



# **ACTON-AGUA DULCE UNIFIED SCHOOL DISTRICT**

## **REQUEST FOR PROPOSALS**

### **PROPOSITION 39 ENERGY CONSERVATION AND ENERGY EFFICIENCY SERVICES:**

#### **HVAC Retrofit Project**

Acton-Agua Dulce Unified School District  
32248 Crown Valley Rd.  
Acton, CA 93510  
(661) 269-0750

Attn: Lynn David, Assistant Superintendent Business Services

**SEALED SUBMITTALS MUST BE RECEIVED BY MARCH 11, 2019 AT 9:00 A.M.**

**Acton-Agua Dulce Unified School District**  
**PROP. 39 ENERGY CONSERVATION AND ENERGY EFFICIENCY SERVICES**  
**HVAC Retrofit Project**  
**Request for Proposals**

**PROJECT**

Acton-Agua Dulce Unified School District (“District”) is requesting proposals from qualified HVAC contractors (“Contractor”) with experience working in K-12 educational settings. The District has received funding from Proposition 39, and a previous energy audit has identified several opportunities that exist within the District. The project contemplates the complete HVAC retrofit at Meadowlark Elementary School. The school sites are occupied and the installation of the HVAC systems will be performed so as to avoid any disruption to the schools. The District has contracted with The R Group to act as its Project Manager for the project.

The selected Contractor will work with the Project Manager, make presentations as required to the Board, prepare final documents, gather and submit verification data consistent with Prop 39 and any Southern California Edison (“SCE”) rebate requirements, complete construction and installation, obtain required permits, and project close out.

It is the intent of this Request for Proposals (RFP) to establish the project approach, specifications and work-scope, schedule and terms and conditions governing the selection process. Proposals shall be firm for ninety (90) days from the date of their opening. All Proposals must meet or exceed all the specifications contained herein. Two (2) signed copies of the Proposal should be addressed to the attention of:

Lynn David, Assistant Superintendent Business Services  
Acton-Agua Dulce Unified School District  
32248 Crown Valley Rd.  
Acton, CA 93510  
(661) 269-0750

Project required completion date is June 28, 2019

**PROCUREMENT**

The project must conform to all requirements of California Government Code 4217, Title 24, California Division of State Architect (DSA) and all the parameters laid out in the Proposition 39 guidelines. In addition, the District will utilize the best value criteria as the basis for award. Best value criteria, as set forth in the law, includes objective criteria related to price, features, functions and life-cycle costs.

The District will evaluate proposals to determine the Firm best qualified consistent with the evaluation criteria set forth, below. The District intends to use the authority granted by

Government Code sections 4217.10, et seq. as the basis for any contract award that may result from this RFP.

The goal of this RFP is to identify an HVAC partner with the necessary experience to ensure a fully managed and well executed HVAC Upgrade project. The successful respondent will have demonstrated experience designing, planning, scheduling, permitting and constructing an HVAC Retrofit. Contractor is responsible for all permitting. Respondents must have worked with Southern California Edison regulations with regards to HVAC upgrades and have established onsite safety standards.

### **SCOPE OF WORK**

The scope of the project will include the following

- **Description of Site:** The main building is single story with integration of the Multi-Purpose Room having a two-story high ceiling. All work performed will be on single story level. See photo below.



Aerial View: 3015 Sacramento Ave., Acton, CA 93510

- **Desired System Size:** The Rooftop Packages Units are expected to be the same tonnage capacity as existing units with confirmation using appropriate sizing software approved by SCE/Project Manager.

- **Description of desired HVAC Upgrade:**

Installation per Title 24, Part 6

- a. Installation of new Thermostats per section 120.2(b)4. Must comply with requirements of Reference Joint Appendix JA5
- b. Minimum cooling Efficiency per section 110.2(a), 14 SEER (11.76 EER)
- c. Ventilation Calcs per section 120.1
- d. Cooling and Heating load calcs per section 140.4(b)
- e. Equipment sizing per load calcs in section 140.4(a)
  - 1) HVAC equipment sizing to be approved by owner

The contractor shall develop a HVAC upgrade process for new High Efficiency HVAC systems. It is the responsibility of the contractor to assess the existing HVAC system at each location on the school campus.

