

VENTURA UNIFIED SCHOOL DISTRICT

Request for Qualifications for a Renewable Electrical Generation Facility Assessment Report

PROPOSAL DEADLINE: June 23, 2023 at 4:00 PM.

**Submit Proposal to: Ventura Unified School District
Vanessa Cordero
Office of the Assistant Superintendent, Business Services
Ventura Unified School District
255 West Stanley, Ventura, CA 93001
Telephone: (805) 641-5000
Email: vanessa.cordero@venturausd.org**

NOTICE CALLING FOR PROPOSALS

DISTRICT: **VENTURA UNIFIED SCHOOL DISTRICT**
PROPOSAL DEADLINE: **June 23, 2023 at 4:00 PM**
PLACE OF RECEIPT: Ventura Unified School District
Attn: Vanessa Cordero, Office of the Assistant Superintendent, Business Services
244 West Stanley
Ventura, CA 93001

NOTICE IS HEREBY GIVEN that the Ventura Unified School District of Ventura County, California, acting by and through its Governing Board, hereinafter referred to as "District" will receive up to, but no later than, the above stated Proposal Submission Deadline, sealed Proposals at the place identified above for its upcoming **Request for Qualifications for a Renewable Electrical Generation Facility Assessment Report**.

Request for Qualifications documents can be downloaded at: <https://www.venturausd.org/about/measure-e>

Time is of the essence. The District reserves the right to reject any and all submissions, or any portion thereof, to negotiate with any or all responsive Firms, and to waive any deficiencies, irregularities or informalities in any proposal or during the evaluation process.

Any questions regarding the Request for Qualifications shall be directed to Vanessa Cordero at vanessa.cordero@venturausd.org via e-mail **only** by **June 16, 2023**. All responses will be posted on the District's website.

1. Background and Overview

1. Overview

Ventura Unified School District (the District) is the third largest district in Ventura County, and is located on the California coast 63 miles northwest of Los Angeles. Approximately 17,000 students in Pre-School through Adult Education receive a rigorous, standards-based curriculum from dedicated and highly qualified professionals. The district is comprised of early childhood programs, 14 elementary schools, 3 K-8 school, 4 middle schools, 3 comprehensive high schools, 1 independent study high school, 1 continuation high school and a robust adult education program, as well as other education support facilities. More information about the District is available at www.venturausd.org.

1.1 Overview of Services

Ventura Unified School District seeks statement of qualifications ("Proposal") in response to this Request for Qualifications ("RFQ") from interested professional services firms and organizations (collectively, "Firm(s)") capable of providing the energy assessment described herein.

The District purchases electricity from Southern California Edison (SCE). The District is interested in installing Renewable Electrical Generating Facilities to obtain energy cost savings for its properties including solar photovoltaic systems and energy saving lighting as available and appropriate ("Energy Facilities"). As part of this endeavor, the District submitted a Net Energy Metering (NEM) 2.0 Interconnection Request to SCE as part of its plan to pursue installing Energy Facilities at its sites. Thus, the District seeks qualified Firms to provide a complete assessment of District properties and propose a project to install and operate Energy Facilities on the District properties (the "Energy Facility Report").

Based on this Energy Facility Report, the District anticipates entering into an agreement with the selected Firm to oversee the installation and implementation of the Energy Facilities described in the Energy Facility Report pursuant to the process set forth in California Government Code section 4217.10 et seq. (collectively, "Section 4217"). However, this RFQ does not obligate or require the District to enter into any subsequent agreement with the selected Firm or take any action to implement the Energy Facility Report. Instead, the Energy Facility Report shall be provided solely to provide the District with a proposed project to meet the requirements of Section 4217.10. The District, at its sole discretion, shall determine if it will enter into a subsequent agreement with the selected Firm to implement the proposals contained in the Energy Facilities Report. However, the selected Firm will be granted the opportunity to prepare and present a proposed agreement to implement the Energy Facility Report to the District, which will be considered by the District Board pursuant to the process set forth in Section 4217.

