

REQUEST FOR QUALIFICATIONS & PROPOSALS (RFQ/P) NO. 2026/27-01

Infrastructure Modernization & Utility Savings Program

This RFQ/P seeks proposals from qualified design-build firms capable of providing comprehensive energy, gas, and water infrastructure modernizations. The District intends to improve the efficiency of its facilities through HVAC modernizations, indoor air quality improvements, various efficiency & utility savings measures, renewable energy solutions and other operational efficiencies through one or more phases of work. The scope of services shall also include the assessment and potential implementation of EV charging for both passenger vehicles and bus fleet, on-site energy storage, solutions for existing solar systems, and door access controls to support optimized energy usage. The selected respondent shall identify and apply for alternative funding solutions on the District's behalf from local, state and federal funding programs.

RESPONSE DEADLINE FOR PROPOSALS: October 9, 2026

RFQ/P Contact for Questions & Submission:

Evergreen School District

Casino Fajardo

3188 Quimby Rd, San Jose CA 95148

cfajardo@eesd.org

I. RFQ/P PROCESS

The District intends to select a qualified provider for the development, implementation, funding and monitoring of a comprehensive infrastructure modernization and utility savings program. Upon RFQ/P award, the selected respondent shall conduct districtwide site assessments for determining a potential scope of work to be considered by District stakeholders.

Prior to considering the program for implementation, an agreed upon scope of work and funding plan will require separate board approval. The District intends to award an implementation agreement for energy services under the provisions of California Government Code sections 4217.10-4217.18 which requires savings pay for the cost of improvements.

The District, at its sole discretion, may select the awarded respondent for subsequent phases of work so long as the savings from all phases combined pay for the collective phases. The District, at its sole discretion, also reserves the right to reject any or all bidders.

II. PROJECT GOALS

The District's ultimate goals are to: 1) improve the health and safety of 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
- Creates general fund relief through reduced operating expenditures

- Helps prepare facilities for safe operations during the current health pandemic
- Meets current health guidelines for indoor air quality and ventilation standards
- Upgrades antiquated and inefficient equipment
- Promotes renewable energy & greenhouse gas emissions reductions
- 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 equipment and controls
- Provides funding solutions including application and reporting requirements

III. MINIMUM REQUIREMENTS

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

- Have five (5) California K-12 customer references for which the respondent has provided turnkey energy services in the past three (3) years. A minimum of two (2) references must include (2) years of verified 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.

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 & filtration improvements
- Interior and exterior LED lighting upgrades
- Solar, battery storage, and other renewable technology
- Building Automation System (BAS) installation, upgrade, or expansion
- Electrification & EV charging solutions
- Water conservation measures
- 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 help 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, Division of the State Architect (DSA) requirements, delivery, installation, commissioning, training, warranty service, funding applications and compliance with any applicable funding programs. After the scope of work is fully implemented, the selected respondent will be required to provide measurement & verification services to monitor post-retrofit utility usage and track energy savings.

V. PROPOSED TIMELINE

September 22,2026	RFQ/P Released
September 29,2026	Questions Due
October 2, 2026	Questions & Answers Released
October 9, 2026	RFQ/P Reponses Due
November 12, 2026	Respondent Awarded

VI. PROPOSAL INSTRUCTIONS

Ink or Typewritten

All information, prices, notations, signatures, and corrections must be in ink or typewritten. Mistakes may be crossed out and corrections typed or printed adjacent to the mistake and initialed in ink by the person signing the proposal.

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.

VII. PROPOSAL SUBMISSION REQUIREMENTS

One (1) electronic copy of the proposal that is signed shall be submitted in the format contained in the RFQ/P to the following email: cfajardo@eesd.org

It is critical that all responses follow the same format to allow equal and fair evaluation of each response. Responses should be limited to thirty (30) pages (not including table of contents, cover letter, or sample contracts/agreements) and include the following:

SECTION TABS

Proposals should be divided by tab sections according to items in the index. This will assist the evaluating team in identifying items and information submitted with the proposal.

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 RFQ/P. Please describe how the respondent meets the minimum requirements as described in section III of the RFQ/P.

Tab 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.

Tab 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.

Tab 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 utility savings programs in the past three (3) years. A minimum of two (2) references must include (2) years of verified savings performance demonstrated through a measurement & verification report or actual utility bills. Describe the scope of work, start/completion date, services and equipment provided, project size, total project savings, and funding sources.

Tab 4: Project Approach

- a) Provide a description of the respondent's approach to performing site assessments and identifying infrastructure improvements.
- b) Provide a description of the respondent's approach to managing the project implementation and procedures for minimizing occupant disruptions.
- c) Describe the steps taken by the respondent during and after the turnover process to ensure successful project implementation.
- d) Describe training programs available for district employees.

Tab 5: Funding Sources

Describe the respondent's experience with obtaining funding for 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 which may be unique or exclusive to the respondent.

Tab 6: Savings

- a) Describe the respondent's approach to projecting and proving utility savings.
- b) Describe the methodology and formulas utilized for reporting of the savings.
- c) Provide a description of monitoring services after implementation.
- d) List any projects in which savings projections were not met and how each was resolved.

Tab 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 infrastructure modernizations, sustainability programs and other programs that enhance the health of students and staff.

Tab 8: Contracts, Pricing and Forms

Provide sample contracts for project development, implementation and monitoring including terms and conditions. Complete and include enclosed pricing proposal and acknowledgement form.

VIII. 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 similar services or who cannot clearly demonstrate their ability to meet the District's objectives and the RFQ/P minimum requirements will not be considered. 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) **Background:** i.e. qualifications, experience, resources, financial solvency. (10 pts)
- b) **Litigation Disclosure** (25 pts)
- c) **Project Team & Management Structure:** i.e. amount of work self-performed, strength of proposed team, trainers, and management structure. (20 pts)
- d) **Project History & References:** i.e. relevant past project experience. (50 pts)
- e) **Project Approach:** i.e. approach to completing study, program implementation, project management, training, etc. (15 pts)
- f) **Funding Sources:** i.e. funding experience & unique funding sources. (25 pts)
- g) **Additional Benefits & Added Value:** i.e. additional benefits resulting from implementation and respondent's added value elements. (10 pts)
- h) **Savings:** i.e. savings approach and track record. (35 pts)
- i) **Contracts & Forms:** i.e. sample contracts, terms & conditions, pricing proposal, and completed forms. (30 pts)
- j) **Response:** responsiveness and compliance with proposal requirements. (5 pts)

Total Maximum Point Valuation: 225

PRICING PROPOSAL

RFQ/P #2027-01 Infrastructure Modernization & Utility Savings Program

Pursuant to and in compliance with your Notice Requesting Proposals 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:

What is the respondent's profit fee for program implementation?

Profit % _____

ACKNOWLEDGEMENT FORM

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Infrastructure Modernization & Utility Savings Program

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Name of Respondent: _____

ACKNOWLEDGEMENT OF AMENDMENTS:

The respondent acknowledges receipt of issued amendments to RFQ/2027-01

Amendment Number						Initial Here
Date						