Request for Statement of Qualifications – Professional Services
Re: Proposition 39: California Clean Energy Jobs Act
February 10, 2014

Responses to RFIs for RFQs

The following are questions submitted by potential firms regarding the RFQ issued on January 16, 2014 and additional information provided at the January 31, 2014 non-mandatory pre-proposal meeting. This RFQ mandatory pre-proposal meeting was initially scheduled for January 24, 2014, but was cancelled and re-scheduled as a non-mandatory meeting. Additional information provided below also includes added instructions and/or information.

The questions have been answered in the order in which they were received, and are not prioritized in any manner. No requests received after the February 05 due date for questions will be answered.

Additional Information #1 provided at January 31, 2014 non-mandatory pre-proposal meeting:

On January 29, 2014, OUSD adopted a resolution amending the 2008 Local, Small Local and Small Local Resident Business Enterprise Program (L/SL/SLRBE) and increasing the mandatory local participation requirement from twenty (20%) to fifty (50%) percent for all capital program/construction related contracts and professional services agreements. As with all OUSD projects, companies must be certified by the City of Oakland in order to earn credit toward meeting the participation requirement.

The full version of OUSD’s latest Local, Small Local and Small Local Resident Business Enterprise Program can be found by going to the OUSD home page: ouzd.k12.ca.us > governing board > legislative information center > search: 13-2935

Additional Information #2 provided at January 31, 2014 non-mandatory pre-proposal meeting:

As a result of the mandatory pre-proposal meeting being pushed out, the District has revised the RFQ “Schedule of Activities” dates. The revised dates are as follows:

- January 31, 2014-Non-Mandatory Pre-proposal Meeting at Facilities Planning & Management
- February 05, 2014-Written requests for Interpretation, Correction or Modification are due
- February 10, 2014-District will respond to requests for clarification
- February 18, 2014-Proposals Due by 10:00am
- February 21, 2014-Announcement of Short List

Additional information #3:

OUSD will be submitting a five (5) year energy expenditure plan with energy efficiency projects amounting to the estimated total five –year program awarded. The District has been allocated $1,767,540 for this fiscal year.

Additional information #4:
OUSD will be filing for free technical assistance services from the California Energy Commission, Bright Schools Program. This grant will provide up to $20,000 and be used to supplement our Proposition 39 funds.

Additional information #5:

There have been four (4) ASHRAE Level 2 energy audits completed under the Leadership Energy Efficiency Program (LEEP). This program is associated with Alameda County Office of Education. The goal for these audits performed, will be a reference point on how the District would like to move forward with identifying, evaluating and prioritizing possible energy-savings measures for selected school sites.

Additional information #6:

OUSD is currently involved in the following energy related programs:

- Energy and Water efficiency
- 2010 District wide energy efficiency
- Collaborative for High Performance Schools (CHPS)
- Installing $40 millions of solar panels
- Energy Star-Portfolio Manager
- On Bill Financing

Additional information #7:

The District will not be open to qualified Energy Service Companies (ESCO) approach for the planning and implementation of Prop 39.

Question #1:

1. I attended the mandatory meeting on behalf of my employer, <company name hidden> last Friday only to be advised that the meeting was cancelled. I was there with several other interested parties/vendors who intend to bid on this project. We were all told to come back next Friday at 10am. Unfortunately, I have a previous commitment and cannot attend. I am requesting to still be able to submit a bid to this RFQ since the original meeting was canceled by the District. We at <company name hidden> are very excited and are looking forward to submitting our response to Oakland Unified.

2. I also wonder if you intend to extend the response due date an additional week From Feb 10th to Feb 17th to compensate for pushing back the mandatory pre-proposal meeting? Please advise

District Response #1:

Yes. You will still be able to submit your firm qualifications if you were not in attendance. The District has
changed this pre-proposal meeting to non-mandatory.

**District Response #2:**

See additional information #2

**Question #2:**

1. Because of the rescheduling of the mandatory pre-bid meeting from January 24, 2014 to January 31, 2014, would it be possible to extend the original due date for proposal submissions? We believe an extension will allow us the necessary time to provide Oakland Unified School District with the best possible qualifications to support the requested Prop 39 professional services

**District Response #2:**

See Part 2 of the District Response # 1

**Question #3:**

1. There was not a sign-in sheet when I arrived last Friday however I did leave my business card with OUSD staffer < person’s name hidden). I am not going to be able to come back on 31 Jan but I would like to respond to the RFQ once the revised schedule is published. Please confirm that this is okay.

