REQUEST FOR PROPOSALS

COMPREHENSIVE ENERGY CONSULTANT
PC602

Issue Date: August 12, 2011
Proposals Due: September 13, 2011 at 2 pm PDT

Issued by:
Housing Authority of the County of San Bernardino
715 E. Brier Drive
San Bernardino, CA 92408
# REQUEST FOR PROPOSALS

**COMPREHENSIVE ENERGY CONSULTANT**

**PC602**

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**EXHIBITS:**

A. SCOPE OF WORK

B. CONTACT INFORMATION FORM

C. PROPOSAL FORM

D. HUD FORM 5369 B OR C

E. LISTING OF PROPERTY LOCATIONS

F. SAMPLE CONTRACT
I. INTRODUCTION
The Housing Authority of the County of San Bernardino, hereafter referred to as the HACSB was organized in 1941, under the U.S. Housing Act of 1937. We are governed by a seven-member Board of Commissioners, which includes two tenant commissioners and five appointed by the county board of supervisors. Our main purpose is to provide affordable housing to low and moderate income families, senior citizens and disabled/handicapped individuals. We also provide self sufficiency programs and non-discriminatory housing assistance services. HACSB is designated a HUD “Moving-To-Work” Agency. The U.S. Department of Housing and Urban Development hereinafter referred to as “HUD” provides HACSB with an annually appropriated subsidy for public housing, but HACSB is also active in developing and acquiring additional affordable housing throughout the county. HACSB owns 1685 units of HUD public housing and 1,000+ non-HUD units in the County of San Bernardino, CA. HACSB intends to develop and or acquire approximately 100-300 additional units per year through a variety of financing methods including tax credits, bond issues, and conventional loans.

The Housing Authority of the County of San Bernardino (HACSB) is requesting Qualifications Statements from professional Consulting firms interested assisting HACSB in implementing renewable energy strategies for its entire building portfolio. The goal is to transition, wherever feasible, from an energy supply of non renewable energy sources to renewable sources.

II. PURPOSE
The purpose of this Request for Proposals is to solicit responses from qualified companies to furnish services to the HACSB as identified in the “Scope of Work” of this request.

III. BOARD
The powers of the HACSB are vested in its Board of Commissioners.

IV. ADMINISTRATIVE PERSONNEL
Susan Benner is the Executive Director of the HACSB.

V. SCOPE OF SERVICES
Respondents will be expected to provide Assessments of Existing Multi-family Rental Housing Developments as outlined in the attached Exhibit A-Scope of Work that has been provided.

VI. RFP INSTRUCTIONS
a. Contact Information
This RFP is being issued, as will any addenda by the HACSB. The contact person for the HACSB is:
b. **RFP Submission and Format**

By this Request for Proposals, the HACSB solicits proposals to be received by **2:00 p.m. (PST) on September 13, 2011** in the form outlined below. **Late submittals will not be accepted.**

1. Proposals must be submitted by mail with **one (1) signed original and four (4) copies**. Any general information not specifically relevant to the proposal shall be omitted or bound in a separate document. At a minimum, the proposal shall include the following:

   - Identification of the company or individual(s) including name, address, telephone number, fax number, and email address;
   - Name, title, address and telephone number of contact person during the period of the evaluation process;

2. Proposal shall be submitted to:

   Housing Authority of the County of San Bernardino  
   Procurement & Contracts Department  
   Attn: Marsha Zeller  
   715 East Brier Drive  
   San Bernardino, CA 92408-2841  
   mzeller@hacsb.com  
   Fax 909-890-2349  
   Phone 909-890-0644 x2176

   The envelope must be **sealed** and include the following notation on the bottom left hand corner of the proposal, **“Request for Proposal PC602 for COMPREHENSIVE ENERGY CONSULTANT Enclosed.”** Please also include company/individual name on outside of envelope. The proposals will be evaluated based on the criteria established in this document. Proposals received after the specified date and time will not be accepted. Two or more companies may be selected for an interview.

3. **Facsimile Copies or emails will NOT be accepted.** All proposals will become property of the HACSB upon submission.

c. **RFP Terms and Conditions**

The HACSB reserves the right to select more than one respondent (and will accept joint venture proposals), to select a respondent(s) for specific purposes or for any combination of specific purposes, and to defer the selection of any respondent(s) to a time of the HACSB’s choosing.
d. **Board and Staff Communications**
Under no circumstances may any member of the HACSB or any staff member other than the contact specified in Section VI. a. above be contacted during this RFP process by any entity intending to submit a response to this RFP. Failure to comply with this request will result in disqualification. All questions should be in writing and directed to the individuals identified in Section VI. a above.

e. **Timetable**

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<td>Request for Proposal Released</td>
<td>August 12, 2011</td>
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<td>Due Date for Questions</td>
<td>August 24, 2011 at 2:00 p.m.</td>
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<td>Posting of Responses for Questions</td>
<td>August 31, 2011</td>
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<td>Proposals Due</td>
<td>September 13, 2011 at 2:00 p.m.</td>
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<td>Evaluation Process/Interviews</td>
<td>Week of September 21, 2011</td>
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<td>October 12, 2011</td>
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<tr>
<td>Award Contract</td>
<td>October 2011</td>
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If you have questions regarding this proposal, you must submit them in writing to mzeller@hacsb.com no later than 2:00 PST on August 24, 2011.

