



SAN FRANCISCO UNIFIED SCHOOL DISTRICT  
PROPOSITION A 2011 BOND PROGRAM

REQUEST FOR QUALIFICATIONS (RFQ)

FOR ENERGY AUDITING SERVICES

March 26, 2012

## TABLE OF CONTENTS

- I. INTRODUCTION TO RFQ SUBMITTAL PROCESS
  - 1. Methodology of Contracting with Energy Auditing Consultant and Basis of Fees
  - 2. Insurance Requirements
  - 3. Description of Projects and Scope of Work
- II. DISTRICT PROCESS FOR CONSULTANT SELECTION
- III. CONTENTS OF QUALIFICATIONSS AND EVALUATION CRITERIA
  - 1. Introductory/Cover Letter
  - 2. Professional Qualifications, Experience and Project Approach
  - 3. Project Staffing
  - 4. Billing Rates and Fees
  - 5. Work Product Sample
  - 6. Insurance
  - 7. Prior Claims
- IV. RFQ SCHEDULE
- V. EXHIBITS
  - 1. SFUSD Prop A 2011 Bond Project List – Exhibit A

## I. INTRODUCTION TO RFQ SUBMITTAL PROCESS

Energy Auditing Consultants to provide ASHRAE Level 2 energy audits at select school sites to evaluate efficiency improvements in the buildings' lighting and mechanical systems for the purposes of reducing energy use and utility cost at 2011 Prop A Bond school projects involving modernization work.

Energy Auditing firms should be familiar and experienced with all procedures and requirements with respect to California public schools. This program has rigid schedule requirements and firms will be expected to demonstrate the ability to provide services to schedule requirements.

Request for Qualification information is available at the District Website: <http://www.sfusd.edu/en/doing-business-with-sfusd/current-rfps-rfqs-and-rfis.html> and at the Bond Program Office Room 217, 135 Van Ness Avenue, San Francisco, beginning **March 26, 2012**.

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All participating Energy Auditing Consultants must have an existing working business location within a 50-mile radius of the city limits of San Francisco, CA.

**Applicants shall submit Qualifications by 2:00 PM, April 18 , 2012.**

**Late submittals will not be considered.**

### 1. Energy Auditing Consultant Services and Basis of Fees

The District will determine project assignments for the selected pool of consultants firms, subcontracted through its pool of Architects selected for the 2011 Bond Program. Being selected to the pool does not commit the District to contracting directly with any given consultant or guarantee work will be assigned.

Fees shall be based on the firm's standard billing rate as submitted in the SOQs and shall be a time and material contract with a not to exceed amount for the determined scope of work at each school projects.

### 2. Insurance Requirements

Each firm awarded a contract will be required to maintain, in full force and effect and at their own expense, insurance policies with companies certified with the California Insurance Commission. Please include the name of your insurance providers in your response. The following minimum insurance is required in order for your firm/joint venture group to qualify for participation in these projects:

- Worker's Compensation Insurance (\$1 million)

- General Liability Insurance (\$1 million/per occurrence)
- Automobile Insurance (\$1 million/per occurrence)
- Professional Liability Insurance (\$1 million per occurrence and \$2 million aggregate)

If any policy is written on a Claims Made Form, the consultant must provide a project specific policy to continue the coverage for two (2) years beyond the date of the individual project completion.

Prior to commencing work, each firm must provide the District with insurance certificate(s) of insurance that includes the following:

- a. The San Francisco Unified School District and its Board, Officers and employees, and the Architect shall be named as additional insured parties on General Liability and Automobile policies. Endorsements must be submitted with the certificate(s);
- b. Should any of the above described policies be canceled before the expiration date thereof, the issuing company will provide written notice to the certificate holder a minimum of 30 days prior to said cancellation.

### 3. Description of Projects and Scope of Work

A list of the 2011 Prop A Bond Program school projects is included in Exhibit A of this package. The scope of each contract will be specific for each project. Most of the projects include accessibility, life safety and seismic improvements such as ramps, walkways, new elevators, fire sprinklers, fire alarm and structural upgrades.

