

# SCPPA Efficiency Services and Products RFQ<sup>2</sup> – June 7, 2018 & amended June 14, 2018

## III. Areas of Interest

Certain SCPPA Members have expressed interest in enhancing existing programs and developing new opportunities for customers to improve the efficiency of their homes and businesses. **This could include inter-utility service offerings with SoCalGas.** While the desired efficiency improvements could include the purchase of certain products to increase energy and water efficiency, it is expected that Members will also require related services from suppliers to meet the needs of their municipalities. However, Respondents to this RFQ do not need to offer all products and/or services. Respondents should only offer to SCPPA and our Members related services and/or products that they are qualified to provide.

General services and exemplary programs, with a few bulleted points highlighting specific needs or interests, that are being sought would include, but not be limited to:

### 1. **Energy and/or Water Audits**

- Residential (e.g. ENERGY STAR®, WaterSmart or Member-defined) – including up to ten (10) recommendations for efficiency improvements, ranked on price/cost and simplicity for homeowner. Audits should be performed on-site or in-home as well as electronically.

Typical or expected services for in-home audits include, but are not limited to:

- Contractor's trained energy and water auditor conducts thorough in-home inspection of customer's electric and water billing history, an assessment of appliances and equipment and usage patterns of home's occupants.
- During the visit, auditor will identify key areas of the home that are wasting energy/water and will educate the customer by providing clear and actionable recommendations to improve efficiency.
- Audit questions on current types of lighting, appliances, equipment, fixtures (i.e. Electric Vehicles, Solar, Smart Thermostats, Variable Speed Pool Pumps **and heaters**, Showerheads...)
- Provides customers with usage score of a comparable size/type of home (i.e. using zip codes, weather data, number of people in household, square footage, and number of stories)
- Provide utility bill education and assistance
- Income qualify and refer to other utility assistance programs
- Reports provided to customer by email and if required, standard mail
- Contractor will follow-up with customer on results of audit and utility program participation
- Survey customers about their experience with utility programs and general utility services
- Audit results/reports accessible to utility staff through online portal
- Utility receives access to portal with customer data resulting from audits (i.e. appliance age and efficiency rating)
- Use of segmentation data to direct market to customer on program offerings (Income Qualified)
- Direct installation and/or distribution of Energy and Water Efficiency products and measures
- Contractor available to conduct audits on weekends
- Contractor attends community events during week days and weekends
- Spanish speaking personnel in both field and office environments

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Typical or expected services for electronic, web-based audits and services include, but are not limited to:

- Audits are emailed to customer
  - Post phone / in-person follow-up with customer to review audit
  - Income qualify and refer to other utility programs
  - Modernize with tablet and questions on current lighting, appliances, equipment (EV's, Solar, Smart Thermostats, Variable Speed Pool Pumps and heaters)
  - Survey customers about their experience with utility programs and general utility services
  - Reports should be accessible to Call Center staff if a customer calls contractor
  - Access to portal with customer data resulting from audits (i.e. appliance / equipment age)
  - Email or Mail follow-up letter on results of audit and utility program participation (once three months)
  - Contractor will utilize segmentation data to direct market to customer on program offerings (e.g. Low Income)
  - Install EE and WE measures including attic insulation, AC tune-ups, Wi-Fi technology (i.e. Smart Thermostats, WBIC's, Pool Pumps and heaters)
  - Contractor attends annual community events
  - Utility bill explanation and assistance
  - On-line Tool will compare using zip codes, # of people in household, sq. ft., 2 or 1 story homes, CO2 emissions "What's Your Score?"
  - Modernize with questions on current lighting, appliances, equipment (EV's, Solar, Smart Tech.)
  - Online tool could be used with customers at community events
  - Email or Mail follow-up letter on results of audit and utility program participation (once three months)
  - Spanish Speaking services available
- Commercial/Industrial/Institutional (e.g. ASHRAE levels(s) or Member-defined) – including up to ten (10) recommendations for efficiency improvements, ranked on price/cost and simplicity for business owner

Additional, related on-line services of interest include an on-line energy and water audit for residential and commercial customers to access 24/7 that could include:

- Tool that can provide customers with an energy, water and CO2 emission score and potential saving considerations
- Compare energy and water usage of a comparable size / type of home (i.e. using zip codes, weather data, number of people in household, square footage, and number of stories).
- Usage calculator for home equipment/appliances (i.e. Electric Vehicles, Solar, Smart Thermostats, Clothes Washers)
- Ability to access online tool on mobile device such as tablets for use during community events
- Spanish language version of online tool

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As well as an Efficiency Audit Program Participant database and on-line portal that is accessible to utility staff and will:

- Maintain an on-line customer database with all participant measures installed and/or provided, audit findings, survey results, recommendations, and notes
  - Update customer database in a timely manner no less than monthly with all customer participant information
2. **Direct Installation of Contractor-identified and/or Member-specified efficiency measures**
    - a. Residential
    - b. Commercial/Industrial/Institutional (CII)
  3. **Distribution of Energy and Water Efficiency Products / Kits**
    - a. Direct mail or bulk purchase of energy and water efficiency products / kits for customer distribution
    - b. Utility branding on products and/or kits
  4. **Upstream/Midstream Efficiency Rebate Program**
    - a. Air Conditioning Equipment
    - b. Pumps/Motors
    - c. Lighting
  5. **Energy Efficiency, Demand Response and/or Retrocommissioning Program Design and Development**
    - a. Design market segment and/or technology focused programs
    - b. Develop program policies & procedures
    - c. Create application forms and review processes
    - d. Develop savings calculation tools
  6. **Energy Efficiency, Demand Response and/or Retrocommissioning Incentive Program Implementation and Technical Support**
    - a. Evaluate project energy savings and cost estimates
    - b. Provide customer calculation and incentive application assistance
    - c. Develop program support software
  7. **Quality Assurance/Quality Control**
    - a. 3<sup>rd</sup> Party verification services of auditing, direct installations and Home Performance contracting (note: Respondents selected to provide 3<sup>rd</sup> party verification/quality control services will not be eligible to perform or provide other services identified and requested in this RFQ<sup>2</sup>)
    - b. Energy Efficiency Incentive Program Evaluation and Reporting
      - i. Verify program energy savings and costs
      - ii. Evaluate program cost-effectiveness - TRC and PAC
      - iii. Conduct site inspections
      - iv. Perform program evaluation, measurement & verification (EM&V)
    - c. Conduct customer equipment inspections

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### 8. Efficiency and Electric Utility-related Training Services

- b. Qualified trainer(s) are sought to provide informed training sessions on electricity and efficiency-related topics that may be requested by SCPPA and/or our Members, including but not limited to:
  - i. Energy Efficiency Training Courses
    - 1) Small Business Energy Efficiency
    - 2) Energy-Efficient Air Conditioning – Package Units
    - 3) Energy-Efficient Lighting Systems
    - 4) Energy Efficiency for Schools
    - 5) Energy-Efficient Motors
    - 6) Variable Speed Drives
    - 7) Chilled-Water Plant Efficiency
    - 8) Cooling Tower Energy Efficiency and Water Conservation
    - 9) Air Handling Systems New Technologies
    - 10) Commercial Refrigeration Efficiency
    - 11) Industrial Refrigeration Efficiency
    - 12) Energy Management and Control Systems
    - 13) Distributed Energy Resources
    - 14) Thermal Energy Storage
    - 15) Compressed Air Efficiency
    - 16) Technology Updates - Executive Overview
    - 17) Energy Intensive Manufacturing
    - 18) Energy Efficiency for Hotels
    - 19) Energy Efficiency for Boilers
    - 20) Energy Efficiency Survey
    - 21) Implementing Energy Efficient Projects
    - 22) HVAC Testing & Equipment
    - 23) Technology Update
  - ii. Demand Response Training Courses
    - 1) Understanding Demand Response
    - 2) Knowing the Flow of Demand Response (half-day)
    - 3) Screening and Auditing Techniques for Demand Response
    - 4) Calculating Demand Response Load Reductions
    - 5) Demand Response Technical Coordinator Training
    - 6) Planning New Construction with Demand Response (2-days)

In addition to this comprehensive list, Members may be interested in other training programs in related areas or matters.

### 9. Regulatory Proceeding Support

- a. Evaluation and assessment services and potential intervention in state and federal regulatory and legislative proceedings related to energy efficiency and utility load management programs

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A partial list of the potential types or possible examples of the products, technologies or measures that Members would desire service providers and product suppliers to focus on during audits, direct installations and home performance contracting would include, but not be limited to:

1. **Air Conditioning Equipment**
  - a. Refrigerant Charge
  - b. Coil condition
  - c. Supply and return air flows
  - d. Smart Thermostats
  
2. **Weatherization**
  - a. Insulation
  - b. Caulking & weather-stripping/air-sealing
  
3. **Lighting**
  - a. Fixtures (Fluorescent, LED, Induction ...)
  - b. Lamps (screw-in & hard-wired, Fluorescent & LED ...)
  - c. Solar Tubes
  
4. **Pumps and Motors**
  - a. Pool Pumps
  - b. Commercial-grade Variable speed drives
  
5. **Indoor Water Efficiency Improvements**
  - a. Low-flow Showerheads
  - b. Aerators (kitchen with shutoff and bathroom)
  - c. Toilet Flappers & Dams
  - d. Waterless urinals
  - e. High Efficiency toilets
  
6. **Outdoor Water Efficiency Improvements**
  - a. Rotating sprinkler nozzles
  - b. Soil moisture sensors
  - c. Sprinkler Timers/controls

Recognizing that many services and products can fit within the different areas of interest referenced above, SCPPA has determined that providing potential Respondents with a complete or comprehensive list of said services and products is not feasible because it would be daunting for Respondents to complete such a list. Similarly, the evaluation and comparison would be very difficult, at best.

Therefore, Respondents are encouraged to submit an exemplary list or catalog of the products and/or services that the Respondent would offer to SCPPA and our Members. Any such list shall be no more than eight (8) pages in length for both products and/or services. This list shall include unit prices for each product, including listings of volumetric pricing offers. Respondents shall also include a complete list of the labor rates for all job classifications that may be employed in the execution of any professional services being offered.

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These exemplary data points will be the primary considerations in SCPPA's evaluation of responses to the RFQ<sup>2</sup> but will not be the sole determinant used to decide if one or more Respondents will be considered for development of a Goods and Services Agreement with SCPPA. However, should a contract be awarded for Goods and/or Services as a result of this solicitation, the Respondent will not be limited to the provision of only the Goods and Services presented in the exemplary list and will be able to offer additional Goods and/or Services to SCPPA and our Members. SCPPA and/or our Members will have sole discretion to choose to accept any additional offers and will have no obligation at any time to accept such additional offers.