

**BERRYESSA UNION SCHOOL DISTRICT  
PURCHASING DEPARTMENT**

1376 Piedmont Road  
San Jose, CA 95132  
(408) 923-1871 (ph)  
(408) 926-8329 (fax)



*Pathway to the Future*

**REQUEST FOR QUALIFICATIONS**

**RFQ 02-2016-17**

**PROPOSITION 39 AND ENERGY CONSULTING SERVICES**

DUE: Before 2:00 p.m. on June 16, 2017

**REQUEST FOR QUALIFICATIONS  
BERRYESSA UNION SCHOOL DISTRICT**

**DUE DATE: JUNE 16, 2017 BEFORE 2:00PM**

**RFQ 02-2016-17  
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PROPOSITION 39 AND ENERGY CONSULTING SERVICES**

NOTICE IS HEREBY GIVEN that the Berryessa Union School District of Santa Clara County, State of California, acting by and through its Governing Board, hereafter referred to as the "District", will receive under sealed cover BEFORE 2:00 P.M. (Pacific Daylight time), on June 16, 2017, qualification statements from firms that provide Proposition 39 and energy consulting services. The Request for Qualifications (RFQ) is located on the District's website at [www.berryessa.k12.ca.us](http://www.berryessa.k12.ca.us) click on the quick link Request for Proposals where a proposal package and instructions can be found and are ready to download.

Proposals shall be received at: Purchasing Department  
Berryessa Union School District  
1376 Piedmont Road  
San Jose, CA 95132

The intent of this RFQ is to solicit Statements of Qualification from firms that can provide Proposition 39 and energy consulting services.

The School District reserves the right to accept or reject any and all proposals and to waive any irregularities or informalities in the proposals or in the proposal process. No proposers may withdraw their proposal for a period of 90 days after the date set for the opening of proposals or after approval by the Governing Board of the Berryessa Union School District

For all questions please contact: Bonny Gregorius, Purchasing and Contracts Manager  
Berryessa Union School District  
Phone: 408 -923-1871  
Fax: 408-926-8329  
Email: [bgregorius@busd.net](mailto:bgregorius@busd.net)

For the Governing Board  
Berryessa Union School District  
Bonny Gregorius  
Purchasing and Contracts Manager

## **PROJECT SUMMARY**

The Governing Board (“Board”) of the Berryessa Union School District (“District”) is seeking a qualified provider of services for assessment, development and planning for installation of potential energy saving projects within the District, including, but not limited to, Proposition 39 auditing, projects assessments, application and planning (“Provider”).

Responses to this Request for Qualifications (“RFQ”) will be reviewed by District staff and interviews may be scheduled and conducted by the District, at the District’s sole discretion. Following a comprehensive review of the responses, and any interviews (if desired by District), staff will make a recommendation to the Board for selection of one or more Providers, and authorization to negotiate and execute one or more contracts for the contemplated services.

Selection of a Provider will be made on the basis of the best interests of the District and the Provider’s qualifications, as well as factors including, but not limited to, Provider’s fee and other price requirements, Provider’s services and experience, the adequacy of the Provider’s suggested services, and the ability of the Provider to achieve the District’s energy efficiency and cost saving goals. The District reserves the right to reject any or all proposals, or waive any irregularities in any of the proposals submitted pursuant to this RFQ.

## **DISTRICT BACKGROUND INFORMATION**

Berryessa Union School District is a public K-8 school district operating ten elementary and three middle schools. The District is located in the sloping northeastern foothills of the Silicon Valley in San Jose, California. The District serves a community of approximately 45,000 homes and has approximately 7,500 students enrolled in Kindergarten thru Eighth Grade. Challenging educational programs and a strong commitment to excellence produce high pupil achievement. As such, we are constantly striving to fill District needs in the most cost-effective manner to obtain the best combination of product, quality, price, and service.

This Request for Qualifications does not commit the Berryessa Union School District to award a contract, to pay for any costs incurred in the preparation of a proposal, or to procure or contract the services or supplies. The Berryessa Union School District reserves the right to accept or reject any or all proposals received as a result of this request, to negotiate with any qualified source, or to cancel in part or in its entirety this Request for Qualifications if it is in the best interest of the Berryessa Union School District.

## **ADMINISTRATIVE INFORMATION**

### **District Contact:**

For purchasing and legal questions please contact:

Bonny Gregorius, Purchasing and Contracts Manager  
Berryessa Union School District  
Phone: 408 -923-1871  
Fax: 408-926-8329  
Email: [bgregorius@busd.net](mailto:bgregorius@busd.net)

### **Attachments:**

Attachment A: List of School and Administrative Sites

### **Proposal Due Date:**

Proposals must be submitted before 2:00 PM (Pacific Daylight time) on Friday June 16, 2017. See the "Submittal Requirements" section of this document for details.