- HVAC upgrade shall meet applicable State and local building code requirements and safety regulations.
- Removal and disposal of existing HVAC systems.
- HVAC controls shall be compliant in the interior spaces and meet or exceed existing code level.
- All rooms under HVAC Retrofit activity shall be securely locked at the end of each day.
- HVAC upgrade plan shall be submitted to District/Project Manager and be compliant with local energy, mechanical, and electric code and ordinance requirements.
- All equipment must be UL listed for its intended use. Construction must comply with current adopted State Building Code, which includes: International Building Code, National Electric Code (NEC), California State Fire Marshall (if applicable), Mechanical code, and Energy code.
- HVAC Packaged Units: HVAC packaged units selected shall be manufactured by LENNOX or equivalent, and be submitted for approval prior to purchase.

The final design package and documents shall include the following but are not all required in the proposal stage. Please reference the proposal requirement section for detailed bid submission requirements:

- Description of the High Efficiency Lennox system
- Construction documents and engineering calculations that are signed and sealed by a licensed architect or engineer
- Layout drawing of installation site providing location of all equipment
- Equipment details and specifications
- Schedule for equipment procurement and installation
- Description of controls, monitors, and instrumentation to be used for the HVAC units
- Equipment and installation manuals
- Safety plan
- Block off all work areas
- Quality control plan
- Site implementation plan

- Weekend work hours or Select weekdays after 3PM
- Operations and Maintenance manuals for system operations
- Title 24 Control system

The HVAC equipment provider’s standard system warranty coverage should cover equipment operation.

- HVAC Unit: 5-Year Limited Warranty
- Workmanship: 1 Year Limited Warranty

Prior to completion of the HVAC project, Contractor shall provide all equipment Operation and Maintenance documentations. The information shall be sufficient for District to evaluate and ensure appropriate O&M is being maintained over the life of the equipment. Project as-builts that detail location of all above shall be submitted at end of project.

**SCHEDULE**

<b>Date</b>	<b>Event</b>
February 25, 2019	RFP Issued
February 28, 2019	Mandatory job walk: 4:00 Meadowlark
March 7, 2019	Deadline for questions and information requests
March 11, 2019	RFP Due Date
March 18, 2019	Announcement of Award
March 28, 2019	Board approval

**QUALIFICATIONS**

Acton-Agua Dulce Unified School District may award a contract to the Contractor that, in its sole opinion, is the most capable of providing the range of services described in this RFP, and in the long-term best interest of the District. To be considered for this project a provider must demonstrate knowledge and experience in similar projects:

- California K-12 references that can attest to the quality of the Provider’s past work
- An established record of technical performance on typical projects within California
- A proven record of on-time and on-budget performance
- Excellent safety record
- Established records of the Provider’s ability to complete the work
- Credentialed, trained, and knowledgeable staff
- Competent management support at all levels
- Ability to effectively communicate with the school sites, administration, staff, students, and community as needed

Acton-Agua Dulce Unified School District reserves the right to investigate the qualifications of all Contractors under consideration and to confirm any part of the information furnished, or to require other evidence of managerial, financial, or technical capabilities that are considered necessary for the successful performance of the described energy efficiency project.

## **PREVAILING WAGE RATES AND COMPLIANCE WITH SENATE BILL 854**

This project is subject to the California Prevailing Wage law, at Labor Code sections 1720, et seq. The successful respondent and all contractors and subcontractors thereto shall fully comply with all requirements thereof, and all related requirements of California law. Applicable prevailing wage determinations shall be available upon request at the District office.

## **SUBMITAL REQUIREMENTS**

Address the following items as completely as possible; response to each item is mandatory:

### **1. COVER LETTER/LETTER OF INTEREST**

Cover letter must include name of firm, address, telephone and fax numbers, and name of Principal to contact. Letter must be signed by representative of the firm with authorization to bind the firm by contract.