Responses to all appropriately submitted questions will be posted on the HACSB website on or before August 31, 2011.

**The deadline for submissions in response to this Request for Proposals is 2:00 p.m. (PDT), September 13, 2011.** Fax responses will be accepted for this request. It is the intent of the HACSB to select a contractor no later than Wednesday, October 12, 2011.

f. **Release of Information**
Information submitted in response to this RFP will not be released by the HACSB during the proposal evaluation process or prior to a contract award.

g. **Proprietary Information**
If a respondent does not desire certain proprietary information in their response disclosed, the respondent is required to identify all proprietary information in the response, which identification shall be submitted concurrently with the response. If the respondent fails to identify
proprietary information, it agrees by submission of its response that those sections shall be deemed nonproprietary and may be made available upon public request after a contract award.

h. **Term of Contract**

HACSB intends to award a contract for its requirements as follows:

The contract period of performance is for two base (2) years, beginning on or about October 12, 2011 and expiring October 11, 2013 with one single-year option to extend the contract until no later than October 11, 2014, or until such time as terminated per the terms of the agreement. The initial engagement will be for a two (2) year period. In addition, HACSB shall have the option to extend the engagement for up to one (1) additional year. The option year shall be exercised contingent upon satisfactory performance. The options year will be administered through written amendments executed by the parties. After the initial two-year base period, the engagement shall be renewed, on a year-to-year basis, on a unilateral basis at the fee in the original proposal. Such renewal engagement shall be confirmed in writing.

7.1.1 Contractor shall perform its services hereunder in a prompt and timely manner and shall commence performance upon receipt of a written Notice to Proceed from HACSB. The Notice to Proceed shall set forth the precise date of commencement of the work.

7.1.2 Contractor shall make its non-exclusive services available during the entire contract period.

HACSB may award the contract at a time other than that stated in the Schedule. In which case HACSB, at its option, may shorten the duration of the contract or change the beginning and end dates, but in no case will the contract exceed the duration in as aforementioned.

i. **Contract Option Years**

HACSB will have the unilateral right in the contract by which, for a specified time, HACSB may elect to purchase additional services called for by the contract, or may elect to extend the term of the contract. The requirements below apply:

1. Any options that were requested by HACSB and/or contained in the Contractor’s bid or offer must have been evaluated in making the contract award prior to exercising any such options.

2. Contractor shall not be allowed to change its proposed pricing for the option years since this pricing is considered in evaluating the Contractor’s original proposal, therefore was the basis for awarding the contract unless otherwise provided herein.

3. Exercise of an option must be in accordance with the terms and conditions of the option stated in the initial contract award.
HACSB will provide a minimum of sixty days (60) written notice to the Contractor of HACSB’ unilateral right to exercise the option years. The minimum time for the written notice may be waived by mutual agreement.

If HACSB does not provide written notice to the Contractor, then the contract shall conclude on October 11 of the year for which the contract was last awarded.

i. **HACSB Reserves the Right to:**
   1. Request an oral interview with, and additional information from, companies prior to final selection of a provider.
   2. Consider information about a company in addition to the information submitted in the response or interview.
   3. Reject any and all responses and waive any irregularities.

VII. **RFP QUESTIONS FOR PROVIDERS**

   a. **Organizational and Personnel Background**
      Provide an overview of your company, emphasizing its qualifications and major organizational strengths.

   b. **Experience**
      Discuss your experience, in serving as a provider of assessments of real property, specifically for existing multi-family rental housing developments.

   c. **Miscellaneous Discussion Questions**
      1. Identify the specific individuals who would be assigned to work with the HACSB and specify which person would be the primary contact person with the HACSB.
      2. Provide a sample Comprehensive Energy report that covers the scope of work requested.
      3. Provide an estimate of the time that will be required to begin providing Comprehensive Energy Consultant Services as outlined in Exhibit A.

   d. **Price (Fee Schedule)**
      Provide a grand total cost for the rendering of the services and clearly specify if any additional expenses will be charged to the HACSB in connection with this proposal.

   e. **Affirmative Action**
      The HACSB requires that each respondent be an Equal Opportunity Employer:
      State that the respondent complies fully with all government regulations regarding nondiscriminatory employment practices.
VIII. RFP REVIEW
At a HACSB meeting, scheduled after such review, some of the companies that have responded may be asked to be available for interviews. If so, those companies will be given not less than three (3) business days notice, along with the date, time and place for the interviews. Expenses will be the responsibility of the respondent.

IX. COMPANY QUALIFICATIONS
Proposals shall be considered from responsible organizations or individuals engaged in the performance of Comprehensive Energy Consultation Services in the area of renewable energy sources. Proposals must include information on competency in performing comparable Assessments of Existing Multi-family Rental Housing Developments, demonstration of acceptable financial resources, and personnel staffing. The vendor shall furnish detailed information on references, as well as background and experience with projects of a similar type and scope to include as a minimum:

a. Brief history of the company including a description of the firm, including identification of the owners and key personnel anticipated to perform work on the project(s). Additionally, include the length of time in operation under the current business structure.

b. A listing of three (3) references for recent work similar to the programs covered under this RFQ and undertaken by you. References should only include a contact name, address, phone number and email address.

c. Vendor shall describe their understanding of the project scope, their proposed approach to performing the services, and submit a proposed schedule.

