



Request for Proposals  
Energy Efficiency Audits for Santa Cruz County Government  
Buildings

**ISSUE DATE: June 29, 2010**

**DUE DATE: July 29, 2010 3:00 p.m. MST**

## **SECTION I: GENERAL INFORMATION**

### **A. BACKGROUND**

Santa Cruz County received a grant from the Arizona Department of Commerce Energy Office in conjunction with the American Reinvestment and Recovery Act (ARRA) Energy Efficiency and Conservation Block Grant (EECBG) program to assess and implement energy efficiency measures at local government facilities.

### **B. PURPOSE OF REQUEST FOR PROPOSALS**

Santa Cruz County issues this Request for Proposals (RFP) to select a Certified Energy Manager to provide comprehensive energy system audits, equivalent to ASHRAE standard Level II, at five government buildings in Santa Cruz County, Arizona. The comprehensive audit will assess the building envelope, heating systems, mechanical cooling systems, hot water systems, lighting, plug loads, and energy management systems. Specific audit deliverables and facilities information is provided in Section III: Scope of Work.

Generally, the audit report will:

- analyze the existing energy systems serving the facilities in terms of efficiency, functionality and condition;
- identify energy conservation measures to maximize energy cost savings;
- identify energy-saving operations and maintenance;
- assess the economic and technical feasibility of the energy conservation measures and the suggested operations and maintenance;
- detail the product specifications for the suggested energy conservation measures and instructions for the suggested operations and maintenance;
- project the estimated savings and payback associated with implementing each measure, including a discussion of the interaction effects associated with the selection and timing of particular measures that may have interaction effects.

### **C. RESPONSES TO REQUEST FOR PROPOSALS**

The procedure for submittal of questions is provided in Section II: General Terms & Conditions. Proposals are due Thursday, July 29, 2010. Information about the required proposal content is provided in Section IV: Required Proposal Content.

## **SECTION II: GENERAL TERMS AND CONDITIONS**

### **A. ISSUING OFFICE**

This RFP is issued by the Santa Cruz County Department of Community Development (SCCD CD).

### **B. CANCELLATION AND MODIFICATION**

The Issuing Office reserves the right to cancel or modify this RFP as needed. Modifications to the RFP will be posted on the SCCD CD website, <http://www.co.santa-cruz.az.us>, on the Community Development page and attempts will be made to notify all interested parties of the modifications.

### **C. INQUIRIES**

Inquiries concerning this RFP, selection of the successful proposer, and administration of the contract must be directed to the Project Manager:

Mary Dahl, Director  
Santa Cruz County Department of Community Development  
E-mail: [mdahl@co.santa-cruz.az.us](mailto:mdahl@co.santa-cruz.az.us)  
Phone: 520-375-7930

Verbal communication from the Project Manager is not binding and shall not alter a specification, term or condition of this RFP. Responses to inquiries will be made in writing. Inquiries or requests for information shall not be made to other staff. Any attempt on the part of any consultant or any of its employees, agents or representatives to contact anyone other than the party listed above regarding this RFP, will lead to disqualification. Respondents are strongly encouraged to identify concerns, issues, or questions that should be considered by the Issuing Office.

### **D. DUE DATE**

Proposals are due Thursday, July 29, 2010 by 3:00 p.m. local time. Proposals may be submitted by e-mail, mail, or hand delivery. Information pertaining to each submittal option is listed below.

E-mail Submission: [mdahl@co.santa-cruz.az.us](mailto:mdahl@co.santa-cruz.az.us)

Mail and Hand Delivery Submission:  
(2 hard copies required)  
Santa Cruz County Department of Community Development  
Attn: Mary Dahl  
2150 North Congress Drive, Suite 117  
Nogales, AZ 85621

## **E. Proposers' COST**

The cost of developing a proposal is each proposer's responsibility.

## **SECTION III: SCOPE OF WORK**

### **A. BUILDINGS**

The selected CEM will conduct an energy audit for five Santa Cruz County Government Buildings in Nogales, Tubac and Sonoita, Arizona.

### **B. LOCATIONS & DESCRIPTIONS**

1. County Complex – 60,000 square feet

2150 North Congress Drive  
Nogales, Arizona 85621

This is 20+year old multi-level public building that houses administrative and judicial functions.

2. WIA Building – 5,000 square feet

610 North Morley  
Nogales, AZ 85621

This is a single level public building that houses various workforce training and jobs programs.

3. 1904 Courthouse – 11,000 square feet

21 East Court Street  
Nogales, AZ 85621

This is a 106-year old multi-level historic building that houses post-secondary education programs.

4. North County Facility – 12,400 square feet

50 Bridge Road  
Tubac, AZ 85646

This is a single-level 45-year old building originally built as a public school that now houses various community-based programs such as a library, senior meals, the historical society and the chamber of commerce.

5. Sonoita Court – 7,500 square feet

3147 Highway 83  
Sonoita, AZ 85637

This is a single-story building, originally a gasoline fuel station built in the 1950s, is used primarily for justice of the peace court and administrative support offices.

### **C. DELIVERABLES**

The energy audit Scope of Work is equivalent to the ASHRAE standard of a Level II commercial audit with a complete written technical analysis. Short presentation of audit findings to county officials is also required. Proposers are encouraged to suggest other deliverables not mentioned in the Scope of Work and the justification for these items that may best suit the needs of the County government and their facilities' staff.

Each energy audit analysis will include three basic elements:

- A survey of all (i.e. no/low cost to high cost) energy conservation measures (ECM) and operation and maintenance (O&M) procedures that will create energy savings;
- A financial analysis of implementation costs, operation costs, and projected energy savings (in simple payback) associated with each ECM and O&M identified;
- Specifications for recommended ECM and O&M.

