

Hidden Valley Lake Community Services District
REQUEST FOR QUALIFICATIONS

Resilience RFQ



Contract Services

For

Resilience Related Energy Services

Deadline for Submission: 1:30 p.m. Wednesday, September 30th, 2020

Issued by:
Hidden Valley Lake Community Services District
19400 Hartman Rd.
Hidden Valley Lake, CA. 95467
(707) 987-9201

Hidden Valley Lake Community Services District

RESILIENCE REQUEST FOR QUALIFICATIONS

Resilience Related Energy Services

PROJECT DESCRIPTION SUMMARY

The Hidden Valley Lake is a community of approximately 7,000 people in rural Lake County California. Hidden Valley Lake Community Services District (“The District”) provides water and wastewater service to the homes, recreational facilities, and businesses in its service territory. To provide these services the District operates wells, a water treatment facility, booster pumps and water storage tanks to distribute drinking water, as well as a wastewater collection system including several lift stations and a tertiary treatment water reclamation plant, and all the associated appurtenances for both.

While beautiful, the area where Hidden Valley Lake is located is regularly subject to disruptive impacts from fire and weather related events. Meeting the definition of a Wildland Urban Interface (WUI), fire is a very real threat that has been realized on a number of occasions. Having lost 73 homes in the 2015 Valley Fire, and this year’s LNU Lightning Complex fires reaching as close as 2 miles from the community perimeter, resilience against natural disaster is of paramount concern. Public Safety Power Shutoff (PSPS) events have also become regular features of life in the District, which add to the normal risk of winter storm-induced power loss. Rolling blackouts are a recently re-introduced threat that also must be considered. In addition, some elements of the District’s energy consuming infrastructure is also approaching the end of useful life.

In light of these challenges, the District is seeking to retain the services of highly qualified Professional Energy Service Company (or companies) (ESCO) to partner with in finding, evaluating, and executing beneficial resilience related energy projects. This Request For Qualifications (RFQ) invites ESCOs to prepare and submit to the District professional qualifications for resilience related energy project(s) so that staff may evaluate different providers and select the company best suited to meeting our needs. The District’s goal is to select and develop a long-term relationship with a qualified company to perform the District’s resilience related energy projects as needed throughout the course of the contract term. This relationship and any subsequent projects during the contract term will remain subject to the best interests of the District.

It is anticipated that one firm will be selected to perform all services related to the Resilience RFQ in collaboration with District staff, but multiple firms could be selected if found to be advantageous to the District. No plans or formal engineering specifications shall be issued as part of this solicitation. The District reserves the right to terminate this project prior to selection of a qualified Respondent as well as reject any and all qualifications submitted.

BACKGROUND

On September 15th, 2020 the Hidden Valley Lake Community Services District Board of Directors held a public meeting authorizing staff to issue an RFQ for Resilience Related Energy Services. Given travel restrictions that many potential ESCO partners are under, a traditional pre-proposal site walk will not be held. Because of this, in addition to submitting qualifications and experience, respondents to this RFQ are encouraged to demonstrate the range of potentially applicable facility improvement measures that could be considered in a preliminary review. The purpose is to identify the most qualified company for resilience related energy projects that best match project scope,

size, location, and other opportunities present in the Hidden Valley Lakes service territory so the District can fully evaluate potential ESCO partners.

All work implemented shall be done in accordance with Government Code Sections 4217.10 through 4217.18, District policies and all other applicable laws.

SCOPE OF WORK/SERVICES

The District is interested in contracting for a full range of resilience related energy services and energy-related improvements, as well as other work that the District, in its sole discretion, believes to be beneficial and efficient to include in the resilience related ESCO contract. The work proposed by the selected ESCO will be financed through a mechanism to be proposed by the ESCO, and will include the guaranteed system performance needed to meet finance obligations as appropriate to the measures eventually selected. Processes anticipated to be undertaken in this project may include, but are not limited to: an investment grade energy audit or formal assessment, design, engineering, acquisition, installation, taxes, bonds, insurance, permits, shipping, transportation, disposal, equipment, materials, appurtenant facilities, modifications, maintenance and training in the operation of existing and new equipment. This project is anticipated to increase resilience, reduce energy costs, avoid equipment replacement capital expenses, or otherwise economically benefit the District.

