



Morgan Hill Unified School District

REQUEST FOR QUALIFICATIONS for COMPREHENSIVE ENERGY SAVING PROJECT

The District is seeking proposals from qualified Design-Build firms capable of providing comprehensive energy, gas, and water savings measures.

RFQ Contact for Questions and Submission:

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Date RFQ Issued: March 17, 2025
Mandatory Bidders Conference March 25, 2025
RFQ Due Date: April 18, 2025 BEFORE 3:00PM

1. Project Background

Morgan Hill Unified School District intends to select a qualified provider for the development, implementation, and monitoring of a comprehensive energy and utility savings program. Upon award, the District will enter into a professional services agreement for a districtwide site assessment. Prior to entering into a contractual agreement for project implementation, an agreed upon scope of work and project pricing will require separate board approval.

The Morgan Hill Unified School District (MHUSD) encompasses nearly 300 square miles and serves the ethnically diverse population of Morgan Hill, San Martin, and a small portion of South San Jose.

The District serves approximately 8,100 students and is composed of six elementary schools (TK-5), two elementary/middle schools (K-8), one Dual Immersion magnet program (K-8), two middle schools (6-8), two comprehensive high schools (9-12), one continuation high school and a community adult school, listed below. We not only offer our students an exceptional education in the classroom, but we also offer an array of extracurricular opportunities as well.

School	Address
Barrett Elementary School	895 Barrett Ave, Morgan Hill, CA 95037
Britton Middle School	80 W Central Ave, Morgan Hill, CA 95037
Central High School	85 Tilton Ave, Morgan Hill, CA 95037
El Toro Health Science Academy	455 E Main Ave, Morgan Hill, CA 95037
Jackson Academy of Math and Music	2700 Fountain Oaks Dr, Morgan Hill, CA 95037
Los Paseos Elementary School	121 Avenida Grande, San Jose, CA 95139
Martin Murphy Middle School	141 Avenida España, San Jose, CA 95139
Nordstrom Elementary School	1425 E Dunne Ave, Morgan Hill, CA 95037
Paradise Valley Engineering Academy	1400 La Crosse Dr, Morgan Hill, CA 95037
San Martín/Gwinn ES Academy	100 North St, San Martin, CA 95046
Walsh STEAM Academy	353 W Main Ave, Morgan Hill, CA 95037
District Office	15600 Concord Cir, Morgan Hill, CA 95037
Ann Sobrato High School	401 Burnett Ave, Morgan Hill, CA 95037
Live Oak High School	1505 E Main Ave, Morgan Hill, CA 95037
Central High School	85 Tilton Ave. Morgan Hill CA 95037
Community Adult School	17960 Monterey Road Morgan Hill, CA 95037

The District intends to implement a design-build program consistent with the provisions of California Government Code sections 4217.10-4217.18 that will provide sustained efficiencies and energy cost savings.

The District, at its sole discretion, may select the awarded respondent for subsequent phases of work. The District, at its sole discretion, also reserves the right to reject any or all bidders response.

2. Project Goals

The District's ultimate goal is to realize financial savings from a comprehensive energy project that may include energy efficiency, renewable energy generation, energy storage and/or water efficiency measures. The District envisions a project with renewable generation as a focal point, with energy efficiency projects that make the comprehensive project more cost effective. To that end, respondents shall support the District's goal by developing, implementing, and monitoring an energy and utility savings program that accomplishes the following:

- Achieves long-term cost savings through reduced energy, gas & water usage
- Upgrades antiquated and inefficient equipment
- Provides a comfortable and safe learning environment
- Maintains 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
- Provides training to employees on maintenance and repair of installed equipment and controls
- Provides comprehensive funding solutions, with positive cash flow in all years

3. Procurement Milestones

Project Milestones	Date
RFP Released	Monday March 17, 2025
Proposers' MANDATORY Conference & Site Walk	Tuesday March 25, 2025, 10:30 am
Deadline to Submit Clarification Questions	Friday March 28, 2025, 5:00 pm
RFP Responses Due	Friday April 18, 2025, 3:00 pm
Shortlist Interviews	Monday April 28, 2025
Notice of Intent to Award Issued	Friday May 2, 2025
Board Approval of Agreement (tentative)	May 2025

4. Minimum Requirements

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

- Have five (5) California K-12 customer references for which the respondent has provided turn-key responsibility including guaranteed energy savings in the past five (5) years. Of those five (5) references, at least two (2) need to have two (2) years of verified energy savings performance.
- Current accreditation by the National Association of Energy Services Companies (NAESCO) as an Energy Services Provider (ESP) or Energy Services Company (ESCO)
- 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.

