



**SAN FRANCISCO UNIFIED SCHOOL DISTRICT (SFUSD)
PROPOSITION A BOND PROGRAM**

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

ZERO NET ENERGY MODELING SERVICES

November 18, 2016

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I. INTRODUCTION TO RFQ SUBMITTAL PROCESS

The San Francisco Unified School District (SFUSD) is looking for qualified energy modeling firms to provide Zero Net Energy (ZNE) models at school sites slated to be funded by the 2016 Proposition A Bond. **The 2016 Prop A Bond is subject to voter approval on November 8, 2016.**

Energy modelers must have experience working in California public schools and an existing business location within a 10-mile radius of the city limits of San Francisco, CA. This solicitation will create a pool of energy modeling consultants, who will share responsibility for modeling school sites named in the upcoming bond.

The District will accept emailed questions from prospective consultants until Friday, **November 11, 2016**. 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>

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

Applicants shall submit Qualifications by 2:00 PM, Friday, November 18, 2016 to:
kaestnerN@sfusd.edu

1. Methodology of Contracting & Basis of Fees

The District will determine project assignments for each firm in the selected pool of energy modelers. 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 models as other firms.

Fees shall be based on the average bid provided in the Statements of Qualification (SOQ) by the winning firms.

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; \$2 million general aggregate)
- Automobile Insurance (\$1 million/occurrence; \$2 million general aggregate)
- Professional Liability Insurance (\$2 million)

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 develop an energy model and produce a Zero Net Energy (ZNE) feasibility assessment at select school sites mentioned in the 2016 SFUSD Facilities Bond.

Deliverables include:

- a. **Project Kick-Off Meeting:** Meet with SFUSD personnel to confirm the scope of work, schedule and coordinate site/data access, and gain an understanding of sites.
- b. **Utility Bill Analysis:** Evaluate four years-worth of utility data to determine current energy use intensities and cost indices for each school.
- c. **Walk-Through Assessment:** Survey sites to identify energy efficiency opportunities, interview staff, and inspect equipment as necessary.
- d. **Energy Model:** Develop EQuest model of entire property and calibrate by comparing to most recent energy data
- e. **Analysis of Measures:** Identify series of energy efficiency measures that will reduce Energy Use Intensity (EUI) at each target site significantly below 20 kBtu/sq/yr and eliminate the combustion of natural gas.
- f. **Solar Analysis:** Identify the total amount of rooftop solar capacity available as well as the fraction of available resources needed to achieve ZNE status.
- g. **Draft Recommendations:** Present list of recommended measures in table format (by site) for presentation to the SFUSD Sustainability Office.
- h. **Model Report:** Present final recommendations in 5-8 page report including a brief overview of existing energy usage at the site, concise facility description (w/photos), descriptions and table of recommended measures with itemized usage and cost savings, solar energy analysis, and results of ZNE evaluation.

II. PROCESS FOR CONSULTANT SELECTION

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

**LENGTH OF PROPOSAL/SUBMITTAL:
6 pages MAX + Appendix A
PDF (not printed), 12 pt font
Maximum Points Possible: 100 points**

Each firm's SOQ 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. Professional Qualifications & Experience (2 pages 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 and professional qualifications obtained, to clearly demonstrate your ability to successfully furnish the services described in this RFQ.
 - d. Description of your project team's approach to completing the necessary field and office work in order to meet scope of work requested on schedule and within budget.
 - e. List of representative PUBLIC SCHOOL projects (minimum of 5) undertaken in the last five years demonstrating energy model experience in grades K-14. Include:
 - a. project title
 - b. description of services provided
 - c. project duration & budget
 - d. owner rep(s) & contact information
2. Project Staffing (1 page 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.

3. Billing Rates & Fees (1 page MAX)

- a. Provide a per-square-foot price for services based on the assumption that each winning firm will visit & model nine (9) sites with a total area of 1 million square feet.

4. Insurance (1 page 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).

5. Work Product Sample (Appendix A)

- a. Provide a typical model report your firm has provided for other K-12 educational clients that provides the same or similar analysis of a building's energy footprint.
- 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. Professional Qualifications & Experience	10	
a) Firm address & distance from SF b) Rep contact info c) Description of firm d) Project team approach e) K-12 experience	<i>Poor:</i> 0-4 <i>Acceptable:</i> 5-8 <i>Exceeds:</i> 9-10	
2. Project Staffing	10	
a) Firm size b) Sub-consultants c) Staff names & resumes	<i>Poor:</i> 0-4 <i>Acceptable:</i> 5-8 <i>Exceeds:</i> 9-10	
3. Billing Rates & Fees	25	
a) Fee for nine (9) sites & 1 million SF	<i>Poor:</i> 0-10 <i>Acceptable:</i> 11-19 <i>Exceeds:</i> 20-25	
4. Insurance	5	
a) Copy of current insurance coverage b) Work Comp (\$1M), Gen Liab (\$1M/per), Auto (\$1M/per), Prof Liab (\$1M/per; \$2M/agg)	<i>N/A: 0</i> <i>Partial: 1-4</i> <i>Complete: 5</i>	
5. Work Product Sample (Appendix A)	50	
a) Typical K-12 energy report	<i>Poor:</i> 0-20 <i>Acceptable:</i> 21-39 <i>Exceeds:</i> 40-50	

IV. RFQ SCHEDULE (Subject to change)

- **Post RFQ to District Website:** **October 14, 2016**
- **Written Questions Accepted until:** **November 11, 2016**
- **Addenda Posted to Website By:** **November 14, 2016**
- **Proposals Due No Later Than:** **November 18, 2016 at 2:00 PM**
- **Shortlist Notification:** **December 2, 2016**

NOTES

- **The District reserves the right, at its sole discretion, to modify RFQ requirements, amend the schedule, and/or dispense with interviews if selection can be made based upon written SOQs received.**
- Firms responding to this RFQ shall not be reimbursed for any costs associated with the preparation of their SOQ.
- SFUSD may confirm the accuracy of all information submitted in response to this RFQ.