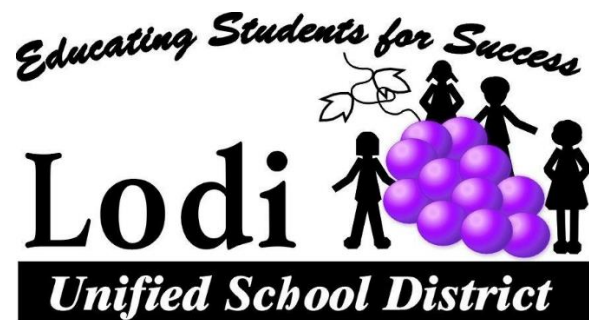


**REQUEST FOR PROPOSAL
RESOLUTION #2020-09**

**Request for Proposal for Pacific Gas and Electric On Bill
Finance Phase II – Lighting Retrofit**



**Proposals must be received
by 2:00 p.m. on November 7, 2022**

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REQUEST FOR PROPOSAL

Part 1 – Summary

1.1. Purpose

Lodi Unified School District, herein referred to as “Client” or “District” is requesting proposals from qualified lighting contractors, herein referred to as “Contractor” with experience in completing lighting retrofits in a K-12 setting using the Pacific Gas & Electric (PG&E) On Bill Financing (OBF) Program. The project is being funded by **PG&E’s OBF Program** and all contractors wishing to be considered for this project must comply with all OBF, federal, state, and local requirements.

1.2. RFP Schedule

The District has set the following RFP Schedule that all Contractors must adhere to. The District reserves the right to modify this Schedule as needed and will issue an addendum if it modifies the Schedule.

Event / Occurrence	Deadline	Time
District Issues RFP	October 6, 2022	
Mandatory Kick Off Meeting at Lodi Unified School District Maintenance & Operations Department – 880 N. Guild Ave., Lodi, CA 95240 at 10:00 am	October 17, 2022	10:00 am
Deadline for Contractor to submit questions regarding this RFP	October 21, 2022	4:30 pm
Deadline for Contractors to submit	November 7, 2022	2:00 pm
Contractor Interviews (If necessary)	Week of November 14, 2022	
District to finalize recommendation for District Board of Education	Week of December 12, 2022	
District Board of Education approves successful Contractor	December 13, 2022	
Installation Commences	TBD	

1.3. Qualified Contractor

The purpose of this RFP is to obtain information that will enable the District to select a contractor that is extremely familiar with all applicable regulations and industry guidelines especially as they apply to the District facilities projects, and be capable of providing work products that will enable the District to strictly comply with said requirements. Each Contractor responding to this RFP should be prepared and equipped to provide full service to the District.

Contractors and subcontractors will be required to furnish certified payroll records directly to the Department of Industrial Relations in accordance with Labor Code Sections 1771.4(a) and 1776. The RFP and contract documents must include notice of this requirement. In addition, contractors and subcontractors must be registered with the Department of Industrial Relations in order to bid or work on any public works project. The Department maintains a list of registered contractors and subcontractors on its website at <https://efiling.dir.ca.gov/PWCR/Search>.

The selected Contractor shall be required to work cooperatively with District staff, the Board of Education, and all other technical Contractors, the project inspector, and any program and/or

construction manager to facility timely and professional completion of the Project.

1.4. Submission

If your firm is interested in performing services for the project, on behalf of the District, please submit to the District a proposal in accordance with this RFP. Proposals must be received no later than the date and time indicated in the RFP Schedule, Section 1.2. Proposals will be date stamped to record receipt thereof. The proposals may be mailed or delivered in person during on **November 4, 2022**. Delivery of proposals is the sole responsibility of the Contractor. All proposals must be signed and become the property of the District. The address for submission of the proposals is:

Lodi Unified School District
Facilities and Planning
ATTN: Vickie Brum
880 N Guild Ave.
Lodi, CA 95240

1.5. Response Format

Each Contractor is required to submit a response they deem appropriate to the following requests. Submittals should be brief and concise but provide sufficient clarity to meet the criteria to be used in the evaluation process. Contractor's response shall not exceed twenty (20) pages, excluding Exhibits. Each hardcopy of the Proposal must be bound individually, single-sided, tabbed, and organized in order and include all sections and information as stated in Part 3, Submittals. Each Contractor shall submit four (4) bound hard copies and one (1) USB or CDROM electronic copy, in PDF format with bookmarks, of their responses. The District will evaluate the responses based on the responsiveness to District requirements listed.