The consultant will be asked to perform an ASHRAE Level 2 energy audit at select school sites to evaluate improvements in the building's lighting and mechanical systems. Audit components shall include:

1. **Kick-Off Meeting:** Meet with SFUSD personnel to confirm the scope of work, coordinate site/data access, schedule site surveys, etc.
2. **Utility Bill Analysis:** Evaluate a minimum of 12 months of utility data to calibrate energy models and perform a monthly energy evaluation, taking seasonal effects into account. Compare Energy Utilization Indices (EUI) and cost indices to comparable school buildings and determine approximate breakdown of energy use by end-use categories.
3. **Walk-Through Audit:** Tour school sites to identify energy efficiency opportunities, interviewing staff and inspecting equipment as necessary.
4. **Analysis of Measures:** Using energy models based on nameplate and utility data, and making reasonable assumption given building type and age, determine the cost effectiveness of identified energy efficiency opportunities. This analysis should be done at the existing SFUSD power and gas rates as well as those predicted for the next few years.
5. **Audit Report:** Present an executive summary, brief facility description, energy baseline analysis, and a description of measures and associated energy and cost savings.

## II. PROCESS FOR CONSULTANT SELECTION

This solicitation will create a pool of energy auditing consultants from which the assigned architect will select for audit of their project. The firm's Statement of Qualifications will be scored through a preliminary screening process that will include scoring outlined in Part III below, along with reference checks. Those firms who qualify for the short list through the preliminary screening process may be invited to participate in the final screening process, which may include an interview.

The District will accept written questions and comments from prospective consultants up to April 4, 2012.

### III. SOQS AND EVALUATION CRITERIA

Please provide the following information in the order given below. Responses to the RFQ will be carefully evaluated for completeness and ability to perform the work indicated based on the information provided in the following categories:

1. Introductory/Cover Letter (maximum length: 1 page, 0 points)
  - a. Describe what sets your firm apart from other energy auditing firms.
  
2. Professional Qualifications and Experience, Project Approach (3 pages, 25 points max.)
  - a) The full name and address of the firm or team. Confirm that the office is within 50 miles of the SFUSD facilities office located at 135 Van Ness Avenue in San Francisco.
  - b) Name, email address and phone number of a designated contact person
  - c) A brief description of the firm including a description of typical services to clients of the firm.
  - d) Describe the firm's professional qualifications and (minimum 3-years verifiable) experience in order to clearly demonstrate your ability to successfully furnish the services described in this Request for Qualifications.
  - e) Discuss your firm's understanding of the services required for these projects (primarily renovation and modernization scope) and provide an outline or description that clearly demonstrates:
    1. Your project team's approach to completing the necessary field and office work in order to meet a project's Scope of Work requirements on schedule.
    2. List of representative projects (minimum of 5 projects) undertaken in the last five years demonstrating energy audit experience in grades K-14. Include project title, description of services provided, project duration, owner contacts and telephone numbers. The District may or may not contact those listed on the reference list.
    3. Your approach to quality assurance and your process for quality control.
  
3. Project Staffing Approach (2 pages, 15 points max.)
  - a. Please provide information regarding the size of your firm, and include any sub-consultants or subcontractors that you intend to include in your project team.
  - b. Provide a narrative discussing your approach to staffing, sub-consultant management and delivering timely and quality service on five or more project assignments running concurrently.

- c. Staffing - Provide the names and brief resumes of the principal-in-charge, the assigned project manager and/or other key staff members who will comprise the core of your firm's project team. Identify the number of licensed/certified members on your staff.
  - d. Provide brief resumes for any identified sub-consultants. (Appendix A)
4. Billing Rates and Fees (1 page, 10 points max.)
- a. Provide fee schedule with the hourly billing rates for each type of employee anticipated to be assigned to the project.
5. Work Product Sample (Appendix A, 25 points max.)
- a. Provide a typical audit report your firm has provided for other K-12 educational clients.
6. Insurance (1 page, 5 points max.)
- Provide copy of current insurance coverage issued by Consultant's Insurance carrier that meets minimum District requirements (see section I.2).

