

## Part I. Request for Proposal (RFP) Template for Electric School Bus Fleet Leasing and Financing Services

The template below is designed to facilitate the competitive solicitation of fleet management and leasing services from a qualified third-party service provider. School Districts are encouraged to provide as much of the outlined information as possible to ensure qualified responses.

### A. Overview

[District name] (“District”) is issuing this RFP pursuant to California Government Code section 4217.10 et seq. The District is seeking qualified firms to provide electric bus chargers, [electric buses and as applicable Energy Supply (Solar Photovoltaic (“PV”) and battery energy storage system (“BESS”))] as well as Charge Management Services (“CMS”) via one or more third party agreements to support the charging operations of the District’s electric bus fleet.

The response to the Request for Proposals (RFP) must be received by \_\_\_\_\_, at \_\_\_\_\_.  
Attention: \_\_\_\_\_

### B. District Background

[Provide a brief introduction of your District, including number of students and communities served, and general background on the District. Use template below as a model]

[District name] serves [number of students] students in grades XX – XX. The District serves the communities of [list towns]. The District budget is \_\_\_\_\_. For more information, visit [District website]

### C. Scope of Work

The objective of this Request for Proposal (RFP) is to establish a relationship with a vendor to service and support the full lifecycle management of school transportation assets in the District’s operation as a turnkey third party solution. The District recognizes that the efficient and effective use of resources necessitates a holistic assessment of all aspects of the specification, acquisition, and disposal management of its school transportation vehicles. To achieve this objective, it is seeking to create a partnership with one company to provide for all aspects of school bus fleet electrification and management. The District is encouraging innovative approaches to address the needs identified in this Request for Proposal, but the intention is to award a single vendor who will be responsible for coordinating all the identified services.

The District expects that the selected firm will work with the District to achieve the objectives identified below:

Create a comprehensive plan, possibly in multiple phases, for the District to procure and deploy electric school buses to transition the District’s [\_\_\_\_\_] buses to an all-electric bus fleet.

Establish a parallel plan for the design, installation, and implementation of charging and related interconnection infrastructure for [the initial phase of] transitioning to an all-electric bus fleet.

Design bus yard layout to accommodate and optimize EV charging infrastructure capacity and requirements, with the option to place solar PV generation and/or battery energy storage assets in designated locations.

Work with District on suggested redesign of bus routes and schedules to optimize the performance and economic operation of the new electric fleet.

Evidence of long-term cost savings through transition to electricity as a primary fuel for school buses, optimization of bus charging times and capacities to capture energy savings or credits, reduction of maintenance costs, and optional implementation of vehicle to grid and other energy-related revenue- or savings-generation capabilities.

Maintain building functionality during construction and assure compatibility with existing equipment.

Provide options for smart charging from on-site renewable energy sources.

Provide an Internet accessible charge and fleet management dashboard or application.

Design and implement capital improvements to maximize incentives and lower the total cost of fleet electrification.

Provide summary specifications and schedule for the project, including quantity and type of electric buses and the deployment date for each bus, the quantity and type of charging stations, and the deployment date for each, the expected interconnection modality (behind-the-meter of the District, new interconnection with District as customer, new interconnection with service provider as customer, three-phase, other); and the quantity and type of material interconnection facilities.

#### D. Schedule

The following outlines the schedule of the procurement process.

Date	Time	Event
Insert here	Insert Here	RFP Issued
Insert here	Insert Here	Pre-Proposal Conference
Insert here	Insert Here	Written Questions Due
Insert here	Insert Here	Response to Written Questions and Final Addenda
Insert here	Insert Here	RFP Responses Due
Insert here	Insert Here	Interviews
Insert here	Insert Here	Intent to Award
Insert here	Insert Here	Contract Start

**Pre-Proposal Conference:** A preproposal conference will be conducted at the date and time shown in the table above. Attendees shall meet at \_\_\_\_\_ [insert weblink or address]\_\_\_\_\_. The purpose of the conference will be to review proposal requirements and site conditions, as well as provide a high-level overview of the project components.

