



Pacific Gas & Electric On Bill Finance (OBF) Phase 3 Project

District-Wide Lighting and HVAC System Replacement Services

ADDENDUM #3 to RFP 8150-5830-920-86

Appendix A - Scope of Work

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Definitions

Sites	To be finalized based on price with adders for up to 16 school locations
LUSD	Lodi Unified School District
PG&E	Pacific Gas & Electric – Sponsor of OBF Program
IES	Information & Energy Services, Inc. – Energy Manager on behalf of LUSD
OBF	On-bill Financing program from PG&E, to be utilized for this project
Contractor	Design Build Contractor
Client	Lodi Unified School District
Customer	Lodi Unified School District
Project	Work completed through this request
Energy Services	Services associated with energy conservation
Response	The Contractors' Response to this Document
Energy	Electricity Consumption
Request	This Document: its' attachments and any addendum
Company	Responding Contractor
Monitoring	Equipment used to monitor electricity consumption or demand
EMS	Energy Management System, as it applies to lighting system control

1) EXECUTIVE OVERVIEW

Information & Energy Services, Inc. (herein IES) is managing the customer's Lighting Retrofit and HVAC Replacement Project on behalf of the Lodi Unified School District (herein LUSD). IES is utilizing this RFP process to look for qualified Lighting and Mechanical Contractor(s) to implement the following projects utilizing PG&E's On-Bill Financing (OBF) program:

- Interior lighting projects at twelve (12) schools
- Exterior lighting projects at nine (9) schools
- HVAC replacements at up to eight (8) schools
- HVAC smart thermostat installation at eight (8) schools

The District intends to award a single contract to a firm or (team of firms) to provide lighting improvements and HVAC improvements. Firms are welcome and encouraged to subcontract either discipline to propose a full lighting and mechanical bid for this work.

IES will review bid information submitted by responding Contractors and will recommend award to the highest-scoring proposer. The District intends to award a single contract to a firm (or team of firms) qualified to perform both the lighting and HVAC portions of the work. For lighting work, a single Contractor is anticipated for interior and exterior lighting at each LUSD school site identified in the scope of work documents. For mechanical work, a single Contractor is desired for HVAC unit replacements and smart thermostat installation at each LUSD school site identified in the scope of work documents. Each school site shall be priced individually for each scope element.

PG&E On-Bill Financing

This project is intended to be funded through the PG&E On-Bill Financing (OBF) Program. Contractors submitting proposals must hold all required licenses and demonstrate experience and familiarity with PG&E's OBF program requirements and processes.

The selected contractor shall be responsible for completing and submitting all required OBF application materials through a qualified PG&E OBF Project Developer. The contractor may fulfill the Project Developer role directly if properly qualified or subcontract these services to an approved PG&E OBF Project Developer. Any associated costs shall be included in the contractor's proposed pricing and OBF package. Lodi Unified School District has already completed field assessments, pre-project photo documentation, and preliminary energy savings calculations in coordination with Information & Energy Services, Inc. (IES). These materials, along with reasonable supporting documentation and assistance requested by the contractor, will be made available to facilitate completion of the OBF application process.

The scoring criteria in Section XI of the RFP will assist IES in scoring the responses and making the recommendation to LUSD to move forward with the award of a contract to the selected contractor.

- Must be an PG&E Certified Trade Professional in PG&E's System – more information available at <https://www.pge.com/assets/pge/docs/account/customer-service/pge-trade-professional-requirements-enrollment.pdf>

In the event the selected Contractor and/ or Client cannot agree on contract terms, Client has the right to terminate negotiations and contract with another Contractor of its choice.

Contractors are required to review the RFP in its entirety prior to response submission and to acknowledge such review as part of the submission. Any addenda or additional information will be e-mailed to the contractors provided point of contact.

AT END OF PROJECT:

- Wavier of lien from principal suppliers
- All warranties and guarantees (must be included to be considered responsive)
- As-built drawings for HVAC replacements 7.5-tons or greater (minimum requirement)
- All “post-install” photos necessary for OBF program compliance

2) SCOPE OF WORK FOR PROJECT INCLUDING PROJECT BACKGROUND

Work Element Structure, Base Bid Requirements, and Funding

Work Elements (WE) 1.1, 1.2, 2.1, and 2.2 constitute the Base Bid Work Elements. All Base Bid Work Elements will be evaluated, scored and awarded together as a single project package.

Base Bid Work Elements will be awarded to the firm(s) providing the best value to the District as determined through the scoring matrix in Section 12.

