

WORK ORDER 1022
CONSULTANT SERVICES FOR IMPLEMENTATION OF THE SOUTHERN CALIFORNIA
REGIONAL ENERGY NETWORK
**DISTRIBUTED ENERGY RESOURCES DISADVANTAGED COMMUNITIES PROJECT
DELIVERY PROGRAM**
STATEMENT OF WORK

STATEMENT OF WORK

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.

Southern California Regional Energy Network (SoCalREN) currently offers a Public Agency Distributed Energy Resource (DER) Disadvantaged Communities (DAC) Project Delivery Program (PDP), available to any public agency within SoCalREN territory. The DER DAC PDP serves as a one-stop shop for public agencies to conduct whole building energy efficiency retrofit projects at their facilities.

1.0 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 DER DAC Project Delivery 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 to 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 will include 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 by the CPM. A Transition Plan schedule shall be submitted within 15 calendar days of Work Order execution and is subject to CPM approval.

2.0 DER DAC PROJECT DELIVERY PROGRAM

Upon successful transition from the incumbent implementer, Contractor shall continue to implement the DER DAC Project Delivery 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.

2.1 Implementation Plan

Contractor shall, but not limited to, complete the following tasks:

2.1.1 Maintain and track program budget, and supply necessary monthly budget information to SoCalREN administration team for required CPUC submittal.

2.1.2.1 Track all necessary energy efficiency data and metrics as required by the CPUC and the CPM, and supply necessary monthly metrics data to SoCalREN administration team for required CPUC submittal.

2.1.3 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

2.1.4 Provide support for CPUC-regulatory filings when requested by County staff and the SoCalREN administration team related to the implementation of the DER DAC Project Delivery Program.

2.1.5 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 DER DAC Project Delivery Program.

2.1.6 Submit a monthly report to SoCalREN administration and County of Los Angeles ISD 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 will be determined by the CPM.

2.1.7 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.

2.2 Program Implementation

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

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

2.2.3 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.

- 2.2.4 Contractor shall coordinate with all three SoCalREN Public Agencies programs to ensure no duplication of services, as well as to assist project conversion and to mitigate customer confusion.
- 2.2.5 **Enrollment and Project Identification:** Contractor shall support the enrollment of an agency through a non-binding enrollment form that acknowledges PDP participation, responsibilities, and services. The enrollment shall include the process of an initial engagement presentation to introduce SoCalREN Public Agency Programs in coordination with the IOUs, Local Government Partnerships, and other applicable program partners. The enrollment form should be presented to the agency during this meeting; program services are not offered until the form is signed and returned. Once enrolled, an DER DAC PDP project manager is assigned to the agency to begin the project development process.
- 2.2.5.1 After enrollment, Contractor shall prepare an agency-wide energy analysis for the DAC agency.
- 2.2.5.2 Contractor's analysis shall provide a portfolio-wide snapshot of energy consumption and cost by sector (i.e. water and wastewater pumping, street lighting, facilities, and outdoor lighting), and estimates of potential energy and financial impacts of the potential retrofit and applicable DERs that could be applied to the public agency facility or project.
- 2.2.5.3 Contractor shall support the use of this analysis as a tool to help identify and develop energy efficiency project opportunities. This shall include, but not limited to:
- i. Working with enrolled SoCalREN DAC public agencies to identify potential facilities for energy efficiency projects;
 - ii. Conducting detailed energy audits and financial analyses on potential projects;
 - iii. Meetings with public agency staff to review findings of energy audit and financial analysis;
 - iv. Prepare a report and/or power point presentation for public agency staff or elected officials on project details. Report shall include, but not limited to:
 - Estimated cost savings and energy savings
 - List of measures
 - Financing Plan
 - Project timeline

2.2.6 **Provide program services support regarding DERs:** Contractor shall provide, but not limited to, the following support services:

Strategies	Program Services
Demand Response (DR)	Educate customers on potential DR measures and available SCE DR programs for possible participation and support in accessing SCE rebates and advisory services.
Electric Vehicles (EV) Charging Stations	Provide information regarding general cost estimates for installing charging stations, as well as information and support in accessing SCE rebates and advisory services.
Solar Water Heating	Provide information and support in accessing SoCalGas and SCE financial incentives for solar water heating systems.
Photovoltaic (PV) and Battery Storage Systems	Perform a high-level review of solar PV and battery storage which will provide information and support in accessing SCE pilots and programs.
Greenhouse Gas Emission (GHG) Reduction Options	Educate customers on their options to reduce GHG through the SCE renewable energy tariff program.
Permanent Load Shifting via energy storage	Provide information and support in accessing facility peak demand and possible load shifting benefits.
Water Efficiency	Conduct high-level review to identify possible water efficiency measures and support in identifying and accessing related incentives or rebates.

