



## **CITY OF SHASTA LAKE** **REQUEST FOR PROPOSALS**

### **City of Shasta Lake Electric Evaluation, Measurement, and Verification Services for:**

1. Commercial Lighting Retrofit
2. Keep your Cool Program
3. Provide a limited Process Evaluation per the following:  
Based on a review of the program records and materials provided by the Efficiency Services Group, the consulting firm that manages the Shasta Lake energy efficiency programs:
  - a. Review the current tracking system and the information gathered and recorded by that system,
  - b. Review the marketing materials and customer recruitment processes, and reviews the measures targeted in Shasta Lake's residential portfolio to determine cost-effectiveness and identify potential alternatives.
  - c. Provide an Impact Evaluation of the measure with the largest combined relative size of savings achieved as well as degree of uncertainty with anticipated estimates of the savings.

Evaluation priorities should be based on a combination of relative size of the savings achieved as well as the degree of uncertainty with anticipated estimates of the savings. Based on the anticipated estimates of the savings and the level of achieved savings in 2007, the highest evaluation priority is to evaluate the savings from the non-residential process/motor measures. However, in reviewing the 2008 project lists provided by Efficiency Services Group, process/motors may not be the dominant measure implemented in FY 2008. Non-residential lighting may have more impact. If that is the case, then non-residential lighting should have the highest priority.

### **City of Shasta Lake**

- 4,500 Customers (residential and businesses).
- City of Shasta Lake projects an average 50 new meters annually for the next 10 years.
- Peak demand – 33.6 megawatts; summer afternoon peak.

### **Legislative Background**

Two legislative bills (SB1037 and AB2021) were signed into law a year apart. SB1037 requires that the Publicly Owned Utilities place cost effective, reliable, and feasible energy efficiency and demand reduction resources at the top of the loading order. Assembly Bill 2021, signed by the Governor a year later, reiterated the loading order and annual report stated in SB1037 as well as expanded on the annual report requirements. The expanded report must include investment funding, cost-effectiveness methodologies, and an independent evaluation that measures and verifies the energy efficiency savings and reductions in energy demand achieved by the energy efficiency and demand reduction programs.

### **RFP Information: Respondent must supply to be considered for this contract.**

See "Project Deliverables and Services" below for a complete list of deliverables.

- Provide detailed scope of work to be used in contract development
- Provide details on EM&V methodology proposed for each of the two programs

- Provide project cost schedule
- Responses must include:
  - Cover letter
  - Budget
  - Timeline
  - Evaluation Criteria
  - List of Staff Qualifications
  - Written proposal with detailed scope of work to be used in creating the Professional Service Agreement Contract.

Send proposal to:     **Electronic Copy**  
Tom Miller  
Electric Utility Director  
City of Shasta Lake  
PO BOX 777  
Shasta Lake, CA 96019  
530-275-7457 phone  
[Tom.miller@ci.shasta-lake.ca.us](mailto:Tom.miller@ci.shasta-lake.ca.us)

**Hard Copy**  
City of Shasta Lake  
Tom Miller  
Electric Utility Director  
PO BOX 777  
Shasta Lake, CA 96019

RFP Deadline: February 1, 2010 **5:00 PM (PST)**

The City of Shasta Lake, in its sole discretion, may reject any late or incomplete response.

Please submit an electronic copy of your response to Tom Miller. Both the electronic and hard copies of your response must be submitted no later than 5:00 p.m. (PST) February 1, 2010.

None of the material received by the City of Shasta Lake from the Respondent in response to this RFP will be returned to Respondent. All materials submitted by the Respondent will become the property of the City of Shasta Lake.

The City of Shasta Lake requires consultants doing this type of survey to provide the attached General Liability insurance coverage levels. Insurance must be obtained prior to the contract going to City Council for approval.

**EM&V Report Objectives:**

1. Evaluation of current RE programs and applied evaluation, measurement and verification (EM&V) methods;
2. Recommended EM&V methods and rigor guidelines for ensuring accurate gross energy and demand savings;
3. Assessment of uncertainties underlying the savings estimates. The study scopes

will also identify the most important parameters to be verified in order to ensure that the program savings are correct.

4. Determination of whether, for prescriptive measures and combinations of prescriptive measures, there is a need for greater consistency in determining energy and demand savings values, and if so recommending how this could be done for City of Shasta Lake Electric.

The final product will be a report, with supporting documentation. Other deliverables will include reporting on preliminary/draft findings, participation in several teleconferences, and presentations of results.

Work must begin in February and completed no later than March 1, 2010.

**Contractor Evaluation Criteria:**

The combined responses to the following five criteria will be used to evaluate the responses to the RFP:

1. **Third Party Status** - The contractor must be an independent third party, not affiliated with the City of Shasta Lake, City of Shasta Lake Electric Department, or involved with contractual administration of the programs being evaluated.

2. **Knowledge, Experience, Skills, and/or Ability to Implement EM&V Protocols and Conduct EM&V Services of Energy Efficiency and Demand Reduction Programs** – This criterion applies to both the contractor and the staff assigned to the EM&V contract. Please provide examples of work, previous reports and references.

