

Sonoma Public Energy

Local Government Partnership: County of Sonoma / Pacific Gas and Electric Co.

Program Administrator: County of Sonoma Energy and Sustainability Division

# Program Description

The Energy and Sustainability Division of Sonoma County shall deliver “Sonoma Public Energy”, a suite of comprehensive services aimed primarily at the reduction of energy usage, reduction of energy cost, and assistance with access to existing and future resources and services. These services will be focused on facilitating upgrades to Public Facilities, K-12 Schools, Special Districts, Hard To Reach (HTR) customers located within Sonoma County.

The County of Sonoma has entered into contract as the Local Government Partnership (LGP) with Pacific Gas and Electric Company (PG&E), delivered through the General Services Department’s Energy and Sustainability Division. Current and planned services include, but are not limited to:

Identification of Energy Efficiency Projects to Support Energy Savings in the Public Sector

* Benchmarking of energy usage in public buildings
* Facilitating energy efficiency projects in public buildings
* Compiling and maintaining a listing of approved, participating EE contractors
* Implementation of Sonoma’s California Green Business Certification

Training and Education to Support Building Capacity to Help Save Energy

* Facilitating relevant training for public sector staff
* Encouraging facilities staff to complete Building Operator Certification or ASHRAE

 training, etc.

Awareness Building in the Community to Magnify the Reach of Energy Efficiency Services

* Planning and implementing a marketing and outreach plan
* Fostering local connections and interactions within the community to encourage

 energy efficiency in ways that make the most sense for that community

Innovative Efforts that Allow Flexibility to Best Serve the Public Sector and Larger

Community

* Supporting initiatives identified in the California Long-Term Energy Efficiency

 Strategic Plan

* Documenting an integrated services delivery model that assists potential customers

 with multiple services

* Developing and implementing a Commercial Building EE Roadmap Service to serve

 public facilities

* Modeling of “EE Roadmap” for public facilities and DAC/HTR Facilities
* Offering subject matter expertise in construction planning of new facilities

The Energy and Sustainability Division shall develop and implement a public building energy efficiency roadmap service that will include assessment of existing energy-consuming equipment and systems, identification and review of legacy equipment and recommendations for improvements to achieve energy and water efficiency in existing

nonresidential/public buildings. Informal/technical training sessions will be presented to

facility decision makers and building operations staff to provide the energy efficiency

roadmap, education about energy efficiency upgrade and equipment replacement options,

and available related 3P resource programs with referral to 3P resource program contacts. This service will also present potential financing programs to customers such as On Bill Financing (OBF) as offered through the Utility.

The Energy Efficiency Roadmap service will provide assessment tools that lend

guidance to building managers and operators to investigate, analyze, and identify no-cost,

low-cost,, and capital-intensive energy efficiency and demand reduction measures to

improve building performance through optimization of existing equipment controls and/or

replacement of failing or aging equipment. For facilities that do not have qualified staff or

have more complex systems, referral will be provided to the appropriate PG&E 3P resource

program to perform the assessment. In addition, a local firm or firms will be recognized through an RFQ process. The company(ies) will provide technical support for the assessment. The ultimate deliverable for each customer will be an EE Roadmap for the facility and its inhabitants, defining a long term plan towards energy efficiency and sustainability. A periodic “Check In” will be performed by Division staff to identify and document which measures have been implemented and when.

The Division will develop and integrate the necessary tools into Customer Relations

Management (CRM) software to generate the roadmap and track activities on a

structure-by-structure basis.

The Energy and Sustainability Division staff will leverage already existing services and resources available through the Division, such as financing through the Sonoma County Energy Independence Program, no-cost Green Business certifications, Better building consultations for new and existing, solar and battery storage consultations, rebates and incentives and other services offered by the Division through partner contracts. At the time of program ramp up, PG&E has not yet recognized those “Resource” programs to which SPE will refer customers when performing building upgrades. Initial efforts will see Sonoma Public Energy prioritizing “On Bill Financing” before those PG&E 3P Resource Programs are recognized and detailed.

