

**Brooktrails Township Community Services District  
REQUEST FOR PROPOSAL (RFP) for  
Infrastructure Renewal & Resiliency Program**

The following RFP is seeking qualifications and proposals from qualified design-build firms capable of providing comprehensive energy, gas, & water infrastructure improvements.

**RESPONSE DEADLINE FOR PROPOSAL:** January 12, 2024

RFP Contact for Questions & Submission:  
General Manager Tamara Alaniz  
707-459-2494; [tamaraa@btcsd.org](mailto:tamaraa@btcsd.org)  
24860 Birch Street, Willits, CA 95490

**I. RFP PROCESS**

The District intends to select a qualified provider for the development, implementation, and monitoring of a comprehensive infrastructure renewal and resiliency program. Upon award, the selected provider will conduct a Districtwide assessment for all energy, gas and water infrastructure. Prior to entering into a contractual agreement for project implementation, an agreed upon scope of work and funding plan will require separate Board approval.

The District intends to implement a design-build program consistent with the provisions of California Government Code sections 4217.10-4217.18 or other applicable design-build procurement.

The District, at its sole discretion, may select the awarded respondent for subsequent phases of work. The District, at its sole discretion, also reserves the right to reject any or all bidders.

**II. PROJECT GOALS**

The District's ultimate goal is to utilize financial savings realized from more efficient buildings and reinvest those savings towards infrastructure revitalization and improving District services. Respondents shall support the District's goal by developing, implementing, and monitoring an infrastructure renewal and resiliency program that accomplishes the following, as appropriate:

- Modernizes aging infrastructure
- Provide electrification options across facilities that help offset fleet costs
- Realize potential revenue streams
- Achieve long-term cost savings through reduced energy, gas & water usage
- Promote staff and operational efficiency
- Maintain building functionality and compatibility with existing equipment
- Improve utilization of technology to optimize performance and energy savings
- Minimize financial and technical risk to the District
- Provide training to employees on maintenance and repair of equipment and controls
- Provide comprehensive funding solutions

### **III. MINIMUM REQUIREMENTS**

Respondents must meet the following minimum requirements to participate in the District's RFP process:

- Have a minimum of four (4) California public sector customer references for which the respondent has had turn-key design-build responsibility within the past three (3) years.
- Current accreditation by the National Association of Energy Services Companies (NAESCO) as an Energy Services Provider (ESP) or Energy Services Company (ESCO)
- Currently on the U.S. Department of Energy's (DOE) Qualified List of Energy Service Companies
- Hold an active General Contractor's license in California
- Maintain a minimum \$10 Million in bonding capacity
- Statement of no pending/previous litigation from program implementation, savings performance, and/or measurement and verification (M&V) of a comprehensive infrastructure renewal and resiliency project in the last five (5) years

### **IV. SCOPE OF WORK**

Upon award, the selected respondent shall perform in-depth site assessments at District facilities to comprehensively evaluate the viability of infrastructure renewal and resiliency measures in the following areas, as appropriate:

- Solar, battery storage, and other renewable technology
- Water meter improvements
- Microgrid and power resiliency solutions
- Electrification options
- Electric Vehicle (EV) charging
- Heating Ventilation & Air Conditioning (HVAC) systems
- SCADA improvements to operating functions
- Building Automation System (BAS) and security/access systems installation, upgrade, or expansion
- Interior & exterior lighting and controls
- Building envelope upgrades including roofing and windows
- Water/Wastewater infrastructure, including valve management, flow controls, and lift and pump stations
- Water conservation measures
- Other related infrastructure improvements
- Other training, remote monitoring services, and on-going support services that will ensure objectives of program are met over the term of the agreement

The selected respondent will develop a scope of work and financial analysis for staff and Board of Directors consideration. If the proposed scope and funding plan meet the needs of the District, an implementation agreement will be presented for Board consideration. If approved, all infrastructure improvements must be provided on a turn-key basis including all necessary permits, engineering, delivery, installation, commissioning, training, warranty service, and compliance with any applicable funding programs.

**V. PROPOSED TIMELINE**

November 21, 2023	RFP Released
December 22, 2023	Questions Due
January 3, 2024	Questions & Answers Released
January 12, 2024	RFP Responses Due
January 23, 2024	Respondent Awarded

**VI. PROPOSAL INSTRUCTIONS**

Ink or Typewritten

All information, prices, notations, signatures, and corrections must be in ink or typewritten. Mistakes may be crossed out and corrections typed or printed adjacent to the mistake and initialed in ink by the person signing the proposal.

Signature Verification

To be considered for award, each proposal must be signed by a legally authorized representative of your company.

Proposal Documents

Failure to completely execute and submit the required documents before the bid submittal deadlines will render a proposal non-responsive.

Informed Respondent

It will be your responsibility to be fully informed as to the conditions, requirements, and specifications before submitting qualifications. Failure to do so will be at your firm's own risk and relief cannot be secured on the plea of error.

**VII. PROPOSAL SUBMISSION REQUIREMENTS**

Five (5) hard copies (one marked "original") and one (1) electronic copy of the proposal shall be submitted in the format contained in the RFP. The original proposal shall be submitted under folder or binder cover. It is critical that all responses follow the same format to allow equal and fair evaluation of each response. Responses should be limited to forty (40) pages (not including table of contents, cover letter, or sample contracts) and include the following:

SECTION TABS

Qualifications should be divided by tab sections according to items in the index. This will assist the evaluating team in identifying items and information submitted with the proposal.

