



REQUEST FOR QUALIFICATIONS
RFQ NUMBER: 2023-006

CaISHAPE PROGRAM

MOORPARK UNIFIED SCHOOL DISTRICT

Issued: January 25, 2023

SCHEDULES

RFP Available	January 25, 2023
Proposals Due by	February 8, 2023 at 10:30 am
Consultant Selection	February 15, 2023
Board Approval	February 28, 2023

END OF DOCUMENT

REQUEST FOR QUALIFICATIONS (RFQ) NO. 2023-006
CalSHAPE Program

Notice is hereby given that the Governing Board of the Moorpark Unified School District will receive up to, **but not later than, Wednesday, February 8, 2023 at 10:30 am local time**, letters of interest and qualification packages from qualified design-build firms for the AB-841 California School Healthy Air, Plumbing, and Efficiency Program (CalSHAPE). Proposals are to be delivered to the Facilities Department located at 5297 Maureen Lane, Moorpark CA 93021.

A copy of the RFQ is available at the Moorpark Unified School District Maintenance/Facilities Office, or can be downloaded from the MUSD website at the following web address:

<https://www.mrpk.org/businessservices/purchasing>

Each bid must conform and be fully responsive to the RFQ.

The District may, at its discretion and pursuant to applicable law(s), award a contract to the selected Firm per Government Code section 4525 et seq. (the professional services statute), Government Code section 53060 et seq. (the special services statute), Government Code section 4217 et seq. (the energy efficiency statute), Education Code section 17406 (the lease-leaseback statute), Education Code section 17250 (the design-build statute), or Public Contract Code section 20111 (the general procurement statute for school districts) in accordance to a best value selection.

The District, at its sole discretion, may select the awarded respondent for subsequent phases of work. The District reserves the right to reject any and all proposals and to waive any informalities or irregularities in the bidding.

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I. OVERVIEW

The District intends to select a qualified provider to provide design-build professional services for the CalSHAPE program. The District intends to use the competitive qualification process to select a qualified firm based on technical criteria to provide expertise for the application, design, assessment, implementation, documentation and reporting requirements for the AB-841 CalSHAPE program. The program funding will be for the ventilation systems to meet certain classroom ventilation requirements and non-compliant plumbing fixture upgrades.

The selected firm shall be a single point of contact (POC) for AB-841 related projects and shall assist the District with the applications for grant funding. Upon approval of the AB-841 grant funding, the selected firm will serve as a design-build entity and a single POC for the implementation of the scope of work and energy efficient projects associated and related to the approved funding for qualified school sites. Upon RFQ award, the selected respondent shall conduct districtwide site assessments for determining a potential scope of work. Site assessments must be conducted in accordance with the funding guidelines for AB-841 or other funding sources pursued.

II. PROJECT GOALS

The District's ultimate goals are to: 1) improve the health and safety of classrooms and facilities, 2) promote efficient facilities operations through reduced utility and maintenance costs, and 3) utilize funding alternatives to relieve budget pressure. Respondents shall support the District's goals by developing, implementing, and monitoring a comprehensive program that accomplishes the following:

- Achieves long-term cost savings through reduced energy, gas and water usage. Have experience in energy saving reports for state funded programs such as Prop 39 and AB-841
- Creates general fund relief through reduced operating expenditures
- Helps prepare facilities for safe operations during health pandemics, and to assist the district with a safe operations plan post-pandemic
- Meets current health guidelines for indoor air quality and ventilation standards
- Upgrades antiquated and inefficient equipment within the guidelines of AB-841 or other funding sources pursued
- Maintains consistent and reasonable levels of occupant comfort
- Maintains or improves building functionality and compatibility with existing equipment
- Improves utilization of technology to achieve optimum performance and savings
- Minimizes financial and technical risk to the Owner and Owner's maintenance staff
- Provides training to employees on maintenance and repair of equipment and controls

- Provides comprehensive funding solutions including application preparation and reporting requirements in accordance with AB-841 requirements. Be available to work with the district through multiple application process per the AB-841 process

III. MINIMUM REQUIREMENTS

Respondents must meet the following minimum requirements to participate in the District's RFQ process:

- Have five (5) California K-12 customer references for which the respondent has provided turn-key energy services in the past five (5) years.
- Currently on the U.S. Department of Energy's (DOE) Qualified List of Energy Service Companies
- Active G.C. license in California
- Minimum of \$10 Million in bonding capacity
- No pending or recent litigation associated with the savings performance and/or measurement and verification (M&V) of a guaranteed energy savings project.
- Licensed professionals and qualified testing personnel as required for applicable funding programs such as AB-841.

IV. SCOPE OF WORK

Upon award, the selected respondent will be required to perform districtwide site assessments to evaluate infrastructure needs and develop a scope of work tailored for the District's objectives. Specifically, the awarded respondent will evaluate and propose applicable efficiency, indoor air quality and sustainability measures including but not limited to:

- Heating Ventilation & Air Conditioning (HVAC) modernizations
- Ventilation improvements
- Air cleaning technologies
- Interior and exterior lighting upgrades
- Water conservation including touchless faucet and toilet replacements
- Building envelope upgrades
- Other related infrastructure improvements
- Other training, remote monitoring services, and on-going support services that will ensure objectives of program are met over the term of the agreement

Once a scope of work and funding plan is approved by Staff and the Board, the selected respondent will obtain all applicable funding sources on the District's behalf. After funding is secure, the selected respondent will provide turnkey implementation services for the approved

scope of work including all necessary permits, engineering, any Division of the State Architect (DSA) requirements, procurement, delivery, installation, commissioning, training, warranty service, and compliance with any applicable funding programs. After the scope of work has been fully implemented, the selected respondent will be required to provide measurement & verification services to monitor post-retrofit utility usage and track energy savings.