2.2.6.1 In addition, the contractor shall offer project management support for each strategy. This shall include, but not limited to, working with third parties and programs to identify and secure additional resources that move the project through implementation. An example is financial support services program to educate customers on possible utility and non-utility financial options, including providing support for the applications/process if needed. In addition, the Contractor shall assist agencies on identifying where technical assistance can be obtained to develop the DER project.

2.2.7 **Provide Audit and Engineering support:** Once a project is identified, the Contractor shall be tasked to obtain a DAC agency's project commitment that communicates program services and records the DAC agency's commitment to pursue a viable project prior to the investment of limited program resources.

2.2.7.1 The DER DAC PDP project manager shall work with the designated engineer to complete a detailed facility or site visit to identify a preliminary list of recommended energy efficiency measures to present to the agency.

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to complete a detailed facility or site visit to identify a preliminary list of recommended distributed energy resources that could be utilized within the facility to present to the agency.

- 2.2.7.2 The engineer and DER DAC PDP staff shall 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.
- 2.2.7.3 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.
- 2.2.7.4 Contractor shall complete the audit phase in coordination with applicable program partners, such as IOU Local Government Partnerships and third party programs. Contractor shall coordinate 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.
- 2.2.8 **Offer Design and Procurement support to enrolled public agencies:** The DER DAC PDP Contractor shall offer procurement support in the form of supplementary bid package materials and sample language as required.
- 2.2.9 **Assist in obtaining agency approval and preparing a detail project proposal:** The DER DAC PDP 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.
- 2.2.10 **Provide construction management support to public agencies:** The DER DAC PDP Contractor's project management team shall offer 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.
- 2.2.11 **Support project completion and close out:** Once the project is installed and verified, the DER DAC PDP Contractor's 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, the DER DAC PDP 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.

- 2.2.12 Utility Coordination and stakeholder engagement:** Contractor shall coordinate, facilitate, and host regulator meetings and/or conference calls with IOU staff to provide overall PDP updates
- (i) For each individual project completed through the PDP, Contractor shall coordinate, facilitate, and host meetings with IOU and the public agency's staff to ensure the IOU understands the project details
- 2.2.13 Benchmarking Support Services:** Contractor shall offer benchmarking services to assist public agencies to meet California Benchmarking and Public Disclosure Program requirements and to facilitate the assessment of opportunities for facility improvements, and implement upgrades that result in quantifiable energy savings. Services may include, but are not limited to:
- (i) Perform an in-depth on-site benchmarking data collection.
- (ii) Input gathered building information and metered data collected to create an entry for each building according to its most appropriate occupancy type or types into the agency's EnergyStar Portfolio Manager account.
- (iii) Perform data-driven screening analysis to determine what energy program interventions would benefit each building.
- (iv) Prepare materials or reports as needed.

2.3 Program Optimization

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

2.3.1 For any program changes and design improvements, the proposer shall, but not limited:

- 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.

2.4 Marketing

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

- Develop marketing collateral for the DER DAC Project Delivery 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;
- Utilize a variety of marketing channels to engage potential customers such as the EE PDP, IOU partnership programs, strategic agency meetings and peer to peer workshops;

- Research relevant industry events and marketing opportunities to create an event calendar for County staff;
- Maintain and populate a contact list of SoCalREN enrolled public agencies and other relevant stakeholders;
- Send monthly e-blasts to contact list to provide program information and share program successes;
- Provide updates to the EE Project Delivery Program contractor for the SoCalREN Public Sector Quarterly Newsletter. Updates should include, but are not limited to, the following information:
 - (a) Program updates and upcoming changes
 - (b) Program success stories
 - (c) Upcoming important dates
 - (d) New opportunities for program participation
- As requested by the County, provide DER DAC PDP programmatic information to SoCalREN's REN-Wide marketing consultant to assist in the marketing of the SoCalREN DER DAC Program.