The Division will use SPE funds to offer/facilitate training for Building Maintenance and

Construction Professionals and to continue promotion and administration of the Green Business Certification Program to public facilities.

## Program Goals and Objectives

The primary objective of SPE is to assist staff within Public, K-12, Special District,

and HTR facilities to realize deeper savings and more comprehensive energy savings

through a collection of services offered to them at little to no cost.

On site “Energy Efficiency Roadmaps” will be offered both as a free service and as a “DIY”

solution to building maintenance professionals in the previously mentioned target sectors.

With support from Division staff, qualified maintenance professionals will be able to complete

the Energy Efficiency Roadmap workbook themselves and submit their findings to the

Division’s tool through CRM software, making the only cost to any customer the actual time

of the building maintenance professional. The collection of data necessary to participate in

the EER falls within the standard work scope of any building maintenance professional.

The Division will track the implementation of suggested energy efficiency plans through its

Customer Relations Management tool over the life of the service, data will be kept and

made available to customers even beyond the lifespan of the service. The Division

currently tracks buildings as customers and will use SPE funds to author the capacity to record pertinent information related to all served facilities. Data collection will result in both a

long term plan for operations, maintenance, and equipment replacement as well as a

comprehensive database allowing for all local public buildings within Sonoma County to

have the ability to be compared to each other in order to improve EE awareness.

The Division will also track any referrals to Resource Programs that are made as a result of

either targeted campaigns or the EE Roadmap service.

## Direct Observable Program Outputs

● Capacity to record collected building data in CRM

● EE Roadmap Workbook

● EE Roadmap Web Page

● EE Roadmap Assessments Completed

● EE Roadmaps Generated

● EE Roadmaps plans adopted for long-term execution

● EE Roadmaps implemented

● EE projects completed (Resource Referrals)

## Short-Term Impacts (12 Months)

* Increased knowledge of EE practices amongst public building owners and

 operators

* Reduced electric use and demand, and reduced natural gas use in public

 buildings throughout Sonoma County in collaboration with PG&E’s 3P resource

 program offerings

* Expansion of public sector resources, services and existing project development offerings
* Increased cost effectiveness of EE upgrades by identifying potential EE projects

 in the public sector and within HTR customer group

## Medium-Term Impacts (12-36 Months)

* Increased data offerings for public building owners to guide future improvements
* Established public building benchmarking program to track energy usage across

agencies

* Promotion of meter-based savings approaches and pay-for-performance models

in coordination with PG&E 3P resource programs

* Continued lower energy use and demand

## Long-Term Impacts (36+ Months)

* Seamless interaction of public building owners with PG&E’s 3P energy efficiency

resource programs

* Easy availability to data that identifies energy efficiency opportunities and

quantifies savings

* Increased momentum for all public sector customers to transition to zero net

energy (ZNE) development

* Sustained progress towards doubling energy efficiency savings in public

buildings by 2030

Energy Efficiency Roadmap provides a comprehensive zero cost building and

behavioral analysis to PG&E customers in public buildings. The results of the EE EER are to be recorded through CRM (Customer Relationship Management) software. Modules will be developed resulting in a deliverable report to the customer detailing a roadmap for near and long term goals in energy efficiency for their staff and facility, highlighting the potential benefits behind any employed measures.

The Energy and Sustainability Division will build upon its existing CRM in order to act as an

ongoing repository for each customer to catalog the results of building audits, utility bill

analysis, EE trainings, customer surveys, benchmarking results, solar bid analysis, past

improvement projects, and future improvement opportunities. The EER will be easily printed and/or saved for discussions with third-party contractors or other building performance professionals. This report will make clear the customer’s ability to save incrementally by taking steps in order of effectiveness, making energy efficiency investments easier and more attractive. The report and CRM integration will assist in maintaining a consistent thread of communication with the customer looking to the future.