1.2 Energy Facility Report

Based on the review of the District's current infrastructure, the Firm shall provide an Energy Facilities Report that will propose the design and implementation of a Project to produce the energy cost savings required by Section 4217. The proposed project must provide sufficient energy to operate the District's current properties that is capable of being operated in a safe, normal, reliable, and continuous manner. The proposed system design shall comply with all requirements established by SCE through the Net Energy Metering program and any and all applicable laws and regulations and applicable permits.

The Energy Facility Report shall outline the specific requirements of any proposed installed equipment including any recommendations for the foundation designs, structural support designs, corrosion protection, pile drive frequency, minimum pile size, and any geologic conditions that may prevent the development of the project. Based on the Energy Facility Report, the Firm may include a proposed subsequent agreement that will establish the process and plan to implement the project recommended by the Energy Facility Report for the District's further consideration.

1.3 The RFQ Process

This RFQ is designed solely to enable the District to obtain an Energy Facility Report that will propose a project to enable the District to obtain the energy cost savings contemplated in Section 4217. Thus, the Energy Facility Report may include a proposal to enter into a subsequent implementation agreement to install the facilities, systems and equipment suggested by the Energy Facilities Report under the provisions of Section 4217.10. Thus, the Energy Facility Report must meet the requirements of Section 4217 by establishing that the proposed project will result in energy savings that will pay for the cost of proposed project, based on a best value evaluation established by the District. The District, at its sole discretion, may enter into a subsequent agreement with the selected Firm for subsequent phases of work to implement the Energy Facilities Report pursuant to the process set forth in Section 4217. However, this RFQ does not obligate the District to enter into any such agreement. Proposers are encouraged to explain the process they propose to implement the recommended actions in the Energy Facility Report, including proposing a subsequent agreement in which the selected Firm will oversee the installation of the proposed project and ensure the District meets the requirements of Section 4217 and all requirements established by SCE. Thus, this RFQ serves solely to enable the District to receive and consider proposals to enter into a subsequent agreement for Energy Facilities with the selected firm based on their Energy Facilities Report.

This RFQ is a formal request for proposals. The District reserves the right to reject any and all RFQ responses, including any information submitted pursuant to this RFQ. The District also reserves the right to amend this RFQ as necessary. All materials submitted to the District in response to this RFQ shall remain the property of the District. The District shall not be responsible for the costs of preparing any proposal in response to the RFQ.

1.4 INSTRUCTIONS TO FIRMS

1.4.1 Proposal Contact and Correspondence

All correspondence related to the RFQ must be directed to the following designated "District RFQ Contact":

Vanessa Cordero – Office of the Assistant Superintendent, Business Services
Ventura Unified School District
255 West Stanley
Ventura, CA 93001
Email: **vanessa.cordero@venturausd.org**

There will be no verbal understandings recognized by the District.

No Firm should attempt to contact or obtain information from any other District representative, and no Firm shall contact any members of the District's Board of Education. Doing so may result in immediate disqualification of a Firm's Proposal.

All RFQ documents are posted on the District website; <https://www.venturausd.org/about/measure-e>

1.4.2 Proposal Deadline and Submission

Proposals must be received no later than **June 23, 2023 at 4:00 PM.**

Firms may submit their Proposals electronically to the District RFQ Contact listed above or a hard copy via mail at the address listed above. The District will consider both electronic and hard copy proposals but does not require Firms to submit both.

Time is established per the District official clock.

1.4.3 Delivery to District

A written Proposal must be received at the District Office, no later than the Proposal Submission Deadline specified in the Calendar of Events either through mail or email, at the choice of the Proposer. The District assumes no responsibility for late delivery or any misdirected mail.

1.4.4 Withdrawal, Resubmission or Modification

A Firm may withdraw the Proposal at any time prior to the Proposal Submission Deadline specified in the Calendar of Events, by submitting a written request for its withdrawal to designated District RFQ contact, signed by the Firm or authorized agent. The Firm may thereafter submit a new or modified Proposal prior to the Proposal Submission Deadline. Modifications offered in any other manner, oral or written, will not be considered. A Proposal cannot be changed, corrected, or withdrawn after the Proposal Submission Deadline.