X. SELECTION CRITERIA
Proposals will be evaluated based on the selection factors listed below; the relative weight that each factor will receive in the evaluation is shown below.

Selection Factors:

1. Capabilities of the Proposer’s Organization and/or Team. (30 points)
Assessment of the capabilities of the organization and individuals that will be engaged in the project. Qualities and indicators that will receive consideration include the individual professionals who will be doing/working on each task; the various professional, technical, and educational achievements and registration of each organization and individuals involved; the applicable experience of the proposed assigned staff, and the specific experience gained on similar projects.

2. Ability of the Lead Consultant to Design an Approach and Work Plan to Meet the Project Requirements. (20 points)
There will be an assessment of the overall quality of the proposal. Qualities and indicators that will receive consideration include the Proposer’s performance in
converting the Scope of Services into a work plan; the detail and clarity of the
discussion as to the Proposer’s approach to undertaking the project; past
experience; the Proposer’s performance in identifying any special problems or
concerns which may be associated with the project and preliminary ideas about
how these obstacles should be addressed; the inclusion of any unique
approaches which are designed to save time and money or increase the benefits
or effectiveness of the proposed work; and the demonstrated ability to work with
governmental bodies and a full understanding of applicable laws or regulations
that relate to the project.

3. Review of Past Experience - Ability of the Proposer to Carry Out and
Manage the Proposed Project. (20 points)
A review of the past experience of the organization in general. Qualities and
indicators that will receive consideration include the number and types of projects
the organization or its employees have completed; the variety of projects
completed and a demonstration of the organization’s ability to undertake this
project, the general level of experience in the areas of supervision, observing and
monitoring projects; the organization’s ability to realize timetables and quality
control objectives; and the demonstrated general ability to bring about a
successful completion of the projects under the Proposer’s direction.

4. Current Workload of the Consultant Organization and/or Team. (10 points)
An assessment of the perceived ability of each organization to devote the
necessary human resources and management attention to the project. Qualities
and indicators that will receive consideration include the number and size of the
projects presently being performed by each organization and the assigned staff;
the status of existing projects; the past ability of the organization to deliver
projects on a timely basis; and the nature of the existing projects that are behind
schedule or past the completion date.

5. The Proposer and/or Team’s Proximity to the Project (10 points)
An assessment of the geographic proximity to the project; the location of the
office from which the proposed project will be administered; the perceived
response time and general availability of the Proposer’s management to be on
site, the perceived effect that project management location will have on price
and the ability of the project to be completed on a timely basis; and the availability of
special travel or communication plans which would effectively mitigate difficulties
associated with location. The mitigating circumstances that render proposer’s
office location of minimal impact to the project (such as successful track record
with State and local utilities)

6. Cost of Proposal. (10 points)
The total cost of proposal may be considered in the selection process.

7. Evidence of Insurance Coverage. (Mandatory)

XI. RFP REQUIREMENTS AND CONDITIONS
Minimum Requirements
This RFP sets forth the minimum requirements that all submissions shall meet. Failure to submit proposals in accordance with this request may render the proposal unacceptable.

Cost of the Proposal
Costs incurred by any proposer in the preparation of its response to the RFP are the responsibility of the proposer and will not be reimbursed by the HACSB. Proposers shall not include any such expenses as part of their proposals.

Submission Requirements
Forms included within this Request for Proposal must be included with proposal. HUD form 5369-B and 5369-C. These forms are available on the HACSB website on the Procurement page at www.hacsb.com. Failure to submit mandatory forms could result in rejection of the company’s proposal.

Clarification to Proposals
The HACSB reserves the right to obtain clarifications of any point in a company’s proposal or to obtain additional information necessary to properly evaluate a particular proposal. Failure of a proposer to respond to such a request for additional information or clarification could result in rejection of the company’s response or responses.

Cancellation of the RFP
The HACSB reserves the right to cancel this RFP at any time, for any reason, and without liability if cancellation is deemed to be in the best interest of the HACSB. The proposer assumes the sole risk and responsibility for all expenses connected with the preparation of its proposal.

Collusion
Proposer, by submitting a proposal, hereby certifies that no officer, agent, or employee of the HACSB has a pecuniary interest in this Proposal; that the Proposal is made in good faith without fraud, collusion, or connection of any kind with any other proposer; and that the proposer is competing solely in its own behalf without connection with, or obligation to any undisclosed person or company.

Contacts
All questions concerning the RFP shall be directed to Marsha Zeller whose contact information is provided above. To avoid all appearances of impropriety proposer should only contact the above referenced staff person and should not attempt to contact any HACSB Commissioner or the Executive Director. No oral request for clarification or information will be accepted. All such requests must be in writing (by email, mail, fax, or hand delivery) and submitted to the HACSB no later than 2:00 p.m. PST on Friday, August 28, 2011. All questions and clarifications shall be answered in one written addendum, to be issued no later than Thursday, September 3, 2011 to all respondents who have been duly recorded as having received a copy in the HACSB’s RFP distribution log.
Disputes
In case of any doubt or differences of opinions as to the participation sought hereunder, or the interpretation of the provisions of the RFP, the decision of the HACSB shall be final and binding upon all parties.