NOTE for Exhibits: All Exhibits should be tabbed, labeled and included as part of the appendix. It is at the Firm's discretion to determine how to reference, in the body of the Proposal, the location of the Exhibits in the appendix. All Exhibits may be recreated in another program as long as the formatting and information requested mirrors the PDF forms attached to this RFP. The intent of the PDF forms is to keep all the requested information in a uniform format.

1.6. Questions

The selected contractors must carefully read the entire RFP prior to submitting questions as most questions will be answered in this RFP. If, however, you should have questions regarding this RFP, please email vbrum@lodiUSD.net. All questions must be submitted in writing. The question deadline is indicated in the RFP Schedule, Section 1.2. After this deadline, the District will not answer, address, and/or review any questions interested Contractor might submit. Responses to all questions received prior to the deadline will be provided to all Contractor.

1.7. Form of Agreement

Selected contractor must be able to execute the District's standard Agreement for Construction Services, ("Agreement") as attached to this RFP as EXHIBIT A.

1.8. Indemnity

Contractors responding to this RFP must acknowledge that they have reviewed the District's indemnity provision set forth in EXHIBIT A and must agree to the indemnity provision and confirm in writing that, if given the opportunity to contract with the District, the Contractor has no

substantive objections to the use of the District’s standard indemnity provision.

1.9. Insurance

The District requires at least the following insurance coverage:

Type of Coverage	Minimum Requirement
Commercial General Liability Insurance , including Bodily Injury, Personal Injury, Property Damage, Advertising Injury, and Medical Payments	
Each Occurrence	\$ 2,000,000
General Aggregate	\$ 4,000,000
Automobile Liability Insurance - Any Auto	
Each Occurrence	\$ 1,000,000
General Aggregate	\$ 3,000,000
Workers’ Compensation	Statutory Limits
Employer’s Liability	\$ 4,000,000

Selected contractor shall provide to the District certificate(s) of insurance and endorsements satisfactory to the District. Insurance policy(ies) shall not be amended or modified and coverage amounts shall not be reduced without thirty (30) days’ written notice to District prior to modification and/or cancellation. For Commercial General Liability and Automobile Liability, District shall be named as an additional insured on all policies. Contractor’s policy(ies) shall be primary; any insurance carried by the District shall only be secondary and supplemental. Selected Contractor shall not allow any employee or subcontractor to commence work on any contract or any subcontract until the proof of insurance required of the Contractor or subcontractor has been provided to and accepted by the District.

1.10. Full Opportunity

The District hereby affirmatively ensures that Disadvantaged Business Enterprises (“DBE”), Small Local Business Enterprise (“SLBE”), Small Emerging Local Business Enterprise (“SELBE”) and Disabled Veterans Business Enterprise (“DVBE”) firms shall be afforded full opportunity to submit qualifications in response to this notice and will not be discriminated against on the basis of race, color, national origin, ancestry, disability, gender, transgender status, political affiliation, or religion in any consideration leading to the award of contract. No qualified disabled person shall, on the basis of disability, be excluded from participating in, be denied the benefits of, or otherwise by subjected to discrimination in any consideration leading to the award.

Part 2 – Project Description

2.1. Project Description

The general scope of the project involves converting the sites to LED lighting technology for both interior and exterior fixtures. There is an associated Excel file titled “Scope of Work” that provides a list current equipment and proposed retrofits. Contractors shall provide pricing to complete the proposed scope of work identified in the Scope of Work spreadsheets, pricing shall include all associated costs and fees. Due to the OBF reimbursement process, the Client will require that the site be completed in a sequential fashion and each contract will require an individual contract. The proposed sequence follows the order that the sites Project Locations are listed in the Section 2.2.