Key benefits:

* Report that expands as information is collected by Energy and Sustainability Division

 staff throughout the engagement process, increasing the customer’s ability to better

 manage their building’s energy.

* Report provides ongoing record of energy efficiency improvements made to the

 building and a prioritized catalog of recommended future improvements, illustrating

 their ability to save energy and reduce demand.

* Customers who choose to not move forward immediately with improvements will

 have access to the information collected so that they can proceed with the

 recommended improvements when the conditions are right

The Division’s unified service delivery model streamlines the offerings of various EE

services to all market sectors, positively impacting the experience of the end customer and

best demonstrates the Division’s ability to reach a greater proportion of customers without

proportional budget increases. Tying the Division’s offerings together, our approach to

energy efficiency in commercial buildings will remain holistic as buildings remain in place

while inhabitants do not. When the building itself is treated like a customer, its needs will be

met in a well-planned and comprehensive manner spurring deep investment and persistent

energy saving.

## Rationale

Within the prescribed market sector (Public, K-12 Schools, Special Districts, HTR, DAC) exists much deferred maintenance. Those customers being targeted historically have a number of challenges to meet when considering the maintenance and upgrade of their facilities. This service aims to assist maintenance staff in overcoming the challenges at the root of the problem, which is the initial recognition and prioritization of those issues which need to be addressed. In providing the Energy Efficiency Roadmap, and subsequent guidance and navigation behind working with contractors (3P Resource Programs) and securing financing (OBF, etc…), this service aims to be the initial “foot in the door” for those entities considering such improvements.

# Program Delivery and Customer Services

Sonoma Public Energy’s target customers: Local Government/Public Facilities, Special Districts, K-12 Schools (prioritizing DAC schools) within Sonoma County.

* Local Governments: City and County government staff from General Services, Facility Operations, Administration and Management, Public Works, and/or Parks Departments. Examples include the County of Sonoma, City of Santa Rosa, and/or City of Cloverdale.
* Special Districts: Directors and Managers of organizations identified as special districts. Examples include Sonoma County Agricultural Preservation and Open Space District, Sonoma Valley Healthcare District, Gold Ridge Fire Protection District, and/or Sonoma County Library.
* K-12 School Districts: Administrators and building operation staff from local school districts and offices. Examples include Sonoma County Office of Education, Santa Rosa City Schools, and/or Cotati-Rohnert Park Unified School District.

Within the County are 9 city jurisdictions in addition to the County itself, 67 special districts, and 40 separate school districts with a total of 174 separate schools, 37 of which are considered “Disadvantaged” by CalEnviroScreen 3 standards. Within the Santa Rosa City School District alone are 24 campuses housing roughly 415 separate buildings, most of which are suffering from years of deferred maintenance. The County of Sonoma owns 457 structures and leases an additional 35, most of which are also suffering from decades of deferred maintenance. This is to illustrate that just 2 of the above listed customers hold nearly 1,000 separate buildings in their stock.

Initial efforts by SPE will focus on assistance for schools within the County designated as DAC. Services provided by SPE will be offered to those school districts with the highest count of DAC designated schools, however services will not be denied to those qualifying entities soliciting assistance from SPE.

Based upon our years of experience providing EE services to commercial and residential customers, we expect to stay connected to these market sectors through the other services available through the Energy and Sustainability Division. The Division’s unified service delivery model will allow us to assist all customers contacting our office independent of their specific building sector. For customers outside of the parameters set forth for funding in this proposal (e.g., Agricultural and/or Industrial), referrals will be made independent of SPE.