In accordance with law, no contract shall exceed statutory limits in duration and must comply with applicable statutes, regulations, and procurement laws. The economic benefits achieved by the project measures must be sufficient to cover all project costs, including annual maintenance and monitoring fees (if any), for the duration of the contract term, and be advantageous to the District. The contract must provide that the economic benefits in any year are guaranteed to the extent necessary to make payments under the contract during that year.

NON-MANDATORY INFORMATIONAL MEETING

On **Monday, September 20th, 2020** District staff will conduct an online briefing for interested Respondent's at **11:00 a.m.** The presentation will include basic information on the energy infrastructure of the District that may be of interest to candidates. After the presentation, an opportunity to answer questions (Q&A) will be provided to all interested parties at one time. To receive an invitation to this presentation, a request must be sent to Alyssa Gordon (agordon@hvlcsd.org) by **5 p.m. Friday, September 18th, 2020.**

THE DISTRICT'S ROLE

Hidden Valley Lake Community Services District staff will provide coordination and oversight of the work. District management will also serve as a resource in a collaborative effort with the successful respondent.

COMPENSATION AND REIMBURSEMENT OF EXPENSES

Compensation for the services listed in responses shall not exceed the total projected costs for the work. The successful respondents shall submit for review and approval invoices detailing the services provided during each invoice period. The invoice shall utilize a simple, easy to understand format that has been approved by the District. The California Constitution requires that any District contract that extends beyond the current fiscal year must be subject to future appropriations.

QUALIFICATION CONTENT

In order for the District to compare and evaluate qualifications effectively and efficiently, all responses shall be organized in the specific format outlined below. Failure to comply with this requirement may cause disqualification. Responses shall include the following as a minimum:

1. **Cover Page:** Business name, title of RFQ, and date of response.
2. **Transmittal Letter:** Shall include the legal name of the agency or organization submitting a response, business address, name, title, address (mailing and physical), email address, and telephone number of person(s). The letter shall be signed by a principal or officer authorized to make commitments on behalf of the business.
3. **Executive Summary:** An overview of the entire ESCO process anticipated for use in this project, describing its most important elements. This section should include
 - a. A discussion of the potential project elements to be included in the evaluation phase that show
 - i. The candidate's understanding of the specific needs of Hidden Valley Lake,
 - ii. Opportunities available to the District, and
 - iii. Any anticipated constraints.
 - b. The candidate's scope of services, objectives and intended results of the project.
 - c. When in the process any expenditures are required by the District
 - d. When in the process would the District take on any contractually binding financial obligations
 - e. How the response meets the RFQ requirements and why the candidate is best qualified to perform the required work.
 - f. When the candidate can begin work and difficulties this may present with current or future work.
4. **Minimum Qualifications.** The following are minimum qualifications required to respond to this RFQ. All qualifications listed below must be discussed with a response by respondents in writing:
 - a. The respondent must demonstrate that it has implemented ESCO scopes of work with no less than three (3) California public sector clients in the past five years.
 - b. The respondent must have established operations (physical office location) within the State of California.
5. **Global Statement of Experience and Qualifications:** Description of the nature of the respondent's present work and how that could relate to potential measures to adopt in a project with the District. Include evidence of any special licensing or qualifications required to perform the specific measures that may be considered.
6. **Specific Experience and Qualifications:** Discuss your approach to resilience related energy contracting projects in California:

- a) Management strategies and approach to projects.
- b) Objective and subjective criteria used for assessments.
- c) Knowledge and methods used in planning, including CEQA or other regulatory regimes
- d) Contract structures appropriate to conceived measures
- e) Design capabilities, including unique and/or sustainable design approaches
- f) Training for District staff and/or outside maintenance approaches
- g) Experience specifically with financing and funding of energy projects
- h) Include your knowledge of working with local agency implemented or sponsored projects.
- k) Past experience with energy contracting under Government Code Sections 4217.10 through 4217.18 and how they may apply or be used for this project.
- l) Provide an outline of your version of the ESCO process and;
- m) Provide two examples of ESCO contracts and/or agreements you have entered into with public sector clients within the last five (5) years in California.

RFQ SUBMITTAL:

Responses submitted must meet the following criteria to be acceptable for consideration regarding this project:

1. Submit **four (4)** bound copies and **one (1)** electronic copy (CD or flash drive) in Microsoft Word no later than **1:30 p.m. Wednesday, September 30th, 2020** to:

Hidden Valley Lake Community Services District 19400 Hartman Rd., Hidden Valley Lake Calif., 95467.

