



SAN JOSE CHARTER ACADEMY

West Covina, California

REQUEST FOR QUALIFICATIONS

FOR

**ENERGY SERVICE PROVIDER — AUDIT, DESIGN AND CONSTRUCTION OF HVAC, CONTROLS
& SYSTEMS INTEGRATION, AND INTERIOR & EXTERIOR LIGHTING ENERGY CONSERVATION
MEASURES**

OWNER

SAN JOSE CHARTER ACADEMY

Procurement Administered on Behalf of the Academy by

SCHOOL LEADERS

A MANDATORY JOB WALK IS REQUIRED FOR ALL FIRMS

See Section 1.2 for date, time, and location

SUBMITTALS MUST BE RECEIVED BY:

August 31, 2026, 4:30 P.M.

San Jose Charter Academy

2021 W. Alwood Street, West Covina, CA 91790

August 10, 2026

The Academy reserves the right, in its sole discretion and pursuant to applicable law(s), to award a contract to the selected Firm and may include, but is not limited to, procurement pursuant to Government Code section 4525 et seq. (professional services), Government Code section 53060 et seq. (special services), Government Code section 4217.10 et seq. (energy efficiency), Education Code section 17250.10 et seq. (design-build), Government Code section 4525 et seq. (architectural or engineering services), Government Code section 17406 (competitive best-value with published evaluation procedures and price estimates), or Public Contract Code section 20111 (general school district procurement). Nothing in this RFQ shall be construed to limit or waive the Academy's ability to select any lawful procurement pathway under these or other applicable statutes, or to determine the timing, scope, or structure of any solicitation or contract award.

This RFQ is being administered on behalf of the Academy by School Leaders, serving as the Academy's program manager for this procurement. Firms should direct all communications regarding this RFQ to School Leaders as identified below. School Leaders is not itself a Firm eligible to respond to this RFQ and has no financial interest in its outcome.

Submittal

Interested Firms are invited to submit their SOQ in a sealed envelope, one (1) original and three (3) copies, to: 2021 W. Alwood Street, West Covina, CA 91790

San Jose Charter Academy

An electronic copy (PDF) must be submitted to jason@schoolleaders.com by the deadline.

Questions

Questions regarding this RFQ must be directed in writing to Jason Vilorio, School Leaders, at Jason@SchoolLeaders.com or 949.241.6854. Firms are directed not to contact any other Academy representative, board member, or staff member regarding this RFQ. All questions must be submitted by 4:30 p.m. on August 21, 2026.

Schedule

Date	Event
August 10, 2026	RFQ Issued
August 14, 2026 @ 10:00 AM	Mandatory Job Walk (see Section 1.2) — required to submit a Response
August 21, 2026	Deadline for questions and information requests
August 31, 2026, 4:30 p.m.	RFQ Response Due Date

September 3 & 4, 2026 (if needed)	Interviews, at the Academy's sole discretion
September 10, 2026	Anticipated Board Approval

The Academy reserves the right to reject any or all Responses, in whole or in part, to waive any irregularities or informalities, and to negotiate contract fees, terms, and conditions, or to terminate such negotiations at any time. Selection is solely at the Academy's discretion.

1. Firms That Intend to Submit a Response Must Meet the Following Criteria

1.1 Licensure

- Hold a current, valid California Contractor's License(s) in good standing appropriate to the scope — at minimum Classification C-20 (Warm-Air Heating, Ventilating, and Air-Conditioning) and C-10 (Electrical), or an equivalent Class A/B license covering HVAC, interior and exterior lighting, and controls/systems integration work. Firms proposing controls and systems integration scope should also hold or provide subcontracted C-7 (Low Voltage Systems) capability, as applicable.
- Firms proposing to serve as an energy services company should be a NAESCO-accredited Energy Service Company (ESCO) or Energy Services Provider (ESP), or demonstrate comparable qualifications.

1.2 Mandatory Job Walk

Attendance at the mandatory job walk is a condition of eligibility to submit a Response. Firms that do not attend, in full and on time, will be deemed non-responsive and their Response will not be considered.

Date/Time: August 14, 2026 @ 10:00 AM

Location: San Jose Charter Academy, 2021 W. Alwood Street, West Covina, CA 91790 — meet at Main Office

RSVP: Firms must RSVP to Jason Vilorio (Jason@SchoolLeaders.com) no later than August 13, 2026, indicating the name(s) and title(s) of attendees.

1.3 Bonding

Have sufficient bonding capacity to provide a payment bond and performance bond, each in an amount up to 100% of the contract price, with the Firm as principal and the Academy as obligee, if required by the Academy for the Construction Services Stage.

