



**FALLBROOK UNION ELEMENTARY SCHOOL DISTRICT
REQUEST FOR QUALIFICATIONS AND PROPOSALS
RFQ/P #399-21-22**

Fallbrook Union Elementary School District ("District") is requesting proposals from qualified firms for HVAC assessments, maintenance, and repairs ("Project") to be funded by the California Schools Healthy Air, Plumbing, and Efficiency ("CalSHAPE") Ventilation Program under the School Energy Efficiency Stimulus Program ("SEES") enacted under Assembly Bill 841. The Project shall be compliant with the District's grant through the CalSHAPE program in the amount of **\$580,348.80**.

The Request for Qualifications and Proposals ("RFQ/P"), which includes instructions for its completion, is enclosed for your consideration. Respondents to this RFQ/P shall submit a completed Statement of Qualifications ("SOQ") along with the Proposal (collectively "RFQ/P Packet").

Please note that, if the District receives further CalSHAPE program funding for additional scopes of work, the District may choose to negotiate a revised agreement or an additional agreement with the selected proposer or other proposers to this RFQ/P.

The District will only receive RFQ/P Packets submitted electronically. RFQ/P Packets will be received until 10:00 a.m., June 27, 2022, only at the following email address:

bbickler@fuesd.org

Any RFQ/P Packet that is submitted after this time shall be nonresponsive and returned to the bidder. **Each respondent is solely responsible for timely submission of its RFQ/P Packet; the District is not responsible for any technological issues in a respondent's ability to timely submit its RFQ/P Packet or portion thereof.**

Questions regarding this RFQ/P may be directed to bbickler@fuesd.org and must be submitted in writing on or by **2:00 P.M. On June 22, 2022.**

This Project is subject to labor compliance monitoring and enforcement of compliance with prevailing wage requirements by the Department of Industrial Relations pursuant to Labor Code, § 1771.4.

RFQ/P SCHEDULE SUMMARY

DATE	ACTION ITEM
June 6 – June 17, 2022	Release and advertisement of RFQ/P #399-21-22.
June 20, 2022 at 2:00pm.	Last day to receive written questions from Respondents.
June 22, 2022	Last day for District to issue addenda to answer questions/clarifications.
June 27, 2022 at 10:00 A.M.	Deadline for submissions in response to RFQ/P # 399-21-22.
July 19, 2022	Notice of award to selected respondent.

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**FALLBROOK UNION ELEMENTARY SCHOOL DISTRICT
REQUEST FOR QUALIFICATIONS AND PROPOSALS
COMPREHENSIVE ASSESSMENT OF HVAC SYSTEMS AND DEVELOPMENT OF
MODERNIZATION AND ENERGY SAVING PROGRAM**

I. INTRODUCTION

This Request for Qualifications and Proposals ("RFQ/P") defines the services sought from Respondents and generally outlines the Project requirements. Respondents to this RFQ/P shall submit a completed Statement of Qualifications ("SOQ") along with the Proposal (collectively "RFQ/P Packet").

I. PROJECT DESCRIPTION AND SCOPE OF SERVICES

A. General

Fallbrook Union Elementary School District ("District") is requesting proposals from qualified firms for HVAC assessments, maintenance, and repairs, as further defined below, to be funded by the California Schools Healthy Air, Plumbing, and Efficiency ("CalSHAPE") Ventilation Program under the School Energy Efficiency Stimulus Program ("SEES") enacted under Assembly Bill 841. The Services shall be compliant with the District's grant through the CalSHAPE program in the amount of **\$580,348.80**.

