceptance of RFQ Proposal Content. The contents of the proposal of the successful firm will become contractual obligations. Failure of the successful firm to accept these obligations in a subsequent contractual agreement may result in cancellation of the award.

C. Submittals. One (1) original and four (4) copies of the qualifications package should be submitted and delivered to:

900 Otay Lakes Road, Chula Vista, CA 91950
Attn: Henry Amigable
Bond Program Manager Office Building 1688
(not shown on current campus map)



ATTACHMENT A

EVALUATION CRITERIA

The following criteria will be used to evaluate the written submissions of ESCO qualifications, interviews with previous clients, and responses of ESCOs during final selection interviews as appropriate. Evaluation weighting values are indicated below.

- I. Project Management 20%**
 - A. Clear assignment of responsibility for various project tasks to specific individuals. All individuals with major responsibility for the project's technical design, management, and negotiation should be present at the oral interview.
 - B. Quality of communication skills of the ESCO's representatives at the oral interview.
 - C. Ability to coordinate project construction with local utilities, subcontractors, equipment suppliers and facility personnel.
 - D. Quality of provisions for training facility staff.
 - E. Prior Experience working with Colleges or Universities either in Performance Contracting or other capacities
 - F. ESCO shall have an in-house support facility equipped with full time service technicians within 30 miles of the site and the ability to manage construction, repairs, regular service, and emergencies effectively.

- II. Technical Approach 20%**
 - A. Qualifications of the technical design professionals.
 - B. The number of past retrofit projects that include similar technical measures proposed for inclusion in these projects and completed by the person(s) responsible for project technical design.
 - C. Quality of a sample energy audit for similar types of facilities completed by the person(s) responsible for project technical design.



- D. Documented energy savings of previous retrofit projects managed by the ESCO.
- E. Comprehensiveness of the technical approach to the project, based on improvements likely to be included and the conceptual design creativity demonstrated during the oral interview.
- G. Typical baseline energy use calculation methodology.

III. Financial Approach 10%

- A. Financial soundness and stability of the ESCO.
- B. Demonstrated ability to provide or arrange project financing.
- C. Financing arrangements and Bonding for this project, as required.
- D. Quality and clarity of the financial savings calculation methodology.
- E. Reconciliation accounting methods for adjusting windfalls/shortfalls in project cash flows.
- F. Completeness of most recent annual financial report.
- G. Clarity of sample project invoice.

IV. References 15%

- A. Provide a list of projects similar in scope and size that your firm has been involved in the past five (5) years. Failure to identify any projects will result in immediate disqualification.

V. Added Value Services 10%

- A. ESCO's program offered to Higher Education institutions as a value added service

VI. Local Service Support 15%

- A. ESCO shall have an in-house support facility equipped with full time service technicians within 50 miles of the site and the ability to



manage construction, repairs, regular service, and emergencies effectively.

VII. Local Training Center 10%

- A. ESCO shall have an in-house training facility at the local office to provide training to the College staff

**THE ESTABLISHMENT, APPLICATION AND INTERPRETATION OF THE ABOVE
CRITERIA SHALL BE SOLELY WITHIN THE DISCRETION OF THE DISTRICT.**

**THE DISTRICT RESERVES THE RIGHT TO REJECT ANY AND ALL SUBMISSIONS.
LATE SUBMITTALS WILL NOT BE ACCEPTED.**