



## **REQUEST FOR PROPOSALS (RFP) NO. 2022-11 (2)**

### **Comprehensive Energy and Water Infrastructure Modernization and Utility Savings Program**

As part of a joint procurement process, the following RFP is seeking proposals to procure services from capable energy and water services firms that specialize in developing, implementing, and funding comprehensive energy infrastructure modernizations. The selected firm would be responsible for applying and obtaining funding from the Inflation Reduction Act and alternative funding sources for the following participating District (“the District”).

Seeley County Water District

### **RESPONSE DEADLINE FOR PROPOSALS: December 12 (3:00 PM DEADLINE)**

RFP Contact for Questions & Submission:

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#### **I. RFP PROCESS**

Seeley County Water District intends to jointly select a single qualified provider to develop, implement and provide monitoring services as part of a comprehensive energy and water infrastructure modernization and utility savings program. Upon award, the District will enter into a professional services agreement for an Energy Infrastructure Modernization Conservation Study. Prior to the District entering into a contractual agreement for project implementation, an agreed upon scope of work and project pricing will require separate board approval.

In addition to utilizing Inflation Reduction Act grant funds, the awarded respondent shall identify additional funding sources to address infrastructure needs that exceed the Inflation Reduction Act for measures such as energy, Infrastructure, and water conservation. Additional funding sources may include future funding from California Energy Commission, utility programs, federal & state grants, and low-rate equipment lease purchase and financing that can be repaid through guaranteed savings.

The Districts, at their sole or collective discretion, may select the awarded respondent for subsequent energy, Infrastructure, and water conservation phases of work. The Districts, at their sole or collective discretion, reserve the right to reject any or all bidders. Public Sector Agencies (PSA's) in Imperial County may piggyback this joint procurement process for energy, Infrastructure, and water utility conservation programs.

## **II. PROJECT GOALS**

The Districts' ultimate goal is to utilize financial savings realized from more efficient buildings and water and wastewater facilities towards other upgrades and programs that 1) have the program fully pay for itself with energy savings, and 2) utilize alternative funding sources as much as possible, particularly from new federal programs.

In addition, respondents shall support the Districts' goal to have the funding plan explore ways to maximize and stretch the impact of capital dollars by promoting economies of scale and investing in infrastructure modernizations that have an immediate impact on reducing operating expenditures (i.e., reduced utility and maintenance costs).

The funding plan objectives would be to

- Achieves long-term cost savings through reduced energy, infrastructure & water usage · Upgrades old and/or inefficient systems
- Maintains consistent and reasonable levels of occupant comfort
- 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 comprehensive funding solutions
- Security and Telecommunications Technology

## **III. MINIMUM REQUIREMENTS**

Respondents must meet the following minimum requirements to participate in the Districts' RFP process:

- Have five (5) energy, infrastructure, and water customer references for which the respondent provided turn-key responsibility of similar energy and water infrastructure modernization and utility savings program services in the past three (3) years with at least two (2) references in Imperial County
- Active G.C. license in California
- Minimum of \$2 Million in bonding capacity

## **IV. SCOPE OF WORK**

Upon award, the selected respondent will be required to perform site walks at each District's facilities to evaluate infrastructure improvements in order to develop a Utility Conservation Study customized for District's needs.

Specifically, the awarded respondent will evaluate and propose applicable conservation measures including but not limited to:

- Heating Ventilation & Air Conditioning (HVAC) system optimization, retrofit, upgrade or replacement
- Interior and exterior lighting retrofit or replacement

- Building Automation System (BAS) installation, upgrade, or expansion leveraging existing technology
- Renewable energy measures
- Water conservation measures
- Building envelope upgrades
- Other infrastructure improvements
- Remote monitoring services, Scada System and on-going support services that will ensure objectives of program are met over the term of the agreement

Upon Board approval, the selected respondent will implement an agreed upon scope of work.

All proposed infrastructure improvements must be provided on a turn-key basis including all necessary County permits, engineering, California Department of Industrial Relations (DIR), Title 24 standard requirements, delivery installation, commissioning, training, warranty service, and CEC compliance.

After the scope of work has been fully implemented the selected respondent will be required to provide Measure & Verification (M&V) services to monitor post-retrofit utility usage and track energy savings. M&V services are to be provided in accordance with CEC guidelines for project tracking and reporting.