2.2. Project Locations

Christa McAuliffe Middle 3880 Iron Canyon Circle Stockton, CA 95209
Westwood Elementary 9444 Caywood Drive Stockton, CA 95210
Oakwood Elementary 1315 Woodcreek Way Stockton, CA 95209
Morada Middle 5001 E. Eastview Drive Stockton, CA 95212
Julia Morgan Elementary 3777 A. G. Spanos Boulevard Stockton, CA 95209
Sutherland Elementary 550 Spring River Circle Stockton, CA 95210
Clairmont Elementary 8282 Le Mans Avenue Stockton, CA 95210
Woodbridge Elementary 1290 Lilac Street Lodi, CA 95242
Adams (Ansel) Elementary 9275 Glacier Point Drive Stockton, CA 95212
Davis Elementary 5224 E. Morada Lane Stockton, CA 95212
Houston 4600 Acampo Road Acampo, CA 95220
Live Oak Elementary 5099 E. Bear Creek Road Lodi, CA 95240
Tokay Colony 13520 E Live Oak Road Lodi, CA 95240

2.3. Installation Approach

1. Overview of Personnel and Installation Approach

Please provide an overview of your installation approach for a project of this size and scope. Identify the make-up and experience of the delivery team, specifically discuss the role of site and project management. Identify specific staff members that you would anticipate using for this project, provide a brief of bio of the individuals highlighting recent and relevant experience. Also, include your nearest field office and from where delivery staff will be provided.

Provide an estimate for the total time to deliver a project of the scope identified in the preliminary survey data, use the contract signing date as day 1 for this estimate.

Notes:

1.) In the event the work is not completed during times when school is not in session the work will need to be completed after school hours and all areas of the site must be fully operational and available at the start of each school day.

2.) All work conducted during student contact hours requires that staff conducting the work is either Department of Justice (DOJ) cleared or supervised by a DOJ cleared responsible party as staffed by contractor. In addition, all work shall be in accordance with California Education code 45125.2

2.4. Project Site Visit

A Mandatory Kick-Off Meeting at Lodi Unified School District Maintenance & Operations is scheduled for October 17, 2022 at 10:00 am located at 880 N Guild Ave., Lodi, CA 95240. At that time, maps and meeting locations for the balance of the site visits will be distributed to all attendees. The site visits will consist of visiting at least 5 of the sites listed above. Allow 4-6 hours for driving time and on-site evaluation. It shall be the responsibility of the vendor to thoroughly read and understand the information, instructions, and scope of services contained in this RFP. Interested participants are expected to fully inform themselves as to the conditions and requirements of the services to be provided. Failure to do so is at the Contractor's own risk. No plea of error or ignorance by the participant of conditions that exist or that may hereafter exist as a result of failure or omission on the part of the service provider to make the necessary examinations and investigations will be accepted as a basis for varying the requirements of the District. The District will assume that submission of a response means that the Contractor has familiarized itself with the conditions and requirements and intends to comply with them unless specifically noted otherwise.

Part 3 - Scope of Services & Pricing

3.1. Scope of Services Summary

The Client is pursuing this project using PG&E's On Bill Financing (OBF) Program. As such all work proposed must meet any and all requirements of the OBF program. The Client has selected the following thirteen (13) sites to include in this project. Due to the manner in which the OBF program reimburses for projects, the Client will require an individual contract for each site representing the scope of work to be completed at the site. Contracts for each site will be issued sequentially. The order in which the sites are to be completed are as follows.

1. Christa McAuliffe
2. Westwood
3. Oakwood
4. Morada
5. Julia Morgan
6. Sutherland
7. Clairmont
8. Woodbridge
9. Ansel Adams
10. Davis
11. Houston
12. Live Oak
13. Tokay Colony

It is the desire of the Client to retrofit all of the interior and exterior lighting at all sites with current LED technologies.