## Program outreach activities:

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| * Strategy
 | Target Audience | Market Barrier | Opportunity |
| Direct contact through phone and in-person meetings | Key decision makers, decision influencers | Lack of buy-in from management/key decision makers | One-on-one time to discuss available services and specific projects, relationship development  |
| Sample resolutions/council/board items | Administrative support staff | Lack of directive and prioritization of EE Improvements from Key Decision Makers, Lack of funding | Assistance preparing for presentations and board items by providing formatted samples |
| Presentations at meetings | All | Lack of knowledge of availability of resources and services | Increase awareness of available services |
| Exhibiting at events | All | Lack of knowledge of availability of resuorces and services | Increase awareness of available services |
| Workforce development trainings | Facilities staff | Lack of technical knowledge | Training staff on building efficiency operations to run at peak performance |
| Behavioral training | Support staff | Lack of technical knowledge, individual buy-in | Increased knowledge of individual contributions towards efficiency in the workplace  |
| Website information page | All | Lack of knowledge of availability of programs and services | Fast way to deliver information about programs and services |
| Case studies | Facility managers | Lack of knowledge of project benefits | Documented examples of projects completed  |
| Partner with outside agencies | Key decision makers | Lack of buy-in from management/key decision makers | Working with partner agencies to make contacts and presentations |
| Direct mail | Facility managers | Lack of knowledge of availability of programs and services | Target specific contacts with information |
| Collateral – brochures, flyers | All | Lack of knowledge of availability of resources and services | Allow for bulk distribution of information  |

## Project Acquisition

Sonoma Public Energy offers a simple process providing public building maintenance personnel with expert advice and appropriate measures that will encourage implementation and adoption of the identified measures provided in the EE Roadmap as well as personal behavioral changes from staff as recommended in consultations, workshops and through certification as a Green Business . Additionally, SPE will continue to act as the conduit to those PG&E 3P Resource Programs yet to be identified resulting in energy efficiency retrofits saving money, saving energy, and reducing greenhouse gas emissions in Sonoma County.

## Energy Efficiency Roadmap

Once the Division has engaged key decision makers, staff will perform an initial assessment for all participants to determine the level of support required to complete the site assessment and Energy Efficiency Roadmap Workbook. For smaller facilities with simple mechanical and control systems the workbook and resources will be available for “DIY” completion by onsite facility staff with support and guidance by trained Division staff. This workbook will be used to complete the EE Roadmap for the facility. For more complex facilities or facilities without qualified onsite staff, Division staff will coordinate and work with the selected qualified Energy Efficiency Roadmap Specialist(s) to complete the onsite assessment, Energy Efficiency Roadmap Workbook and EE Roadmap with available onsite maintenance staff. The ultimate goal would be that any suggestions made through the EE Roadmap would be implemented by facility staff. Periodic check-ins will occur to determine and overcome roadblocks surrounding the implementation of suggested actions.

## Green Business Program

The Energy and Sustainability Division is the administrator of the Green Business Program within the County of Sonoma, as prescribed by the California Green Business Network. Businesses, Schools, and Public Agencies of all types can become Certified Green Businesses based on the certification of their facility. This certification assists these organizations in conserving energy, water, waste, along with pollution prevention and implementing best practices through a checklist and verification approach. ]Division staff assist these organizations in completing goals as set forth in the Green Business Checklist and to ultimately become Certified Green Businesses by completing said checklist. The certification does not require the adoption of such measures as to necessitate major construction, but may be used as an entree to more substantial upgrades to their facilities through engagement with Sonoma Public Energy and other 3P Program Implementers.

# Program Design and Best Practices

With lack of funding being the overarching barrier towards making energy efficiency improvements and procuring training for facility staff, offering the following services at no cost to the customer is an opportunity to be met.

The Division will provide no-cost behavioral training and no-cost professional training to industry professionals in facilities that generally do not have funds allocated to such services. Training will also be provided to industry professionals at the Energy and Sustainability Division office. These trainings will target Building Operators and Contractors. Relevant training programs available from the PG&E Pacific Energy Center, Energy Code Ace and BOC will be leveraged and ESD will coordinate with the providers to facilitate and host these trainings locally and/or through webcasts with the goal that building professionals are encouraged to earn certifications and further their own education beyond what the Division can offer. Existing programs, including the Building Operator Certification and training, the PG&E Pacific Energy Center’s no cost existing building O&M trainings - including the Retro-Commissioning Workshop Series, the International Facility Management Association trainings and certification programs, will be put forth as encouraged learning and the Division will work to identify any emerging certifications or courses to be disseminated to trainees.