Work Elements 2.1.1 through 2.1.10 are Adder Scope items that expand the mechanical (HVAC) scope of the project. Proposers may elect to submit pricing for any or all Adder Work Elements. Adder Work Elements will be considered by the District, at its sole discretion, for inclusion in the final project scope.

Detailed requirements, equipment counts, locations, and assumptions for each Work Element are provided in the Excel Scope of Work documents included in the RFP package as Exhibit A-1 or Appendix A-1. The Excel documents shall govern in the event of any discrepancy.

The project is anticipated to be funded through PG&E’s On-Bill Financing (OBF) program. Contractors shall provide all documentation, technical information, and coordination necessary to support OBF eligibility review. OBF approval is required prior to the commencement of any work. Proposers shall demonstrate knowledge of and experience with PG&E’s OBF program within their submitted experience, qualifications, and project approach responses. Failure to adequately support OBF requirements may be grounds for disqualification or delay in award.

All Work Elements shall be performed in accordance with applicable federal, state, and local codes, District standards, and manufacturer requirements. Work shall be coordinated with District staff to minimize disruption to instructional activities and campus operations. Contractors shall be responsible for protection of existing facilities and for restoring all affected areas to original or better condition, including required

patching, painting, and cleanup. All installations shall result in complete, fully operational systems suitable for their intended use.

Work Element Descriptions

Base Bid

WE 1.1 – Replace Selected Interior Lighting with LED Lighting (BASE BID)

In general, WE 1.1 consists of 4' tube & driver retrofits in existing strip fixtures and retrofit-kits with controls in existing troffer fixtures. Surface mount fixtures are either replaced with a new surface mount fixture or retrofit with tubes and drivers, depending on specific site conditions. There are some exceptions based on conditions in specific rooms. Library direct/indirect fixtures are to remain in place and have the tubes and drivers replaced only. Surface mount high-bay T5/HO fixtures in the MPR to be replaced with new surface mount LED fixtures.

- Replacement of emergency lighting ballasts/ batteries should be included in proposals.
- The district-wide color temperature standard is **4000 Kelvin**, please specify products in this color temperature only.

The following schools and approximate fixture quantities are included in this work element:

- Creekside Elementary: 952 fixtures (all types)
- Delta Sierra Middle: 1,047 fixtures (all types)
- Dorothy Mahin Education Center: 163 fixtures (all types)
- Extension Road (Henderson/Independence/VRA): 261 fixtures (all types)
- John Muir Elementary: 142 fixtures (all types)
- Lockeford Elementary: 501 fixtures (all types)
- Parklane Elementary: 704 fixtures (all types)
- Plaza Robles High: 374 fixtures (all types)
- Turner Academy: 74 fixtures (all types)
- Victor Elementary: 267 fixtures (all types)
- Wagner-Holt Elementary: 960 fixtures (all types)

All installed fixtures and controls shall qualify for PG&E's On-Bill Financing (OBF) program, and the contractor shall provide any documentation and support required for OBF approval. LED products must be listed on the DLC QPL (qualified product list). The latest list is DLC V6.0 effective as of January 5, 2026. Fixture types, quantities, locations, and control requirements are provided in Attachment 1- Scope of Work document included with the RFP package. Expected LED replacements are shown below and are outlined on a site-by-site basis in Exhibit A-1 Scope of Work Details Table document included in the RFP package:

- LED 2'X4' Retrofit Kit with Controls
- LED 2'X2' Retrofit Kit with Controls
- LED Surface Mount Wrap 4' with Controls
- LED Surface Mount Highbay with Controls

- LED 2' T8 Tubes & Driver Replacement
 - LED 3' T8 Tube & Driver Replacement
 - LED 4' T8 Tube & Driver Replacement
 - LED 4' T5 HO Tubes & Driver Replacement
 - LED 4" Downlight Retrofit
 - LED 6" Downlight Retrofit
 - LED 8" Downlight Retrofit
- ❖ The selected contractor will be responsible for walking all sites in scope to confirm fixture and lamp counts and other details prior to OBF application and project commencement.
 - ❖ The contractor is also responsible for ensuring that the correct quantity and type of emergency battery backups are used in this project.

WE 1.2 – Replace Selected Exterior Lighting with LED Fixtures (BASE BID)

Scope element includes the replacement of selected exterior lighting with new LED fixtures throughout the District's campuses. Work shall include proper removal of existing fixtures, installation of new energy-efficient LED units, electrical connections, mounting, aiming, and any required site adjustments to achieve full functionality.

- The district-wide color temperature standard is **4000 Kelvin**, please specify products in this color temperature only.