XII. INSURANCE REQUIREMENTS
A. Proof of Insurance, shall not be terminated or expire without thirty (30 days written notice, and are required to be maintained in force until completion of the contract. The Contractor shall require all subcontractors used in the performance of this contract to name HACSB as an additional insured. Following are the standard types and minimum amounts.

- **General Liability:** $1,000,000; per occurrence for bodily injury, personal injury and property damage liability; HACSB Additional Insured or,
- **Commercial General Liability:** $1,000,000; combined single limit bodily and property damage liability per occurrence; HACSB additional named insured.
- **Comprehensive Automobile Liability:** $1,000,000; combined single limit bodily and property damage liability per occurrence and aggregate; HACSB Additional Insured.
- **Errors and Omissions Liability:** $1,000,000; combined single limit bodily and property damage liability per occurrence and $3,000,000 aggregate or,
- **Professional Liability:** $1,000,000; per occurrence and aggregate.
- **Workers’ Compensation:** statutory limits or,
- **Self Insurance Program:** a State Approved program in an amount and form that meets all applicable requirements of the Labor Code of the State of California.
- **Environmental Liability:** $500,000; per occurrence and aggregate; HACSB Additional Insured.
- **Owner’s Liability:** 100% of insurable value of the work, Builder’s Risk, Extended coverage for Vandalism and Malicious Mischief, if required; HACSB additional named insured.
- **Fire Insurance with Extended Coverage:** 100% of insurable value of the work; Builder’s Risk, Extended coverage including Vandalism and Malicious Mischief, if required; HACSB Additional Insured.

B. Failure to provide proof of insurance or failure to maintain insurance as required in this bid, or by law; are grounds for immediate termination of the contract. In addition, the awarded bidder should be liable for all re-procurement costs and any other remedies under law.
C. Indemnification and Insurance Requirements

1. Indemnification
   The Contractor agrees to indemnify, defend and hold harmless HACSB and its authorized officers, employees, agents and volunteers from any and all claims, actions, losses, damages, and/or liability arising out of this Contract from any cause whatsoever, including the acts, errors or omissions of any person and for any costs or expenses incurred by HACSB on account of any claim therefore, except where such indemnification is prohibited by law.

2. Additional Named Insured
   All policies, except for the Workers' Compensation, Errors and Omissions and Professional Liability policies, shall contain additional endorsements naming HACSB and its officers, employees, agents and volunteers as additional named insured with respect to liabilities arising out of the performance of services hereunder.

3. Waiver of Subrogation Rights
   The Contractor shall require the carriers of the above required coverages to waive all rights of subrogation against HACSB, its officers, employees, agents, volunteers, Contractors and subcontractors.

4. Policies Primary and Non-Contributory
   All policies required above are to be primary and non-contributory with any insurance or self-insurance programs carried or administered by HACSB.

6. Proof of Coverage
   The Contractor shall immediately furnish certificates of insurance to HACSB Procurement Department administering the Contract evidencing the insurance coverage, including the endorsements above required, prior to the commencement of performance of services hereunder, which certificates shall provide that such insurance shall not be terminated or expire without thirty (30) days written notice to the Department. Contractor shall maintain such insurance from the time Contractor commences performance of services hereunder until the completion of such services. Within sixty (60) days of the commencement of this Agreement, the Contractor shall furnish certified copies of the policies and all endorsements.

7. Insurance Review
   The above insurance requirements are subject to periodic review by HACSB. HACSB’s Risk Manager is authorized, but not required, to reduce or waive any of the above insurance requirements whenever the Risk Manager determines that any of the above insurance is not available, is unreasonably priced, or is not needed to protect the interests
of HACSB. In addition, if the Risk Manager determines that heretofore, unreasonably priced or unavailable types of insurance coverage or coverage limits become reasonably priced or available, the Risk Manager is authorized but not required, to change the above insurance requirements, to require additional types of insurance coverage or higher coverage limits, provided that any such change is reasonable in light of past claims against HACSB, inflation, or any other item reasonably related to HACSB’s risk. Any such reduction or waiver for the entire term of the Agreement and any change requiring additional types of insurance coverage or higher coverage limits must be made by amendment to this Agreement. Contractor agrees to execute any such amendment within thirty (30) days of receipt.

XIII. CONTRACT CONDITIONS

Americans with Disabilities Act
Proposer must comply with all applicable requirements of federal and state civil rights law and rehabilitation statues.

Law of the State of California
The resulting contract will be entered into within the State of California and the law of said state, whether substantive or procedural, shall apply to the contract, and all statutory, charter and ordinance provisions that is applicable to public contracts within the County of San Bernardino and the State of California shall be followed with respect to the contract.

Contract Terms and Final Selection
The selected company will be expected to sign the HACSB’s Contract Agreement, which will specify the term of service, likely to be annually. If the selected applicant and the HACSB cannot come to terms with respect to the contract, the HACSB reserves the right to select the next most qualified applicant or to terminate this RFP and to re-issue a new RFP if no Proposer is acceptable to the HACSB.
EXHIBIT A
COMPREHENSIVE ENERGY CONSULTANT
Scope of Work

I. INTRODUCTION

Profile of the Housing Authority of the County of San Bernardino:
The Housing Authority of the County of San Bernardino, hereafter referred to as the HACSB was organized in 1941, under the U.S. Housing Act of 1937. We are governed by a seven-member Board of Commissioners, which includes two tenant commissioners and five appointed by the county board of supervisors. Our main purpose is to provide affordable housing to low and moderate income families, senior citizens and disable/handicapped individuals. We also provide self-sufficiency programs and non-discriminatory housing assistance services. HACSB is designated a HUD “Moving-To-Work” Agency. The U.S. Department of Housing and Urban Development hereinafter referred to as “HUD” provides HACSB with an annually appropriated subsidy for public housing, but HACSB is also active in developing and acquiring additional affordable housing throughout the county. HACSB owns 1033 units of HUD public housing and 1100+ non-HUD units in the County of San Bernardino, CA. HACSB intends to develop and or acquire approximately 100-300 additional units per year through a variety of financing methods including tax credits, bond issues, and conventional loans.