**District Response #3:**

See Part 1 of District Response # 2

**Question #4:**

We have received the District’s RFQ for professional services to support the Proposition 39 energy retrofit program and intend to submit a response. I will attend the RFQ meeting this coming Friday morning. I also understand that the deadline to submit inquiries is this afternoon, so please find below the list of questions we submit regarding this RFQ.

1. I also understand that the deadline to submit inquiries is this afternoon
2. Is the District currently engaged in any energy efficiency activities?
3. Has the District already performed energy audits of any of its campuses?
4. Does the District have any projects already identified that it plans to include in the Energy Expenditure Plan?
5. Does the District have a system in place for benchmarking campus energy use and tracking energy data?
6. The RFQ General Statement of Work (page 2) does not include any mention of project design or construction support; however, the Statement of Qualifications format (page 4) seems to imply otherwise, as it asks for information regarding schedule management, change order management, and “the ability of the firm to produce solid construction documents”. Please clarify whether the District intends for the selected consultant to provide project design (i.e., engineer of record) and/or construction administration services as this will affect our team selection.

7. Please clarify the submittal requirement regarding Professional Fees (page 5). Since the detailed scope of services is yet to be determined, would an hourly rate table be acceptable?

**District Response #4:**

1. See additional information #2.
2. Yes. See additional information #6.
3. Yes. See additional information #5.
4. Yes. We have identified four (4) school campus and look to add more.
5. Yes, we are using Energy Star, Portfolio Manager.
6. The District will provide all construction management services under Prop 39, but will require the selected firm or joint firms to have the ability to carry out design services and produce construction documents with the intent of making Prop 39 projects shovel ready.
7. At this point, the District is requesting a fee schedule for the types of services, your firm has Previously done that would be similar to projects under Prop 39.

**Question #5:**

You had mentioned today that the District’s revised Local Business Policy was important. I’ve tried to locate on the OUSD website, but...... Could you either send or post on your Facilities Web Page.

**District Response #5:**

This is the link to main page; [http://www.ousd.k12.ca.us/Page/682](http://www.ousd.k12.ca.us/Page/682)

This is the link to the actual amended policy file:


**Question #6:**

Section 2.5.7.8 of the Oakland Unified School District Request for Statement of Qualifications Proposition 39: California Clean Energy Jobs Act requires that vendors, “Indicate cost of change orders as a percentage of the overall construction cost” and Section 2.6 requests that vendors, “Include graphics that will assist the District in evaluating the quality or firm’s design, the ability of the firm to produce solid construction documents...”
It is our understanding that construction is outside the scope of the RFQ. Will the District please clarify what Vendors are to provide in response to these requirements given that construction is out of scope?

District Response #6:

1. What’s being asked is, has your firm performed these services under Section 2.5.7.8. Under Prop 39, the District will be providing the construction management services reference under this section.
2. In reference to Section 2.6, the District would like to select a qualified firm and/or joint firms that have the ability to provide design services and produce construction documents for shovel ready projects.

Question #7:

I have two questions.
1. If there is a sub-consultant with less than 50% participation on the project, the sub-consultant is not required to have been present at the mandatory pre-proposal meeting, correct?
2. On a joint venture, are both Joint Venture Partners required to have signed and attended the pre-proposal meeting?

District Response #7:

1. The pre-proposal meeting was changed to non-mandatory meeting. So you are correct.
2. See the District Response to your question #1

Question #8:

Only one very general, albeit somewhat lengthy, question. We are considering a joint proposal with one AIA firm and one M-E firm, both with excellent qualifications and experience. However, our (and their) concern is that in doing so will take them out of contention for further AIA/M-E work with the District in the implementation of Prop 39 funded projects. In the pre-bid meeting it was mentioned, more in context of not wanting as “ESCO” approach that “Planning” and “Implementation” are distinctly separate contracts. Understood. We simply want to make sure that a successful “Professional Services” award on this contract will NOT exclude our sub-contractors from working with OUSD on resulting Prop 39 projects.

