

University of California, Office of the President
Request for Qualifications
Energy Tax Deduction Coordinator
October 31, 2024

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**University of California, Office of the President
Request for Qualifications
Energy Efficiency Tax Deduction Coordinator
October 31, 2024**

Overview

The University of California Office of the President (UCOP), is soliciting qualifications for an Energy Efficiency Tax Deduction Coordinator to provide services for the University of California at various UC locations. The selected consultant shall coordinate, schedule and process with the IRS eligible construction projects built and/or to be built and/or systems that qualify for the IRS 179D Tax Deduction. The selected consultant may also manage the required 3rd party certification process to enable UCOP or any campus to recover some portion of the costs relating to the design and construction of the energy saving commercial structure or system for use on future projects.

Scope of Work

The selected Firm must provide all services and labor necessary to identify, coordinate, schedule, and process with the IRS, eligible construction projects built and/or to be built and/or systems that qualify for the IRS 179D Tax Deductions at various UC Locations. The selected Firm shall facilitate the allocation of the 179D Deduction, shall manage the required 3rd Party Certification process, and shall enable the University of California to recover some portion of the costs relating to the design and construction of the Energy Saving Commercial Structure or System. This Project will involve some or all the UC Locations mentioned below. These services are expected to include, but are not limited to:

1. Working with the UC Location Representative and University IRA consultant to identify, coordinate, schedule, and process with the IRS, eligible construction projects built and/or to be built and/or systems that qualify for the IRS 179D Tax Deductions at various UC Locations.
2. Provide Technical and Administrative Services related to the IRS 179D Tax Deductions.
3. Manage any required 3rd party certifications as part of 179D applications.
4. Negotiate, as directed by the University of California Office of the President (or the specific campus, as applicable), agreements with the project Designer(s) to maximize payment to the University in return for the assignment of the tax deduction to the Designer.
5. Provide annual training for UC campus staff on 179D requirements.
6. Provide advice and consultation to UCOP for contract language and terms that follow current and future 179D and Inflation Reduction Act (IRA) requirements.
7. Propose a Tax Benefit Agreement for Cost Sharing with the Designer and Third-Party Verifier.
8. Provide Monthly Reporting on all work done for the various UC locations.

Scope Phases

Part 1- Kick-off and Training

The selected Firm should anticipate two (2) kick-off and planning meetings with UCOP project staff. The first meeting will be in person at UCOP if feasible. Any subsequent meetings will be via web-conference. UCOP project staff will provide the selected Firm with all completed projects for the last three (3) years as well as current and future major projects and will introduce the selected Firm to affiliated campus staff with whom to gather further information.

The selected Firm will provide two (2) 1-hour trainings to various campus staff on 179D requirements. These trainings will be recorded.

Part 2 - Feasibility Analysis

Upon completion of part 1, the selected firm will:

1. Determine which completed and current projects are most viable for 179D application.
2. Prepare a preliminary project information request for campus staff to complete for each recently completed, current, and future projects.

Part 3 - Pursuing Incentive

1. Upon receipt of any project information request from the Client, provide Client with a detailed memo describing Client's eligibility for the Incentive, the computation of the credit, and applicable compliance requirements.
2. Work with campus staff to identify eligible projects for the 179D credit.
3. Prepare 179D agreement for project for signature by the eligible designer, consultant, UCOP, and campus.
4. Assist campus client with questions regarding requirements, compliance, certifications, and documentation so the campus can file for 179D credit.
5. Projects pursuing both 179D and IRA, will be referred to another consultant.

Part 4 – Reporting

1. Provide monthly status reports to UCOP on projects with pending and executed agreements.
2. The report should highlight any agreements that have been pending for more than two (2) months and reasons for that.
3. For projects with executed agreements, note which projects have:
 - a. Anticipated schedule for reimbursement.
 - b. Which projects have collected their reimbursement.

Agreement Term

The term of the Agreement shall commence upon execution of the Agreement and will be for a period of two (2) years (the “Initial Term”) with three (3) optional two (2) year extensions (the “Renewal Terms”), at the sole discretion of the UC, for a total of eight (8) years. Category discounts shall remain firm for the Initial Term and all Renewal Terms of any Agreement which may be awarded pursuant to this RFQ. All pricing must be verifiable and auditable from the date of the contract award.

University Background

The University of California locations below may partake in the services covered under this solicitation:

- Ten campuses and their adjacent areas – [UC Berkeley](#), [UC Davis](#), [UC Irvine](#), [UC Los Angeles](#), [UC Merced](#), [UC Riverside](#), [UC San Diego](#), [UC San Francisco](#), [UC Santa Barbara](#), [UC Santa Cruz](#), UC Agriculture and Natural Resources (ANR), and Lawrence Berkeley National Laboratory
- Six Medical Centers and their primary, campus, and remote locations – [UC Davis Medical Center \(UCDMC\)](#), [UC Irvine Medical Center \(UCIMC\)](#), [UC Los Angeles Medical Center \(UCLAMC\)](#), [UC Riverside Medical Center \(UCRMC\)](#), [UC San Diego Medical Center \(UCSDMC\)](#) and [UC San Francisco Medical Center \(UCSFMC\)](#).
- [The Office of the President](#) located primarily in Oakland and Berkeley, California, with other locations throughout the State of California and in Washington, D.C.