1.4.5 Calendar of Events

Event	Details	Date
Advertisements - RFQ Posting	Ventura County Star & VUSD Website https://www.venturausd.org/about/measure-e	6/12/22
Last Day to Submit Questions (RFIs)	Emailed to: vanessa.cordero@venturausd.org	6/16/22 at 10:00 a.m.
Response to Questions Posted	The District Website	6/20/22 at 10:00 a.m.
Proposals Due	255 West Stanley, Ventura, CA 93001	6/23/22 at 4:00 p.m.
Interview, if required by District	255 West Stanley, Ventura, CA 93001	week of 5/26/22

All dates are subject to change. Amendments to these dates and other aspects of the RFQ, will be posted at

1.4.6 Preparation

The Proposal should be prepared in such a way as to provide a straightforward description of Firm capabilities to satisfy the requirements of this RFQ. Emphasis should be concentrated on conformance to the RFQ instructions, responsiveness to the RFQ requirements, and completeness and clarity of content.

The completed documents(s) should be without interlineations, alterations, or erasures. The Proposal should present all information in a concise manner, neatly arranged, legible, and in terms understandable for evaluation. All information requested is to be addressed directly and completely. It is more desirable to give additional information than less when the answer could be misinterpreted.

Responses must follow District prescribed format and the Firm must provide all documents and forms provided in this RFQ. Proposals that do not include all required documents may be deemed non-responsive at the District's sole discretion.

All Firms are fully responsible for all costs associated with the preparation and delivery of any Proposal submitted to the District.

1.4.7 False and Misleading Statements

A Proposal which contains false or misleading statements, or which provide references which do not support an attribute or condition contended by the Firm may be rejected. If, in the sole opinion of the District, such information was intended to mislead the District in its evaluation of the Proposal and the attribute, which is a condition or capability of a requirement of this RFQ, the Proposal shall be rejected.

1.4.8 Request for Information (RFI)

Firms are encouraged to ask questions during the open RFQ question period. All questions shall be in writing and submitted to the listed contact person. Questions must be received by the deadline specified in the Calendar of Events. There shall be no verbal understandings or clarifications recognized by the District. Responses to all RFIs received by the written deadline will be posted on the District website. Requests for clarification or modification to the form must be submitted through the RFI process.

1.4.9 Amendments to the RFQ

During the RFQ period, the District may amend the RFQ. Amendments to the RFQ and/or calendar of events will be posted at <https://www.venturausd.org/about/measure-e>

1.4.10 Limits of the RFQ

The District reserves the right to reject all Proposals and will determine what future action, if any, will be taken. All costs incurred in the preparation or submission of a Proposal shall be entirely the responsibility of the Firm and shall not be chargeable directly or indirectly to the District.

1.4.11 Public Records Act

All records, documents, drawings, plans, specifications and other materials submitted by Firm in its Proposal and during the course of any work awarded shall become the exclusive property of the District and may be deemed public records and subject to the provisions of the California Public Records Act (Government Code, sections 6250 et seq.). The District's use and disclosure of its records are governed

by this Act. The District will accept information clearly labeled "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY" as determined by the submitting party in accordance with the Act. The District will endeavor to inform the Firm of any request for the disclosure of such information. Under no circumstances, however, will the District be responsible or liable to Firm or any other party for the disclosure of any such labeled information. Firms that indiscriminately identify all or most of their Proposal as exempt from disclosure without justification may, at the District's discretion, be deemed non-responsive. The District will not advise as to the nature or content of documents entitled to protection from disclosure under the California Public Records Act, including interpretations of the Act or the definitions of "Trade Secret," "Confidential" or "Proprietary." If litigation is brought under the Public Records Act concerning documents submitted in response to this RFQ, the appropriate Firm shall indemnify, defend and hold harmless the District, its Board of Trustees, officers, agents, employees in such litigation.