The overall goal of this proposal is to partner with a firm(s) or individual(s) to grow the capacity and expertise of HACSB and property management staff; along with tenants to effectively reduce energy and water use across the agency’s portfolio.

Through the assistance of consultants, HACSB has been able to implement energy efficient upgrades, such as dual pane windows, solar photovoltaic panels, low water use plumbing fixtures, xeriscaping, and tank-less water heaters at some of the properties in our portfolio. We desire to continue to improve our efficiency and look for additional ways to improve our renewable energy profile.

Energy Efficiency Targets:
HACSB would like to improve renewable energy sources and efficiency within its affordable housing and commercial office portfolio throughout the County of San Bernardino. Targeted regions and cities wherein authority assets are located include Apple Valley, Fontana, Hesperia, Ontario, Rancho Cucamonga, Rialto, San Bernardino, Victorville, Yucaipa, Redlands, Barstow, Chino, Montclair, Yucca Valley and Twentynine Palms. A complete listing of the property is attached in “Exhibit E”.

Purpose of the Request
HACSB desires outside professional services and organizations to assist in transitioning from non-renewable energy sources to renewable sources at no or very low-cost/cash outlay to the Authority, by means of leveraging Authority-owned assets, American Reinvestment and Recovery Act (ARRA) monies, California Energy Commission funds, anticipated Energy Efficiency Community Block Grant (EECBG) funding, Utility Company subsidies/rebates, creative
financing mechanisms, grants, and/or other funding sources. The selected organization(s) will have demonstrated success in working with local housing agencies to implement innovative renewable energy strategies; obtaining State/Federal funds, grants, and other innovative funding sources; and, if appropriate, be able to work in a team environment with other project consultants.

II. SCOPE OF SERVICES
HACSB is looking for the most innovative and forward thinking solutions available to local Public Housing Authorities to transition from non-renewable energy sources to renewable sources. The intent, with this request for consulting services, is for the development of a comprehensive strategy for the gradual transition of HACSB owned assets to a variety of renewable energy sources which respond to the unique physical characteristics of each asset (residential and commercial) within the overall portfolio. HACSB is currently under contract with an ESCO for the completion of an Energy Performance Contract for its public housing portfolio, which primarily consists of water savings, lighting upgrades and xeriscaping. HACSB welcomes additional innovative proposals, creative thinking, and is particularly interested in proposals that incorporate one or more of the following programs:

- Financing mechanisms to encourage energy efficiency upgrades and renewable energy production at residential and commercial sites, including non-subsidized housing.
  - Coordination with available programs and resources
  - Negotiation of grand funding
  - Financial bundling and strategies for individual properties and the larger portfolio
- Alternative energy efficiency technologies for all HACSB-owned facilities.
- Power Purchase Agreements (PPA) for HACSB owned facilities and land.
- Development of a renewable energy micro-utility facility on one or more HACSB parcels.
- Energy audits for residential and commercial sites at little-to-no net cost to HACSB; development of a program to fund recommended energy efficiency upgrades/improvements.
- Evaluation and expansion, if feasible, of existing public housing energy performance contract, with audit, commissioning and compliance monitoring services as required.
- Implementation/Construction Management Services associated with new projects utilizing alternative funding sources identified in the comprehensive strategy. (Provide fee proposal showing rates for all key team members).
- Increase the internal capacity of HACSB and private property management staff, through operation and maintenance training opportunities. Create/provide a program for training and certification of staff. This training would encompass a “green” operation plan which would maximize energy and water efficiency.
- Provide training and workforce development opportunities to the local community (residents of our properties as well as the community at large)
- Tenant outreach and education program to provide information and resources regarding energy use and conservation.
- Provide guidance in establishing a public relations plan to showcase efforts of HACSB regarding energy and water savings.
- Provide guidance and expertise in drafting and developing policies around energy and water efficiency for use with affordable housing properties.

* HACSB intends to add other specific task work order assignments unique to HACSB properties as the contract and resulting strategies progress.

Organizations may respond to parts of the scope of services or to the entire RFQ, or may propose a different approach that best suits their area of expertise.

Depending on the responses, HACSB will either:
1) Choose a variety of the most innovative, cost-effective solutions presented by various organizations/firms; or,
2) Request that a single organization manage a team to implement multiple proposed ideas; or,
3) Take an alternative approach most appropriate for the proposed program(s).

III. PROPOSAL FORMAT
All proposals shall include the following minimum information:

Approach:
A brief explanation of the intended approach to the project that demonstrates the Proposer understands the issues and tasks and the Proposer’s ability to address them.

