



Inland Regional Energy Network I-REN Executive Committee

AGENDA

**Tuesday, February 21, 2023
2:00 PM**

**Apple Valley Development Services Building
14975 Dale Evans Parkway
Conference Center South Room
Apple Valley, CA 92307**

[Join Zoom Meeting](#)

Meeting ID: 864 5862 7870

Passcode: 072601

Dial in: (669) 444 9171 U.S.

SPECIAL NOTICE – COVID-19 RELATED PROCEDURES IN EFFECT

Due to the State or local recommendations for social distancing resulting from the threat of Novel Coronavirus (COVID-19), this meeting is being held via Zoom under Assembly Bill (AB) 361 (Government Code Section 54953). Pursuant to AB 361, WRCOG does not need to make a physical location available for members of the public to observe a public meeting and offer public comment. AB 361 allows WRCOG to hold Committee meetings via teleconferencing or other electronic means and allows for members of the public to observe and address the committee telephonically or electronically.

In addition to commenting at the Committee meeting, members of the public may also submit written comments before or during the meeting, prior to the close of public comment to jleonard@wrcog.us.

Any member of the public requiring a reasonable accommodation to participate in this meeting in light of this announcement shall contact Janis Leonard 72 hours prior to the meeting at (951) 405-6702 or jleonard@wrcog.us. Later requests will be accommodated to the extent feasible.

The Committee may take any action on any item listed on the agenda, regardless of the Requested Action.

- 1. CALL TO ORDER (Crystal Ruiz, Chair)**
- 2. PLEDGE OF ALLEGIANCE**
- 3. ROLL CALL**

4. PUBLIC COMMENTS

At this time members of the public can address the Committee regarding any items within the subject matter jurisdiction of the Committee that are not separately listed on this agenda. Members of the public will have an opportunity to speak on agenda items at the time the item is called for discussion. No action may be taken on items not listed on the agenda unless authorized by law. Whenever possible, lengthy testimony should be presented to the Committee in writing and only pertinent points presented orally.

5. CONSENT CALENDAR

All items listed under the Consent Calendar are considered to be routine and may be enacted by one motion. Prior to the motion to consider any action by the Committee, any public comments on any of the Consent Items will be heard. There will be no separate action unless members of the Committee request specific items be removed from the Consent Calendar.

A. Assembly Bill 361 Findings

Requested Action(s):

1. Affirm the findings of the I-REN Executive Committee in Resolution Number 01-22, adopted on December 13, 2022, which are:
 - a. The Governor proclaimed a State of Emergency on March 4, 2020, related to the COVID-19 pandemic, which State of Emergency continues to exist today; and
 - b. State or local officials have recommended measures to promote social distancing.

B. Summary Minutes from the January 17, 2023, Executive Committee Meeting

Requested Action(s):

1. Approve the Summary Minutes from the January 17, 2023, Executive Committee meeting.

6. REPORTS / DISCUSSION

Members of the public will have an opportunity to speak on agenda items at the time the item is called for discussion.

A. I-REN Proposed Programs and Budget Allocations

Requested Action(s):

1. Receive and file.

B. Contract Approvals for Implementers for I-REN's Business Plan Sector Programs.

Requested Action(s):

1. Authorize the WRCOG Executive Director to execute the following contracts:
 - a. Contract #2023-80-2080-001 between the Western Riverside Council of Governments and The Energy Coalition for Public Sector Energy Efficiency Program Services for a not to exceed amount of \$7,500,000 for a three-year term with no more than two options to renew or amend.
 - b. Contract #2023-80-2080-002 between the Western Riverside Council of Governments and Alternative Energy Systems Consulting, Inc., for Building Upgrade Concierge (BUC) Software Development Services for a not to exceed amount of \$655,000 for a three-year term with no more than two options to renew or amend.
 - c. Contract #2023-80-2080-003 between the Western Riverside Council of Governments and Frontier Energy,

Inc., for I-REN Codes and Standards Program Services for a not to exceed amount of \$2,374,000 for a three-year term with no more than two options to renew or amend.

- d. Contract #2023-80-2080-004 between the Western Riverside Council of Governments and ICF Resources, LLC., for I-REN Portfolio-wide Marketing and Communication Services for a not to exceed amount of \$750,000 for a three-year term with no more than two options to renew or amend.

C. Workforce, Education & Training Sector Update: Introduction of Fellowship Program

Requested Action(s): 1. Discuss and provide input.

D. I-REN Strategic Planning Update

Requested Action(s): 1. Receive and file.

7. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR

Crystal Ruiz, WRCOG

8. ITEMS FOR FUTURE AGENDAS

Members are invited to suggest additional items to be brought forward for discussion at future Committee meetings.

9. GENERAL ANNOUNCEMENTS

Members are invited to announce items / activities which may be of general interest to the Committee.

10. NEXT MEETING

The next I-REN Executive Committee meeting is scheduled for Tuesday, March 21, 2023, at 2:00 p.m.; location yet to be determined.