TABLE OF CONTENTS

The table of contents of the proposal should include a clear and complete identification of the materials submitted by tab section and page number.

## COVER LETTER

A signed letter of interest (no more than two (2) pages), stating the respondent's interest and qualifications in providing the services as outlined in the RFP. Please describe how the respondent meets the minimum requirements as described in section III of the RFP.

### Tab 1: Background, Financial Capacity & Management Structure

- a. Provide general information on the respondent including: a brief history of the firm, key differentiating factors and areas of expertise, length of time performing services, and location of California offices.
- b. Provide a statement of the respondent's financial capacity and capability to perform to the terms of this solicitation request.
- c. Describe the management structure of the responding firm and include an organizational chart. Provide resumes for personnel to be used on this project and describe their qualifications and experience with projects of a similar size and scope.

### Tab 2: Litigation Disclosure

Describe any previous or current involvement as a party in any formal litigation, arbitration or mediation associated with implementation performance, savings performance on an energy savings contract or specifically related to an Investment Grade Audit (IGA) agreement in the last five years under any previous or current firm names, along with a description of the nature and outcome of such litigation.

### Tab 3: References

Provide detailed project histories for a minimum of five (5) California public agencies which the responding firm provided turn-key responsibility for similar design-build energy and water renewal and resiliency programs in the past three (3) years. Describe the scope of work, start/completion date, services and equipment provided, project size, total project savings, and funding sources. Include customers' primary contact phone number and email.

### Tab 4: Project Approach

- a) Provide a description of the respondent's approach to performing site assessments and identifying infrastructure improvement.
- b) Provide a description of the respondent's approach to managing the project implementation and procedures for minimizing occupant disruptions.
- c) Describe the steps taken by the respondent during and after the turnover process to ensure successful project implementation.
- d) Describe training programs available for District employees.

### Tab 5: Funding Sources

Describe the respondent's experience with obtaining funding for California public sector infrastructure needs and resiliency programs. Please describe specific funding sources that the respondent has assisted other entities with including any funding solutions or approaches which may be unique or exclusive to the respondent.

Tab 6: Savings

- a) Describe the respondent's approach to projecting and proving utility savings.
- b) Describe the methodology and formulas utilized for reporting of the savings.
- c) Provide a description of monitoring services after implementation.
- d) List any projects/customers in which the guaranteed savings was not met and how each was resolved.

Tab 7: Additional Benefits and Value-Added Elements

Please describe any additional benefits that may result from program implementation and the respondent's added value elements in delivering infrastructure renewal and/or resiliency programs.

Tab 8: Contracts, Pricing and Forms

Provide sample contracts for an investment grade audit, project installation, Measurement & Verification (M&V) including terms and conditions. Complete and include enclosed pricing proposal and acknowledgement form.

**VIII. PROPOSAL EVALUATION CRITERIA**

The District will evaluate qualifications based on the scoring criteria outlined in this section. Respondents who are not actively engaged in providing services of the nature proposed in this RFP and/or who cannot clearly demonstrate to the satisfaction of the District their ability to satisfactorily perform the work in accordance with the RFP requirements will not be considered, nor will respondents who do not meet the minimum requirements.

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:

Scoring Criteria

- a) **Background:** i.e. qualifications, experience, resources, financial solvency. (10 pts)
- b) **Litigation Disclosure** (25 pts)
- c) **Project Team & Management Structure:** i.e. amount of work self-performed, strength of proposed team, trainers, and management structure. (20 pts)
- d) **Project History & References:** i.e. relevant past project experience. (50 pts)
- e) **Project Approach:** i.e. approach to completing study, project management, training, etc. (15 pts)
- f) **Funding Sources:** i.e. funding experience & unique funding sources. (25 pts)
- g) **Additional Benefits & Added Value:** i.e. additional benefits resulting from implementation and respondent's added value elements. (10 pts)
- h) **Savings:** i.e. savings approach and track record. (35 pts)
- i) **Contracts & Forms:** i.e. sample contracts, terms & conditions, pricing proposal, and completed forms. (30 pts)
- j) **Response:** responsiveness and compliance with proposal requirements. (5 pts)

Total Maximum Point Valuation: 225

**PRICING PROPOSAL**

**Brooktrails Township Community Services District RFP for  
Infrastructure Renewal & Resiliency Program**

Pursuant to and in compliance with the Request for Proposals and all other documents relating thereto, the undersigned respondent, having familiarized itself with the terms and conditions of the proposal documents and the District objectives, hereby proposes and agrees to perform the work to be done and to provide all labor and materials necessary to perform the work.

Name of Respondent: \_\_\_\_\_

**INVESTMENT GRADE AUDIT (IGA):**

Does the respondent require an IGA agreement be entered into before a scope of work, price and savings can be finalized?

YES     NO

If an IGA agreement is required, does it include exit fees and/or penalties in the event the District chooses to not implement the IGA findings?

YES     NO     N/A

What is the respondent's price to complete an IGA?

\$ \_\_\_\_\_ per square foot

**IMPLEMENTATION:**

What is the respondent's profit fee for program implementation?

Profit % \_\_\_\_\_

**ACKNOWLEDGEMENT FORM**

**Brooktrails Township Community Services District RFP for  
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Name of Respondent: \_\_\_\_\_

**ACKNOWLEDGEMENT OF AMENDMENTS:**

The respondent acknowledges receipt of issued amendments to Brooktrails Township Community Services District RFP for Infrastructure Renewal & Resiliency Program.

Amendment Number						Initial Here
Date						