For purposes of the RFP, the Client Representative has surveyed the thirteen (13) sites and developed a scope of work to convert all lighting to LEDs. All of the survey data and scope recommendations are included in Excel files by site for Contractor reference and review. The cost information included in the Excel files was used strictly for demonstration purposes and shall have

no bearing on the cost provided by responding Contractors. The Contractor shall provide cost to perform the retrofits called for and shall include ancillary costs associated with the development and delivery of the project. It is the responsibility of the contractor to survey the sites to gain the necessary knowledge to accurately develop a cost that accounts for any special situations or nuances of each site.

While the Client Representative has included a proposed scope of work and Contractors are required to provide a cost to deliver it, Contractor may at its discretion also provide alternative recommendations using its lighting design and retrofit expertise that will in their opinion result in a better overall project as it relates to quality of lighting, quality and longevity of materials and overall value to the District. Any alternatives shall be identified using the site survey tables provided and the pricing shall be provided in the "Optional Pricing" table provided below.

All retrofit solutions must include the removal of all ballast that are properly disposed of and replaced with drivers. Additionally, all retrofit solutions must address the replacement of all emergency lighting applications.

The Contractor will be required to complete all necessary paperwork to obtain the OBF as well as any utility rebate applications.

Contractor shall also identify all other cost associated with the development and delivery of a turnkey project, including but not limited to survey fees, engineering, project management, permit fees, utility rebate application development fees, OBF management fees, equipment disposal fees and taxes. Contractor shall include the specifications for all equipment they are recommending and their pricing is based upon. Any and all equipment recommended must comply with all OBF, federal, state and local requirements and meet or exceed industry standard warranties. requirements and standards.

As part of the project contract for each site the selected Contractor shall prepare and submit for approval the OBF application. The OBF application must be approved prior to commencement of the construction. All classrooms and office lighting shall perform within published standards as set by the Illumination Engineers Society.

3.2. Pricing Requirement

By responding to this RFP, Contractor acknowledges it is required to submit the following pricing schedule of project costs by site using the table below.

All pricing information will be treated as confidential and proprietary. It will not be released to any outside party by Client or Client Representative.

<i>Site</i>	<i>Cost</i>
Christa McAuliffe	
Westwood	
Oakwood	
Morada	
Julia Morgan	
Sutherland	
Clairmont	

Woodbridge	
Ansel Adams	
Davis	
Houston	
Live Oak	
Tokay Colony	
Tokay Colony	
Westwood	
Woodbridge	
Project Subtotal	
Contingency (include 10% of Project Subtotal)	
Project Total	

Any use of Contingency funds must have prior approval by Client. Contingency is intended for use to cover the cost of work that goes beyond that called for in the attached scope of work.

3.3 Optional Pricing

In the event Contractor is providing alternative recommendation the following table must be populated:

Site	Cost
Christa McAuliffe	
Westwood	
Oakwood	
Morada	
Julia Morgan	
Sutherland	
Clairmont	
Woodbridge	
Ansel Adams	
Davis	
Houston	
Live Oak	
Tokay Colony	
Tokay Colony	
Westwood	
Woodbridge	
Project Subtotal	
Contingency (include 10% of Project Subtotal)	
Project Total	

Any use of Contingency funds must have prior approval by Client. Contingency is intended for use to cover the cost of work that goes beyond that called for in the attached scope of work.