#### **V. PROPOSED TIMELINE**

Monday, November 21, 2022, RFP Released

Monday, November 28, 2022, Questions Due

Thursday, December 1, 2022, Questions & Answers Released

**Monday, December 12, 2022, RFP Responses Due (3:00 PM Deadline)**

Monday, December 26, 2022, Respondent Awarded

Tuesday January 3, 2022 (Tentative) Board Approval for Respondent Awarded

January 2022 Utility Conservation Study Completed

February 2022 Board Approval for Project Implementation

Spring 2022 Commence Construction

#### **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 initiated in ink by the person signing the proposal.

### Signature Verification

To be considered for the 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 submission 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**

Three (3) original and one (1) electronic copy of the proposal shall be submitted in the format contained in the RFP. The original proposals shall be submitted in a three (3) ring loose-leaf binder or report cover. 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-five (35) 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 RFP. Please describe how the respondent meets the minimum requirements as described in section III of the RFP.

### Tab 1: Background, Financial Capacity & Management Structure

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.

Provide a statement of the respondent's financial capacity and capability to perform to the terms of this solicitation request.

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: References

- a) Provide five (5) - energy, infrastructure, and water customer references the respondent provided turn-key responsibility of similar energy and water infrastructure modernization and utility savings program services in the past three (3) years with at least two (2) references in Imperial County
- b) Active G.C. license in California
- c) Minimum of \$2 Million in bonding capacity

Tab 3: Project Approach

- a) Provide a description of the respondent's approach to performing audits, and identifying improvement measures.
- 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 4: 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 installation to ensure continued savings.

Tab 5: Additional Benefits and Value Added Elements

Please describe any additional benefits that may result from implementation of the utility savings program and the respondent's added value elements in providing products/services for utility savings projects.

Tab 6: Pricing, Contracts & Forms

- a) Provide a pricing proposal to develop a comprehensive energy and water infrastructure modernization and utility savings study for developing a scope of work described as a dollar per square foot.
- b) Provide a pricing proposal for the respondent's implementation services described as percentage of the turnkey project.
- c) Provide sample contracts for project installation, measurement & verification, and terms and conditions. Include completed acknowledgement form.

**VIII. PROPOSAL EVALUATION CRITERIA**

Seeley County Water District will evaluate qualifications based on the scoring criteria outlined in this section. Respondents who are not actively engaged in providing services of the nature proposed in this RFP and/or who cannot clearly demonstrate to the satisfaction of the Districts their ability to satisfactorily perform the work in accordance with the RFP requirements will not be considered, nor will respondents who do not meet the minimum requirements.

The Districts shall be the sole judge of the qualifications and services to be offered and their decision(s) 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. (20 points)
- b) **Project Team & Management Structure:** i.e.. amount of work self-performed, strength of proposed team, trainers, and management structure. (25 points)
- c) **Project History & References:** i.e.. relevant past project experience. (50 points)
- d) **Project Approach:** i.e.. approach to audits, project management, training, etc. (25 points)
- e) **Additional Benefits & Added Value:** i.e.. additional benefits resulting from implementation and respondent's added value elements. (10 points)
- f) **Savings:** i.e.. savings approach and track record. (35 points)
- g) **Contracts & Forms:** i.e., sample contracts, terms & conditions & completed Acknowledgement Form (30 points)
- h) **Response:** responsiveness and compliance with the requirements of the proposal. (5 points)

Total Maximum Point Valuation: 200

**ACKNOWLEDGEMENT FORM**

**RFP # 2022-11 (2) Comprehensive Energy and Water Infrastructure Modernization and Utility Savings Program**

Pursuant to and in compliance with your Notice Requesting Proposals and all other documents relating thereto, the undersigned respondent, having familiarize himself with the terms and conditions of the proposal documents, hereby proposed and agrees to perform the work to be done and to provide all labor and materials necessary to perform the work.

Name of Respondent: \_\_\_\_\_

**ACKNOWLEDGEMENT OF AMENDMENTS:**

The respondent acknowledges receipt of amendments to RFP # 2022-11 (2)

Amendment Number						Initial Here
Date						