



**SAN FRANCISCO UNIFIED SCHOOL DISTRICT
PROPOSITION 39 EFFICIENCY PROGRAM**

**REQUEST FOR QUALIFICATIONS (RFQ)
FOR:**

UTILITY AUDITING SERVICES

August 12, 2015

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I. INTRODUCTION TO RFQ SUBMITTAL PROCESS

SFUSD is looking for qualified Utility Auditing firms to provide ASHRAE Level 2 energy audits, water fixture surveys, and project cost estimates to identify efficiency improvements at select school sites that may be funded by Proposition 39 dollars. This solicitation will create a pool of utility auditing consultants, who will share responsibility for auditing school sites being considered for this funding.

Utility Auditors must be familiar with and have experience working in California public schools. This program has rigid schedule requirements and firms will be expected to demonstrate the ability to provide services in a timely fashion.

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>.

The District will accept written (email) questions and comments from prospective consultants up to **Monday, September 14, 2015**.

District Contact: **Nik Kaestner**
San Francisco Unified School District
135 Van Ness Avenue Room 215A
San Francisco, California
Phone 415-241-4327
Email: KaestnerN@sfusd.edu

All participating Auditing Consultants must have an existing working business location within a 10-mile radius of the city limits of San Francisco, CA.

Applicants shall submit Qualifications by 2:00 PM, Monday, September 28, 2015 via email to kaestnern@sfusd.edu

Late submittals will not be considered.

1. Methodology of Contracting & Basis of Fees

The District will determine project assignments for each firm in the selected pool of Utility Auditors. Being selected to the pool does not ensure that a firm will automatically be contracted to work with the District, nor that it will conduct a similar number of audits as other firms.

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

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. The following minimum insurance levels are required in order for your firm to qualify for participation in these projects:

- Worker's Compensation Insurance (\$1 million)
- General Liability Insurance (\$1 million/occurrence)
- Automobile Insurance (\$1 million/occurrence)
- Professional Liability Insurance (\$1 million/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 project completion.

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

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

3. Description of Projects and Scope of Work

The consultant will be asked to perform an ASHRAE Level 2 energy audit at select school sites being considered for Prop 39 efficiency upgrades.

Deliverables include:

- a. **Project Kick-Off Meeting:** Meeting with SFUSD personnel to confirm the scope of work, schedule and coordinate site/data access, and gain an understanding of sites being audited.
- b. **Utility Bill Analysis:** Evaluate four years-worth of utility data to calibrate energy models, determine the approximate breakdown of utility use by end-use categories, and compare energy use intensities and cost indices to comparable school buildings.
- c. **Walk-Through Audit:** Site survey to identify energy efficiency opportunities, interviewing staff and inspecting equipment as necessary.
- d. **Analysis of Measures:** Using energy models based on nameplate and utility data, and making reasonable assumptions given building type and age, determine the cost effectiveness of identified energy efficiency opportunities as measured according to Prop 39 guidelines. *This analysis should be done at the existing SFUSD utility rates as well as increased rates being phased in over the next few years.*
- e. **Draft Recommendations Meeting:** Draft list of EEM's in table format (by site) for presentation to Sustainability and Facilities offices and Buildings & Grounds staff.
- f. **Audit Report:** Deliverable to include an executive summary, brief facility description (w/photos), energy use breakdown and monthly usage profiles for past few years (graphs suffice), and a (separate) spreadsheet of measures and associated energy and water cost savings. See the Prop 39 Energy Expenditure Plan Handbook for the audit guideline (Page

II. PROCESS FOR CONSULTANT SELECTION

Firms should submit a Statement of Qualifications that meets the following guidelines:

**LENGTH OF PROPOSAL/SUBMITTAL:
6 pages MAX + Appendix A
PDF (not printed), 12 pt font
Maximum Points Possible: 85 points**

Each firm's Statement of Qualifications will be scored through a screening process according to criteria outlined in the next section. Responses to the RFQ will be carefully evaluated for completeness and ability to perform the work indicated based on the information provided.

Reference checks and interviews will only be conducted if deemed necessary by SFUSD.

III. SOQS AND EVALUATION CRITERIA

Please provide the following information in the order given below, rigidly sticking to the page limits given (each page is one side of a sheet of paper):

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 (2 pages, 25 points max.)
 - a. The full name and address of the firm or team. Confirm that the office is within 10 miles of San Francisco city limits.
 - 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 provided, professional qualifications, and (minimum 3-years verifiable) experience in order to clearly demonstrate your ability to successfully furnish the services described in this RFQ.
 - d. Discuss your firm's understanding of the services required for these projects by describing:
 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.

3. Project Staffing Approach (1 page, 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 the names and brief bios (one paragraph each) 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.

4. Billing Rates and Fees (1 page, 15 points max.)

- a. Provide fee schedule with the hourly billing rates for each type of employee anticipated to be assigned to the project.

5. Insurance (1 page, 5 points max.)

- a. Provide a copy of your firm's current insurance coverage as issued by your Insurance Carrier that meets minimum District requirements (see section I.2).

6. Work Product Sample (Appendix A, 25 points max.)

- a. Provide a typical audit report your firm has provided for other K-12 educational clients.
- b. **Do not include appendices, equipment lists, or data sheets.** The narrative with photos and spreadsheet(s) of recommended measures will suffice.

Evaluation Criteria	Points	Score
1. Introductory and Cover Letter	0	
2. Professional Qualifications and Experience Project Approach	25	
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 5) undertaken in the last 5 years demonstrating your team’s K-12 public school experience.	<i>Poor:</i> 0-5 <i>Marginal:</i> 6-13 <i>Acceptable:</i> 14 -18 <i>Exceeds:</i> 19-25	
3. Project Staffing Approach	15	
a) Firm size b) Describe your firms staffing approach c) Provide Names and Resumes	<i>Poor:</i> 0-4 <i>Marginal:</i> 5-8 <i>Acceptable:</i> 8-12 <i>Exceeds:</i> 12-15	
4. Billing Rates	15	
a) Provide fee Schedule and hourly rates b) Identify hourly rate for staff assigned to SFUSD	<i>Poor:</i> 0-4 <i>Marginal:</i> 5-8 <i>Acceptable:</i> 8-12 <i>Exceeds:</i> 12-15	
5. Insurance	5	
a) Provide a copy of current insurance coverage b) Work Comp (\$1M), Gen Liab (\$1M/per), Auto (\$1M/per), Prof Liab (\$1M/per; \$2M/agg)		
6. Work Product Sample (as Appendix A)	25	
a) Work product sample (Failure to provide these samples may result in the response being rejected as “non-responsive”.)	<i>Poor:</i> 0-5 <i>Marginal:</i> 6-13 <i>Acceptable:</i> 14 -18 <i>Exceeds:</i> 19-25	

IV. RFQ SCHEDULE (Subject to change)

- **Post RFQ to District Website:** **August 12, 2015**
- **Written Questions Accepted until:** **September 14, 2015**
- **Addenda Posted to Website By:** **September 18, 2015**
- **Proposals Due No Later Than:** **September 28, 2015 at 2:00 PM**
- **Shortlist Notification:** **October 2, 2015**

NOTES

- **The District reserves the right, at its sole discretion, to modify RFQ requirements, amend the schedule, and/or cancel interviews if selection can be made based upon written SOQs received.**
- 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 may confirm accuracy of all information submitted in response to this RFQ.