District Response #8:

We preferred that firms that design projects not bid to build them, but will consider this on a case by case basis.

Question #9:

< Company name hidden> would like to submit the following questions to the District for clarification:
1. In reference to the document "2014 Amendment LBE Requirements"
   Subject: ADOPTION OF RESOLUTION AMENDING THE 2008 LOCAL, SMALL LOCAL AND SMALL LOCAL RESIDENT BUSINESS ENTERPRISE PROGRAM (L/SL/SLRBE) AND INCREASING THE MANDATORY LOCAL PARTICIPATION REQUIREMENT FROM TWENTY (20%) TO FIFTY (50%) PERCENT FOR ALL CAPITAL PROGRAM/ CONSTRUCTION RELATED CONTRACTS AND PROFESSIONAL SERVICES AGREEMENTS, AND APPROVAL OF BOARD POLICY IMPLEMENTING ADMINISTRATIVE REGULATIONS.
   On pages 5-6, there are references to earning both 3 and 5 preference points for additional allocation of contract dollars to SLBE firms. Please advise as to which is the correct number of points that may be earned.

2. In reference to the document "2014 Amendment LBE Requirements":
   To clarify, an LBE may complete more than 25% of the scope, as long as no more than 25% is used to meet the LBE requirement, is this correct?
   Example: Firm A (LBE) may get 75% of contract, and Firm B (SLBE) gets 25%.
   This would meet the 50% Local Business Participation requirement with 25% coming from Firm A for the LBE requirement and 25% coming from Firm B for the SLE requirement.

3. Does the district have a budget determining what portion (and $ amount) of the Prop 39 funds will be used for energy planning?

4. Will the OUSD apply for additional Proposition 39 funding during the next round of applications?

5. What are the scoring criteria for evaluating proposals? How many possible points are allotted for each section of responses?

**District Response #9:**

1. No preference points will be assessed as no hard fee is part of this RFQ.
2. Yes. You are correct.
3. Yes. OUSD budget for energy planning for this fiscal year is $530,262.00
4. Yes. OUSD will be applying for additional funds from the Bright Schools Program
5. OUSD scoring criteria for Prop 39 qualifying firms and/or joint firms, will be based on the following:
   - Firm history and technical experience (Max 10 points)
   - Experience in energy efficient projects & K-12 school design (Max 15 points)
   - Experience in working with District staff and school sites (Max 15 points)
   - Experience in working with agencies: DSA, CDE, OPSA, ect... (Max 15 points)
   - Experience in CHPS projects, sustainable design, green design, energy saving design (Max 5 points)
   - Project approach, fee structure and overall cost competitiveness (Max 5 points)
   - Experience in working with time constraints. Project schedule (Max 10 points)
   - Local Business Participation and local hiring work plan (Max 25)

**Question #10:**
1. I am somewhat perplexed on the qualifying for submission to the OUSD on the prop 39 dollars. The RFQ went out at an earlier date, January 16h, 2013. Which was a public notice. Then the Board amended their local participation policy to 50% two weeks later on the 29th. So, my question is:

- Qualifying firms for this January TA contract are subject to the original request requirements,
- Meaning, a firm that is within 50miles of the district would still qualify, if it meets the 20% local participation guidelines,
- From January 29th onward, the qualifying consultant or contractor and all newly administered contracts must be 50% located in Oakland. Or award 50% of their contract dollars to local firms.

District Response #10:

1. OUSD will be implementing the Board new adopted resolution of 50% for this RFQ.

Question #11:

1. <Company name hidden> is feverishly working to provide our response to OUSD’s RFQ request. In reviewing the outline questions today, it appears as though 2.4 were left incomplete. We’re not sure if this was asked in the questions, but would be of value to all potential participants.

2.4. Narrative - Provide a comprehensive narrative of the services offered by firm. The narrative should include the following:

   Nothing was included here.....

2.5. Firm Information

Can you indicate whether there were supposed to be bullets included or is it wide open? A response to the entire email list is appropriate. However, I would ask that it be a confidential question.

District Response #11:

1. Requested narrative in section 2.4 should be inclusive of items listed under section 2.5.