Project Budget

- Part 1 will be billed on a Time and Material basis.
- Part 2 will be billed on Fixed Not to Exceed basis.
- Part 3 will be billed on a Fixed Not to Exceed basis to the campus project to which the selected Firm is assigned.
- Part 4 will be billed on a Fixed Not to Exceed basis.

Registration List & Access

Please register your primary contact information (i.e., name, company, and email address) with UCOP (via email to Leslie Palaroan, leslie.palaroan@ucop.edu) by Thursday, November 7, 2024, 5 p.m. Pacific Time to express interest in submitting a qualifications statement and be added to the Registration List. Only submitted qualifications statements from those on the Registration List will be considered.

All documentation, including a copy of this RFQ and RFI responses, are and will be made available to registered vendors through the: *UC 179D repository*.

Schedule & Deliverables

Send all requests for information (RFI) and qualifications by email by the dates below to Leslie Palaroan (leslie.palaroan@ucop.edu).

Description	Schedule
a. Release RFQ with UC Terms & Conditions	Mon. 10/28/2024 (5 p.m. Pacific Time)
b. Interested parties register primary contact information (i.e., name, company and email address) with UCOP (via email to Leslie Palaroan, leslie.palaroan@ucop.edu) to be added to the Registration List. Only submitted qualifications statements from those on the Registration List will be considered.	Thurs. 11/7/2024 (5 p.m. Pacific Time)
c. Requests for Information/Clarification due from vendors (earlier submittals encouraged)	Mon. 11/18/2024 (5 p.m. Pacific Time)
d. RFI responses provided by UCOP to vendors	Mon. 11/25/2024 (5 p.m. Pacific Time)
e. Qualifications due	Mon. 12/9/2024 (5 p.m. Pacific Time)
f. Notify Finalists of Interviews (if necessary)	Wed. 12/11/2024 (5 p.m. Pacific Time)
g. Interview Finalists (if necessary)	Week of 12/16/2024
h. Award Date	Fri. 12/20/2024 (5 p.m. Pacific Time)

Request for Qualifications Contents

Executive Summary & Approach

In no more than two (2) pages, please describe your approach for completing the scope of work, why your team is the best qualified to provide the required services, and any unique capabilities your team offers.

Specifically address:

1. How would you incentivize project designers to participate in 179D rebate programs?
2. What your suggested percentage split of the 179D rebate should be between UC and the designer in return for the Assignment of the Tax Deduction to the Designer?

Qualifications & Experience

In no more than four pages, please describe and provide examples of your team's relevant accomplishments, qualifications, and experience as they relate to 179D consulting. Experience should only be included for members of the team proposed to work on this project. Provide information covering the last three (3) years including:

1. Prior work providing 179D consulting services and filing 179D rebates with the IRS, with an emphasis on any prior government consulting experience.
2. Experience with energy modeling and 3rd party certification.
3. Understanding of prevailing wage and apprenticeship requirements in the State of California.
4. Any work for or with the University of California within the past five years.

5. Any disputes, claims or litigation arose from such work.

In no more than 4 pages, describe how your Firm has successfully executed at least five (5) tax, rebate, or grant incentive programs within the last ten (10) years which were buildings constructed in the United States of America. Provide a list of Projects which includes all the following elements:

1. A Deduction confirmed by the IRS 179D of at least \$40,000 per Project;
2. At least two (2) Buildings submitted for the IRS 179D Deduction Projects must be characterized as: New Construction with IRS 179D Savings Value or at least \$40,000 per Project;
3. At least two (2) Buildings submitted for the IRS 179F Deduction Projects must be characterized as: Renovation and/or System Upgrade not submitted under one IRS 179F Application with IRS 179F Deduction Savings Value or at least \$20,000 per Project.

Project Team Organization & Resumes

Please describe your project team with brief resumes for each team member, role and responsibility, and a team organization description or chart.

Potential Conflict of Interest Information

Please describe any potential conflict(s) of interest that may arise under this contract per Article 18 - Conflict of Interest of Exhibit 1 - Terms and Conditions.

Cost

Provide an hourly rate chart for all proposed staff on the project.

General Requirements

Invoices

Invoices must include the number of hours for each Consultant team member, report the percent completion of phases/tasks to allow for monitoring progress of scope and budget, and be submitted by the tenth day of each month.

Substitutions

In the event that any of the Consultant team members proposed are unable to perform, the Consultant must submit, within five working days to the Project Lead, a detailed written request explaining the circumstances necessitating the proposed substitutions and a resume for the proposed substitute. Substitutions that require an increase in the staffing to perform or accomplish the scope of work will be at the expense of the Consultant. Per the California Subletting and Subcontracting Fair Practices Act, any substitutions must be confirmed as acceptable by UC.

Terms & Conditions

The attached Attachment 1, University of California Professional Services Agreement Terms and Conditions, is the governing document with regard to this scope of work. Please review Attachment 1 and provide exceptions, if any, with the submittal of the proposal. Attachment 1 need not be completed as part of the proposal, however, will be executed with the selected Consultant.

Ownership

All work and data generated under this contract is the property of the UC Regents.

Attachments

Attachment 1: University of California – Terms and Conditions of Purchase