In developing an EE Roadmap, the Division will not only leave behind a comprehensive maintenance strategy with timeline, but also equip on-site maintenance staff with the necessary tools to maintain existing infrastructure and plan for future upgrades and replacements. With minimal staff time dedicated by the Division, Facility Maintenance Departments, and optional qualified contractors, targeted agencies can expect to see deep savings and reduction in energy usage at zero cost. In soliciting this free service from a government agency, customers need only cover the capital cost of their own staff time to coordinate with ESD staff.

In addition to reduced maintenance costs, the customer will benefit in the long term by having an equipment replacement plan. As the Roadmap provides a clear path, the customer should not have any need for further evaluation of existing systems when the time comes to replace existing equipment. Should the customer find themselves in the position to make multiple improvements at once, they will have clear prioritization of improvements to be made and in which order.

Energy efficiency of administrative functions within any given customer’s facility will be improved through guidance of workshops, the Green Business certification and will be maintained on site by facility staff.

In Sonoma County, there is only a very small portion of the population which qualifies through CalEnviroScreen as being within a Disadvantaged Community. On July 7, 2020, the Sonoma County Board of Supervisors voted to create the Sonoma County Office of Equity and this demographic may change or be expended as a result. The most widely represented populous within these Disadvantaged Communities is Hispanic and primarily Spanish speaking. The Division currently employs two native Spanish speakers and hopes to offer all programmatic functions to the citizens and business owners in English and/or Spanish.

Lack of directive and prioritization of EE Improvements from Key Decision Makers within any given organization continues to be a major barrier behind the adoption of EE practices and improvements. The current and incoming County Board of Supervisors Chair Persons (seat changes annually) have already identified climate change as a key focus through their tenure as Chair. Additionally, the County is working on a five-year strategic plan, identifying two of the five pillars (climate action and building infrastructure) in which to focus actions. The Division will help in efforts to author and pass the adoption of an Environmental Action Policy which will help to drive EE efforts throughout the entirety of Sonoma County. With the implementation of an Environmental Action Policy, EE practices can be mandated, eliminating the lack of clear directive.

The final barrier to address is lack of technical knowledge and willing cooperation from facility maintenance staff. The Division will facilitate trainings surrounding emerging technologies, supporting EE training directed at key public sector staff whose job responsibilities are directly related to maintaining systems throughout the County’s buildings. In implementing certain measures identified within the provided EE Roadmap, it will be critical that facility maintenance personnel have a deep understanding of the equipment that they maintain, or in considering technologies in replacement of systems.

## Best Practices/Lessons Learned

Through years of delivering the Sonoma County Energy Watch Program, ESD learned that just as the facilities that SPE will be targeting are aging and in need of maintenance and upgrades, maintenance staff within these facilities are in need of continuing education through training and technical knowledge that would allow them to assess their facility’s equipment in an effective and modern fashion. The Energy Efficiency Roadmap will empower maintenance staff to engage in the process of initial planning behind operations, maintenance, and upgrade of their facilities through delivery of the Energy Efficiency Roadmap and trainings as detailed in section 8.