3.2. Submittals

- 3.2.1. Submit in accordance with Lodi USD Submittals Procedures
- 3.2.2. Submit the following to Lodi USD:
 - 3.2.2.1. Manufacturers name, brand name, catalog references for all equipment supplied, indicating UL Listings, for all system components
 - 3.2.2.2. Complete written sequence of operations for all functions of the system.
 - 3.2.2.3. Complete wiring diagrams for all components and floor plans indicating device locations, etc. Provide dimensioned elevation, mounting, and wiring details for all consoles, racks, control panels, and fabricated equipment being supplied under this section.
 - 3.2.2.4. Provide complete point-to-point and termination drawings. Partial or "Typical" drawings will not be accepted. All drawings shall be done in Visio.
 - 3.2.2.5. Bill of Materials.
 - 3.2.2.6. Service information, including address of nearest representative. Provide written approval from each manufacturer affirming that Contractor is certified and approved for systems installation and service for all referenced systems in this Section.
 - 3.2.2.7. Proposed training program, including name and qualifications of trainer(s), schedule of training, curricula and written training materials.

3.3. Product Delivery, Storage and Handling

- 3.3.1. All equipment provided shall be new, not used, and shall be shipped in original packages to prevent damage or entry of foreign matter. All handling shall be in accordance with manufacturers' recommendations. Protective covering shall be provided by Contractor during construction.

3.4. Warranty

- 3.4.1. The Contractor and manufacturer(s) shall warranty all equipment. Materials and installation labor for two (2) years from the filing of the notice of completion (NOC).
- 3.4.2. During the warranty period, upon notification of a problem by the District, the Contractor shall ensure that a competent and qualified field service technician arrives on site to correct the problem, within 48 hours. If a problem can be corrected remotely to the Lodi USD's reasonable satisfaction, the onsite arrival time commitment shall be waived.
- 3.4.3. At least sixty (60) calendar days prior to expiration of warranty, Contractor shall provide the District with post-warranty maintenance contract proposals. The terms and condition of any such post-warranty program shall be consistent with those offered to the provider's most favored customer(s).

Part 4 - Mandatory Minimum Qualifications

4.1. Qualification-1

Legal Name of Contractor

Requirement:

Please fill out the appropriate selection below pertaining to Contractor.

Identify Contractor as an individual, a partnership, a corporation, or a subsidiary. Disclosure of who is authorized to bind the individual, partnership or corporation is also required.

The undersigned hereby represents and warrants that,

_____ is duly incorporated and is in good standing in the State of California

_____.

Legal Name of Contractor:

Name of Individual Authorized to Bind:

Signature of Individual Authorized to Bind:

4.2. Qualification- 2

State Contractors License

Requirement:

Possession of a valid class C-10 Electrical. The undersigned hereby warrants that the Contractor has an appropriate license. Such license will be in full force and in effect throughout the duration of performance under this contract; and that any and all subcontractors to be employed will have appropriate licenses and maintain those license (s) throughout the duration of the project. The undersigned hereby warrants that the Contractor has the appropriate license(s).

License(s) #:

4.3. Qualification- 3

Contractor Qualification Information

Please provide your responses to the following qualification information in the same order and format.

1. Indicate the number of years Contractor has been in business and the number of years it has provided lighting retrofit services:

2. Is Contractor or its owners connected with any other companies as a subsidiary, parent affiliate, or holding company?

Yes___ No___

(If Yes, describe that relationship on a separate page)

3. Has Contractor ever defaulted on a contract forcing a surety to suffer a loss?

Yes___ No___

(If Yes, please describe on another page)

4. In the past three (3) years, has Contractor had any project which was terminated by the owner (Client) and which required completion by another party?

Yes___ No___

(If Yes, state the project name, location owner/contact person, telephone number, contract value, dispute amount, date and reason for termination/dispute.)

5. Has Contractor, an affiliate company, or any owner ever declared bankruptcy or been in receivership?

Yes___ No___

(If Yes, please describe on a separate page)

6. Does Contractor have any outstanding liens or stop notices for labor and/or materials filed against it on any contracts which have been done or are being done by Contractor?