1.4.12 Examination of RFQs

At its own expense and prior to submitting its Proposal, each responding Firm shall examine all documents relating to the RFQ; familiarize itself with all federal, state and local laws, ordinances, rules, regulations and codes affecting the performance of the services, including the costs of permits and licenses required for the services; determine the character, quality, and quantities of the services to be performed and the materials and equipment to be provided; and correlate its observations, investigations, and determinations with all requirements of the RFQ. The RFQ documents are only provided as information for the Firms. The District is not making any warranties regarding said information. The District shall not be liable for any loss sustained by the successful Firm resulting from any variance between the conditions given in the RFQ documents and the actual conditions revealed during the progress of the services. Firm agrees that the submission of a RFQ shall be incontrovertible evidence that Firm has complied with all the requirements of the RFQ documents.

1.4.13 Signature

Any signature required on RFQ documents, must be signed in the name of the Firm and must bear the signature of the person or persons duly authorized to sign these documents. Where indicated, if Firm is a corporation, the legal name of the corporation shall first be set forth, together with two (2) signatures; one (1) from among the chairman of the board, president or vice president and one (1) from among the secretary, chief financial officer, or treasurer. Alternatively, the signature of other authorized officers or agents may be affixed, if duly authorized by the corporation. Such documents shall include the title of such signatories below the signature. Where indicated, in the event that the Firm is a joint venture or partnership, there shall be submitted with the RFQ certifications signed by authorized officers of each of the parties to the joint venture or partnership, naming the individual who shall sign all necessary documents for the joint venture or partnership and, should the joint venture or partnership be the successful Firm, who shall act in all matters relative to the joint venture or partnership. If the Firm is an individual, his/her signature shall be placed on such documents.

1.4.14 Responding Firms Interested in More Than One RFQ

No person, firm, or corporation shall be allowed to make, or file, or be interested in more than one (1) Proposal for the same services.

1.5 Evaluation and Award

1.5.1 General Information

Proposal Evaluation - The District will review submittals and preference will be given to the Firm(s) that demonstrate superiority, professionalism, innovative approaches, technical and contractual solutions, additional services and flexibility in developing and implementing successful projects.

The District shall make its evaluation in its sole discretion and its decision shall be final. Upon review of responses, The District, at its sole discretion, may choose to meet with Firms for further evaluation. Firms who are unable to meet the District's schedule and/or requirements are subject to Proposal rejection.

The District will select the Firm(s) most qualified and the District reserves the right to negotiate and contract with any Firm(s) responding to this RFQ based upon its judgment of the qualifications and capabilities of the Firms(s) and their proposed rates for the services requested.

This RFQ does not commit the District to negotiate a contract.

The District shall select the Firm(s) which it believes are qualified and in the best interest of the District. As set forth herein, the responses to this RFQ will agree to provide an Energy Facility Report proposing a project to enable the District to obtain energy savings through a project in accordance with Section 4217. Thus, the Proposals will include a plan to assess the District properties and provide a proposed project and contract to meet the requirements of Section 4217. However, in no event will the District be obligated or required to enter into a subsequent agreement with the Proposers to implement the Energy Facility Report. The sole purpose of this RFQ is to provide the District with information necessary to determine if installation of Energy Facilities in accordance with Section 4217 is feasible.

Proposal Evaluation Criteria

During the evaluation period, the District reserves the right to conduct telephone or email conversations with a Firm to clarify Proposals; negotiate; ask questions or obtain additional information.

Firm Presentation

The District reserves the right to conduct in-person or online interviews and/or require formal presentations with Firms whose Proposal meets the District's requirements and expectations. The District reserves the sole right to determine if a potential Firm will be invited for an interview. Firms invited for a presentation/interview must be represented by the individuals who will be the prime contact persons to the District, as well as other key project team members. A Firm's inability to respond to any request for clarification and/or oral presentation may be cause for disqualification.

Prior Experience

Districts may use prior experience with Firm services as part of the evaluation process.

Discussions

Discussions may, at the District's sole option, be conducted with responsible representatives from Firms who's submitted Proposals are determined to be reasonably susceptible of being selected. Discussions may be for the purpose of clarification to assure full understanding of, and responsiveness to the solicitation requirements. Firms shall be given fair and equal treatment with respect to any opportunity for clarifications. District may request clarifications of Proposals submitted. In conducting discussions, the District will not disclose information derived from Proposals submitted by competing firms.