## **I. SERVICES REQUIRED**

The District desires to contract for services with one or more qualified Providers to assess, plan and implement energy efficient projects and services, including, but not limited to, all necessary requirements for Proposition 39 eligible projects, such as, energy auditing, funding/ project application, planning, budgeting, scheduling and implementing. Such services will require, in part, the evaluation and planning of potential energy efficiency projects, in compliance with (1) Proposition 39, (2) Senate Bill 73, (3) Proposition 39: California Clean Energy Jobs Act – 2013 Program Implementation Guidelines, and (4) all associated and current Proposition 39 handbook and application materials. **The District may elect to enter into a contract with one or more Providers for the assessment, planning and application for Proposition 39 project approval and funding while reserving the implementation and/or construction of such projects for a separate agreement.**

## II. SCHEDULE OF EVENTS

ACTIVITY	DATE
Request for Qualifications Issued	May 26, 2017
Advertisement in the San Jose Post Record	May 26, 2017 and June 2, 2017
Last Day for Questions	June 9, 2017
Proposals Due	June 16, 2017 before 2:00pm
Proposal Evaluations	June 16, 2017 thru June 22, 2017
Interview Date (please hold the date)	June 27, 2017
Contract offer and good faith negotiations	June 30, 2017 thru July 21, 2017
Board Approval	August 8, 2017
Notice to Proceed	August 9, 2017

## III. SUBMITTAL REQUIREMENTS:

Please submit under sealed cover one (1) original and three (3) bound copies, and one (1) CD-ROM or appropriate USB Flash-Drive. Faxes or emails will not be accepted.

**Submit documents before 2:00 PM (Pacific Daylight time) on Friday, June 16, 2017 to:**

Bonny Gregorius, Purchasing and Contracts Manager  
Berryessa Union School District  
1376 Piedmont Road  
San Jose, CA 95132

Phone: 408 -923-1871  
Fax: 408-926-8329  
Email: [bgregorius@busd.net](mailto:bgregorius@busd.net)

Telephone, electronic or facsimile proposals will not be considered. Proposals received after the time and date of closing will not be considered.

## IV. INTERVIEWS:

The District has set aside the following date to conduct interviews if needed:

Date: Tuesday June 27, 2017

Time: TBD

**V. SUBMISSION EXPIRATION DATE:**

All fees, prices and other information in any submission shall remain valid for 90 days from submission date to the District, and during such time the District may enter into a contract with any Provider on the basis of Provider's submission.

**VI. FORMAT AND CONTENT OF RESPONSE**

Each Provider's response to this RFQ should be clear, concise, complete, well organized, and demonstrate Provider's qualifications, ideas, and ability to work together with the District and any other consultants. An original and three (3) copies and one (1) USB drive of the response must be provided, with no more than 30 single-sided pages in total length excluding the work product sample described below. All Providers are requested to follow the order and format specified below. Please tab each section of the proposal to correspond to the numbers/headers shown below.

**A. Response Cover.** Include the RFQ's title and due date, the name, address, fax number, and the telephone number of responding firm (or firms if a response is submitted by a joint venture or association).

**B. Table of Contents.** Include complete and clear listings of headings and pages to allow easy reference to key information.

**C. Body of Response.** The following sections should be included in the order listed:

1. Cover Letter. The cover letter should be signed by a person with authority to act on behalf of and bind the Provider, and should indicate the Provider's interest in entering into a contract with the District for such services. The cover letter should also include general information about your firm, including at least the following:
  - (a) number of employees;
  - (b) years in business;
  - (c) name(s) of owners(s);
  - (d) home office location;
  - (e) local office location (if different); and
  - (f) proposed team members for services.
  
2. Qualifications Summary. Describe, in detail, your approach and methods for carrying out the services required by this RFQ. Specifically discuss your firm's unique qualifications for the services and potential projects, including successful prior similar experience with local government entities, especially school districts or county offices of education. Provide details, including, but not limited to, your firm's methods for energy auditing, benchmarking, facility assessment, strategy, planning, funding application (including, but not limited to Proposition 39 funding),

permit and authorization acquisition, turn-key service approaches, commissioning of energy projects, and long and short term project implementation strategy.

In addition to the above, please include any qualifications and experience related to the following areas:

(a) Experience in analysis of energy efficiency measures, including, but not limited to, auditing, benchmarking, project cost estimating, short and long term strategic planning, program and project management, energy management, training, and knowledge of all requirements necessary to manage Proposition 39 assessments, applications and projects.

(b) Knowledge and understanding of Proposition 39, Senate Bill 73, Proposition 39: California Clean Energy Jobs Act – 2013 Program Implementation Guidelines, and all associated Proposition 39 handbook and application materials.

(c) Experience with the Division of the State Architect (DSA), the Office of Public School Construction (OPSC), the California Department of Education (CDE), and the California Energy Commission (CEC).