## EVALUATION CRITERIA SCORING SHEET

Evaluation Criteria	Points	Score
<b>1. Introductory and Cover Letter</b>	<b>0</b>	
<b>2. Professional Qualifications and Experience Project Approach</b>	<b>25</b>	
a) Describe the firm and its typical services b) Distance from SFUSD and contact information c) Describe the professional qualifications and experience d) Discuss your firms understanding of services: Provide a list of representative projects (min of 10) undertaken in the last 5 years demonstrating your team's K-12 public school experience.	<i>Poor: 0-5</i> <i>Marginal: 6-13</i> <i>Acceptable: 14-18</i> <i>Exceeds: 19-25</i>	
<b>3. Project Staffing Approach</b>	<b>15</b>	
a) Firm size b) Describe your firms staffing approach c) Provide Names and Resumes (as appendix A)	<i>Poor: 0-4</i> <i>Marginal: 5-8</i> <i>Acceptable: 8-12</i> <i>Exceeds: 12-15</i>	
<b>4. Billing Rates</b>	<b>10</b>	
a) Provide fee Schedule hourly rates	<i>Poor: 0-3</i> <i>Marginal: 3-5</i> <i>Acceptable: 5-8</i> <i>Exceeds: 8-10</i>	
<b>5. Work Product Sample (as Appendix A)</b>	<b>25</b>	
a) Work product sample (Failure to provide these samples may result in the response being rejected as "non-responsive".)	<i>Poor: 0-5</i> <i>Marginal: 6-13</i> <i>Acceptable: 14-18</i> <i>Exceeds: 19-25</i>	
<b>6. Insurance</b>	<b>5</b>	
a) Provide a copy of current insurance coverage that meets minimum District requirements: <ul style="list-style-type: none"> <li>• Workers Compensation Insurance - \$1 million</li> <li>• General Liability Insurance - \$1 million/occurrence</li> <li>• Automobile Insurance - \$1 million/occurrence</li> <li>• Professional Liability Insurance - \$1 million/occurrence and \$2 million aggregate</li> </ul>		

**SUGGESTED LENGTH OF PROPOSAL/SUBMITTAL:**

**18 pages + Appendix A**

**DOUBLE-SIDED**

**Maximum Points Possible: 80 points**

#### IV. RFQ SCHEDULE (Subject to change)

- Post RFQ to District website: March 26, 2012
- Written Questions Accepted: April 4, 2012
- Addenda Posted to Website By: April 6, 2012
- Proposals Due no later than: April 18, 2012 at 2:00 P.M.
- Shortlist Notification: April 25, 2012

#### NOTES

- The District reserves the right, at its sole discretion, to modify RFQ requirements, and/or cancel interviews if selection can be made based upon written SOQ received, cancel the selection process, amend the schedule, or select two or more “pools” of firms.
- RFQ applicants will be notified of any changes to this schedule.
- Firms responding to this RFQ shall not be reimbursed for any costs associated with the preparation of SOQ in response to this RFQ.
- The District will be confirming accuracy of all information submitted in response to this RFQ.



EXHIBIT A

PROPOSITION A 2011 BOND PROJECT SITES

Argonne Elementary School	680 18th Avenue
Cesar Chavez Elementary School	825 Shotwell Street
Daniel Webster Elementary School & CDC	465 Missouri Street
El Dorado Elementary School	70 Delta Street
Enola Maxwell Campus (ISA)	655 De Haro Street
Frank McCoppin Elementary School & CDC	651 6th Avenue
Garfield Elementary School & CDC	420 Filbert Street
George Moscone Elementary School	2576 Harrison Street
George Peabody Elementary School	251 6th Avenue
Ida B Wells High School	1099 Hayes Street
James Lick Middle School	1220 Noe Street
Jean Parker Elementary School & CDC	840 Broadway Street
John Yehall Chin Elementary School	350 Broadway Street
Jose Ortega Elementary School	400 Sargent Street
Junipero Serra Elementary School & CDC	625 Holly Park
Lafayette Elementary School	4545 Anza Street
Las Americas CDC	801 Treat Avenue
Longfellow Elementary School	755 Morse Street
McAteer Campus (School of the Arts)	555 Portola Drive
McKinley Elementary School	1025 14th Street
Miraloma Elementary School	175 Omar Way
Monroe Elementary School & CDC	260 Madrid Street
Paul Revere Annex	610 Tompkins Street
Paul Revere Elementary School	555 Tompkins Street
Presidio Middle School	450 30th Avenue
Redding Elementary School & CDC	1421 Pine Street
Robert Louis Stevenson Elementary School	2051 34th Avenue
Rooftop Elementary School - Nancy Mayeda Campus	500 Corbett Avenue
Roosevelt Middle School	460 Arguello Street
Sheridan Elementary School	431 Capitol Avenue
Starr King Elementary School	1215 Carolina Street
Tule Elk Park Child Care Center	2110 Greenwich Street
Visitacion Valley Elementary School	55 Schwerin Street
Visitacion Valley Middle School	450 Raymond Street
Yick Wo Elementary School	2245 Jones Street