

**Durham Public Schools**  
**Request for Statement of Qualifications (RFQ) for**  
**Energy Conservation and Management Services**

**RFQ# 179-2021-599-ENERGY\_MGMT**

**February 12, 2021**

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## **REQUEST FOR STATEMENT OF QUALIFICATIONS**

Durham Public Schools (DPS) invites consultants to provide qualifications for delivering comprehensive **Energy Conservation and Management Services**. Successful vendors will utilize energy specialists, engineers and/or other energy experts for on-site and remote services including data analysis, organizational behavior change and staff training to optimize current utility use, change the energy culture, and substantially reduce energy consumption without capital investments. Initial agreement will be for 3 years and subject to the standard DPS termination conditions.

### **Background**

DPS is a public K12 school district in Durham County North Carolina that serves over 32,000 students. DPS operates 53 schools covering 5.8 million square feet under roof. Within DPS, there are 30 elementary schools, 9 middle schools, 2 secondary schools (6-12,) 10 high schools, 1 alternative school and 1 hospital school (not part of this scope). Utilities include electricity, gas, and water. Facility construction dates range from 1919-current.

### **Project Scope**

The scope of provided services will include, but not be limited to:

- Provide a full or part time on-site staff dedicated solely to Durham Public Schools to act as Energy Manager (or comparable title)
- Analysis of utility data (collection and visualization software provided by the district, but may be supplemented by contractor)
- Provide behavioral recommendations based on utility analysis
- Assist with the development of equipment replacement prioritization based on equipment efficiency and current operations
- Provide education to district staff on utility management and reductions strategies
- Track utility interventions, calculate, document and report savings
- Assist in the creation of energy-behavior standards document
- Assist in the creation of District Sustainability Plan (potential)
- Assist in the creation of an Energy/Sustainability marking campaign for all schools and central sites
- Assist in the development and execution of energy incentive program for schools and central sites

The contractor-provided staff member will be an employee of the contractor and approved by Durham Public Schools. Scopes identified above may change, be added to, packaged together, or pursued individually at the discretion of DPS.

Responses to this Request for Statement of Qualifications will be received at the time and location designated within, and shall include the information requested hereafter. Responses received after this time will not be considered. Successful firms will be selected on an as needed basis during the

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specified time above. The need for interviews is not anticipated at this time, however DPS may request one if deemed necessary on a project by project basis.

It is the intent of this solicitation process to fully comply with G.S. 143-64.31 for the procurement of Professional Architectural, Engineering, and Surveying Services, “to announce all requirements for said services, to select firms qualified to provide such services on the basis of demonstrated competence and qualification for the type of professional services required without regard to fee other than unit price information at this stage, and thereafter to negotiate a contract for those services at a fair and reasonable fee with the best qualified firm. If a contract cannot be negotiated with the best qualified firm, DPS shall terminate negotiations with that firm and initiate negotiations with the next best qualified firm.” Selection of a firm shall include the use of good faith efforts by DPS to notify minority firms of the opportunity to submit qualifications for consideration by DPS. DPS reserves the right to waive technicalities and informalities and, at its sole discretion, to reject any and all responses to the RFQ.

## **INSTRUCTIONS FOR SUBMISSION – MINIMUM REQUIREMENTS**

*Submittals shall contain all elements outlined in this section. Submittals shall be prepared simply and economically, and shall provide concise answers to the requested information in the order and format prescribed. Failure to do so may be cause for disqualification from further consideration. Emphasis will be placed upon clarity and completeness of the submitted response.*

### **Statement of Qualifications**

#### **1. Letter of Interest:**

This one-page document should be prepared and signed by the representative of the firm authorized to sign contracts. The letter should allow personal expression as to:

- a. Why your firm is best suited to perform surveying services for DPS
- b. What specific qualities/attributes your firm offers to ensure superior performance
- c. Other information you feel best presents your firm’s expertise

#### **2. Submittal Content:**

The submittal should include the following information as a minimum, organized as outlined below:

- a. Firm’s legal name.
- b. Firm’s address, phone number, email address, website URL.
- c. Contact information for communication in follow up to this submittal.
- d. Brief history of the business including:
  - i. Years of service under present business name
  - ii. Prior business names under which like services were offered (if any)
  - iii. Business location (office from which work will be performed)
  - iv. Firm’s HUB / MWBE status/type.
- e. Project Experience: in a table format, provide a summary listing of all similar projects completed within the past 5 years. Include the following for each project:
  - i. Project Name
  - ii. Number of facilities managed
  - iii. Number of square feet managed
  - iv. Scope
  - v. Cost of services
  - vi. Length of contract
  - vii. Number of full time equivalent staff placed on site
  - viii. Brief summary of notable results
  - ix. Name and contact information of three [3] references
  - x. HUB / MWBE Participation (see Attachment A)
- f. Staff resumes: identify key personnel within your firm who will likely be assigned to our projects.