The purpose of this solicitation is for the District to select and retain qualified individuals or firms to provide professional services for the **COMPREHENSIVE ASSESSMENT OF EXISTING DISTRICT HVAC SYSTEMS AND DEVELOPMENT OF MODERNIZATION AND ENERGY SAVING PROGRAM PROJECT** (the "Project") to bring the District's HVAC systems up to the standards espoused by AB 841 for funding, as stated in Sections 1623 through 1627 of the Public Utilities Code. Upon award, the selected consultant or firm will conduct districtwide site assessments and report on existing systems for determining a potential scope of work, and based on the assessment report, develop a comprehensive infrastructure modernization and utility savings program in accordance with the funding guidelines for AB841 or other funding sources pursued. The Project shall be compliant with the District's grant through the CalSHAPE program in the amount of **\$580,348.80**.

Please note that, if the District receives further CalSHAPE program funding for additional scopes of work, the District may choose to negotiate a revised agreement or an additional agreement with the selected proposer or other proposers to this RFQ/P.

B. Scope of Work

Upon award, the selected respondent will be required to perform the Project Scope of Work attached hereto as **Exhibit "A"**.

The Project Scope of Work has been approved by CEC. The selected consultant will assist the District with developing specifications and drawings concerning the Project Scope of Work that the Project Scope of Work can be completed in line with the Project budget approved by CEC in the amount of **\$580,348.80** as shown on **Exhibit "B"** ("Budget").

C. Content of Statement of Qualification

- **Letter of Interest** - A dated Letter of Interest must be submitted, including the legal name of the respondent(s), address, telephone, and the name, title, and signature of the person(s) authorized to submit the RFQ on behalf of the firm. The Letter of Interest should provide a brief statement of your experience indicating the unique background and qualities of the firm, its personnel, and its sub-consultants, and what will make the firm a good fit for the anticipated work.
- **Table of Contents** - A table of contents of the material contained in the Statement of Qualifications should follow the letter of interest.
- **DESCRIPTION OF FIRM AND KEY SUB-CONSULTANT FIRMS -**
 1. Qualified Firm
 - a. Name, address, contact numbers, e-mail, website, and summary of the responding firm's experience with public school HVAC projects.
 - b. Type of business entity:
 - i. Information on the type of entity and its ownership
 - ii. Size of staff, number of professionals which will perform the work.
 - iii. Location of its principal office.
 - c. History, number of years in business in California
 - d. All applicable licenses including license numbers and expirations dates.
 2. Sub-Consultant Firms
 - a. Describe the relationship of your firm and any sub-consultants.
 - b. For each sub-consultant firm, provide the following information:
 - i. Description of the services the firm will be providing.
 - ii. Location of office which will perform the work.
 - iii. Size of staff, number of professionals in the office which will perform the work.
 - iv. All applicable licenses including license numbers and expirations dates.
 - v. Description of extent and duration of prior working relationship with your firm (number and type of projects, number of years).
- **RELEVANT EXPERIENCE -**

1. List relevant K-12 school HVAC projects and include:
 - a. Project name and location
 - b. Year completed or current status
 - c. Client, contact person, and phone number
 - d. Project cost
 - e. Key consultant firms (structural, mechanical, electrical, civil, etc.)

- **FIRM TRACK RECORD -**

1. Has your firm ever been terminated or dismissed by a client or replaced by another firm during any educational and/or related project? If so, explain in detail.
2. Describe by example your experience in meeting schedules and timelines. Describe an approach you have taken to expedite a schedule.
3. Describe by example your experience in meeting budgets. Describe by example an approach you have taken to bring a project back into budget.
4. Provide a statement of your firm's financial stability.
5. Does your firm have any current or pending litigation? If so, please describe.
6. Has your firm ever defaulted on a contract within the past five (5) years or declared bankruptcy, or been placed in receivership within the past five (5) years?
7. Name of the prime professional license holder exactly as on file with the requisite licensing authorities.

