Pre-Bid Conference
Bright Schools Technical Assistance Program

RFQ-13-401

Energy Efficiency Division
Local Assistance and Financing Office
California Energy Commission
July 17, 2014
## Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:30 pm</td>
<td>Welcome and Introductions</td>
</tr>
<tr>
<td></td>
<td>• Purpose, Goals, Background</td>
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<td></td>
<td>• Funding</td>
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<td></td>
<td>• Bright Schools Program</td>
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<td></td>
<td>• Program Participant Recruitment</td>
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<td></td>
<td>• Eligible Applicants</td>
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<td></td>
<td>• Key Dates</td>
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<tr>
<td>2:00 pm</td>
<td>• Scope of Work</td>
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<tr>
<td>2:15 pm</td>
<td>• Submission Requirements</td>
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<td>• Statement of Qualifications</td>
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<tr>
<td>2:30 pm</td>
<td>• Evaluation Process</td>
</tr>
<tr>
<td>2:45 pm</td>
<td>• Questions and Answers</td>
</tr>
</tbody>
</table>
Housekeeping

- Facilities
- Updates to the Solicitation can be found at: http://www.energy.ca.gov/contracts/RFQ-13-401/
Purpose

- Select a dedicated team of energy engineers
- Assist and support the Bright Schools Program
- Provide technical assistance to local educational agencies (LEAs) and community college districts seeking to install Proposition 39 funded projects
Goals

• Select a dedicated team of engineers with demonstrated knowledge and expertise to assist program participants
• Provide highest quality technical assistance, support, and customer service to both the Bright Schools Program participants and the Energy Commission
Background

• Proposition 39 – Job Creation Fund
• Senate Bill 73 – Fiscal Year 2013-14
• Budget Act – Fiscal Year 2014-15
• Fiscal Year 2015-16
Funding

- $4.0 million currently available
- Option for additional $2.0 million if Fiscal Year 2015-16 funds become available
- Three-year contract
- Retainer contract – work assigned via work authorizations
- $20,000 cap per work authorization
Bright Schools Program in the age of Proposition 39

- Bright Schools Program – past and present
- Proposition 39 specific services
- Eligible program participants include LEAs and community college districts
- Grant of services – not a cash award
Program Participant Recruitment

• The Energy Commission recruits Bright Schools Program participants through various forms of marketing such as workshops, conferences, direct mailings and association memberships.

• It is not within the scope of work for the contractor to recruit program participants.
Eligible Applicants

- This is an open solicitation for public and private entities.
- Business applicants are required to register with the California Secretary of State and be in good standing in order to enter into an agreement with the Energy Commission. [http://www.sos.ca.gov](http://www.sos.ca.gov)
- Respondents must propose a team with licensed PE’s and demonstrated expertise.
### Key Dates

<table>
<thead>
<tr>
<th>Activity</th>
<th>Action Date</th>
</tr>
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<tbody>
<tr>
<td>✓ RFQ release</td>
<td>June 27, 2014</td>
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<tr>
<td>Pre-Bid Conference</td>
<td>July 17, 2014</td>
</tr>
<tr>
<td><strong>Deadline for Written Questions</strong></td>
<td>July 17, 2014 by 5:00 pm</td>
</tr>
<tr>
<td>Post Questions and Answers to Website</td>
<td>July 24, 2014</td>
</tr>
<tr>
<td><strong>Deadline to Submit SOQ</strong></td>
<td>August 7, 2014 by 3:00 pm</td>
</tr>
<tr>
<td>Discussions with Firms</td>
<td>August 27 &amp; 28, 2014</td>
</tr>
<tr>
<td>Notice of Selection</td>
<td>September 2, 2014</td>
</tr>
<tr>
<td>Cost Negotiations</td>
<td>September 3 – 18, 2014</td>
</tr>
<tr>
<td>Notice of Proposed Award</td>
<td>September 30, 2014</td>
</tr>
<tr>
<td>Anticipated Energy Commission Business Meeting</td>
<td>November 12, 2014</td>
</tr>
<tr>
<td>Anticipated Contract Start Date</td>
<td>November 26, 2014</td>
</tr>
<tr>
<td>Anticipated Contract End Date</td>
<td>November 12, 2017</td>
</tr>
</tbody>
</table>
Questions

• Any questions so far?
Scope of Work

- Task 1 – Agreement Management (Prime Contractor only)
- Task 2 – Evaluate Energy Efficiency Opportunities in Existing Buildings
- Task 3 – Evaluate Opportunities for Clean onsite Self-generation
- Task 4 – Provide Professional Engineering Support Services
Energy Commission Staff

Responsibilities include:

- Developing the of work authorization
- Project management
- On-going assistance
Questions

• Any questions on the Scope of Work?
Submission Requirements

- Response to solicitation must be a Statement of Qualifications
- Do not submit price quotes or bids
- Rates will be negotiated with top scoring firm
- SOQ format, organization and required documents are explained in the solicitation
Submission Requirements (continued)

• Firm submitting SOQ must be the Prime Contractor of the team

• Prime Contractor must be a single entity – not a group of representatives

• Prime Contractor must have at least one licensed mechanical or electrical PE and be able to perform one or more of the technical tasks

• Subcontractors must have at least one licensed PE
## Example of Team Structure

<table>
<thead>
<tr>
<th>Task</th>
<th>Prime Contractor</th>
<th>Sub #1</th>
<th>Sub #2</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Agreement Management</td>
<td>X</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>2. Evaluate Energy Efficiency Opportunities in Existing Buildings</td>
<td>X</td>
<td>X</td>
<td></td>
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<td></td>
<td>X</td>
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<tr>
<td>4. Provide Professional Engineering Support</td>
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Business Participation Programs

- Disabled Veteran Business Enterprise Participation is required
  - 3% DVBE participation required
  - Incentive points for greater than 3% DVBE participation
Statement of Qualifications

- Volume 1, Administrative Response
- Volume 2, Technical Response
- Volume 3, Examples of Prior Work Products
Volume 1, Administrative Response

- Cover Letter
- Table of Contents
- Contractor Status Form (Attachment 1)
- Darfur Contracting Act Form (Attachment 2)
- DVBE Declarations Form Std 843 (Attachment 3)
- Bidder Declaration Form GSPD-05-105 (Attachment 4)
- Contractor Certification Clauses (Attachment 5)
- Iran Contracting Act Form (Attachment 8)
Volume 2, Technical Response

- Minimum Qualifications
- Approach to Tasks in Scope of Work
- Project Team Organizations Structure & Cost Minimization
- Project Team Relevant Experience and Qualifications
- Analytical Tools
- Client References (Attachment 7)
- Responses to Hypothetical Questions
Volume 3, Examples of Prior Work Products

- Prime contractor and each subcontractor must provide one example of each type of work product that is representative of services it will provide under the contract.
- If more than one firm will provide support to a task, each firm must submit one example work product that demonstrates experience and technical expertise for the task.
After Submission of SOQs

• Administrative and Completeness Screening Criteria
• Grounds to Reject an SOQ
• Minimum Qualifications
Questions

• Any questions on this section?
Evaluation Process and Discussion

- Selection Committee composed of technical staff
- Interviews with top three scoring firms will be scheduled for August 27 & 28 at the Energy Commission Headquarters Building
- Exact times TBD
- Team lead and at least one person from each subcontractor are encouraged to participate
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Question and Answers

• Please send written questions to:
  Cory Irish
  Commission Agreement Officer
  Cory.Irish@energy.ca.gov

Deadline to submit written questions is 5:00 PM PDT, July 17, 2014