Normal business hours are Monday through Friday 8:00 a.m. to 5:00 p.m. and staff can be reached at (707) 987-9201.

2. The RFQ must be submitted in an envelope clearly marked with the name and title of the respondent, and **Resilience RFQ; Resilience Related Energy Services**. The Respondent's return address and Resilience RFQ must appear on the outside of the envelope.
3. Responses received incomplete or late, for any reason, may not be accepted.
4. All responses submitted shall become the property of the District and will not be returned. The District reserves the right to make use of any information or ideas contained in the responses. The response itself shall not constitute a contract, but will, if accepted, be incorporated into the contract between the District and the selected candidate.
5. Responses submitted to the District become public documents subject to disclosure once the RFQ is awarded. If respondents consider any portion of their response to be confidential, the respondent must label each and every page of the confidential portions as: "Trade Secret", "Confidential" or "Proprietary." Respondents must also list the confidential material at the beginning of their responses and provide justification for not making such material public. The District shall have the sole discretion to disclose or not disclose such material, subject to any protective order that the respondent may obtain, but it is incumbent on the respondent to assert its rights to confidentiality.

Please note: The successful respondent shall be expected to fully meet all representations made in its response, including the requirements outlined in this RFQ.

6. Respondents may withdraw their qualifications at any time prior to the RFQ submission deadline. A signed withdrawal request by the Respondent's duly authorized representative must be provided to General Services Administration.

EXCHANGE OF INFORMATION & CONFLICTS OF INTEREST

Exchanges of information between interested Respondents and the District is encouraged to improve the understanding of the requirements set forth in this RFQ. Questions concerning the project and/or RFQ requirements should be directed to **Alyssa Gordon** or by phone at (707) 987-9201 for assistance.

Respondents are specifically directed not to communicate with any District staff or directors during the time between the submission of this response and the selection of a partner by the District. Any attempts to influence any members of the District's Evaluation Committee or other department representatives involved in the selection of an ESCO partner during the evaluation process could create an appearance of conflict of interest or unfair advantage. Failure to adhere to this instruction may result in disqualification of the Respondent.

EVALUATION OF RESPONSES

The selection of a competent ESCO is vital to the success of this project. The project will require ESCO to demonstrate their experience, qualifications, concepts and abilities regarding resilience related energy projects.

1. Responses shall be opened and examined to ensure that each complies with the requirements of the RFQ. The absence of required information may render the response non-responsive and may be cause for rejection.
2. Prior to final selection, a short list of qualified and responsive candidates may be developed depending upon the number and relative strength of the responses received. If a short list is developed, select candidates requested to participate in an online interview and/or be asked to submit additional information for clarification. The purpose of the interview will be to provide an opportunity for staff to delve deeper into the response of each respondent in order to clarify any questions that the District may have regarding the respondent's concept. If any interviews are to be held, the time of the interview will be arranged by staff with the prospective attendees.
3. Following receipt of any additional information obtained from the candidates, District staff will identify the top ranked candidate and make a recommendation to the Board for formal selection or rejection.
4. After selection of an ESCO a process definition and services agreement will be negotiated. If an agreement cannot be reached with the top ranked candidate, the District will then contact the next highest scored candidate and attempt to negotiate a contract as described above. This process will be continued until a contract is successfully negotiated, or until the District determines to cease negotiations with any candidate.

5. The District is an Equal Opportunity/Affirmative Action Employer and the successful respondent will be required to comply with the provisions of Federal Executive Order 11246 and applicable state and federal laws. Respondents should be familiar with the Employers' Practical Guide to Reasonable Accommodations Under the Americans with Disabilities Act as published by the Job Accommodation Network, a service of the U.S. Department of Labor's Office of Disability Employment Policy.
6. All responses are evaluated to determine whether or not they met all the requirements of the RFQ. Responses are individually scored as assigned to a category. Individual scores are averaged and entered into that category column. Each category is assigned a weight and the result is a weighted score. Each category is assigned a point range of **0 to 20** (0 = Non-existent 4 = Poor 8 = Marginal 12 = Acceptable 16 = Very Good 20 = Excellent).
7. The rating scale establishes standards by which points are assigned to responses, and it ensures that the District evaluates each response with consistency.
8. The total points available for this RFQ are **one hundred (100)** points.