5. Scope of Work

Upon award, the selected respondent will be required to perform site assessments at each of the District's facilities to evaluate energy and water improvements in order to develop a scope of work tailored for its needs. Specifically, the awarded respondent will evaluate and propose applicable water efficiency and energy efficiency, generation or storage measures including but not limited to:

- Solar, battery storage, and other renewable technology
- Interior & exterior lighting upgrades
- Water conservation and irrigation system improvements
- Heating Ventilation & Air Conditioning (HVAC) system optimization, retrofit, upgrade or replacement
- Building Automation System (BAS) installation, upgrade, or expansion
- Electronic Vehicle (EV) charging infrastructure implementation
- Building envelope upgrades
- Other related energy improvements

The selected respondent will then implement an agreed upon and Board-approved scope of work. All proposed infrastructure improvements must be provided on a turn-key basis including all necessary permits, engineering, Division of the State Architect (DSA) requirements, 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 M&V services to monitor post-retrofit utility usage and track energy savings. The M&V approach shall follow IPMVP protocols, with a best value approach to balance cost and level of verification, and not overly burden the project economics.

6. Proposal Instructions

Ink or Typewritten

All information, prices, notations, signatures, and corrections must be typewritten and in electronic (pdf) form.

Signature Verification

To be considered for award, each proposal must be signed by a legally authorized representative of your company.

Proposal Documents

Failure to completely execute and submit the required documents before the bid submittal deadlines will render a proposal non-responsive.

Informed Respondent

It will be your responsibility to be fully informed as to the conditions, requirements, and specifications before submitting proposals. Failure to do so will be at your firm's own risk and relief cannot be secured on the plea of error.

7. Proposal Submission Requirements

One electronic copy in pdf format of the proposal shall be submitted in the format contained in the RFQ. The proposals shall be emailed Kolvira Chheng (chhengk@mhusd.org) by the due date listed in this RFQ. It is critical that all responses follow the same format to allow equal and fair evaluation of each response. Responses should be limited to forty (40) pages (not including table of contents, cover letter, or sample contracts/agreements) and include the following:

Table of Contents

The table of contents of the proposal should include a clear and complete identification of the materials submitted by tab section and page number.

Cover Letter

A signed letter of interest (no more than two (2) pages), stating the respondent's interest and qualifications in providing the services as outlined in the RFP. Please describe how the respondent meets the minimum requirements as described in section III of the RFP.

Section 1: Background, Financial Capacity & Management Structure

- a) Provide general information on the respondent including: a brief history of the firm, key differentiating factors and areas of expertise, length of time performing services, and location of California offices.
- b) Provide a statement of the respondent's financial capacity and capability to perform to the terms of this solicitation request.
- c) 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.

Section 2: Litigation Disclosure

Describe any involvement as a party in any formal litigation, arbitration or mediation associated with savings performance on an energy savings contract or specifically related to an Investment Grade Audit (IGA) 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.

Section 3: References

Provide detailed project histories for a minimum of five (5) California K-12 districts for which the responding firm provided turn-key responsibility for similar design-build guaranteed savings programs in the past five (5) years. At least two (2) of these must have a minimum of two (2) years of verified energy savings track record. Describe the scope of work, start/completion date, services and equipment provided, project size, total project savings, and funding sources. Provide customer contact information (phone and e-mail) for all reference projects.

Section 4: Project Approach

- a) Provide a description of the respondent's approach to performing site assessments and identifying infrastructure improvement.
- b) Describe if and how the respondent proposes use of subcontractors, or indicate the project types that will be self-performed.
- c) Provide a description of the respondent's approach to managing the project implementation and procedures for minimizing occupant disruptions.
- d) Describe the respondent's approach to developing M&V and commissioning plans.
- e) Describe the steps taken by the respondent during and after the turnover process to ensure successful project implementation.
- f) Describe training programs available for district employees.

Section 5: Funding Sources

Describe the respondent's experience with obtaining funding for California K-12 Districts' infrastructure needs and sustainability programs. Please describe specific funding sources that the respondent has facilitated and successfully obtained including any funding solutions or approaches which may be unique or exclusive to the respondent.

Section 6: Savings

- a) Describe the respondent's approach to projecting and proving utility savings.
- b) Describe the methodology, formulas and tools utilized for reporting of the savings.
- c) Describe the firm's guaranteed savings approach (or approaches) offered, and the associated cost impacts.
- d) Provide a description of monitoring services after implementation, and the anticipated M&V approach for likely measures.
- e) List any projects/customers in which the guaranteed savings was not met and how each was resolved.

