

WORK ORDER 1022

CONSULTANT SERVICES FOR IMPLEMENTATION OF THE SOUTHERN CALIFORNIA
REGIONAL ENERGY NETWORK**PUBLIC AGENCY NORMALIZED METERED ENERGY CONSUMPTION PROGRAM
STATEMENT OF WORK****1.0 OVERVIEW**

The County of Los Angeles (County) Project Manager (CPM) will issue a Notice-to-Proceed (NTP) prior to any work beginning. The NTP will include time frame, specific tasks, and a not-to-exceed amount within the Work Order's Total Maximum Amount.

The Southern California Regional Energy Network (SoCalREN) currently offers a Public Agency Normalized Metered Energy Consumption (NMEC) Program, available to any public agency within SoCalREN territory. The NMEC Program supports and motivates public agencies to complete Energy Efficient (EE) projects that are to or above code by utilizing normalized usage data and metered savings verification, as a comprehensive, whole-building approach to energy upgrades.

Contractor shall perform the all tasks necessary to implement the SoCalREN NMEC Program as per this Statement of Work (SOW).

2.0 TRANSITION PLAN

Contractor shall work with County staff, SoCalREN administration team, and the incumbent implementer to take over the implementation and administration of the SoCalREN's existing NMEC Program, which will include, but not limited to, the following:

- Work with County staff and the incumbent implementer to acquire a thorough understanding of the current program and its processes
- Undertake all necessary steps to ensure a smooth transition of program implementation with no disruption in the 2019 project pipeline
- Acquire from incumbent and store all program data relevant to the implementation of the existing program from incumbent implementer
- Establish and build relationships with existing program participants
- Contractor shall interview the current program implementer, the interview shall include, but not limited to, the following:
 - (a) Current responsibilities, resource, and processes
 - (b) Tools used (software, reporting) to track projects
 - (c) Needs, areas of concern, key issues to address, and program best practices
- The Transition Plan will be subject to the approval of the CPM. A Transition Plan schedule shall be submitted to the CPM within 15 days of Work Order execution and the Transition Plan is subject to CPM approval.

3.0 PUBLIC AGENCY NORMALIZED METERED ENERGY CONSUMPTION PROGRAM

Upon successful transition from the incumbent implementer, Contractor shall continue to implement the NMEC Program as directed by the program's most current effective guidelines approved by County staff and as indicated in the most updated formally approved California Public Utilities Commission (CPUC) implementation plan. Contractor

3.1 Contractor shall be responsible for completing, but not limited, to the following:

- Maintain and track program budget, and supply necessary monthly budget information to SoCalREN administration team for required CPUC submittal.
- Track all necessary energy efficiency data and metrics as required by the CPUC and the CPM; supply necessary monthly metrics data to SoCalREN administration team for required CPUC submittal.
- If requested by the County, the contractor shall design, and support incentive offerings, or other financial incentives for public agency NMEC projects, subject to final CPUC NMEC rulebook guidelines.
- Participate in CPUC- Program Coordination Group (PCG) meetings, including, but not limited to, meetings with CPUC staff, investor-owned utility staff, and various stakeholders, and participate in any other relevant meetings as requested by the County.
- Provide support for CPUC-regulatory filings when requested by County staff and the SoCalREN administration team related to the implementation of the NMEC Program.
- Assist County staff and the SoCalREN administration team in the preparation of any responses to CPUC requests for data or information related to the implementation of the NMEC Program.
- Submit a monthly report to SoCalREN administration and County staff, detailing overall program status, project pipeline status, budget updates, marketing efforts, performance metrics, and other topics as directed by the County. Monthly report format shall be subject to CPM approval.
- Assist the County when requested in the development or modification of any implementation plan(s), including strategy and tactic development as well as all launch activities.

3.2 Program Implementation

3.2.1 Contractor shall utilize a multi-phase project delivery process to move agency projects from planning and identification to execution and completion.

3.2.2 Contractor shall attend regularly scheduled and/or as-needed meetings related to the SoCalREN NEMC program with County staff, other SoCalREN contractors, IOU or CPUC staff, or any other relevant stakeholders as requested by the County.

3.2.3 Contractor shall participate in a variety of other LGP or IOU or SoCalREN-related meetings with County staff, other SoCalREN contractors, IOU or CPUC staff, and other stakeholders, as requested by the County.