Description of Organization, Management and Team Members:
You must provide a description of your management structure, including an organizational chart that identifies all key management positions and the names and positions of staff managed. You must also describe your key staff and their specific roles and responsibilities for the day-to-day management of your proposed activities.

Past Experience:
Provide examples of recent experience (within the last 24 months) managing activities similar to the ones covered under this notice. Examples should include a discussion of the tasks undertaken, actual results achieved, and the specific skills and resources applied to each task. A list of major projects, both ongoing and planned, to which the organization is committed during the time frame of this project, should also be provided. Include the staff resources devoted to those projects and the status of the projects.

Scope of Work:
Provide a description of each work task with an explanation of how the Proposer plans to approach the tasks and the steps that will be taken to complete the task
including analytical methods and tools. Proposers must demonstrate that they understand the magnitude and importance of each individual task. Tasks should be organized into phases constituting measurable deliverables.

**Proposed Project Schedule:**
The proposal shall include a schedule to undertake the work program. Program development and implementation should begin as soon as feasible, depending on the particular task/program.

**Proposed Budget:**
Indicate the projected costs and hours for the initial project (development of the comprehensive strategy), on a task-by-task basis (by the first 6 tasks bulleted under the Scope of Services), and on a subconsultant basis, inclusive of reimbursables. Please demonstrate how the expenses will be offset by outside funding mechanisms.

**References, Related Experience and Examples of Work:**
The Proposal should include at least five (5) references for recent work similar to the programs covered under this RFQ and undertaken by you. References should only include a contact name, address, phone number and email address. **E-mail and/or fax information is mandatory.**

Specify the client, location, consultant firm members and participating individuals and role on team principal, project director, etc., type of work, implementation results or status, examples of work, and other relevant information as needed.

Alternatively, a reference may include one brief newspaper or journal article, program evaluation, or a transcript from a reputable independent source other than you.

**IV. SELECTION PROCESS**

**Qualifications**
All proposals received by the due date will be evaluated by HACSB. Only information which is received in response to the RFQ or any subsequent interview will be evaluated.

**Selection Criteria**
HACSB will select the most qualified proposal(s) based on the following factors. Responses to the RFQ should address the qualities and indicators that are listed below:

1. **Capabilities of the Proposer’s Organization and/or Team.** (30 points)
2. **Ability of the Lead Consultant to Design an Approach and Work Plan to Meet the Project Requirements.** (20 points)
3. **Review of Past Experience - Ability of the Proposer to Carry Out and Manage the Proposed Project.** (20 points)
4. **Current Workload of the Consultant Organization and/or Team.** (10 points)
5. The Proposer and/or Team’s Proximity to the Project (10 points)
6. Cost of Proposal. (10 points)
7. Evidence of Insurance Coverage. (Mandatory)

V. CONDITIONS OF REQUEST

General Conditions.
HACSB reserves the right to cancel or reject all or a portion or portions of this request for qualifications without notice. HACSB makes no representations that any agreement will be awarded to any organization submitting a proposal. HACSB reserves the right to reject any and all proposals submitted in response to this request or any addenda thereto.

HACSB also reserves the right to reject any subconsultant or individual working on a consultant team and to replace the subconsultant or individual with a mutually acceptable replacement. Any changes to the proposal requirements will be made by written addendum.

Liability of Costs and Responsibility
HACSB shall not be liable for any costs incurred in response to this request for proposals. All costs shall be borne by the person or organization responding to the request. The person or organization responding to the request shall hold HACSB harmless from any and all liability, claim or expense whatsoever incurred by or on behalf of that person or organization. All submitted material becomes the property of the HACSB.

The selected lead consultant will be required to assume responsibility for all services offered in the proposal whether or not they possess them within their organization. The selected lead consultant will be the sole point of contact with regard to contractual matters, including payment of any and all charges resulting from the contract.

Validity.
The Proposer agrees to be bound by its proposal for a period of ninety (90) days commencing October, 2011, during which time HACSB may request clarification or correction of the proposal for the purpose of evaluation. Amendments or clarifications shall not affect the remainder of the proposal, but only the portion so amended or clarified.

Standard Agreement.
A sample agreement has been provided as “Exhibit F” for the Proposer’s review and comment. If a Proposer wishes to take exception to any of the terms and conditions contained in the consultant agreement, these should be identified specifically; otherwise, it will be assumed that the Proposer is willing to enter into the agreement as it is written. Failure to identify contractual issues of dispute can later be the basis for HACSB disqualifying a Proposer. Any exceptions to terms, conditions, or other requirements must be clearly stated. Otherwise, HACSB will consider that all items offered are in strict compliance with the RFP, and the
successful Proposer will be responsible for compliance. HACSB will consider such exceptions as part of the evaluation process, which may constitute grounds for rejection of the proposal. The agreement will not be executed by HACSB without first being signed by the Proposer.

**Permits and Licenses.**
Proposer, and all of Proposer’s sub-consultants, at its and/or their sole expense, shall obtain and maintain during the term of any agreement, all appropriate permits, certificates and licenses including, but not limited to, a Valid Business License, which will be required in connection with the performance of services hereunder.

**Oral and Written Explanations.**
HACSB will not be bound by oral explanations or instructions given at any time during the review process or after the award. Oral explanations given during the review process and after award become binding when confirmed in writing by an authorized HACSB official. Written responses to question(s) asked by one Proposer will be provided to all proposers who received Requests for Proposals in the form of an addendum.