<u>CATEGORIES</u>	Possible Points	Weight
<u>Quality and Responsiveness of the Response</u>	20	10%
<u>Executive Summary</u>	20	10%
<u>Global Experience and Qualifications</u>	20	20%
<u>Specific Experience and Qualifications</u>	20	35%
<u>Specific Applicability to Hidden Valley Lake CSD</u>	20	25%
Total	100	100%

TERMS OF REQUEST FOR QUALIFICATIONS

1. **Acceptance of Responses:** The District reserves the right to reject any and all responses and to waive any informality, technical defect, or clerical error in any response and to request additional information from all respondents should it be deemed by the District to be in its interest. This RFQ is not an offer to contract. The District reserves the right to request clarification of any information submitted, interview candidates and/or request additional information during interviews. The District further reserves the right to enter into negotiations with one or more respondents and/or enter into multiple contracts and/or not award a contract.
2. **Oral Communications:** Any oral communication between the District and the respondent is not binding, nor will it modify the RFQ in any way.
3. **Amendments and/or Addendums:** We expect that you may have questions as you prepare your response to the RFQ and/or changes may be necessary. To handle questions or changes most

effectively and to ensure that everyone has the same information, we request that you promptly send your question(s) to Alyssa Gordon at agordon@hvlcsd.org.

4. **RFQ Cost:** The cost of developing the response is the sole responsibility of the respondent; the District is not liable for any costs incurred by those submitting responses.
5. **Response Submission:** Respondents may submit responses by any means (e.g., U.S. Mail, Fed Ex, courier, etc.). Responses must be received at the physical address noted by the deadline.
6. **Basis for Responses:** The RFQ and any amendments to it represent the most definitive statement the District will make concerning information upon which responses are to be based. Respondents will be assumed to have thoroughly examined these documents.
7. **Right to Negotiate:** The District reserves the right to negotiate any fee or any provision, accept any part, or all parts of any and all responses whichever is in the best interest of the District. The District intends to negotiate only with those candidates whose responses meet the requirements of the District.
8. **Verbal Agreement or Conversation:** No prior, current, or post award verbal conversations or agreement(s) with any officer, agent, or employee of District shall affect or modify any terms or obligations of this RFQ, or any contract resulting from this RFQ.
9. **Background Check:** The District reserves the right to conduct a background inquiry of each respondent, which may include collection of appropriate criminal history information, contractual and business associations, business practices, employment histories, and reputation in the business community. By submitting a response to the District, the respondent consents to such an inquiry and agrees to make available to the District such books and records the District deems necessary to conduct the inquiry.

PROTEST PROCEDURE

1. Respondents may file a written protest with the Hidden Valley Lake Community Services District General Manager no later than **five (5)** working days after the date of **evaluation notification by the General Manager or his designee which may be by telephone, letter and/or email.**
2. The protest shall be delivered or sent by registered mail to the General Manager.
3. The protest filed with the General Manager shall:
 - a. Include the name, address, and business telephone number of the protestor and;
 - b. Identify the project under protest by RFQ name, and RFQ date and;
 - c. Contain a concise statement of the grounds for protest including alleged violations of Federal, State, or local law; provided, however, RFQ process and procedures, including evaluation criteria, shall not be proper grounds for protest and concerns related to those

issues should be raised and addressed, if at all prior to the response opening date to allow adjustments before evaluation of responses and;

- d. Provide all supporting documentation, if any. Documentation submitted after filing the protest will not be considered during review of the protest or during any appeal.

PROTEST REVIEW

1. Upon receipt of a protest, the General Manager shall review all the submitted materials and shall create and retain a written record of the review. The General Manager shall respond in writing at least generally to each material issue raised in the protest no later than **fifteen (15)** working days after receipt of the protest.
2. If the protested procurement involves Federal or State funds, the General Manager shall give notice to the interested party that he or she has the right to appeal to the appropriate Federal or State agency which shall be identified by name and address. An appeal hereunder shall be filed with the appropriate agency within **five (5)** working days of the dispatch of notification to the interested party(ies).
3. General Manager decisions may be appealed in writing to the Hidden Valley Lake Community Services District Board of Directors prior to the award date, which is given in the notification. The Board of Directors shall review and decide the appeal based on the grounds and documentation set forth in the original protest to the General Manager. The appealing party may be represented by legal counsel if desired. Each party shall bear its own costs and expenses involved in the protest and appeal process, including any subsequent litigation. The decision of the Board of Directors shall be final unless the protested procurements are obtained in whole or in part with Federal or State funds.