# Innovation

The EE Roadmap will provide assessment tools lending guidance to building managers and operators to investigate, analyze, and identify no-cost, low-cost and capital intensive energy efficiency and demand response upgrade opportunities and provide direct referrals to OBF, PG&E 3P Programs, and other Resource Programs to improve building performance, reduce energy and operating costs through optimization of existing equipment controls and/or replacement of failing or ageing equipment. Every observation made during the Assessment will be recorded with the potential to be reported on through Salesforce. The EE Roadmap Workbook will be developed and modeled after The City of Seattle’s Building Tune-Up Program workbook. The City of Seattle’s Building Tune-Up Program participants have realized a reduction in energy usage of 10-15% on average and a payback on improvements of 2-3 years when implementing suggested actions. For facilities that do not have qualified staff or have more complex systems, referral will be provided to the appropriate PG&E 3P resource program to perform the assessment. Through an RFQ process, the Division will identify a qualified list of local firm(s) to provide technical support for the assessment. The ultimate deliverable for each customer will be an EE Roadmap for the facility and its inhabitants, defining a long term plan towards energy efficiency and sustainability. It is our hope that the resource program provider(s) announced following PG&E’s early 2019 RFP will be able to perform, and potentially cover the cost of any recommended work that may not be able to be performed by the participating facility’s maintenance staff.

The Energy and Sustainability Division staff will leverage already existing services and resources available through the Division, such as financing through the

Sonoma County Energy Independence Program, no-cost Green Business certifications, Better building consultations for new and existing, solar and battery storage consultations, rebates and incentives and other services offered by the Division through partner contracts.

Our “unified service delivery model” has been designed to provide potential customers with a wide range of service options to facilitate energy efficiency and conservation measures that cost-effectively reduce energy use and optimize their mechanical systems. Individual customers can then choose from a full menu of services. When presented with these additional options, some public customers may choose to also seek Green Business Certification, work to reduce their water and waste streams in addition to their energy consumption, or participate in other services available through the Division.

The Division will build upon its existing CRM tool so that it can act as an ongoing repository for each customer to catalog results of any building audits, utility bill analysis, EE trainings, customer surveys, benchmarking results, solar bid analysis, past improvement projects, and future improvement opportunities. The EE Roadmap would be easily printed and/or saved for

discussions with third-party contractors or building performance professionals. This roadmap

will make clear the customer’s ability to save incrementally by taking steps in order of

effectiveness, making energy efficiency investments easier and more attractive. The report

will be especially helpful in maintaining a consistent thread of communication with the

customer, whether the customer is the same individual who began the facility’s EE planning

or entirely new staff, as many whole building energy efficiency upgrades stretch out over

multiple years.

## Innovative Features:

* Documenting an integrated services delivery model that assists potential

 customers with multiple services

* Developing and implementing a Public Building Energy Efficiency Roadmap

 service

* Modeling of EE Roadmap for public facilities and DAC/HTR Facilities
* Implementation of California Green Business Certification within target

 customer facilities.

* Offering subject matter expertise in construction planning of new facilities

## Key benefits:

* Consistently formatted report that expands as information about the customer and

 their buildings are collected by our staff throughout the entire engagement process,

 allowing customers to better manage their building’s energy

* Report will provide ongoing record of EE improvements made to the building and a

 prioritized catalog of recommended future improvements.

* Customers who choose to not move forward immediately with improvements will

 have access to information collected so that they can proceed with recommended

 improvements when the conditions are right

Our unified service delivery model streamlines offerings of various EE services to all market

sectors, positively impacts the experience of the end customer and best demonstrates the

Division’s ability to reach a greater proportion of customers without proportional budget

increases. Our approach to energy efficiency in commercial buildings is holistic as buildings

remain in place while inhabitants do not. When the building itself is treated like a customer,

its needs will be met in a well-planned and comprehensive manner spurring deep

investment and persistent energy saving.

While previous efforts through the Energy and Sustainability Division to link organizations in need of improvements to PG&E 3P Resource Programs have been successful, inclusion of the Energy Efficiency Roadmap in the process of project acquisition will allow building maintenance personnel to better recognize and prioritize those actions which need to be taken in order to improve the efficiency of their facilities.