#### E. Required Information and Format

It is the District's intention to select one firm that best meets the requirements as set forth in this RFP. The District will make its determination based not only on price considerations, but also on the bidder's experience and merit as demonstrated by their ability to successfully meet the requirements of this RFP.

## **F. Minimum Requirements**

The following criteria may be applied to determine whether Proposers meet District qualifications. Failure to meet any one of the below criteria may lead to a proposal's disqualification.

- Ability to finance the project
- Ability to provide project security in the form of a construction performance bond or similar at fraction or all of project cost (e.g., \$5,000,000)
- No pending or recent litigation with the district

## **G. Application Format**

**Cover Letter:** The respondent will provide a cover letter. The cover letter must include the title of the RFP, full business name of the bidding firm, and contact information including email address and telephone number of the firm's lead contact. In the case of a team application, clearly indicate the lead firm within the team.

**Company Information, References, and Experience:** Provide general information about the Firm and identify the type of firm, legal name, number of years' experience, number of employees, names of owners, primary business, and date of establishment. Include the following items in this section:

- General firm information (State Business License Number, Tax Identification Number, type of firm, office locations)
- Proposed subcontractors, certifications/licensing, litigation disclosure, relevant completed work experience
- Evidence of corporate stability
  - Letter detailing the firm's line of credit
  - Letter from an insurance company stating maximum coverage
  - Current report from a commercial credit agency

**Proposed Project Team:** The selected firm shall employ all necessary personnel with the prerequisite skills for performing the functions described herein. Please provide the information requested below to a high degree of specificity:

- Identify key personnel and provide a clear description of each member's project responsibilities

- Provide general biographical information and relevant qualifications (including titles, licenses, certifications, and experience) for project team members

**G. Operations and Maintenance:** The winning firm will be solely responsible for overseeing project operations and maintenance, or alternatively subcontract these responsibilities to another firm, to be identified in their bid. Prospective firms will identify the ongoing operations and maintenance activities to be performed, including:

- Monitoring the productivity and efficiency of the project system
- Implementing a method for identifying system failures
- Providing system inspections as needed to ensure quality control

**H. Qualifications and Past Projects:** Present your firm's qualifications for completing the tasks outlined in the Scope of Work, along with any relevant completed projects.

- List the company qualifications
- Describe the company approach to Electric Vehicle fleet planning and related charging infrastructure, any relevant solar and energy storage deployment; include a step-by-step approach to the design, installation, construction, commissioning, and operation and management phases of the project
- Describe company experience with Design/Build projects
- Describe experience with construction cost control measures

#### **I. Approach, Proposed Scope of Work, and Timeline**

- Provide your firm's proposed project approach, activities to fulfill the Scope of Work and the schedule, including system design and installation, procurement of materials, and necessary permits and approvals
- Describe regulatory approach with consideration to GC 4217, demonstrating your firm's path to energy savings, and relevant California building and electric codes
- Describe the firm's experience with Electric School Bus and EV charging financing capabilities
- Describe the expected emission reductions and methodology for calculating reductions

#### **J. Cost and Contract Structure**

- Clearly identify total project cost and proposed contract amount
- Sources of funding
- Describe expected incentives and process and timeline to secure available incentives
- For Respondents looking to finance the project through a long-term contract (skip if not applicable)

- 10 and 15 year firm fixed annual pricing options
- A copy of a draft contract

#### **K. Charge Management**

- Describe the siting of the fleet charging system.
- Indicate charger types and quantity (Level 2, DC Fast Charge, etc.), charging rates, and V2G capabilities (if any)
- Describe the Smart Charging Management approach and SCM system specified (if any)
- Identify the location and ownership of any stored data, and related information exchange and real-time monitoring capabilities
- Identify charging system resiliency features and ability to respond to component failures