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- g. Litigation: identify any work that resulted in litigation and briefly summarize outcomes. Include judgments, claims, arbitration, mediation, or lawsuits pending or outstanding within the past five years (your organization as either as plaintiff or defendant).
  - h. Disclose any history or condition that would put the firm in a conflict of interest for the design and construction portions of the work.
  - i. Project Completions: list any projects your organization has failed to complete any part of its contractual obligation for professional services.
  - j. Submit a declaration under penalty of perjury by an authorized corporate officer or principal, stating that reasonable diligence has been used in preparation of the Statement of Qualifications submitted in response to the RFQ and that all information provided is true, correct and complete
3. Supplemental Information:  
No supplemental information is needed beyond what is requested in this document.
4. Additional Requirements:
- a. Interested firms should familiarize themselves with DPS Board Policies. These policies can be viewed on the DPS website at [www.dpsnc.net](http://www.dpsnc.net).
  - b. The selected firm will be required to provide certification documenting compliance with the Lunsford Act / Criminal Background Check and requirements as outlined in the G.S. Chapter 14 for personnel who will be on school sites as part of the performance of their work.
  - c. The selected firm is required to comply with all applicable laws when providing services for DPS, including E-Verify and requirements of the Affordable Care Act.
  - d. The selected firm will be required to provide certification documenting compliance with the Iran Divestment Act pursuant to G.S. 147 Article 6E by documenting they are not listed on the Final Divestment List created by the North Carolina State Treasurer.
  - e. DPS requires the following minimum insurance for these projects:

<b>Insurance Description</b>	<b>Minimum Required Coverage</b>
Workers' Compensation	Statutory
Public Liability	Combined Limit
Bodily Injury: Each Person	\$ 1,000,000.00
Bodily Injury: Each Accident	\$ 1,000,000.00
Property Damage: Each Accident	\$ 1,000,000.00
Automobile Liability & Property Damage	Combined Limit
Bodily Injury: Each Person	\$ 1,000,000.00
Bodily Injury: Each Accident	\$ 1,000,000.00
Property Damage: Each Accident	\$ 1,000,000.00
Professional Liability	\$ 1,000,000.00

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## **Submittal Questions**

1. Firms shall submit any questions by 3:00 PM on Monday, February 22nd, 2021.
2. Questions will include a reference to the applicable RFQ section and page number.
3. Questions received prior to the submission deadline date, Durham Public School's response, and any additional terms deemed necessary by DPS will be posted in the form of an addendum by 5:00 PM on Wednesday, February 24<sup>th</sup>, 2021.
4. No information, instruction, or advice provided orally or informally by any DPS personnel, whether made in response to a question or otherwise regarding this RFQ, shall be considered authoritative or binding. Firms shall be entitled to rely only on written material contained in an addendum to this RFQ.
5. Address any questions via email to:  
**Penny Jefferson, Business Manager, Construction and Capital Planning**  
[Penny\\_Jefferson@dpsnc.net](mailto:Penny_Jefferson@dpsnc.net)

**-AND-**

**Evelyn Gallegos, Purchasing Agent/School Auditor, Financial Services**  
[Evelyn\\_Gallegos@dpsnc.net](mailto:Evelyn_Gallegos@dpsnc.net)

## **Selection and Award Process**

Statements of qualification will be evaluated by a selection committee. The committee may include administrators, school staff, Board of Education, and community members. Firms may be invited to participate in an oral presentation and interview to determine which team is the best qualified to work with the district and community in completing the project(s). The district may request additional information from firms on the short list prior to interviews. If deemed beneficial some members of the selection committee may visit completed projects prior to the final selection recommendation and approval.

The recommendation of the selection committee will be subject to a successful contract negotiation and approval by the Board of Education. If an agreement cannot be reached the district reserves the right to negotiate with other qualified firms.