# Metrics

## Key Performance Indicators

• Number of Contacts – Goal = 90 Total

• Number of Leads – Goal = 43 Total

• Number of EE Roadmaps prepared and presented – Goal = 32 Total

• Number of Projects managed (facilitated financing) – Goal = 17 Total

• Number of Educational Opportunities offered – Goal = 6 Total

• Number of Buildings Benchmarked- Goal = 23 Total

## Performance Data Collection

Data pertaining to KPIs for Sonoma Public Energy will be collected and managed by staff of

the Energy and Sustainability Division. Data will be recorded and reported through Division

maintained Customer Relationship Management software. Data is collected by individuals of all job levels within the Division. A customer facing portal will be created which will allow customer building professionals to input data pertaining to their site when completing an EE Roadmap . EE Roadmap data will also be recorded and input into the CRM by Division staff completing the EE Roadmap and/or by a qualified EE Roadmap Specialist.

## Evaluability

Utilizing Division CRM, reports can be generated and delivered in real time, allowing for

immediate evaluation of program performance. Through CRM, staffwill track all contact and site information for leads acquired, customers engaged, and projects completed. Information collected will include but not be limited to site address, key decision maker(s), date of initial contact and pertinent milestones, lead source and nature of inquiry. The Division utilizes SalesForce as CRM which is customizable and capable of tracking any information desired.

# For Programs claiming to-code savings

N/A

# Pilots

N/A

# Workforce Education and Training

Incorporate workshops and trainings about new EE technologies into outreach efforts to public agencies. Provide high‐level information on the installation, operations, and maintenance of new EE technologies. Focus on educating Executive Management within each customer organization of the benefits of providing additional in‐house training for facilities staff.

SPE will host PG&E trainings and/or workshops locally.

Facilitate relevant training opportunities for public sector staff including encouraging staff to complete available certification programs by providing information about Building Operator Certification, ASHRAE Certification and other relevant trainings.

Assist customers in completing a building assessment resulting in the EE Roadmap report which will outline and help customers to prioritize and plan upgrades and improvements to their building’s equipment over years to come.

Professional development for ESD Staff will include education about available PG&E 3P Resource Programs and PG&E OBF Program. Referrals to PG&E 3P Resource Programs will be a main focus of Sonoma Public Energy and all leads referred will be tracked and reported through County maintained CRM.

# Workforce Standards

## Specialist Recruitment

The County of Sonoma will identify and create a list of qualified EE Roadmap Specialists

and contract with one or more selected qualified EE Roadmap Specialist to provide

technical support and complete more complex system assessments. The EE Roadmap

Specialist will work collaboratively with Division staff, in-house staff and communicate with

existing maintenance providers during all phases.

For building owners/facility managers who are interested in enhanced, investment grade

energy auditing and commissioning services, ESD will direct customer to the 3P energy

efficiency resource program and the EE Roadmap Specialist Directory.

ESD will issue an RFQ to solicit EE Roadmap Service Providers. ESD will create and

maintain an EE Roadmap Specialist Directory. Firms listed in the directory will have staff

that meet the requirements of the "EE Roadmap Specialist" as defined by the Sonoma

Public Energy administrator. Inclusion on this list is voluntary and does not

represent an endorsement by the County of Sonoma or PG&E.

## EE Roadmap Specialist must meet the following qualifications:

At least seven years of experience, including educational and/or professional experience,

with commercial building operations and/or building energy management.

AND

One of the following certifications or equivalent:

* Professional Engineer (PE) in mechanical or architectural engineering – California

 Board for Professional Engineers, Land Surveyors, and Geologists

* Building Operator Certification (BOC) Level II – Northwest Energy Efficiency Council

 (NEEC)

* Certified Energy Manager – Association of Energy Engineers (AEE)
* Certified Energy Auditor - AEE
* Certified Commissioning Professional (CCP) – Building Commissioning Certification

 Board (BCCB)

* Commissioning Authority (CxA) – AABC Commissioning Group (ACG)
* Existing Building Commissioning Professional (EBCP) – AEE

# Disadvantaged Worker Plan

N/A

# Additional Information

N/A