Section 7: Additional Benefits and Value Added Elements

Please describe any additional benefits that may result from program implementation and the respondent's added value elements in delivering a cost effective energy savings project.

Section 8: Contracts, Pricing and Forms

Provide sample contracts for an investment grade audit, project installation, Measurement and Verification (M&V) including terms and conditions. An open book pricing model is desired, to ensure fairness to both the District and respondent. Complete and include enclosed pricing proposal and acknowledgement forms. The respondent must disclose all costs and hourly rates to be used in the open book pricing model. It is required to provide whether costs will be determined as a buildup of hours **or** a flat percentage of project construction costs **and** indicate the maximum percentage of each category will represent.

8. Proposal Evaluation Criteria

The District will evaluate qualifications based on the scoring criteria outlined in this section. Respondents who are not actively engaged in providing services of the nature proposed in this RFP and/or who cannot clearly demonstrate to the satisfaction of the District their ability to satisfactorily perform the work in accordance with the RFP requirements will not be considered, nor will respondents who do not meet the minimum requirements.

The District shall be the sole judge of the qualifications and services to be offered on a best value basis, 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) Background
- b) Litigation Disclosure
- c) Project Team & Management Structure
- d) Project History & References
- e) Project Approach
- f) Funding Sources
- g) Additional Benefits & Added Value
- h) Savings
- i) Contracts & Forms
- j) Response

The School District reserves the right to accept or reject any and all proposals and to waive any irregularities or informalities in the proposals or in the proposal process.

No proposers may withdraw their proposal for a period of 90 days after the date set for the opening of proposals or after approval by the Governing Board of the District.

9. Proposers' Conference and Bid Walk

A **MANDATORY** Proposers' conference and bid walk will take place on Tuesday March 25, 2025, 10:30 am. Please meet at:

Martin Murphy Middle School
141 Avenida España
San Jose, CA 95139

At its sole discretion, the District may schedule additional site walks. Additional site walks are not guaranteed, and all efforts should be made to make the scheduled site walk.

Pricing Proposal RFQ for COMPREHENSIVE ENERGY SAVING PROJECT

Pursuant to and in compliance with your Notice Requesting Qualifications and all other documents relating thereto, the undersigned respondent, having familiarized himself with the terms and conditions of the proposal documents, hereby proposes and agrees to perform the work to be done and to provide all labor and materials necessary to perform the work.

Name of Respondent: _____

Investment Grade Audit (IGA)

Does the respondent require an IGA agreement be entered into before a scope of work, price and savings can be finalized?

Yes No

If an IGA agreement is required, does it include exit fees and/or penalties in the event the District chooses to not implement the IGA findings?

Yes No N/A

What is the respondent’s price to complete an IGA?

\$_____per square foot

Implementation

Will the respondent agree to open book pricing?

Yes No

Provide how the respondent will determine the following soft costs (use “Other” lines as needed to provide all cost categories besides construction costs):

Soft Cost Category	Built Up Cost at Hourly Rates		% of Construction Cost	Max % of Construction Cost
Engineering & Design		or		
Construction/Project Management		or		
Commissioning		or		
Measurement & Verification		or		
Bonding & Insurance	N/A	or	N/A	
ESCO Overhead	N/A	or	N/A	
ESCO Profit	N/A	or	N/A	
Other (specify)_____		or		
Other (specify)_____		or		
Other (specify)_____		or		

Hourly Rates: If any built up costs are indicated above, provide hourly rates for all labor categories which will be used for soft costs build up.

Soft Cost Category	Labor Category	Hourly Rate
Engineering & Design		
Category 1:		
Category 2:		
Category 3:		
Construction/Project Management		
Category 1:		
Category 2:		
Category 3:		
Commissioning		
Category 1:		
Category 2:		
Category 3:		
Measurement & Verification		
Category 1:		
Category 2:		
Category 3:		
Other (specify):		
Category 1:		
Category 2:		
Category 3:		
Other (specify):		
Category 1:		
Category 2:		
Category 3:		
Other (specify):		
Category 1:		
Category 2:		
Category 3:		

Acknowledgement Form
RFQ for
COMPREHENSIVE ENERGY SAVING PROJECT

Pursuant to and in compliance with your Notice Requesting Qualifications and all other documents relating thereto, the undersigned respondent, having familiarized himself with the terms and conditions of the proposal documents, hereby proposed and agrees to perform the work to be done and to provide all labor and materials necessary to perform the work.

Amendment Number	Date	Initial to Acknowledge

Name of Respondent: _____

Title of Respondent: _____

Signature: _____