1.5.2 Requirements

Firms should meet all of the requirements defined in this RFQ, including, but not limited to, conformance to the terms and conditions of this RFQ, contract requirements and general terms. Firms that do not meet the minimum requirements may be disqualified at the District's sole discretion.

1.5.3 Evaluation

Qualifying Firms will be evaluated on their complete Proposal, based on the following considerations. Thus, Firms are encouraged to submit information as appropriate to demonstrate its ability to meet the following factors:

FACTOR
Proposed plan for implementing the results of the Energy Facility Report, including any proposed agreement to complete such work
Organization, content of submittal, and compliance format requirements
Firm's history and resource capability to perform required services
Evaluation of assigned personnel
Successful and similar projects for other school districts
Familiarity with local area - geography and facilities
Experience and technical qualifications and competence of the Firm. Recent experience in conducting similar projects, both creating and implementing projects proposed in similar Energy Facility Reports
References, Financial Resources, Litigation History
Demonstrated ability to meet the District's needs as set forth in this RFQ

1.5.4 Minimum Requirements

Proposals are expected to meet the requirements specified in this RFQ document. Services not meeting the criteria, as determined solely by the District may be cause for the rejection of the Proposal, or services. All costs to remedy to the District's satisfaction will be borne by the Firm.

1.5.5 Award

The District will select a Firm pursuant to this RFQ to provide the Energy Facility Report as set forth herein based on the responses received in accordance with Section 4217. This "award" shall not constitute contract or binding agreement by the District to enter into an agreement with the selected Firm to implement the projects suggested by the Energy Facility Report. Instead, the award shall service s the District's agreement to consider the Energy Facility Report and consider entering into a subsequent agreement with the Firm pursuant to the process required by Section 4217. Any subsequent agreement pursuant to this RFQ or the Energy Facility Report must be presented to and approved by the District's governing board. Thus, by submitting a response to this RFQ, all firms acknowledge that they are not guaranteed to receive any payment to implement the Energy Facility Report or any subsequent agreement. Instead, this RFQ grants the selected Firm the opportunity to prepare an Energy Facility Report and propose a contract to implement the report to meet requirements of Section 4217 and SCE.

1.5.6 Contract and Guarantees

Following the selection of a Firm pursuant to this RFQ, if the District decides to move ahead with a project and one of the selected Firms is asked to provide services to implement the project set forth in its Energy Facility Report, the District will prepare and negotiate an agreement with the selected Firm to deliver the proposed project. This RFQ does not commit the District to negotiate a contract with any Firm selected. There is no commitment from the District that any projects will be awarded.

If a contract is awarded as a result of the Energy Facilities Report all guarantees made by the selected Firm within the Energy Facilities Report shall be incorporated into the Agreement resulting from this

RFQ, and shall be binding upon the Selected Firm. This RFQ, any RFI responses, amendments, and the selected Firm's Proposal will become a part of the Agreement as applicable. All RFQ requirements and guarantees made by the Firm shall apply unless explicitly waived by the District. Any Proposal attachments, documents, letters, and materials submitted by the Firm shall be binding and may be included as part of the Agreement. Submission of a successful Proposal is not the end of the contractual process; further negotiation over the agreement terms and conditions will be necessary, which, in and of itself, could change the Selected Firm.

1.6 SUBMITTAL REQUIREMENTS

The RFQ responses must be organized per the sections below and be clearly labeled to indicate how you plan to develop the Energy Facility Report and propose an implementation agreement for the District's consideration in compliance with Section 4217. Submitting Firms shall demonstrate technical and managerial capability across a broad range of services, including design, construction, close-out, estimating and schedule services (as applicable to the Firm) for any proposed implementation agreement. The District will consider background and experience factors in the evaluation of submittals.