### **2. PROJECT PROPOSAL**

Identify the project schedule (timeline), itemized budget, current and potential measures identified (on the Expenditure Plan Project Summary), product quantity, energy efficiency measures, product life-cycle/warranty, maintenance and support provided and demand savings. Any measures requested but not included in the proposal should be itemized separately in the proposal and clearly marked as not included. State the overall cost to provide and install the HVAC systems.

### **3. DESCRIPTION OF FIRM**

- a) History, number of years in business in California, staff size
- b) Location of office which will perform the work
- c) Size of staff if applicable one person Contractors/firms may submit

### **4. RELEVANT EXPERIENCE**

- a) List relevant K-12 and or Community College projects where your firm has provided similar services and include:
  - i. Project name, type and location Ex: Classroom / Kitchen/ Library / Administration / Laboratory
  - ii. Year completed
  - iii. Project size, and construction cost
- b) List client names, contact person, and phone number for relevant project information.

### **5. FIRM TRACK RECORD**

- a) Has your firm ever been let go by a client or replaced by another firm during any related project? If so, explain in detail.
- b) Does your firm have any current or pending litigation on any projects? If so, please describe.
- c) Has your firm defaulted on a contract within the past five (5) years or declared bankruptcy, or been placed in receivership within the past five (5) years?
- d) Is or has your firm been a party to suits, claims, or similar actions related to:

- a. Construction claims relating to performance or delay
- b. OSHA, labor relations, or similar issues affecting the progress of the work
- c. California State Contractor License suspensions or code violations
- d. If “yes” to any of the above, provide a summary and current status of the issue under separate attachment to the response to this RFP.

### **SUBMITTAL INFORMATION**

Deadline for submission of three (3) copies of your submittal is 9:00 AM, March 11, 2019. Submittals received after the deadline may be returned. All submittals become the sole property of the District and the content will be held confidential until the selection of a firm is made. Any proprietary information must be designated clearly and should be bound separately and labeled with words “PROPRIETARY INFORMATION”. An entire submittal marked as such will not be accepted.

Submit sealed proposals clearly marked “RFP for Acton-Agua Dulce Unified School District–HVAC Retrofit” to the following location:

Acton-Agua Dulce Unified School District  
32248 Crown Valley Rd.  
Acton, CA 93510  
(661) 269-0750

Attn: Lynn David, Assistant Superintendent Business Services

Questions or clarifications may be submitted in writing to Lynn David at the address listed above or e-mailed to [ldavid@aadusd.k12.ca.us](mailto:ldavid@aadusd.k12.ca.us).

### **SUBMITTAL EVALUATION PROCESS**

The Acton-Agua Dulce Unified School District Board will manage the selection process, review and evaluate the Proposals and make a recommendation regarding the selection of a successful Contractor. The committee shall be comprised of individuals with experience, knowledge and program responsibility for the products and services of this Project.

Selection will include an assessment of the Firms’ proven ability to apply their experience and technical expertise to:

- Complete this energy savings project in an efficient and skilled manner.
- Provide quality components per contract documents.
- Collect, document and assemble in the approved format, all pre and post monitoring and verification data as required of a Prop 39 and SCE energy savings project.

District reserves the right to conduct interviews as part of the procurement process.

### **CRITERIA EXPLANATION WEIGHT**

#### **1. Merit of Submittal (10pts)**

General thoroughness and responsiveness of the submittal.

**2. Knowledge and Expertise of Personnel/Firm (25 pts)**

Contractor's demonstrated experience in completing projects of a similar type. Capability of personnel/firm; demonstrated experience of Provider's team; firm's qualifications.

**3. Overall Project Cost (25 pts)**

**4. Record of Past Performance and Experience (40 pts)**

References; quality of past projects; demonstrated ability to complete work tasks within project timelines and budget; quality of submitted work samples.