The following sites are included in this work element:

- Creekside Elementary: 32 recessed CFL canopy fixtures replaced with LED 1x1 surface mount canopy fixture
- Delta Sierra Middle: 30 recessed CFL canopy fixtures, 7 HPS wall pack fixtures and 2 yoke-flood fixtures on the MPR roof replaced with LED fixtures
- George Lincoln Mosher Elementary: 3 recessed HPS canopy fixtures, 20 HPS wall pack fixtures and 30 HPS pole mount fixtures replaced with LED
- Lockeford Elementary: 23 CFL wall pack fixtures and 14 HPS pole mount fixtures replaced with LED fixtures
- Manlio Silva Elementary: 3 recessed HPS canopy fixtures, 11 HPS wall pack fixtures, 26 CFL porch and mini wall pack fixtures, 8 HPS yoke-flood fixtures, and 26 HPS pole mount fixtures all replaced with LED fixtures
- Parklane Elementary: 8 HPS pole mount fixtures replaced with LED fixtures
- Plaza Robles High: 9 CFL mini wall pack fixtures replaced with LED fixtures
- Podesta Ranch Elementary: 35 HPS pole mount fixtures replaced with LED
- Wagner-Holt Elementary: 28 recessed CFL canopy fixtures, 53 HPS wall pack fixtures and 3 HPS pole mount fixtures all replaced with LED fixtures

All fixtures shall meet applicable codes, be suitable for outdoor use, and qualify for PG&E's On-Bill Financing (OBF) program. LED products must be listed on the DLC QPL (qualified product list). The latest list is DLC V6.0 as of January 5, 2026. Contractors shall provide all documentation and support required

to secure OBF approval prior to commencement of work. Locations, fixture types, and quantities are defined in Attachment 1- Scope of Work document included with the RFP package and include the LED fixture types below:

- LED Mini Wallpack
 - LED Full-Cutoff Wallpack (various wattages)
 - LED Yoke Flood (various wattages)
 - LED Pole Arm Area (various wattages)
 - LED Pole Top (various wattages)
 - LED Canopy 1'x1' (various wattages)
- ❖ The selected contractor will be responsible for walking all sites in scope to confirm fixture/lamp counts and other details prior to OBF application and project commencement.

WE 2.1 – Replace Selected HVAC Units with High Efficiency HVAC Units (BASE BID)

Scope element includes replacement of selected existing packaged HVAC units, generally ranging from approximately 2.0 to 7.5 tons (with some larger), with new units of like capacity and minimum efficiency ratings as listed in the Exhibit A-1 Scope of Work Details Tables document included in the RFP package.

The contractor shall remove and recycle all existing HVAC units and electrical disconnects serving HVAC units included in the scope. HVAC units and electrical disconnects shall be replaced with new HVAC units and new electrical disconnects. The contractor will be responsible for choosing the electrical disconnects to install that are compatible with the new HVAC equipment being installed. Work shall include furnishing and installing complete, fully operational HVAC systems, including required electrical connections, controls integration, start-up, testing, and balancing as applicable.

- ❖ Proposed Unit Weight: no proposed HVAC units shall be more than 10% heavier than the existing unit that is being replaced.
- ❖ Phase Monitors: Provide and install phase monitoring protection on replacement HVAC units. Phase monitors shall continuously monitor for phase loss, phase reversal, voltage imbalance, and under/over voltage conditions. The device shall automatically prevent equipment operation or shut down the unit upon detection of an abnormal power condition to protect motors and compressors from damage. Phase monitors shall be factory-installed where available or field-installed by the contractor at the proposed pricing. Devices shall be UL-listed and suitable for the voltage and operating characteristics of the installed equipment.
- ❖ Natural Gas Piping: The selected contractor shall ensure that all natural gas supply piping is adequately sized to properly support proposed ultra-low NOx HVAC units. Any changes to natural gas piping and any work related thereto are solely the contractor's responsibility; to include but not limited to changes that arise from a proposed unit which requires a larger natural gas supply compared to current site conditions and are included in the proposed pricing.
- ❖ Roof Curbs: all roof curb modification, replacement, adapters and any work related thereto are solely the contractor's responsibility; to include but not limited to changes that arise from a proposed unit with a different size, shape or configuration than the existing, addition of economizer on

proposed unit where previously not so equipped, existing structures in the way, or any other unforeseen conditions relating to roof curbs or unit mounting.

