

# South Bay Cities Council of Governments

DATE: November 14, 2016  
TO: SBCCOG Steering Committee  
FROM: Jacki Bacharach, SBCCOG Executive Director  
SUBJECT: Energy Engineering Technical and Professional Services

## Adherence to Strategic Plan:

*Goal A: Environment, Transportation, and Economic development.* Facilitate, implement and/or educate members and others about environmental, transportation, and economic development programs that benefit the South Bay.

## BACKGROUND

The South Bay Cities Council of Governments (SBCCOG) provides energy engineering technical and professional services to member cities through its partnership with SoCal Edison and SoCal Gas Company. These services are funded by rate payer funds through the utility partnership and are provided free of charge to the cities.

Greg Stevens of GSE Solutions has been under contract with the SBCCOG since 2010 providing these services; first as the engineer assigned by Alternative Energy Systems Consulting, Inc. (AESC) and then as an independent contractor after he left the employment of AESC. Both times contract selection was made through a bid process.

## ANALYSIS

Since the contract with GSE Solutions was ending on December 31, 2016, SBCCOG staff conducted a bidding process for these engineering services along with an additional task to provide similar services for businesses participating in the Green Building Challenge (GBC). The SBCCOG received 6 proposals ranging in costs from \$174,644 - \$175,000 including the additional GBC task. The top three were invited for interviews – Cummings, RHA (Richard Heath & Associates, Inc.), and GSE Solutions. A selection committee was formed to participate in the interviews and make recommendations on selection. The committee members included staff from SBCCOG (Jacki Bacharach, Kim Fuentes & Amanda Maki), SoCal Edison (Scot Mann), SoCal Gas (Ann Teall), and staff from a member city with experience using the engineering services (Reata Kulcsar, Carson). The committee recommended GSE Solutions because the proposed services best matched the needs of the South Bay program including identifying the appropriate amount of time allocation required to meet deliverables within budget. Not part of the evaluation per se but important to note, the SBCCOG received 13 letters of recommendation from various city staff members who have worked with GSE Solutions from 9 South Bay cities.

RECOMMENDATION: The Steering Committee recommends that the SBCCOG Board approve a contract for Energy Engineering Technical and Professional Services with GSE Solutions for a one-year period from January through December 30, 2017 in an amount not to exceed \$175,000.

### **Task 1. Technical Support Activities**

Work with the SBCCOG Project Manager and key personnel to establish coordination of technical support activities related to the following tasks:

- a) Participate in kickoff meeting in January 2017 with SBCCOG.
- b) Work with the member agencies and Project Manager to discuss project implementation and strategies to meet program goals – financing, scheduling, staffing – and assist with making them happen.
- c) SBCCOG Staff Meetings:
  - 1) Meet at least quarterly with SBCCOG Project Manager and Executive Director to discuss overall project implementation and strategies to meet program goals – financing, scheduling, and staffing.
  - 2) Participate in meetings at least weekly to report on status of project identification and completion. These meetings may be in person or via conference call as required. A standard reporting format will be utilized.
  - 3) Participate in monthly Program Managers meeting in person.
- d) Conduct routine job walks or site visits as needed and follow-up with participating government agencies (cities, schools, districts, county, state) and utilities to ensure that project activities are progressing towards completion. Consultant is to notify SBCCOG Project Manager of scheduled job walks or site visits prior to occurrence and provide a report after the visit (email is sufficient).
- e) Provide quarterly “At A Glance” reports of each city’s energy efficiency activities and potential projects to SBCCOG as well as a report of the SBCCOG cumulative EE activities for distribution to the cities and be available to answer questions.
- f) Make quarterly presentation in conjunction with SBCCOG Project Manager to the SBCCOG Board of Directors on the energy efficiency activities of each of the cities and the subregion as a whole including a progress report on meeting the SBCCOG’s goals as set by Southern California Edison and Southern California Gas Company.
- g) Participate in face-to-face meetings with SBCCOG member agencies and special districts (i.e. schools) to ascertain what current projects are underway and what they have planned for the rest of the year. Consultant is to notify SBCCOG Project Manager prior to scheduled meetings and provide a report after the visit (e-mail is sufficient).
- h) Working with SBCCOG and member cities, determine what additional information or types of reports members need to move projects forward.
- i) Be available to the SBCCOG staff and the SBCCOG member cities as-needed.
- j) At the direction of the SBCCOG, be available to present project findings to member cities and their governing boards.
- k) Complete reports or provide information for reports to SBCCOG and Southern California Edison and Southern California Gas Company on program activities and goals as-needed.

- l) Provide SBCCOG with calculations of potentially lost savings for current projects that are not moving forward to be used to encourage cities to complete projects.
- m) Provide SBCCOG with any other calculations that can be used to encourage cities to move forward with projects.
- n) Participate in regional collaborative programs as directed.
- o) If additional services are identified, work may be authorized by the SBCCOG on a task order basis.