**Acton-Agua Dulce Unified School District reserves the right to:**

- Reject any or all submittals at its sole discretion.
- Cancel the Request for Proposals (RFP).
- Modify any requirements contained within the RFP and request a revised submission from all providers.
- Establish other evaluation criteria determined to be in the best interest of Acton-Agua Dulce Unified School District.
- Contract with any of the firms responding to this RFP based solely upon its judgment of the qualifications and capabilities of the Contractor/firm.

A Selection Committee, as deemed necessary, will be formed to evaluate the submittals. Composition and creation of this committee, should one be formed, is at the sole discretion of the District. The Selection Committee may review the submittals for format to ensure conformance with the requirements of the RFP and may select finalist to interview with the committee as part of the evaluation process. District does not guarantee that an interview will take place, thus reserving the right to select a Provider based solely on the information provided in the submittals received in response to the RFP. Should an interview take place, the key personnel responsible for fulfilling the requirements of the project shall be required to be present for the interview. District will take all steps necessary to ensure that any discussions and interviews conducted in connection to this RFP will be done in a fair and impartial manner.

This RFP does not commit District to negotiate a contract. District shall not be responsible for any expenses incurred by any firm in preparing and submitting a proposal or response to this RFP.

**ADDITIONAL INSTRUCTIONS TO BIDDERS**

1. Contractor is responsible for providing all materials, labor and necessary equipment to complete the work according to the specifications provided and best practices. Finally, payment will be available after a walk-through ensures completeness and functionality to the District satisfaction.



2. Upon award of contract, Contractor shall submit appropriate documents of insurance (certificates of accord); workers compensation, automobile insurance, property damage and public liabilities, personal injury, etc., and shall hold the school district blameless in any incident involving the contractor, his employees, his/her equipment, and vehicles as set forth in the contract documents.
3. Bidders shall visit the site areas and familiarize themselves with the scope of the project. A pre-bid meeting and project walk-through will be held on February 28, 2019.
4. Following award of the contract, work may commence on or after (date). All work must be completed on or before June 28, 2019.
5. The contractor shall clean their job area daily and dispose of all trash and debris leaving the area broom clean. District dumpsters will not to be used for contractor's trash.
6. It is the responsibility of the contractor / bidders to field verify all existing conditions.

**Exhibit 1: Energy Expenditure Plan - Performance Specifications & Quantities and Locations (Attached to HVAC Retrofit RFP file)**

**Exhibit 2: HVAC Retrofit - Sample Short Form Agreement Documents (Separate file on website or hardcopy by written request)**



STATE OF CALIFORNIA  
**CALIFORNIA ENERGY COMMISSION**  
Proposition 39 Program  
Energy Expenditure Plan Report

**APPLICATION APPROVED**

**Submission**

ID: **5372**      Submittal Option: Multiple-Year (bundled) Award Expenditure Plan      Tier: 3      Expenditure Plans this Fiscal Year: 2017-18

**Energy Planning Reservation Information**

Did you request Energy Planning Funds? (If no, move on to next section) Yes  
 Budget for Screening and Energy Audits: \$2,140.00  
 Budget for Proposition 39 Program Assistance: \$13,913.00  
 Budget for Energy Manager: \$31,475.00  
 Budget for Training Totals: \$47,528.00  
 Totals: \$47,528.00

**Energy Manager and Training**

Are you hiring an Energy Manager with Funds Requested in this Expenditure Plan? Yes  
 Are you using Proposition 39 funds for energy related training costs? No

**Summary of Schools/Sites**

Estimated Totals: \$223,746.00      Total Project Cost: \$223,746.00      Proposition 39 Share: \$223,746.00

**Job Creation Benefits Estimation**

Type of Project      Budget  
 Energy Efficiency      \$223,746.00  
 Renewable Generation      1.25  
 Distributed Energy      1.25  
 Total: 1.25

Please list any state-certified apprenticeship programs being used:

Will this project be subject to a community benefits agreement, community workforce agreement, or other mechanism that defines project co-benefits?