**Proposer’s Representative.**
The person signing the proposal must be a legal representative of the firm authorized to bind the firm to an agreement in the event of the award.

**Deliverables.**
Six (6) copies of administrative draft reports are required upon completion of each major part of the project. Following approval by HACSB staff, six copies of each final report are required.

One (1) unbound copy of each final document and a computer compact disk containing all final documents and all information are to be provided. At the outset of the agreement, the consultant will submit a description of the software to be used in preparation of the reports and graphics. HACSB currently uses Microsoft Word for word processing.

**Insurance.**
General liability, automobile, professional liability, and workers compensation insurance are required in the amount set forth in the attached sample agreement (see Exhibit F).

**VI. AVAILABILITY OF DOCUMENTS**

**Exhibits.**
In the interest of reducing waste, all appendices are available online at www.hacsb.com/procurement
For more information, please visit our website at www.hacsb.com
HACSB TRAVEL AND EXPENSE GUIDELINES

All invoices shall include an itemized listing supported by copies of the original bills, invoices, expense reports and miscellaneous supporting data.

All travel submitted for reimbursement either to Los Angeles/Ontario or from Los Angeles/Ontario to other locations, shall have approval by HACSB’ Project Manager/Coordinator.

Time for travel will not be reimbursed except for travel during normal business hours.

A. Auto Mileage

Auto mileage will be reimbursed at the current IRS approved mileage rate.

B. Air Travel

Air fares will be reimbursed based on the most direct route at coach class travel rates. Upgrading (coach to a higher class) of airline tickets will only be reimbursed when approved, and only when the business schedule requires immediate travel, and only higher class seats are available. Downgrading (exchange) of airline ticket where the Contractor receives financial or personal gain is not permitted. If a trip is postponed, reservations should be cancelled immediately.

Travel arrangements should be made as early as possible (preferably three weeks) to take advantage of advanced reservation rates.

C. Combining Business Travel with Personal Travel

The Contractor’s employees may combine personal travel with HACSB business only if the personal travel does not increase the cost to HACSB. Arrangement for personal travel should be handled by the Contractor’s employee. HACSB will not manage personal travel.

D. Air Travel Insurance

HACSB does not pay for air travel insurance.

E. Accommodations

HACSB will reimburse hotel room fees at the governmental rate. HACSB may reimburse hotel room fees at the standard rate based on single room occupancy in cases where a government rate is not available. HACSB will provide a letter to the Contractor which authorizes hotels to provide rooms at a government rate. This authorization only applies to HACSB business travel.
F. Laundry

Laundry and dry cleaning charges will only be paid if a Contractor’s employee is on travel for HACSB for a period in excess of six (6) consecutive days.

G. Entertainment

HACSB will not pay for the rental of premium channel movies, use of health club facilities or other forms of entertainment.

H. Meals

Meals will be reimbursed based on the actual cost up the GSA per diem rates. Receipts are required for all meals. In order to be reimbursed, meal receipts (itemized if possible) in the form of receipts, credit card receipts, or cash register tape must be submitted. HACSB will not pay for alcoholic beverages.

In lieu of itemizing meal expenses and submitting receipts, the Contractor’s employees may claim the current standard GSA per diem for the duration of the travel.

I. Telephone Usage

The Contractor’s employees shall submit documentation regarding all telephone calls charged to HACSB. Documentation must include the name of the party being called and the purpose of the call. HACSB shall allow one business call upon arrival and one call prior to departure. HACSB will not pay for additional business calls unless directly related to the Contract. Personal telephone calls are not reimbursable unless the Contractor’s employee is on travel for HACSB for more than three consecutive days. In this case, the cost of a call shall not exceed $5.00 and one call is permitted every other day.

J. Parking and Ground Transportation

Pubic transportation should be used whenever possible; however, if necessary, rental car expenses including gas will be reimbursed for authorized travel only. Cab fare (on a shared basis whenever possible) is reimbursable. Receipts shall be required to document all parking charges as well as other ground transportation charges.
The Contractor’s employees shall rent the lowest automobile classification appropriate for the size or purpose of the group using the vehicle.

- 1-2 Travelers: Compact
- 3 Travelers: Medium/Intermediate
- 4-5 Travelers: Full Size/Standard Equipment
- 6+ Travelers: Van

The Contractor’s employees must fuel rental automobiles prior to turn-in.

K. General Parking

The Contractor’s employees should take advantage of “Early Bird Parking” whenever possible. Parking expense incurred while conducting HACSB business is reimbursable.

L. Tolls and Fees

Transportation related toll charges incurred while on HACSB business is reimbursable.

M. Baggage Handling

Baggage handling service fees within or outside the Los Angeles/Ontario region are reimbursable at standard reasonable rates.

N. Other Business Expenses

Supplies, equipment rental reprographics, and facsimile related expenses may be reimbursed when traveling on HACSB business. Such expenses shall be billed at cost.

O. Non-Allowable Expenses

HACSB will not provide any reimbursement for personal entertainment expenses, alcoholic beverages, travel expenses for family members, use of health club facilities, movies in hotels, personal items, charitable contributions, etc.