3. **Significance and Impact of EM&V Results** – City of Shasta Lake is required to provide an annual report pursuant to California Senate Bill 1037 (Statutes of 2005) to their customers and the California Energy Commission (CEC) that contains a description of programs, expenditures, and expected and actual energy savings results. In addition, every three years, City of Shasta Lake Electric is required by California Assembly Bill 2021 (Statutes of 2006) to provide a report to the CEC that contains ten-year projections of the cost-effective potential that can be realized from implementing energy efficiency and demand reduction programs within the utility boundaries of City of Shasta Lake. Please explain how EM&V results can assist City of Shasta Lake in determining the future potential of cost-effective energy efficiency and demand reduction programs and other potential uses of the data, as well as the potential risks and impacts of that use.

4. **Competitive Job Costs and Hourly Rates for Services Performed** – The contractor must provide job cost and hourly rate information in \$/hr and \$/sq. ft. for typical EM&V services in commercial lighting, HVAC, and controls applications.

5. **Creativity in Implementing EM&V Services** – The contractor must describe a plan for each program that provides a cost effective way to conduct one or more of the four EM&V options.

- Option A: Physical assessment of equipment changes,
- Option B: Short-term or continuous measurements taken at the device or system level,
- Option C: Facility level measurements using current year and historical meter or sub-metered data, and
- Option D: Measurements from simulation of facility components and/or the whole facility.

**Project Scope of Work:**

Assessment of the following programs:

1. **Commercial Lighting Retrofit** In order to accurately evaluate these typical lighting installations, the City will provide a list of fixtures removed and fixtures installed. The City will also provide the operational hours used in our savings estimations. Standard wattages are available for most fixtures and can be used in a straightforward calculation of savings. Evaluation results must meet the statistical confidence of 90% +/- 10%. The assumptions for deemed energy savings will be reviewed and the paper verification performed. If the paper verification finds that insufficient documentation has been maintained by the City, then an on-site verification may be necessary.

2. Keep your Cool (gasket replacement) Program. The assumptions for deemed energy savings will be reviewed and paper verification performed. If the paper verification finds that insufficient documentation has been maintained, then an on-site verification may be necessary.

**Project may require staff to work on site, in the field, and at contractors (or subcontractor) offices.**

**Project Deliverables and Services:**

The winning contractor must supply:

**(1) EM&V Report: The EM&V report must include:**

- a. Introduction and legislative history
- b. Description of research methods
- c. EM&V analysis of the programs with analysis and graphics, including an executive summary and description of current programs.
- d. Program evaluation findings
- e. Savings verification
- f. Evaluation of Data and Tracking Systems
- g. Program Process Flows and Evaluation
- h. Staff Interviews
- i. List of subcontractors – if used
- j. Recommended Program Changes

**(2) Additional Consultant Responsibilities**

- a. Create a final report that will be submitted to the California Energy Commission by March 15, 2010
- b. Release of information to be made to City of Shasta Lake staff only

**References:**

1. City of Shasta Lake: <http://www.ci.shasta-lake.ca.us/>
2. NCPA: <http://www.ncpa.com/>
3. International Performance Measurement and Verification Protocol (IPMVP)- <http://www.evo-world.org/index.php?lang=en>

<b>RISK MANAGEMENT DIVISION GENERAL LIABILITY INSURANCE REQUIREMENTS</b>	
<b>Types of Insurance Required of Agreements with General Liability Insurance:</b>	Per occurrence/2M aggregate
<b>Limits of Coverage:</b>	See Above
<b>**Additional Insured INSURANCE. This document</b>	<b>Proof of insurance must be provided on an original CERTIFICATE OF LIABILITY Insurance. The City of Shasta Lake, its officers, agents, volunteers and employees must be specifically named as an additional insured on the policy. A separate endorsement (CG2010 1185 version) must accompany the Certificate of Insurance. A statement on the Certificate will not suffice.</b>
<b>Certificate Holder:</b>	The Certificate Holder on the <i>Certificate of Insurance</i> is “The City of Shasta Lake, attn Risk Management, PO Box 777 Shasta Lake, CA 96019”.
<b>Primary Insurance:</b>	The General Liability policy must be primary insurance as to the City of Shasta Lake. Companies issuing such policies shall be liable up to the total amount of liability without right of contribution from the City of Shasta Lake or its insurers.
<b>Description of Operations:</b>	This box should contain information on the project being insured. For companies doing various projects with the City an “ <b>All California Operations</b> ” description is adequate. Limits of coverage will be evaluated for each individual Agreement to determine sufficiency.
<b>Cancellation Notice:</b>	The City requires a 30-day cancellation notice.
<b>Approval Process:</b>	Proof of insurance for all insurance coverage required by the Agreement must be approved and on file with the City <b>before</b> the Agreement can be executed.
<b>Questions:</b>	If you have questions regarding insurance requirements you may call the Electric Utility Director at <b>(530) 275-7457</b> .

Optimized Energy and Facilities Consulting, Inc.  
5734 Lonetree Blvd.  
Rocklin, CA 95765  
Office: (916) 626-5518

Summit Blue  
1990 N. California Blvd., Suite 700  
Walnut Creek, CA 94596  
925.935.0270