Estimated Apprenticeship Job-Years Created: \_\_\_\_\_

Estimated Other Trainee Jobs Created: \_\_\_\_\_

**Self-Certifications**

- Yes  The LEA followed the Proposition 39 Guidelines regarding Eligible Energy Project Prioritization Considerations.
- Yes  The LEA followed the guidelines regarding Sequencing of Facility Improvements
- Yes  The LEA commits to use the funds for the eligible energy project(s) approved in its energy expenditure plan.
- Yes  The LEA commits that the information included in the application is true and correct based to the best of the LEA's knowledge.
- Yes  The LEA commits that all California Environmental Quality Act (CEQA) requirements are completed.
- Yes  The LEA will obtain DSA project approval as applicable pursuant to California Code Regulations, Title 14.
- Yes  The LEA acknowledges that the expenditures are subject to financial audit requirements
- Yes  The LEA commits to complying with all reporting requirements.

Authorized Representative: Lynn David      Date: 2/24/2018

Version 6

**Applicant Information**

Local Educator Agency Name: Acton-Agua Dulce Unified  
 LEA CDS Code: 19753090000000  
 Mailing Address: 32248 North Crown Valley Road  
 City: Acton  
 Zip Code: 93510-2620

**LEA Authorized Representative**

Name: Lynn David  
 Title: Director/Principal  
 Phone: 6612690310  
 Email: ldavid@aadusd.k12.ca.us

**Project Manager**

Name: Terrence Redd  
 Title: Energy Program Manager  
 Phone: 3238644242  
 Email: tkredd@thergrouplic.com

Summation is for 2 Schools



**Site Information**

Project Start Date: 7/15/2018  
 Completion Date: 10/15/2018  
 Local Education Agency: Acton-Agua Dulce Unified  
 LEA CDS Code: 19753090000000

**Benchmarking**

Square Footage of School/Site: 43,898  
 Average Peak Demand (kW): 109  
 Total Annual Electric Use (kWh): 308,436  
 Total Annual Electric Charges (\$): \$54,669.00  
 Total Annual Gas Use (therms): 8,757  
 Total Annual Gas Charges (\$): \$7,563.70  
 Total Annual Propane Use (gals):  
 Total Annual Propane Charges (\$):  
 Total Annual Fuel Oil Use (gals):  
 Total Annual Fuel Oil Charges (\$):  
 Energy Bill Fiscal Year: 2016-17  
 Electric Utility: Southern California Edison  
 Electric Utility Account #: 3-003-7386-43  
 Gas Utility: Southern California Gas  
 Gas Utility Account #: 031 113 3000 1

**School or Site Information**

School/Site Name: High Desert  
 School/Site CDS Code: 19753096107494  
 School/Site Mailing Address: 3620 Antelope Woods Rd.  
 City: Acton  
 Zip Code: 93510-1757

**Energy Efficiency Project Summary**

Measure Savings Source: Combination Calculator and Audit  
 Proposition 39 Share to be used for Measure Implementation (\$): \$36,744.00

Reminder: If the School/Site includes leased facilities, please include Building Owner Certification in backup documentation.

Energy Use Intensity Calculator			
Electricity	Natural Gas	Other Fuels	
2.48 W/SF	20 Therms/SF		Gals/SF
7.03 kWh/SF	\$ .17 Cost/SF		Cost/SF
\$1.25 Cost/SF			
Energy Costs/SF/Year:	\$1.42	Energy Use(kbtu)/SF/Year:	95.24