- A. Cover Letter - Include a cover letter signed by an individual authorized to bind the firm. Cover letter should include the following:
- Legal contractual name of the Firm and type of entity (corporation, partnership, etc.)
 - Contact person name, title, and contact information
 - Business headquarters' mailing address, business telephone, and email address
 - Number of years in business and the date Firm was established
 - Summarize key elements of the Proposal
- B. Table of Contents
- A table of contents of the material contained in the submittal package should follow the cover letter.
- C. Description of Firm and Approach to Work
- Provide specific information regarding the size, financial strength, location, nature of work performed and number of years in business
 - Describe Firm's approach to work, including list of project management team, coordination methodologies, analysis and research approaches
 - Availability - Describe how the Firm will respond to questions from the District regarding the Energy Facility Report and its implementation
 - Describe Firm's knowledge and understanding of the local environment and a local presence for interacting with the District.
- D. Background of Professional Service Firm's Personnel
- Identify all personnel employed by the Firm who will work on the Energy Facility Report
 - Description of the Firm's qualifications and relevant project experience
 - Describe the role and responsibilities of each individual listed
 - Include a resume for each person that may be assigned to Energy Facility Report and its

subsequent implementation, specifying education, background, experience and continuing education. Resumes must be included in this section of the Proposal

- Include the Professional Licenses held by key personnel, if applicable

E. Consultants/Subcontractors

Indicate the extent to which the Firm will or intends to use consultants or subcontract any of its services. Identify each person or entity the Firm intends to use and specify the scope of the work that shall be performed by that person or entity. Unless the District consents, in its sole discretion, the Firm may not subcontract any portion of the work on a project to a consultant or subcontractor without prior consent of the District.

F. Experience in Design and Implementation of projects typically proposed in the Energy Facility Report. Detail the following:

- Firm's methodology / approach to developing the Energy Facility Report
- Firm's approach for developing scope of work for various types of projects proposed by the Energy Facility Report
- Firm's experience with various project delivery methods used to implement the Energy Facility Report; addressing the areas that are self- performed, subcontracted, team delivered, etc.
- Provide a summary of the Firm's experience in working with other California school districts in both developing and implementation the Projects typically included in the Energy Facility Report:
- Description of any unique capabilities that would be useful to specific needs of the District for the Energy Facility Report
- Description of Firm's commitment to and experience with Section 4217 projects including projects involving SCE, as well as experience with DSA, for public school projects.

G. Litigation/ Claims History

Include a statement declaring whether the Firm has been a party to suits, claims or similar actions.

- The Firm shall identify any litigation in the last ten (10) years the Firm has filed against an owner, owner's consultant or contractor related to or arising from any construction project.
- The Firm shall identify all claims in the last five (5) years, filed either by an owner, owner's consultant or contractor, which involves the Firm, Firm's employees, Firm's consultants, engineers, or Consultant's employees. State the nature of the claim and the resolution or the anticipated resolution of the claim.
- The Firm shall disclose whether the Firm has been terminated either for cause or for convenience by an owner in the last seven (7) years related to or arising from any construction project.
- The Firm shall state whether the Firm has or has not filed a petition for bankruptcy. If the Firm has filed a petition for bankruptcy, the Firm shall provide the date the petition was filed and identify the jurisdiction in which the petition was filed.

I. Complaint History

The Firm shall disclose the complaint(s), if any, that have been lodged against the Firm with any local public agency, any agency of the State of California, or any professional organization with which the Firm is affiliated and, if so, describe the nature of the complaint(s) and outcome(s) or anticipated outcome(s).

J. Insurance Claims History

The Firm shall describe the outcome of claims, if any, filed against Firm's general liability or professional liability or automobile liability insurance carriers during the past five (5) years. Identify the firm's insurance carriers' name and address and policy number(s) for general liability and professional liability for the past five (5) years.

K. References

The Firm shall list a minimum of five (5) references for relevant California public schools, colleges, or other relevant Energy Facility Reports completed within the last five (5) years. Include the District name, Project name, a current owner contact and title with contact information.

L. Experience with State Regulatory Agencies

Specify the Firm's experience working with state agencies, including the Office of Public School Construction, State Allocation Board, Department of Education, Division of the State Architect and SCE.

M. Other

Each Firm is encouraged to provide any additional information or description of resources that Firm believes is pertinent to this RFQ. Do not include brochures or other marketing-related materials.