

# **Request for Proposal**

South Bay Cities Council of Governments  
Energy Engineering Technical and Professional Services

September 21, 2016

The South Bay Cities Council of Governments (SBCCOG) is a joint powers authority of 16 cities that share the goal of maximizing the quality of life and productivity of the South Bay region. Our member cities are Carson, El Segundo, Gardena, Hawthorne, Hermosa Beach, Inglewood, Lawndale, Lomita, Manhattan Beach, Palos Verdes Estates, Rancho Palos Verdes, Redondo Beach, Rolling Hills, Rolling Hills Estates, Torrance, and the Harbor City/San Pedro communities of the City of Los Angeles, along with unincorporated areas of the County of Los Angeles Districts 2 and 4. Further information on the SBCCOG can be found at [www.southbaycities.org](http://www.southbaycities.org).

One of the programs of the SBCCOG is the South Bay Environmental Services Center (SBESC) which works to establish the South Bay cities as leaders in developing and implementing energy and water saving initiatives. Partners in the SBESC programs include: Southern California Edison (SCE), Southern California Gas Company (SCG), West Basin Municipal Water District, Torrance Water Department, and the Sanitation Districts of Los Angeles County.

In a partnership with SCE and SCG, under the SBESC program, SBCCOG implements the South Bay Energy Efficiency Partnership program (“Partnership”). The goal of this program is to achieve kilowatt hour (kWh), kilowatt (kW), and therm savings through local government and community efficiency measures. Annual program targets are set for the SBCCOG by SCE and SCG. In this effort, the SBCCOG will select an individual or firm to provide technical support services to public agencies involving energy efficiency project identification, comprehensive and targeted energy audits, calculation and incentive application assistance, building commissioning and general technical support. Small firms are encouraged to apply. It is also expected that the selected consultant will work in collaboration with the SBCCOG Project Manager as part of the “Energy Efficiency Team.” The day to day activities of the Partnership are overseen by the SBCCOG Project Manager. This task includes monthly partner meetings, weekly status meetings, and the ability to be ‘on-call’ when required.

## A. Proposal Submission – Budget and Timeline

The project budget for 12 months is as follows:

- Total budget is \$165,000 for Tasks 1 – 6 (approximate split 83% SCE and 17% SCG)
- Work performed under Task 7 will be as needed on a Task Order basis in an amount not to exceed \$10,000.
- Total available budget for all tasks is \$175,000.

Attached is the SBCCOG Standard Contract which includes General Terms and Conditions. Request for contract changes must be submitted with proposal.

Bidder(s) shall be, at a minimum, individuals and firms with knowledge and experience in performing the work for which they are bidding. It is within SBCCOG’s sole judgment

to determine whether a Bidder meets the general criteria for selection. Any proposal that does not meet the general criteria shall be rejected without review.

All potential Bidders/Respondents shall disclose any and all affiliations with any investor-owned utility (IOU). Such disclosure shall be included in the response hereto. Failure to accurately respond will result in immediate rejection and exclusion from the solicitation process.

Proposals should include description of tasks, deliverables, schedule, staff assignment, labor rates, budget, qualifications (including certifications such as Professional Engineer (PE) or Certified Energy Manager (CEM)), and should not exceed 12 pages. Samples of work (such as reports on retro-commissioning) should also be included and are not restricted to a specific number of pages; however, relevance and being concise is recommended. **Proposals must be submitted by 3:00 p.m., Thursday, October 20, 2016 via email to [amanda@southbaycities.org](mailto:amanda@southbaycities.org).**

Any questions should be directed to Amanda Maki at 310-371-7222 or [amanda@southbaycities.org](mailto:amanda@southbaycities.org). All written questions must be received by Monday, October 4, 2016. Responses to written questions will be posted on [www.southbaycities.org](http://www.southbaycities.org) by October 7, 2016

The following are key dates in this solicitation:

Key Event	Key Date
RFP release	September 21, 2016
Bidder questions due	October 4, 2016
Bidder questions posted	October 7, 2016
<b>Bidder proposal due</b>	October 20, 2016
Interviews	Week of October 24, 2016
Contract issued (anticipated)	November 17, 2016
Notice to Proceed (anticipated)	January 1, 2017

## B. Scope of Work

### 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 agency and Project Manager to discuss project implementation and strategies to meet program goals – financing, scheduling, staffing – and assist with making it happen.
- c) 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. 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.
- e) Provide quarterly “*At A Glance*” reports of each city’s energy efficiency activities and potential projects to SBCCOG 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 members 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.
- h) Be available to the SBCCOG staff and the SBCCOG member cities as-needed.
- i) At the direction of the SBCCOG, be available to present project findings to IOU customers and governing boards.
- j) 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.
- k) Participate in regional collaborative programs as directed.
- l) If additional services are identified, work may be authorized by the SBCCOG on a task order basis.

For additional services that may be identified through the course of the contract, the consultant will work with the SBCCOG Project Manager to establish expectations and requirements of services.

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

The consultant will work with the SBCCOG Project Manager, city staff, and key personnel for 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) 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. Utility approved models that may be used for this analysis include, but are not limited to:
  - eQuest, EnergyPro and Energy Plus – for building simulations
  - CA IOU CCT software – for analysis of customized measures;
  - BOA tool – for retro-commissioning projects
  - Custom spreadsheet models – for projects where commercially available models do not exist; and,
  - DOE Energy Smart Pools

### **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 record-keeping.

- 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.

### **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

### **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.