P. Other Source of Information

Information not addressed herein regarding the allowability of cost reimbursement expenses is contained in the Federal Acquisition Regulations.
EXHIBIT B
Contact Information Form
To: Marsha Zeller, Procurement and Contracts Dept.
   (900) 890-0644 Ext 2176, (909) 890-2349 Fax, e-mail
   mzeller@hacsb.com
This fax is to acknowledge that we are in receipt of your RFP #PC602 Energy Consultant
and have noted our intention to bid.

Vendor Name: _______________________________________________

Address: _____________________________________________________

Contact/Title: _________________________________________________

Phone: ______________________________________________________

Fax: ________________________________________________________

Email: ______________________________________________________

I PLAN TO SUBMIT A BID.
☐ Yes, I will be submitting a bid.
☐ Maybe, I need to research and get more information (contact HACSB-information listed above)

NO BID. Indicate any of the following. We:
☐ Do NOT desire to be retained on the vendor list.
☐ Desire to be retained on the vendor list, but decline to bid based on the following:
  ☐ Cannot comply with specifications/scope of work, Explain: ________________________________
  __________________________________________________________________________
  ____________________________________________
  ☐ Cannot meet delivery requirements, Explain: ________________________________
  __________________________________________________________________________
  ____________________________________________
  ☐ Do not regularly provide this type of product/service
  ☐ Other, Explain: __________________________________________________________________
  ☐ Please update my information as listed above.

HOW YOU FOUND OUT ABOUT THE BID. Indicate any of the following. We:
☐ Checked the agency website
☐ Received notice by fax or e-mail
☐ Newspaper Ad, please list paper: ________________________________
☐ Trade Publication, please list: ________________________________
☐ Plan Room, please list: ________________________________
☐ Other, Explain: __________________________________________________________________
EXHIBIT C
PROPOSAL FORM

Proposal: Energy Consultant Services PC602

Vendor Name: ___________________________________________________

To: The Housing Authority of the County of San Bernardino
715 E. Brier Drive
San Bernardino, CA 92408

1. The undersigned, having familiarized themselves with the local conditions affecting the cost of the work, and with the Specifications, if any thereto, hereby proposes to furnish all labor, materials, equipment and services required to provide such service(s) described in the scope of work in accordance therewith, for the sum of:

<table>
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<tr>
<th>Total cost to provide Comprehensive Energy Consultant Services as specified in scope of work Exhibit A of this proposal.</th>
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<td>Grand Total</td>
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<td>Estimated # of hours to complete tasks.</td>
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<td>Additional hours at (hourly rate)</td>
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2. In submitting this proposal it is understood that the right is reserved by the Housing Authority of the County of San Bernardino to reject any and all proposals. If written notice of the acceptance of this proposal is mailed, telegraphed, faxed, or delivered to the undersigned within thirty (30) days after the opening thereof, or at any time thereafter before this proposal is withdrawn, the undersigned agrees to a contract/agreement in the prescribed form and furnish any required insurance requirements within ten (10) days after the contract is presented to him for signature.

NOTE: The penalty for making false statements in offers is prescribed in 18 U.S.C. 1001.

Date ____________________, 20____

(Company Name)

(Official Address) (By)

(Title)
**CURRENT CLIENT REFERENCES (REQUIRED)**

Submit this form with the BID, failure to do so is grounds for disqualification.

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<th>Phone Number &amp; Fax Numbers</th>
<th>Federal Employer Identification</th>
<th>Title of Person Authorized to Sign</th>
<th>Print Name of Person Authorized to</th>
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## PROPOSAL PRICING FORM

### DETAILED DESCRIPTION OF COST ELEMENTS

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<th>1. LABOR (specify function/title)</th>
<th>ESTIMATED HOURS</th>
<th>RATE PER HOUR</th>
<th>ESTIMATED COST</th>
<th>TOTAL ESTIMATED COST</th>
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### TOTAL DIRECT LABOR

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<th>2. LABOR OVERHEAD</th>
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<th>OVERHEAD RATE</th>
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<th>ESTIMATED COST</th>
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### TOTAL LABOR OVERHEAD

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### TRAVEL

| a. Transportation | ESTIMATED COST | $ |
| b. Per Diem or Subsistence | $ |

### TOTAL TRAVEL COST:

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### SUBCONSULTANTS (Itemize on Page 2)

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### OTHER DIRECT COSTS (Itemize on Page 2)

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### TOTAL DIRECT COST AND OVERHEAD

(Inclusive of Labor, Labor Overhead, and Travel)

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### GENERAL AND ADMIN. EXPENSE

Based upon: Labor Only, Labor & Overhead, Labor, Overhead, & Travel

| __% x __________________________ |
| $ |

### FEE (Attach Justification)

| $ |

### TOTAL ESTIMATED COST AND FEE:

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## SUPPORTING SCHEDULE

### 4. SUBCONSULTANTS

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<th>Item No.</th>
<th>Item Description</th>
<th>Estimated Cost</th>
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**TOTAL SUBCONSULTANTS:** $ 

### 5. Other Direct Costs

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<th>Item Description</th>
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**TOTAL OTHER DIRECT COSTS:** $ 

Consultant certifies that estimated costs were prepared in accordance with the Generally Accepted Accounting Principles (GAAP) of the United States and in accordance with the Federal cost principles.

**Consultant Name:** __________________________ __________________________

**Date Prepared:** __________________________

**Signature** __________________________ **Date** __________________________

**Printed Name** __________________________ **Printed Title** __________________________