Examples of ECMs and O&Ms include: insulation and weather stripping; replacement insulation for pipes, tanks, roof, ceiling; window replacement, reduction/expansion or storms; replacement of boilers and water heaters (solar water heaters and geothermal heat pumps are allowable recommendations); HVAC system conversions or modifications; lighting efficiency conversions (solar applications are allowable recommendations) and automated controls; replacement of steam traps; refurbishing dampers and controls; energy management systems; smart meters and grid tie-in.

The information below provides more detailed deliverables associated with each element of the energy audit analysis. The written analysis should be organized and easy to understand. It is anticipated that the CEM will spend significantly more time preparing the written analysis than they will spend on-site conducting the physical energy system audit.

#### **1. Survey of Potential Energy Modifications**

The CEM will have access to all utility and building data. In addition, the CEM will be able to gather additional information as needed through walk-throughs and/or interviews with personnel. Thermal and other modeling should be used to identify energy loss. Then, a list of energy conservation measures (ECMs) and operation and maintenance (O&M), including no/low cost measures, should be prepared. ECMs and O&Ms recommendations should include the following information:

- i. The current condition of the system or the current O&M procedures.
- ii. The proposed ECM/O&M including quantity, type and location of all building components involved.
- iii. The post-installation condition of the system, including estimated life of the ECM, and/or describe the outcome for the proposed O&M.
- iv. Lists of other proposed O&Ms or ECMs that may interact with this ECM/O&M and what the estimated interaction effect is in BTUs.
- v. The estimated annual energy savings in site BTUs for this ECM/O&M.

## 2. Financial Model

For each proposed ECM and O&M, the CEM will be asked to prepare an analysis that answers the following questions:

- i. What is the estimated change in annual operating or maintenance cost?
- ii. What is the estimated annual energy savings in dollars?
- iii. What is the estimated cost for this ECM/O&M, including subtotaled costs for (if needed) acquisition, installation, design, disposal of replaced parts/equipment or salvage value, contracted maintenance, and other relevant costs?
- iv. What is the simple payback for this ECM/O&M?

The CEM should create an appendix which lists the assumptions, formulas, schedules, calculations, etc., for each proposed ECM/O&M.

## 3. Specifications

The CEM will be asked to provide specifications for the proposed ECM equipment, product or service with enough detail to enable County personnel to develop calls for bids. The CEM will also be asked to provide sufficient specifications and instruction for County personnel to implement the proposed O&M or to develop calls for bids.

## **D. PROJECT MANAGEMENT DELIVERABLES**

The CEM will be responsible for providing the Project Manager with frequent progress reports, rough drafts of energy assessments, and schedules of activities, including a timeline for submitting drafts to the Project Manager. In addition, the CEM is expected to contact the Project Manager immediately if any problems are encountered.

The Project Manager will assist in scheduling presentation of audit results to County officials.

## **E. OWNERSHIP OF MATERIALS**

Written energy audit analyses and supporting technical documentation developed in regards to the Scope of Work shall become the property of Santa Cruz County.

## **SECTION IV: REQUIRED PROPOSAL CONTENT**

### **A. TECHNICAL PROPOSAL**

#### 1. Business Organization

State the full name and address of your organization's headquarters and, if applicable, the name and address of the branch office or subordinate element that will perform or assist in performing the work. If two or more firms are partnering, please list this information for all firms, but include the name and affiliation of the designated project manager.

#### 2. Key Personnel Qualifications and Prior Experience

Include as a part of your proposal a brief statement concerning the persons from your firm who will be actively engaged in the proposed effort, their recent experience, and relevant certifications. Do not include corporate experience unless persons who will work on this project participated in that experience. Include references and samples of work with similar scope and budget to the energy audit analysis proposed in this RFP.

#### 3. Technique and Methodology

The proposer shall provide a description of the tasks and techniques that will be used to complete the energy audits and written technical analyses. Make note of any suggested deviations from the Scope of Work and Deliverables and the tasks needed and techniques employed to implement those suggestions. Make note of techniques or special skills used to communicate effectively with administrators and maintenance personnel during the audit process and when presenting findings and recommendations. Provide samples of work or examples of communications tools, if applicable.

#### 4. Time Frame

Provide an explanation or schedule of how the study will be completed and the time frame for completion.

#### 5. Authorized Negotiators

Identify and include the names and telephone numbers of the organization's personnel authorized to negotiate the proposed contract. In the event that this proposal, and the subsequent negotiations, leads to a contract you will be asked to provide a written verification that the person signing the contract is authorized to do so.

## **SECTION V: EVALUATION CRITERIA**

The proposers' technical proposals will be evaluated using the selection criteria below. The criteria and the percentage of their importance in making the selection are:

**Method of approach: 50 Percent**

This refers to the technical soundness of the proposer's stated approach to the project, the comprehensiveness of the proposed approach, and the techniques to be used. The proposal should describe the approach and techniques to be used to achieve each Deliverable and item in the Scope of Work.

**Capability and qualifications: 40 Percent**

The proposer's ability will be evaluated under the terms of the RFP, relative to having a staff with the qualifications needed to successfully complete the project. Qualifications of professional personnel assigned to the project will be measured by experience with particular reference to experience on projects similar to that described in the Scope of Work. The proposer's professional and project staff that work on the project must be the same staff that is identified in the proposal.

**Schedule: 10 Percent**

Proposers will be evaluated on their ability to set and follow a schedule that will successfully complete the project within the required time frame.