- 3.2.4 Enrollment and Project Identification:** Once a Public Agency is enrolled with the SoCalREN Energy Efficiency Project Delivery Program (EE PDP), the NMEC Contractor shall work with the SoCalREN EE PDP contractor to identify if the public agency enrolled has a viable NMEC project.
- 3.2.5 Complete NMEC Identification Checklist.** The NMEC Contractor's Program Manager shall work with the EE PDP Contractor to identify if project is viable for the NMEC program based on the NMEC program checklist criteria.
- 3.2.6 Provide Audit and Engineering support:** Once a project is identified, the Contractor shall be tasked in obtaining an agency's project commitment that communicates program services and records the agency's commitment to pursue a viable project prior to the investment of limited program resources.
- 3.2.7 Perform Energy Audit.** Once identified as a viable NMEC project, the NMEC Contractor's Program Manager shall work with the designated engineer to complete a detailed facility or site visit and identify a preliminary list of recommended energy efficiency measures to present to the agency. The engineer and NMEC staff will prepare audit calculations and a project proposal that recommends operational and maintenance improvements and/or upgrades to equipment and controls. The proposal shall detail the business case for the implementation of recommended energy measures by providing estimated project costs, energy bill savings, available incentives, and financing solutions for the package of measures.
- 3.2.8 Data Collection for Whole Building.** In addition to the information in the audit, the Contractor shall collect baseline pre-intervention data from SCE and SCG by requesting meter level consumption data. Green Button 15-minute interval data, actual meteorological year (AMY) weather data and C 2010 weather data shall be used when available. Weather normalized energy consumption data shall be calculated based on ASHRAE Guideline 14 to calibrate the weather normalization model and create sufficient baselines for the 12 month pre-intervention. Submeters may be used as needed to isolate retrofit impacts. Other data may/shall be collected by the Contractor to align with the final California Public Utilities Commission (CPUC) NMEC rulebook, especially to characterize non-routine events, as requested by the County.
- 3.2.9 Data Collection for Street/Exterior Lighting.** Projects with meters serving only lighting such as the exterior lighting in a park or street lighting may not need an audit by the Contractor if there is an accurate inventory of equipment. In cases where a model and simulation are not cost effective or necessary, the NMEC Contractor shall utilize submeters to create baseline data for single-end-use predictable lighting loads. Other data may/shall be collected by the Contractor to align with the CPUC NMEC rulebook as needed and requested by the County.
- 3.2.10 Data Collection for Other Project End Uses.** Projects that are dependent on factors other than weather such as production rates will also need to be collected by the Contractor for each NMEC project where appropriate.
- 3.2.11** Contractor shall support the preparation and submittal of an IOU incentive application package to reserve incentives and on-bill financing (OBF) available to the agency if applicable. Other financing options may also be applied for and pursued at this time.

- 3.2.12 The audit phase shall be completed by the Contractor in coordination with applicable program partners, such as IOU Local Government Partnerships and third party programs. Coordination by the Contractors among partners to ensure a robust array of service offerings are provided to the agency, while also improving cost-effectiveness across programs and avoiding duplication of efforts.
- 3.2.13 **Offer Design and Procurement support to enrolled public agencies:** The NMEC Contractor shall offer procurement Subject Matter Expertise (SME) support in the form of supplementary bid package materials and sample language as requested.
- 3.2.14 **Assist in obtaining agency approval and preparing a detail project proposal:** The NMEC Contractor's Project manager shall be tasked to prepare a detailed project proposal package to assist agency staff with obtaining the necessary approvals for the project, which may include a staff report and draft resolution, scope of work, cost proposal, and any identified utility incentives and/or financing documents.
- 3.2.15 **Provide construction management support to public agencies:** The NMEC Contractor shall offer SME construction management support throughout the process, including review of contractor submittals and verification that the work is performed in accordance with the design specifications to ensure the expected energy savings are achieved and incentives are captured.
- 3.2.16 **Support project completion and close out:** Once the project is installed and verified, the NMEC Contractor's program team shall work with the agency and contractor to collect the information required to submit the appropriate project close-out information to the applicable resource program so the agency can receive incentives and the savings can be accrued for the project. In addition, NMEC Contractor shall provide the agency a survey to provide feedback on the impact of program services utilized to complete the energy efficiency project and how the program can improve.
- 3.2.17 **Utility Coordination and stakeholder engagement:** Contractor shall coordinate, facilitate, and host regulator meetings and/or conference calls with IOU staff to provide overall NMEC updates as needed and requested by County.
- 3.2.18 **NMEC M&V Plan – Whole Buildings.** The NMEC Contractor shall support the implementation the NMEC measurement & verification plan as outlined in SoCalREN's NMEC M&V Plan. For whole building projects this plan shall include, but not limited to:
- Verifying through the energy audit, the total identified project energy savings constitutes at least 10% of the facility's annual consumption.
- 3.2.19 **Quantifying savings at the meter.** The NMEC Contractor shall follow the industry-standard International Measurement & Verification Protocol (IPMVP)-Option C Whole Building.
- 3.2.20 Contractor shall identify baseline assumptions for each project.
- 3.2.21 Contractor's data collection, such as baseline and post-installation energy, use data collected at the meter level. Contractor shall support the collection of energy use and independent variable data throughout the baseline, installation, and post-installation periods.