V. CONTENTS OF REQUEST FOR QUALIFICATIONS

In order for RFQ's to be considered, said RFQ must be clear, concise, complete, well organized and demonstrate both respondent's qualifications and its ability to follow instructions. The quality of answers, not length of responses or visual exhibits is what is important in the RFQ. Respondents shall submit one (1) original plus two (2) copies of the RFQ in 12-point font with all copies to be bound into books of approximately 8½" x 11" format, not to exceed twenty-five (25) pages. Further an electronic version of the RFQ shall also be made available to the District at the time the RFQ is submitted. Although not required, firms responding to this RFQ are permitted to include an appendix limited to copies of past projects that will NOT be considered part of the twenty-five (25) page limit. All respondents shall follow the order and format specified below. Each section of the RFQ shall be tabbed to correspond to the numbers/headers shown below:

VI. Table of Contents

VII. Submittal Letter

The cover letter shall be brief (one page maximum). Include the RFQ's title and submittal due date, the name, address, fax number and telephone number of the responding, include a brief summary of the firm's experience, the unique qualities of the firm and its personnel, what will make the firm a good fit for the District for the proposed contract and must bear the signature of the person(s) authorized to submit the proposal on behalf of the firm. The submittal letter will NOT be considered part of the twenty-five (25) page limit.

VIII. Section 1 - Company Background & Financial Capability

- Provide general information including a brief history of the firm, key differentiating factors and areas of expertise, length of time performing services, and location of California offices.
- Provide a statement of the respondent's financial capacity and capability to perform to the terms of this solicitation request.
- List applicable business license number and federal taxpayer ID number.

IX. Section 2 - Project Team & Management Structure

- Describe the management structure of the responding firm and include an organizational chart.
- Provide resumes for personnel to be used on this project and describe their qualifications and experience with projects of a similar size and scope. Meet or exceed the project team certification requirement.

X. Section 3 - Litigation Disclosure

- Describe any involvement as a party in any formal litigation, arbitration or mediation associated with savings performance on an energy savings contract agreement in the last seven years under any previous or current firm names, along with a description of the nature and outcome of such litigation.

XI. Section 4 - Project References

- Provide references for a minimum of five (5) California K-12 district references for which the respondent has successfully submitted and received NOPA's from the CEC for CalSHAPE Ventilation funding and for which the respondent will implement the scope of work.
- Reference projects should include those of similar scope, size, complexity, and timeline.

XII. Section 5 - CalSHAPE Project Approach & Schedule

- Provide a detailed description of the approach and methodology to be used to accomplish the scope of services to achieve client satisfaction.
- Provide a realistic proposed schedule for implementing the scope of work, specifically identifying dates for completion of the scope and delivery of the HVAC Assessment Report and Deficiencies Log.
- Provide a description of the respondent's approach to managing the project implementation and procedures for minimizing occupant disruptions.
- Describe the steps taken by the respondent during and after the turnover process to ensure successful project implementation.
- Describe training programs available for district employees.

XIII. Section 6 – Project Funding Experience

- Describe the respondent’s experience with obtaining funding for California K-12 district in the areas of energy infrastructure, utility savings, sustainability programs or other facilities improvements.
- Please describe specific funding sources that the respondent has facilitated and successfully obtained, including any funding solutions or approaches that may be unique or exclusive to the respondent.
- The intention is that the scope of work can be executed in a budget-neutral manner, fully funded by the expected AB-841 grants, on a site-by-site basis. Respondents shall provide any additional funding requested to fully execute the prescriptive scope of work.

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XIV. PROPOSAL EVALUATION CRITERIA

The District will evaluate qualifications based on the scoring criteria outlined in this section. The District shall be the sole judge of the qualifications and services to be offered, and its decision shall be final. Discussions may be conducted with respondents who submit qualifications determined to be reasonably acceptable of being selected for award:

Scoring Criteria

- a) Company Background & Financial Capability:** i.e. qualifications, experience, resources, financial solvency. (10 pts)
- b) Project Team & Management Structure:** i.e. strength of proposed team, trainers, and management structure. (10 pts)
- c) Litigation Disclosure** (10 pts)
- d) Project References:** i.e. relevant past project experience. (20 pts)
- e) CalSHAPE Project Approach:** i.e. approach to completing study, program implementation, project management, training, etc. (50 pts)
- f) Project Funding Experience:** i.e. funding experience & unique funding sources. (10 pts)
- g) Additional Benefits & Added Value:** i.e. additional benefits resulting from implementation and respondent's added value elements. (10 pts)
- h) Response:** responsiveness and compliance with the requirements of the proposal. (5 pts)

Total Maximum Point Valuation: 125