D. District's Evaluation / Selection Process

- The District intends to select the firm(s) that best meets the District's needs to complete the Project for the Budget amount as will be memorialized in an agreement to be entered into by and between the District and the selected firm ("Agreement").
- The Agreement will be entered into in compliance with Government Code section 4217 and its requirements and will reference and incorporate the CalSHAPE Ventilation Program Standard Grant Terms.
- From the firms who respond to the solicitation, the District may, at its discretion, interview some, all or none of those firms.
- The District will evaluate qualifications based on the scoring criteria outlined in this above. Respondents who are not actively engaged in providing similar services or who cannot clearly demonstrate their ability to meet the District's objectives of the solicitations minimum requirements will not be considered. The District shall be the sole judge

of the qualifications and services to be offered, and its decision shall be final. Discussions may be conducted with respondents who submit qualifications determined to be reasonably acceptable of being selected for award:

- Responsiveness to the RFQ/P – completeness and quality of the response: 10 Points
 - Firm and sub-consultant experience with school projects
Qualifications and experience of proposed Team Members: 20 Points
 - Ability to comply with Budget: 20 Points
 - Responsiveness to this RFP: 20 Points
- Please note that, if the District receives further CalSHAPE program funding for additional scopes of work, the District may choose to negotiate a revised agreement or an additional agreement with the selected proposer or other proposers to this RFQ/P.

EXHIBIT A Scope of Work

Fallbrook Union Elementary 3768114000000

Total Number of Sites 6

Site Name

Maie Ellis Elementary
La Paloma Elementary
James E. Potter Intermediate
Fallbrook STEM Academy
San Onofre Elementary
William H. Frazier Elementary

CDS Code

37681140131920
37681146038269
37681146038277
37681146038285
37681146096515
37681146116420

Maie Ellis Elementary

Category

Assessment & Maintenance
Filter
Monitor

Unit Count

48
48
33

La Paloma Elementary

Category

Assessment & Maintenance
Filter
Monitor

Unit Count

42
42
35

James E. Potter Intermediate

Category

Assessment & Maintenance
Filter
Monitor

Unit Count

64
64
43

Fallbrook STEM Academy

Category

Assessment & Maintenance
Filter
Monitor

Unit Count

45
45
33

San Onofre Elementary

Category

Assessment & Maintenance
Filter
Monitor

Unit Count

61
61
46

William H. Frazier Elementary

Category

Assessment & Maintenance

Unit Count

46

Filter
Monitor

46
30

**EXHIBIT B
Budget**

**Fallbrook Union Elementary
3768114000000**

**Total Requested Amount
\$580,348.80**

Site Name

Requested Amount

Maie Ellis Elementary	\$89,257.20
La Paloma Elementary	\$82,432.80
James E. Potter Intermediate	\$123,140.40
Fallbrook STEM Academy	\$83,953.20
San Onofre Elementary	\$118,296.00
William H. Frazier Elementary	\$83,269.20

Maie Ellis Elementary

Category

Requested Amount

Assessment & Maintenance	\$52,484.00
Filter	\$3,120.00
Monitor	\$18,777.00
Contingency	\$14,876.20

La Paloma Elementary

Category

Requested Amount

Assessment & Maintenance	\$46,049.00
Filter	\$2,730.00
Monitor	\$19,915.00
Contingency	\$13,738.80

James E. Potter Intermediate

Category

Requested Amount

Assessment & Maintenance	\$73,990.00
Filter	\$4,160.00
Monitor	\$24,467.00
Contingency	\$20,523.40

Fallbrook STEM Academy

Category

Requested Amount

Assessment & Maintenance	\$48,259.00
Filter	\$2,925.00
Monitor	\$18,777.00
Contingency	\$13,992.20

San Onofre Elementary

Category

Requested Amount

Assessment & Maintenance	\$68,441.00
Filter	\$3,965.00

Monitor	\$26,174.00
Contingency	\$19,716.00

William H. Frazier Elementary

Category	Requested Amount
Assessment & Maintenance	\$49,331.00
Filter	\$2,990.00
Monitor	\$17,070.00
Contingency	\$13,878.20

Total Grant Award	\$580,348.80
Initial Payment	\$290,174.40
Final Payment	\$290,174.40