### **Task 2. Identify Energy Efficiency Projects**

The consultant will work with the SBCCOG Project Manager, city staff, and key personnel on the following tasks:

- a) Collect and assess existing energy audit reports, energy evaluation studies, list of identified projects, and other related documentation and determine validity and applicability to current conditions at each facility. This documentation shall be made accessible to SBCCOG staff.
- b) After the screening process is complete, establish a prioritized list of candidate projects from the information that is deemed applicable for each member agency and review with member agency helping to establish steps to implementation.
- c) Provide a written report for projects that are most likely to be completed within the next year to be presented to the city.
- d) When needed, identify and collect necessary additional data to finalize energy analysis.

### **Task 3. Comprehensive and Targeted Audit Services**

Upon direction of the SBCCOG, the consultant will investigate other energy opportunities outside of what has been identified in Task 2 and provide the following energy audit services for other facilities as-needed:

- a) Working in conjunction with the SBCCOG Project Manager, the consultant will establish audit objectives, scope, deliverables, and budget as directed by the SBCCOG. Conduct comprehensive and targeted audits for public agencies. Prepare technical audit services for facilities and processes to meet rigorous utility incentive application review process. Assist in expediting the utility review and approval process. Any document provided to the public agencies must have notation that the work is being completed on behalf of the SBCCOG.
- b) Identify energy efficiency and demand response opportunities.
- c) Provide a detailed inventory of facilities' equipment and energy savings and recommendations, incentives, life cycle costs, and other evaluation analysis based on the level of audit conducted. Include projected energy savings, project costs, measure life, and available incentives in the evaluation.

d) Provide a final written report for each audit completed with all findings and recommendations in a format mutually agreed upon. Work with the SBCCOG Project Manager to develop a template and add any information as needed.

#### **Task 4. Calculation and Incentive Application Assistance**

Conduct calculations and provide incentive application assistance.

a) Upon direction of the SBCCOG, provide detailed calculations (using SCE's software) and information needed for incentive applications. For energy efficiency projects identified in Tasks 2 and 3, the consultant will work closely with SBCCOG and participating public agencies to produce calculations and supporting assumption documentation.

b) Submit to the SBCCOG Project Manager the completed invoice reconciliation (IR) form(s) with supporting documentation upon submission to SCE.

c) Submit to the SBCCOG Project Manager the complete incentive application including supporting documentation upon completion of project for recordkeeping.

d) Provide training in completing Express incentive applications to SBCCOG staff as directed by the SBCCOG.

#### **Task 5. Building Commissioning for Existing Buildings**

Upon direction of the SBCCOG, the consultant will perform retro-commissioning for existing buildings (RCx) utilizing a systematic process for investigating, analyzing, and optimizing the performance of building systems. The RCx process should include: screening, investigation, measure selection, implementation, verification, and operator training as needed.

a) Provide a written report of all findings once completed for each facility.

#### **Task 6. General Energy Engineering Consulting Services**

Upon direction of the SBCCOG, the consultant will provide general technical support services as needed including, but not limited to, the following activities:

a) Answer energy efficiency related technical questions beyond the SBCCOG in-house expertise similar to a "help desk" process for member public agencies and SBCCOG staff

b) Monitor and report short-term and long-term end-use energy and environmental conditions

c) Develop and execute measurement and verification plans

d) Conduct site inspections

e) Perform building energy computer simulation

f) Perform cost and measure lifetime analysis

g) Generate reports and presentation material

H) Provide a full written report on the above using a template developed with the SBCCOG Project Manager

**Task 7- Technical Assistance for Green Building Challenge (GBC) Program – a program for South Bay Business**

The following tasks will be performed on as needed basis upon authorization by SBCCOG staff. All tasks performed must include documentation in the form of reports and spreadsheets. Assessments and audits will be conducted in accordance with ASHRAE level audit and data collection standards.

- a) Benchmark building energy usage – assist GBC participants with benchmarking, which may include conducting onsite property owner and tenant assessments, collecting utility billing data and interpreting benchmark results.
- b) Perform energy audits – conduct an ASHRAE Level I energy analysis that will identify and provide a savings and cost analysis of low-cost/no-cost measures. This analysis will provide a listing of potential capital improvements that merit further consideration, and an initial judgment of potential costs and savings. The identified energy cost savings measures will be prioritized based on simple payback.
- c) Provide savings calculation and incentive application assistance – develop detailed calculations and collect information needed to prepare a utility incentive application on behalf of select program participants. Work with utility program managers and account executives to produce calculations and supporting documentation so that customer receives its incentive check in a timely manner.
- d) Assist in quantifying energy savings and preparing reports on program achievements - working with the SBCCOG team, complete written report for each audit in a mutually agreed upon format.