(d) Experience with applying for and securing grants and funding available for energy efficiency services and projects, including, but not limited to, any federal, state, local, or utility based program.

(e) Experience and success with assessing, planning and implementing energy efficiency projects for California public schools or other local government entities, including, but not limited to, the scoping, scheduling and budgeting of such projects.

Providers may include any additional information they deems relevant for purposes of responding to this RFQ.

3. Financial Information. Provide the following financial information about your firm:
  - A current report from any commercial credit rating service, such as Dunn and Bradstreet or Experian.
  - A letter from an insurance company indicating ability to provide insurance along with applicable, maximum limits of coverage. Insurance coverage shall be to the reasonable satisfaction of the District.
  - Provider's fee structure and/or pricing for all applicable services.
  
4. Work Product Sample. Provide a copy of recent work product for an energy efficiency project.

## **VII. CRITERIA FOR SELECTION**

District staff will carefully review all responses to this RFQ and shall recommend to the Board one or more Providers who are, in staff's opinion, best suited for the services. Selection shall be made on the basis of Providers' qualifications, on the responses given to this RFQ, on the information obtained in interviews, if any, and in furtherance of the best interests and energy efficiency and cost saving goals of the District.

Responses will be opened privately to assure confidentiality and to avoid disclosure of the contents to competing respondents prior to and during the selection process. However, to the extent that the responses are public records under California law, they must be released to members of the public if requested under applicable law.

## **VIII. GENERAL INFORMATION**

Amendments: The District reserves the right to cancel or revise this RFQ in part or in its entirety. If the District cancels or revises the RFQ, all respondents will be notified.

Inquiries: Any questions concerning this RFQ or the selection process may be directed to:

Bonny Gregorius, Purchasing and Contracts Manager  
Berryessa Union School District  
1376 Piedmont Road  
San Jose, CA 95132

Phone: 408 -923-1871  
Fax: 408-926-8329  
Email: [bgregorius@busd.net](mailto:bgregorius@busd.net)

Replies involving any substantive issues will be issued by addenda and mailed to all parties recorded by the District as having received the RFQ documents. Only questions answered by formal written addenda will be binding.

## **IX. SPECIAL CONDITIONS**

Non-Discrimination: The District does not discriminate on the basis of race, color, national origin, religion, age, ancestry, medical condition, disability, or gender in consideration for an award of contract.

Drug-Free Policy and Fingerprinting: Any Provider that enters into a contract with the District shall be required to complete any and all fingerprinting requirements and criminal background checks required by State law and shall also be required to complete a Drug-Free Workplace Certificate.

Costs: Costs of preparing a proposal in response to this RFQ are solely the responsibility of each Provider.



Limitations: This RFQ does not commit the District to award a contract, to defray any costs incurred in the preparation of a proposal pursuant to this RFQ, or to procure or contract for work. The District reserves the right to waive any irregularities in the proposals received pursuant to this RFQ, or in the process outlined herein for selection of a Provider for the services.

**X. SUBMISSION FORMAT**

The following table describes the required format and content for the vendor proposal:

<b>TAB NUMBER</b>	<b>CONTENTS</b>
A	Response Cover
B	Table of Contents
C	Body of Response
C-1	Cover Letter
C-2	Qualifications Summary
C-3	Financial Information
C-4	Work Product Sample

**Total pages not to exceed 30 pages, single sided on 8-1/2 x 11 white paper.**

# ATTACHMENT A

RFQ-02-2016-17  
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PROPOSITION 39 AND ENERGY CONSULTING SERVICES

## BERRYESSA UNION SCHOOL DISTRICT SITE LOCATION LIST

Berryessa Union School District

LOCATION	ADDRESS	CITY STATE ZIP
District Office	1376 Piedmont Rd	San Jose, CA 95132
Brooktree Elementary	1781 Olivetree Dr	San Jose, CA 95131
Cherrywood Elementary	2550 Greengate Dr	San Jose, CA 95132
Laneview Elementary	2095 Warmwood Ln	San Jose, CA 95132
Maintenance/Transportation Yard	935 Piedmont Rd	San Jose, CA 95132
Majestic Way Elementary	1855 Majestic Way	San Jose, CA 95132
Morrill Middle	1970 Morrill Ave	San Jose, CA 95132
Noble Elementary	3466 Grossmont Dr	San Jose, CA 95132
Northwood Elementary	2760 E. Trimble Rd	San Jose, CA 95132
Piedmont Middle	955 Piedmont Rd	San Jose, CA 95132
Ruskin Elementary	1401 Turlock Ln	San Jose, CA 95132
Sierramont Middle	3155 Kimlee Dr	San Jose, CA 95132
Summerdale Elementary	1100 Summerdale Dr	San Jose, CA 95132
Toyon Elementary	995 Bard St	San Jose, CA 95127
Vinci Park Elementary	1311 Vinci Park Way	San Jose, CA 95131