#### **L. Insurance and Performance Guarantees**

- Respondent will outline a performance guarantee for the ongoing operation, fueling, and maintenance of the identified equipment and vehicles provided. The Performance Guarantee shall be offered for duration of contract.
- If the response involves a Power Purchase Agreement PPA for onsite deployment of new solar and or storage, the firm will be obliged to compensate the District for any utility electricity costs that would have been avoided had the installed PV system maintained 95% performance levels.
- Provide the following information related to performance guarantees:
- Describe the manner and frequency of performance measurement, verification, and reporting
- Provide a statement of expected EV range and battery degradation rate and any related guarantees
- If applicable, provide a statement of guaranteed annual output for Solar PV system and related PV degradation rate
- Provide evidence that the responded maintain, from a company with at least a financial rating of **A-** as determined in the most up to date edition of Best's Insurance Reports, such insurance as to protect [District] from claims which may arise from the Respondents operations. If awarded, the Respondent shall offer either a Comprehensive General Liability Insurance or a Commercial General Liability and Property Damage Insurance plan, including any relevant Special Hazards Insurance plan specific to the project. The Plan Certificate Holder shall be [District]. Please outline your firm's general plan for insurance, how it will be implemented, and in what amounts.

#### **M. Safety Plan**

- Provide the Firm's Experience Modification Rating (EMR - used to price worker's compensation insurance premiums)
- Describe the Firm's safety program and what safety plan it will follow

## N. Background Information on Current Fleet Operations

[The District should provide the following information to support effective responses from qualified bidders]

Project lead contact information	
Total Fleet Size and Composition	
Number of fleet depots and addresses, and depot ownership	
Average life of vehicles	
Current fleet vehicle replacement rate	
Current ownership structure of the fleet (leased vs. owned, financing structure, etc.)	
Historic repair and maintenance costs	
Fleet Operating Cost breakdown (fuel, maintenance, replacement)	
Labor rates for maintenance (if available)	
Number of drivers	
Number of maintenance technicians	
Fleet Management Software (existing and desired)	
Desired timing of delivered services	
Desired Lease Terms? In years. (10 year normal)	
Existing electrification efforts, including description of existing charging infrastructure and vehicles in operation	
Timeline for bidding process and selection	
Route details and usage (number and length of routes, any major grades encountered)	
Insurance approach for existing fleet	
Desire for driver training (Y/N)	
Overview of any existing or planned solar and/or battery assets and their ownership structure.	
Resiliency planning	
Vehicle specification preferences	
Type and Size	
Range	
Vehicle-to-Grid (V2G) enabled bus (Y/N)	
Vehicle-to-Building connectivity desired? (Y/N)	
Charging Stations needed (including charger type and charging rate if known, bi-directional capabilities Y/N, single or dual port chargers, charging management software integration if any)	
Utility and tariff description	
Description of current electric service capacity on site	

## Part II. Proposal Evaluation

### Scoring Criteria

Responses will be evaluated by the District and graded according to the criteria weighting below, which will judge the most salient elements of the bidder's proposal. These elements include price, financial responsibility, responsiveness to the specifications delineated in the RFP, sensitivity to time, strength of warranties, and the bidder's experience with EV technology.

RFP Selection Criteria	Evaluation Weight
Cover Letter	0
Company Information, References, and Experience	0 to 15
Proposed Project Team	0 to 10
Operations and Maintenance	0 to 5
Project Approach Relevant Qualifications	0 to 20
PPA Cost Proposal and Contract	0 to 30
PV Supply and Project Implementation Schedule	0 to 5
Charging Management System	0 to 10
Safety Plan	0 to 5
Past Performance Record	-8 to 0
Total	100

### Selection Process and Next Steps

All proposals will be evaluated by a District Evaluation Committee, which may ask for clarification on any Proposal item at its own discretion. The District may place respondents on a shortlist, as determined by the evaluation criteria. Shortlisted respondents may be asked for an interview, at which key personnel from the planning, construction, and maintenance phases of the project will be expected to attend.