Yes___ No___

(If Yes, describe on a separate page. State the project name, location, owner/contact person, telephone number, amount of dispute and a brief description of the situation)

7. Please indicate the physical business location within the closest proximity to Client from where Contractor would provide project management and on-going maintenance services if awarded this project:

8. Has the contractor had any labor claims (NCECA, etc) in the past 3 years?

Yes___ No___

(If Yes, describe on a separate page. State the project name, location, owner/contact person, telephone number, amount of dispute and a brief description of the situation)

Note: All work conducted on this project is subject to prevailing wage requirements. **Certified payroll records shall be provided per the Department of Industrial Relations requirements.**

THE UNDERSIGNED DECLARES UNDER PENALTY OF PERJURY THAT ALL OF THE INFORMATION SUBMITTED WITH THIS PROPOSAL IS TRUE AND CORRECT.

Signature: _____

Name: _____

Title: _____

4.4. Qualification- 4

Please fill out reference information for three (3) past projects.

Contractor Reference #1

1. Customer Name:
2. Address (City, State & Zip):
3. Customer Contact Name:
4. Phone:
5. Amount of Project:
6. Contract Signing Date: Project Completion Date:
7. Components of Project Yes No

a. Retrofit of existing fixtures with LEDs	_____	_____
b. Replacement of existing fixtures with LEDs	_____	_____
8. OBF Project: ___ Yes _____ No
9. For each Yes answer, please briefly describe the work performed and cost of this reference project.

4.4. Contractor Reference #2

1. Customer Name:
2. Address (City, State & Zip):
3. Customer Contact Name:
4. Phone:
5. Amount of Project:
6. Contract Signing Date: _____ Project Completion Date: _____
7. Components of Project

	Yes	No
a. Retrofit of existing fixtures with LEDs	_____	_____
b. Replacement of existing fixtures with LEDs	_____	_____
8. OBF Project: ___ Yes _____ No
9. For each Yes answer, please briefly describe the work performed and cost of this reference project.

4.4. Contractor Reference #3

1. Customer Name:
2. Address (City, State & Zip):
3. Customer Contact Name:
4. Phone:
5. Amount of Project:
6. Contract Signing Date: _____ Project Completion Date: _____
7. Components of Project

	Yes	No
a. Retrofit of existing fixtures with LEDs	_____	_____
b. Replacement of existing fixtures with LEDs	_____	_____
8. OBF Project: ___ Yes _____ No
9. For each Yes answer, please briefly describe the work performed and cost of this reference project.

4.5. Qualification-5

Financial Statement

Requirement:

A copy of the Contractor’s most recent balance sheet (preferably audited by an outside firm) listing assets, liabilities and owners (or stockholders) equity for the legal entity identified in Qualification #1.

Client will require Contractor to have minimum annual sales in excess **of five hundred thousand U.S. dollars (\$500,000) for any one fiscal year between 2019 through 2021.**

An annual report can be substituted in lieu of Qualification #5.

List audit firm for the most recent audit

Firm:

Contact Person:

Telephone:

4.6. Qualification-6

Performance and Payment Bond

Requirement:

A 100% **performance and payment bond** will be required prior to final contract execution. The firm is to submit proof of Contractor's ability to post a single performance bond. For purposes of this project assume a contract value of \$2,000,000.

Satisfactory proof of bonding ability should include:

A letter from AA best related surety insurer, addressed to the Client, referencing unused bonding capacity in an amount not less than the proposed contract amount.

ACKNOWLEDGEMENT OF TERMS AND CONDITIONS

By signing below, you acknowledge that you have read the Terms and Conditions for Lighting Retrofit Services which are posted on the Lodi Unified School District's website at:

<https://www.lodiusd.net/district/departments/business-services/facilities-and-planning>

You also acknowledge that you are responsible for viewing any addenda or additional information that is posted on that site prior to the bid opening and that you will include such addenda in your bid response.

Signature

Name (printed)

Title

Date

Exhibit 1: Scoring Criteria

Requirements	Available Points
Mandatory Minimum Requirements	100
Miscellaneous Requirements	
Company References	
OBF Experience	100
Pricing Schedule	150
Installation Schedule/Approach	100
Installation Approach/Project Mgmt.	
Warranty	50
Total Points Available	500