2.5 Event Support and Stakeholder Engagement

2.5.1 Contractor shall assist County staff and the SoCalREN administration team in the preparation for any event or conference related to the administration of DER DAC Project Delivery Program energy efficiency programs.

- 2.5.2 Contractor shall attend and participate in any event or conference related to public sector or the implementation of the DER DAC Project Delivery Program energy efficiency program administration, as requested by the County.
- 2.5.3 Contractor shall attend and participate in Local Government Partnership and or local government agency meetings.
- 2.5.4 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.
- 2.5.5 Contractor shall support SoCalREN's LACI REIC grant by participating in coordinated events with LACI's REIC team and coordinating project DER DAC project meetings.
- 2.5.6 Contractor shall identify opportunities where LACI Regional Energy Innovation cluster technologies could be piloted in DER DAC program projects.

2.6 Outreach and Education

- 2.6.1. Contractor shall develop and implement an outreach strategy targeted to recruit specific program participants: public agencies, energy leaders, industry professionals, and government councils, etc.
- 2.6.2 Contractor shall conduct outreach events specific to each program participant and be designed to educate participants on their specific role in the program and available opportunities within the program.
- 2.6.3 Contractor shall develop an outreach strategy specifically targeted for properties in CPUC-designated hard to reach areas and disadvantaged communities.

2.7 Performance Objectives

- 2.7.1 Contractor shall meet outlined internal annual savings performance targets as approved by County management.
- 2.7.2 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, County staff and Contractor will work together to identify a Corrective Action Plan (CAP) for the Contractor. A CAP will be established and Contractor shall adhere to CAP; CAP will be reevaluated by County CPM at the next quarterly performance check-in.

2.8 Underserved and Disadvantaged Communities (DAC) Action Plan

2.8.1 Contractor shall develop an Action Plan to increase projects in CPUC-identified Disadvantaged Communities (DACs). DAC Implementation Plan shall be subject to County CPM approval and shall include:

- Identification of barriers to the completion of projects in DACs;
- Proposed solutions to addressing DAC barriers;
- Outreach plan to DER DAC Project Delivery Program property owners within DACs;
- Education plan for raters, contractors, and building professionals on program opportunities within DACs.

3.0 CONTRACTOR ADMINISTRATIVE RESPONSIBILITIES

3.1. Invoicing

Contractor shall adhere to all LAC, 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. Contractor shall make their best effort to implement such invoice requirement changes as directed by LAC, not to exceed 2 billing periods unless otherwise directed. Contractor shall be responsible for correctly accounting for all labor and expenses as applicable per LAC 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. Contractor shall adhere to any funding source invoice and reporting requirements. Contractor shall be required to adhere to the following monthly invoicing requirements and guidelines.

- i) Contractor and their sub-contractors are required to use the most recent Invoice Reporting (IR) Tool as directed by LAC staff.
- ii) Invoicing shall be monthly and transmitted to County designated staff, no later than the 25th of the month for the prior month of services.
- iii) Invoicing periods shall be on a calendar basis starting with the first day in the month to the last day of the month.
- iv) Invoicing shall include all services rendered in the invoice month, including all sub-contractor(s) expenditures.
- v) 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 months invoice has been approved for payment by County.
- vi) Expenses being invoiced shall have been incurred by contractor and/or sub-contractor.

- vii) Expenses for events, conferences, etc. shall not be expensed till such event has occurred and all final billings have been paid by contractor and/or sub-contractor.
- viii) Deposits, such as for event venues, etc., will not be allowed to be expensed prior to the event concluding. All invoices must be final, no estimations will be accepted.
- ix) Labor and expenses associated with administrative and marketing tasks which impact the overall SoCalREN shall be identified as SoCalREN in the IR Tool.
- x) 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.
- xi) All expenses must meet County guidelines and receipts shall be provided for all expenses billed as required by County Expense guidelines.
- xii) Contractor will assist County with training the subcontractors on invoice requirements and submittal.
- xiii) Contractor 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.