

Procurement Case Study

Hilton Creek Community Services District

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Summary

In 2023, Hilton Creek Community Services District (CSD) enlisted procurement support from Southern California Regional Energy Network (SoCalREN) for an aeration process improvement project. SoCalREN helped the agency decide on a procurement method that suited the agency's unique limitations from being in a remote area and having a small staff with limited capital procurement experience. SoCalREN offered educational resources, reviewed request-for-proposal (RFP) documents, drafted technical scopes of work, and evaluated equipment submissions.

Procurement Options Presented to the Agency

Formal Bid Process

The most procedurally complex option. This includes developing a formal RFP and draft contract agreement, publicly posting the RFP to solicit bids, and a transparent contractor selection process, which takes a significant amount of time and resources. *Not ideal for a remote agency and having a relatively small dollar amount project. Hilton Creek CSD wasn't sure they would receive sufficient bids.*

Sourcewell

This option would grant SoCalREN permission to work with Sourcewell, a government organization that helps public agencies through cooperative procurement. Sourcewell has an existing list of local, competitively awarded construction contracts to choose from, eliminating the need to put out a formal bid process which would save time and money for the agency.

Government Code 4217



Agency's Choice

Government Code (GC) 4217 is a unique policy that allows public agencies to enter into energy services contracts without a formal bid process, provided that the anticipated cost for the proposed energy efficiency upgrades is less than the anticipated costs in the absence of the project.

Anticipated Outcomes

\$128,000

lifetime cost savings

\$91,900

accessed from SoCalREN's Revolving Savings Fund

\$30,000

in incentives secured to reduce capital costs

Project Scope

- Replacement of the main lead blower
- Installation of dissolved oxygen (DO) controls

Procurement Timeline

- March 2023** • Project incentives approved
- April 2023** • Procurement kickoff meeting with the agency. Monthly procurement check-ins begin.
- May/June 2023** • SoCalREN reviews and provides feedback on the agency's RFP documents
- June 2023** • SoCalREN provides draft technical specifications
- July 2023** • SoCalREN schedules a Sourcewell introduction with the agency
- August 2023** • SoCalREN provides reference materials on GC 4217 and reviews equipment incentive and financing program eligibility
- September 2023** • Hilton Creek CSD Board approves the use of GC 4217

After thorough guidance from SoCalREN and SoCalREN's regional partner High Sierra Energy Foundation, the agency's board opted for Government Code 4217. This allowed the agency to avoid the time-consuming formal bid process and select a vendor that provided the best combination of services and value to help achieve the expected energy savings.