Energy Efficiency Measure	Description	Demand Savings (kW)	Annual Electric Savings	Annual Nat. Gas Savings	Annual Propane Savings	Annual Fuel Oil Savings	Annual Energy Cost Savings (\$)	Measure Cost (\$)	Rebates and Grants (\$)	EEM SIR
Lighting: Retrofit Interior Lamps to LED	Retrofit 1086 lamps in 2-lamp fixtures of 32w Fluorescent T8/electronic ballast to LED T8/electronic ballast		35,422	(165)			\$6,124.00	\$36,744.00		2.72
<b>Energy Efficiency Narrative Description</b>										
Replacement of all existing T8 32W 4ft tube lamps with LED 4ft Plug n Play lamps compatible with existing ballasts.										
<b>Site Project Summary</b>										
Total Demand Savings										
Total Annual Electric Savings										
Total Annual Natural Gas Savings										
Total Annual Propane Savings										
Total Annual Fuel Oil Savings										
Total Annual Cost Savings										
Total Project Cost										
Total Rebates										
Total Prop 39 Share										
Savings-to-investment Ratio (SIR)										
Total Cost Paid Under PPA										



**Site Information**

Project Start Date: 7/15/2018  
 Completion Date: 11/15/2018  
 Local Education Agency: Acton-Agua Dulce Unified  
 LEA CDS Code: 19753090000000

**Benchmarking**

Square Footage of School/Site: 31,922  
 Average Peak Demand (kW): 122  
 Total Annual Electric Use (kWh): 313,297  
 Total Annual Electric Charges (\$): \$59,211.21  
 Total Annual Gas Use (therms): 4,042  
 Total Annual Gas Charges (\$): \$3,899.49  
 Total Annual Propane Use (gals):  
 Total Annual Propane Charges (\$):  
 Total Annual Fuel Oil Use (gals):  
 Total Annual Fuel Oil Charges (\$):  
 Energy Bill Fiscal Year: 2016-17  
 Electric Utility: Southern California Edison  
 Electric Utility Account #: 3-014-0956-28  
 Gas Utility: Southern California Gas  
 Gas Utility Account #: 021 864 9499 9

**School or Site Information**

School/Site Name: Meadowlark Elementary  
 School/Site CDS Code: 19753096115679  
 School/Site Mailing Address: 3015 West Sacramento Avenue  
 City: Acton  
 Zip Code: 93510-2434

**Energy Efficiency Project Summary**

Measure Savings Source: Combination Calculator and Audit  
 Proposition 39 Share to be used for Measure Implementation (\$): \$187,002.00

Reminder: If the School/Site includes leased facilities, please include Building Owner Certification in backup documentation.

Energy Use Intensity Calculator					
Electricity	Natural Gas	Other Fuels			
3.82 W/SF	13 Therms/SF				Gals/SF
9.81 kWh/SF	\$ .12 Cost/SF				Cost/SF
\$1.85 Cost/SF					
Energy Costs/SF/Year:	\$1.98			Energy Use(Kbtu)/SF/Year:	117.83

Energy Efficiency Measure	Description	Demand Savings (kW)	Annual Electric Savings	Annual Nat. Gas Savings	Annual Propane Savings	Annual Fuel Oil Savings	Annual Energy Cost Savings (\$)	Measure Cost (\$)	Rebates and Grants (\$)	EEM SIR
Lighting- Retrofit Interior Lamps to LED	Retrofit 1756 lamps in 2-lamp fixture of 32w Fluorescent T8/electronic ballast to LED T8/electronic ballast									
HVAC- Packaged/Split System AC/Heat Pump/VRF	Replace eight rooftop packaged AC units (41-tons) with higher efficiency units									
<b>Energy Efficiency Narrative Description</b>										
Replacement of all 32W T8 4ft tube lamps in 2-lamp fixtures throughout entire campus, with LED T8 4ft lamp replacement of 37-tons of Air Conditioning (~7 Rooftop Units) with higher Energy Efficiency Rating										
<b>Site Project Summary</b>										
Total Demand Savings	8		Total Annual Fuel Oil Savings		\$187,002.00					
Total Annual Electric Savings	72,382		Total Annual Cost Savings		\$13,211.00		Savings-to-investment Ratio (SIR) 1.37			
Total Annual Natural Gas Savings	(392)		Total Project Cost		\$187,002.00		Total Cost Paid Under PPA			
Total Annual Propane Savings			Total Rebates							