- 3.2.22 Contractor shall utilize empirical, or data-driven methods, to develop models that show mathematically how the project's facility independent variables influence energy use.
- 3.2.23 Contractor shall develop baseline models from baseline period data, and post-installation models from post-installation period data.
- 3.2.24 Contractor, shall, at the minimum, collect 12 months each of baseline and post-installation data which shall be utilized to support modeling and identify verified savings achieved.
- 3.2.25 The NMEC Contractor's Project Manager shall work with the Contractor and the customer to update the Operations and Maintenance (O&M) manual at the facility for the measures installed, or create a new one, if none exists.
- 3.2.26 In addition, the NMEC Contractor's Project Manager will provide a "savings persistence" report will be created on a monthly basis after the measures are installed to provide direct feedback to facility personnel that may not have visibility to utility bills.
- 3.2.26.1 The NMEC Contractor's Project Manager shall present these reports to the customer facility staff so there is an understanding of how the information was collected and analyzed, and also to identify any potential NREs.
- 3.2.27 **NMEC M&V Plan – Street Lighting and Exterior Lighting** The NMEC Contractor shall support the implementation the NMEC measurement & verification plan as outlined in SoCalREN's NMEC M&V Plan (document can be found at). For whole street and exterior lighting projects this plan includes, but not limited to:
- Verifying through the energy audit, the total identified project energy savings constitutes at least 10% of the facility's annual consumption.
- 3.2.28 **Quantifying savings at the meter.** The NMEC Contractor shall work to obtain a lighting schedule from the customer or a site visit which shall be used to estimate the baseline energy usage based on the fixture count, wattage, and DEER operating hours for the baseline lighting application and control.
- 3.2.29 Contractor shall identify baseline assumptions for each project.
- 3.2.30 To validate the savings from this project type, 12 months of pre-retrofit metered power consumption data and 12 months of post-retrofit power consumption data will be collected and compared by the Contractor. Data will be collected by the Contractor in the most granular form available, with 15-minute interval data preferred, though monthly data will likely be required for street lighting service accounts that do not have net-energy metering.
- 3.2.31 Photometric analysis will be conducted by the Contractor before and after project implementation. These analyses will be compared by Contractor to ensure that post-retrofit lighting systems meet or exceed baseline lighting output or meet ANSI/IESNA RP-8 standards.
- 3.2.32 Modeling shall be completed by the Contractor as outlined in SoCalREN's NMEC M&V Plan.
- 3.2.33 The NMEC Contractor's Project Manager shall work with the Contractor and the customer to update the Operations and Maintenance (O&M) manual at the facility for the measures installed, or create a new one, if none exists.

3.2.34 In addition, the NMEC Contractor's project manager shall provide a "savings persistence" report will be created on a monthly basis after the measures are installed to provide direct feedback to facility personnel that may not have visibility to utility bills.

3.2.35 The NMEC Contractor's Project Manager shall present these reports to the customer facility staff so there is an understanding of how the information was collected and analyzed, and also to identify any potential NREs.

3.3 Program Optimization

Concurrent with the implementation of the existing NMEC Program, the Contractor shall work with the SoCalREN administration and County Staff team to develop design improvements to heighten the program's impact and more efficiently capture energy savings.

3.3.1 For any program changes and design improvements, the Contractor shall, but not limited to the following:

- Provide SoCalREN administration and County staff with a timeline for implementation of program changes, clearly stipulating deadlines and deliverables, and noting any impacts to the current budget for CPM approval.
- Conduct outreach and provide education to stakeholders and program participants to ensure proper support for the design improvement.
- Ensure that any change is compliant with relevant CPUC guidelines.
- Provide support to SoCalREN administration and County staff to properly notify CPUC and other stakeholders of the program change.

3.4 Marketing

Contractor shall, using the existing SoCalREN brand and style guide, provide support to County staff and the REN-wide SoCalREN marketing consultant, in the following tasks:

- If requested, develop marketing collateral for the NMEC Program designed to provide education and increase program participation.
- Develop and produce marketing collateral for electronic, print and /or other media pursuant to the terms and conditions of ESSMA; and, further, shall obtain County approval in writing prior to dissemination, and update as needed and/or requested by County.
- Maintain and populate a contact list of SoCalREN enrolled public agencies and other relevant stakeholders that would be potential participants of the NMEC program.
- As requested by the County, provide NMEC programmatic information to SoCalREN's REN-Wide marketing consultant to assist in the marketing of the SoCalREN NMEC Program

3.5 Event Support

3.5.1 Contractor shall assist County staff and the SoCalREN administration team in the preparation for any event or conference related to the implementation of the NMEC Program.