1.4 Insurance

Maintain, or demonstrate the ability to obtain, commercial general liability, automobile liability, workers' compensation, and professional liability (as applicable) insurance in amounts consistent with California public school district/charter school standards.

2. Project Scope

The Academy intends to structure the Project in three (3) stages. The Academy does not guarantee award of any stage and reserves the right to revise the scope, sites, or stages at any time, with compensation adjusted accordingly. The Academy's current understanding is that the Project will include the following, subject to the findings of the Investment Grade Audit and the Academy's sole discretion:

- HVAC replacement, schoolwide.
- Controls & Systems Integration.
- Interior & Exterior Lighting.
- Other ECMs identified through the Investment Grade Audit, at the sole discretion of the Academy.

2.1 Audit Stage

- Investment-grade energy audit of existing HVAC systems (equipment inventory, age, condition, capacity, controls, and energy usage) at the Academy's campus.
- Investment-grade audit of existing building automation/control systems and identification of controls and systems integration opportunities.
- Investment-grade audit of existing interior and exterior lighting systems (fixtures, controls, condition, and energy usage).
- Utility rate analysis and identification of applicable funding, rebate, and grant opportunities.
- Proposed ECMs with estimated costs and projected savings; final ECM selection remains at the Academy's sole discretion.

2.2 Design Stage

- Design of the HVAC ECMs selected by the Academy.
- Design of controls and systems integration ECMs, including building automation/control system upgrades and integration with existing facility management systems.
- Design of interior and exterior lighting ECMs, including related controls.
- Coordination of any required DSA submittals or other agency approvals.

2.3 Construction Stage

- Turnkey implementation of the approved HVAC, controls & systems integration, and interior & exterior lighting ECMs, including permitting, procurement, installation, commissioning, training, and warranty service.
- Funding shall be structured, to the extent applicable, so that costs are offset by utility cost savings and/or other funding secured for the program; the Academy will determine the amount financed, if any.

3. Content of Response

To keep this process efficient, Responses should not exceed twelve (12) pages (excluding the Letter of Interest and license documentation) and must include the following:

- Letter of Interest. One page identifying the Firm's legal name, address, phone, email, and the name/title/signature of the person authorized to submit the Response.
- License Information. Copies of the Firm's current California Contractor's License(s) and any relevant professional engineer or NAESCO accreditation.
- Relevant Experience. A summary of up to five (5) comparable HVAC, controls/systems integration, and/or interior or exterior lighting energy conservation projects completed for California K-12 or charter school clients in the past five (5) years, including scope, contract value, and verified savings performance (if any).
- Key Personnel. Names, roles, and relevant experience of the personnel who would be assigned to this Project, including the primary point of contact.
- References. Two (2) letters of reference from California public-sector or charter school clients within the past three (3) years.
- Safety Record. The Firm's Experience Modification Rate (EMR) for the past three (3) years and a summary of any reportable OSHA incidents in that period.
- Approach. A brief narrative describing the Firm's approach to minimizing disruption to an operating school campus during audit, design, and construction.
- Form of Contract Comments. Any comments, objections, or proposed changes to the Academy's form of contract (if one is attached to this RFQ), submitted with the Response.

4. Evaluation and Selection

The Academy, with the support of School Leaders, intends to select one Firm that best meets the Academy's needs. A Selection Committee will review submitted Responses for completeness, qualifications, relevant experience, safety record, and approach. Firms that fail to attend the mandatory job walk or that do not meet the minimum licensure requirements will not be considered.

The Academy reserves the right to interview one or more Firms as part of the evaluation process, at its sole discretion; an interview is not guaranteed. Should an interview occur, the key personnel proposed for the Project must be present.

The Academy reserves the right to reject any and all Responses, to waive irregularities or informalities, to negotiate fees, terms, and conditions with any Firm(s), and to select more than one Firm if it is in the Academy's best interest.

5. Public Records

Responses submitted to this RFQ become the property of the Academy and may be subject to public disclosure under the California Public Records Act (Government Code section 6250 et seq.). Material a Firm considers a trade secret or otherwise exempt from disclosure should be clearly marked

“CONFIDENTIAL” or “TRADE SECRET”; the Academy is not responsible for disclosure of such material if required by law or court order.

6. Contact

All communications regarding this RFQ, including job walk RSVPs and questions, should be directed to:

Jason Vilorio, Executive Director

School Leaders, on behalf of San Jose Charter Academy

Jason@SchoolLeaders.com | 949.241.6854 | SchoolLeaders.com