### **Selection Criteria**

Finalists for contract consideration by the district will be selected on the basis of qualifications and demonstrated competence as evidenced by the information presented in the qualifications submittal. Evaluation of qualifications may include, but not limited to the following:

1. The Proposer's understanding of the educational environment related to the project and qualifications to complete the services required.
2. The Proposer's previous experience, qualifications and competence on educational facility projects of similar size and scope.
3. Past performance on similar projects, and as indicated from reference contracts.
4. Ability to communicate with the selection committee both in written format and verbally.

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## **Schedule and Deadlines**

1. Submittals are to be received no later than **3:00 PM on Monday March 1<sup>st</sup>, 2021.**
2. One (1) digital copy of your submittal should be sent to each of the following:

Evelyn Gallegos, Purchasing Agent/School Auditor	<a href="mailto:Evelyn_Gallegos@dpsnc.net">Evelyn_Gallegos@dpsnc.net</a>
Penny Jefferson, Business Manager	<a href="mailto:Penny_Jefferson@dpsnc.net">Penny_Jefferson@dpsnc.net</a>

3. Alternatively, submissions can be made by mail or dropped off in person to:  
Evelyn Gallegos - Purchasing Agent  
Durham Public Schools  
511 Cleveland St.  
Durham, NC. 27701
4. The following schedule is anticipated to select firms for these projects:

RFQ Issued/Advertised:	February 12 <sup>th</sup> , 2021
RFQ Questions Due:	February 22 <sup>nd</sup> , 2021
RFQ Questions Answered:	February 24 <sup>th</sup> , 2021
RFQ Package Received:	March 1 <sup>st</sup> , 2021

## **Contact Policy**

Until a contract resulting from this RFQ process is executed, no employee, agent or representative of any professional services provider shall make available or discuss its proposal with the media in any form, electronic or printed, or with any elected or appointed official or officer of DPS, or any employee, agent or other representative of the DPS unless required by law.

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## **ATTACHMENT A**

### ***Durham Public Schools***

#### ***Participation of Minority Businesses***

**Durham Public Schools Board of Education Policy Number 9125 (partial, full policy available online)**

The board affirms the State's commitment to encouraging the participation of minority businesses in the school system's building construction contracts. A minority business is defined in accordance with [G.S. 143-128.2](#) and is one in which (1) at least 51 percent is owned by minority persons or socially and economically disadvantaged individuals, and (2) the management and daily business operations are controlled by one or more of the minority persons or socially and economically disadvantaged individuals who own it. Minority persons include African-Americans, those of Hispanic descent, Asian Americans, American Indians, and females.

After notice and public hearing, the board hereby adopts an aspirational verifiable percentage goal of 10 percent for participation by minority businesses in the total value of work for each building project costing \$300,000 or more paid entirely from local or other non-state funds. In addition, the board adopts the state's aspirational verifiable goal of 10 percent participation by minority businesses in the total value of work for each building project costing \$100,000 or more funded in whole or in part with state funds.

All bidders on school construction and renovation projects subject to Section A of this policy who intend to subcontract any part of the project must (1) identify the minority businesses to be used on the project and (2) provide affidavits indicating that a good faith effort has been made in preparing the bid to meet the board's verifiable goal for participation by minority businesses. Upon being named the apparent lowest responsible, responsive bidder, a bidder shall provide additional evidence of its good faith efforts as required by law.

The level of minority participation in bidders' bids will not affect the contract award decision; however, the failure to provide documentation of a good faith effort to meet the board's goal may result in the bid being rejected as non-responsive.

Before recommending the award of a contract, the superintendent shall direct designated school officials to evaluate bidders' documents in accordance with applicable law and regulations to determine whether bidder good faith requirements are satisfied.

The board will award public building contracts without regard to race, religion, color, creed, national origin, sex, age, or disability. Nothing in this policy should be construed to require the board or contractors to award contracts or subcontracts to minority business contractors or minority business subcontractors who do not submit the lowest responsible, responsive bid or bids.

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**LEGAL NOTICE**

REQUEST FOR QUALIFICATIONS: Durham Public Schools has issued an RFQ for Energy Conservation and Management Services for all Durham Public Schools (DPS) facilities. Submittal due date/time: March 1<sup>st</sup> 2021 by 3:00 p.m. For Legal Notice and RFQ information, go to <http://www.dpsnc.net> and select Resources/Construction & Capital Planning. Issue date 2-12-21.