3.5.2 Contractor shall attend and participate in any event or conference related to public sector or the implementation of the NMEC Program, as requested by the County.

- 3.5.3 Contractor shall monitor for pertinent events, presenting opportunities to County staff, manage tasks associated with ensuring proper representation of the SoCalREN at sponsored and attended events.

3.6 Outreach and Education

- 3.6.1 Contractor shall develop and implement an outreach strategy targeted to recruit specific program participants: public agencies, energy leaders, industry professionals, and government councils, etc.
- 3.6.2 Contractor shall conduct outreach events specific to each program participant and shall be designed to educate those participants about their specific role in the program and available opportunities within the program.
- 3.6.3 Contractor shall develop an outreach strategy specifically targeted for public agencies in disadvantaged communities.

3.7 Performance Objectives

- 3.7.1 Contractor shall meet outlined annual savings performance targets as approved by County management and as approved by CPUC annual budget advice letters.
- 3.7.2 Quarterly evaluations of performance shall be conducted by County staff and Contractor to determine progress towards internal annual performance targets. If such progress is deemed less than anticipated, Contractor shall submit a Corrective Action Plan (CAP). CAP will be subject to County's approval; once approved by the County, Contractor shall adhere to CAP. CAP will be reevaluated by County CPM at next quarterly performance check-in.

3.8 Disadvantaged Communities (DAC) Action Plan

Contractor shall develop an Action Plan to increase projects in CPUC-identified Disadvantaged Communities (DACs). Action Plan shall include, but not limited to:

- Identification of barriers to the completion of projects in DACs;
- Proposed solutions to addressing DAC barriers;
- Outreach plan to potential NMEC program public agency participants within DACs;
- Education plan for raters, contractors, and building professionals on program opportunities within DACs;
- DAC Implementation Plan format and approach will be subject to CPM approval.

4.0 CONTRACTOR ADMINISTRATIVE RESPONSIBILITIES

4.1 Invoicing

Contractors shall adhere to all County, IOU, and/or CPUC invoicing policies, guidelines, requirements as applicable based on funding source and are subject to change at any time due to compliance directives. Contractors shall make their best effort to implement such invoice requirement changes as directed by County, not to exceed 2 billing periods, unless otherwise directed. Contractors shall be responsible for correctly accounting for all labor and expenses as applicable per County guidelines and/or CPUC guidelines, while assuming full responsibility and oversight of all sub-contractor invoicing. When funding source is non-CPUC funds, invoice requirements shall still apply as applicable. Contractors shall adhere to any funding source invoice and reporting requirements. Contractors shall be required to adhere to the following monthly invoicing requirements and guidelines.

- 4.1.1 Contractors and their sub-contractors are required to use the most recent Invoice Reporting (IR) Tool as directed by County staff.
- 4.1.2 Invoicing shall be monthly and transmitted to County no later than the 25th of the month for the prior month of services.
- 4.1.3 Invoicing periods shall be on a calendar basis starting with the first day in the month to the last day of the month.
- 4.1.4 Invoicing shall include all services rendered in the invoice month, including all sub-contractor(s) expenditures.
- 4.1.5 Invoices for unaccounted expenses, labor, and/or services rendered in periods of performance prior to the current month being invoiced will not be accepted after such month's invoice has been approved for payment by County.
- 4.1.6 Expenses being invoiced shall have been incurred by contractor and/or sub-contractor.
- 4.1.7 Expenses for events, conferences, etc. shall not be expensed until such event has occurred and all final billings have been paid by contractor and/or sub-contractor.
- 4.1.8 Deposits, such as for event venues, etc. shall not be allowed to be expensed prior to the event concluding. All invoices must be final, no estimations will be accepted.
- 4.1.9 Labor and expenses associated with administrative and marketing tasks which impact the overall SoCalREN shall be identified as SoCalREN in the IR Tool.
- 4.1.10 All labor and expense entries must include a detailed description of the activity being billed for and included for each line as provided for in the IR Tool.
- 4.1.11 All expenses must meet County guidelines and receipts shall be provided for all expenses billed as required by County Expense guidelines.
- 4.1.12 Contractor shall assist County with training the subcontractors on invoice requirements and submittal.
- 4.1.13 Contractors shall be required to provide a monthly narrative with the submittal of their invoice providing a high level report out of all programs managed including YTD goal and/or metrics status.