- ❖ Duct Modifications: any modifications to ductwork to accommodate contractors' proposed design shall be the contractor's responsibility and are included in the proposed pricing.
- ❖ Duct Detectors (fire/life safety system): all duct detectors and other components of the fire life safety system must be fully installed and operational to provide a complete and functional fire life safety system pursuant to all applicable codes and standards. All required work (parts, labor, sub-contractors, etc.) to make the fire life safety system functional with respect to HVAC units that are replaced and the ductwork associated with those units shall be the contractor's responsibility and is included in the proposed pricing.

The following sites are requested in the base bid:

- John Muir Elementary: Replace a total of 11 split-systems (42.5 tons).
- Parklane Elementary: Replace 2 units (12.5 tons).
- Sutherland Elementary: Replace a total of 22 package units (92 tons).
- Wagner-Holt Elementary: Replace 4 package units and a mini-split (27 tons).
- Ronald McNair High: Replace the large RTUs on the Big Gym (4), the Small Gym (2), and the Stage and Theater units only (315 tons). Other areas covered in adders.

The District requests that supply and return air duct cleaning services are included in the proposal for all rooftop package units being replaced. Please exclude all split-systems from duct cleaning.

All equipment shall be new, code-compliant, and suitable for use in K–12 educational facilities. Acceptable packaged HVAC unit manufacturers include the following:

- Carrier
- Lennox
- York
- Trane

Acceptable manufacturers for ductless type mini split systems include the above list, plus the following manufacturers:

- Fujitsu
- Mitsubishi
- LG

Submittals will be reviewed and scored for acceptability, efficiency, and value. Equipment submittals must be approved by the district prior to equipment ordering. Installation shall be performed in accordance with manufacturer requirements and industry best practices to ensure long-term reliability, serviceability, and performance. Equipment types, quantities, capacities, and locations are identified in Exhibit A-1 provided with the RFP package.

WE 2.2 – Add Pelican Thermostats to Selected Units Where Not Already Present (BASE BID)

This scope element includes installation of **Pelican Wireless model TC-3 thermostats** and required system components such as repeaters on selected HVAC units that currently lack smart web-based thermostat controls. Work shall include furnishing and installing all required hardware, wiring, and programming to integrate with existing HVAC systems or those systems replaced in WE 2.1 or subsequent selected adders. This work element will occur in the following schools:

- Creekside Elementary: 15 additional thermostats to be installed
- Delta Sierra Middle: 24 additional thermostats to be installed
- G.L. Mosher Elementary: 49 additional thermostats to be installed
- John Muir Elementary: 48 thermostats + gateway to be installed
- Manlio Silva Elementary: 50 additional thermostats to be installed
- Podesta Ranch Elementary: 50 thermostats + gateway to be installed
- Sutherland Elementary: 30 additional thermostats to be installed
- Wagner-Holt Elementary: 36 additional thermostats to be installed

Installation shall be performed in accordance with manufacturer instructions, industry best practices, and applicable codes to ensure reliable operation and ease of service. Contractors shall provide any required documentation to support PG&E On-Bill Financing (OBF) eligibility where applicable. Locations and applicable units are identified in Exhibit A-1 included with the RFP package.

- ❖ Pelican's air blocking shield shall be installed before mounting thermostat backplate to the wall. Repeaters and gateways shall be installed above drop ceilings if in areas accessible by school staff, all power cords must be plugged in above the ceiling as well.

Adders to HVAC Base Bid

The following scope elements include the replacement of HVAC equipment at additional locations throughout the District. These locations will be part of the pre-bid site walk and specific replacements are identified in Attachment 1.

- WE 2.1.1 – HVAC: McNair Main Building 1st Floor (66 units, 260 tons)
- WE 2.1.2 – HVAC: McNair Main Building 2nd Floor (51 units, 229 tons)
- WE 2.1.3 – HVAC: Additional McNair Gym Units Not in Base Bid (10 units, 61 tons)
- WE 2.1.4 – HVAC: Additional McNair Performing Arts Units Not in Base Bid (8 units, 37 tons)
- WE 2.1.5 – HVAC: McNair Cafeteria/MPR Building (8 units, 65 tons)
- WE 2.1.6 – HVAC: McNair Culinary Arts Building (3 units, 18.25 tons)
- WE 2.1.7 – HVAC: Mosher Elementary 1st Floor (22 units, 102.5 tons)
- WE 2.1.8 – HVAC: Mosher Elementary 2nd Floor (21 units, 72 tons)
- WE 2.1.9 – HVAC: Manlio Silva Elementary (43 units, 170 tons)
- WE 2.1.10 – HVAC: Podesta Ranch Elementary (42 units, 211 tons).

(END OF APPENDIX A)

EXHIBIT A-1

See Addendum 004 for scope of work detail tables (Excel).