11. ADJOURNMENT

12. AGENCY ACRONYMS

Inland Regional Energy Network Acronym Guide

3C-REN – Tri-County Regional Energy Network (Counties of Ventura, Santa Barbara, and San Luis Obispo)

ABAL – Annual Budget Advice Letter

AHJ – Authority Having Jurisdiction

AVCE – Apple Valley Choice Energy

BayREN – Bay Area Regional Energy Network (nine county REN in Northern California)

BUC – Building Upgrade Concierge

C&S – Codes & Standards

CAEECC – California Energy Efficiency Coordinating Committee

CalChoice – California Choice Energy Authority

Cal ISO – California Independent System Operator

CARB – California Air Resources Board

CCA – Community Choice Aggregator

CCEC – California Climate & Energy Collaborative

CEC – California Energy Commission

COG - Council of Government
 CPA – Clean Power Alliance
 CPUC – California Public Utilities Commission
 CVAG – Coachella Valley Association of Governments
 DAC – Disadvantaged Communities
 DACAG – Disadvantaged Communities Advisory Group
 DCE – Desert Community Energy
 DER – Distributed Energy Resources
 DOE – U.S Department of Energy
 EE – Energy Efficiency
 EM&V – Evaluation, Measurement, and Verification
 EV – Electric Vehicle
 GHG – Greenhouse gases
 HTR – Hard To Reach communities
 IID – Imperial Irrigation District
 IOU – Investor-Owned Utility
 I-REN – Inland Regional Energy Network
 JCM – Joint Cooperation Memorandum
 LGSEC – Local Government Sustainable Energy Coalition
 LGP – Local Government Partnership
 MOA – Memorandum of Agreement
 NEBs – Non-energy Benefits
 NMEC – Normalized Metered Energy Consumption
 NREL – U.S Department of Energy National Renewable Energy Laboratory
 PG&E – Pacific Gas & Electric
 PA – Program Administrator
 POU – Publicly Owned Utility
 REN – Regional Energy Network
 RMEA – Rancho Mirage Energy Authority
 RPU – Riverside Public Utilities
 SBCOG – San Bernardino Council of Governments
 SCE – Southern California Edison
 SCG / SoCalGas – Southern California Gas Company
 SDG&E – San Diego Gas & Electric
 SJP – San Jacinto Power
 SoCalREN – Southern California Regional Energy Network (all of southern California, administered by Los Angeles County)
 TA – Technical Assistance
 TOU – Time of use
 TRC – Total Resources Cost
 V2G – Vehicle to Grid
 WE&T – Workforce Education & Training
 WRCOG – Western Riverside Council of Governments



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: Assembly Bill 361 Findings

Contact: Dr. Kurt Wilson, WRCOG Executive Director, kwilson@wrcog.us, (951) 405-6701

Date: February 21, 2023

Requested Action(s):

1. Affirm the findings of the I-REN Executive Committee in Resolution Number 01-22, adopted on December 13, 2022, which are:
 - a. The Governor proclaimed a State of Emergency on March 4, 2020, related to the COVID-19 pandemic, which State of Emergency continues to exist today; and
 - b. State or local officials have recommended measures to promote social distancing.

Purpose:

The purpose of this item is to authorize virtual Committee meetings pursuant to Assembly Bill 361.

Background:

Since the onset of the COVID-19 in early 2020, California government agencies have been able to continue to discharge their legal responsibilities through the use of virtual teleconferencing platforms such as Zoom to hold public meetings that enabled agencies to meet and conduct business, comply with social distancing orders, and most importantly, provide access to the public. WRCOG has been meeting on Zoom since March of 2020, when many Executive Orders were issued by Governor Newsom in response to the pandemic. One such order altered Brown Act requirements to allow for virtual meetings.

Although transmission, hospitalization, and death rates from COVID-19 have sharply declined since the original onset of the pandemic and subsequent Delta and Omicron Variant surges, an air of uncertainty remains regarding the pandemic and many counties continue to recommend masking inside and social distancing. Given that environment and a desire to continue allowing for the flexibility of holding virtual meetings, the Legislature recently approved, and Governor Newsom signed, Assembly Bill 361 (AB 361) to temporarily allow for virtual meetings under proscribed circumstances.

AB 361 amends the Brown Act to allow local legislative bodies to continue using teleconferencing and virtual meeting technology in certain circumstances. Under the Bill, legislative bodies can continue to meet remotely as long as there is a "proclaimed state of emergency" and the Executive Committee can make either of the following findings: (a) state or local officials have imposed or recommended measures to promote social distancing, or (b) whether as a result of the emergency, meeting in person would present imminent risks to the health or safety of attendees. Even though cases have dropped, AB 361 is expressly intended "to protect the health and safety of civil servants and the public and does not preference the experience of members of the public who might be able to attend a meeting in a physical

location over members of the public who cannot travel or attend that meeting in a physical location" because of physical status.

The Governor proclaimed a State of Emergency on March 4, 2020, related to the COVID-19 pandemic, which continues to exist to this day.

AB 361 requires specific procedural safeguards for the public. To accommodate individuals during these teleconferences and virtual meetings, a public comment period will be offered where the public can address the legislative body directly in real time. Additionally, public comments will be allowed up until the public comment period is closed at the meetings. The agenda will include information on the manner in which the public may access the meeting and provide comments remotely. If technical problems arise that result in the public's access being disrupted, the legislative body will not take any vote or other official action until the technical disruption is corrected and public access is restored.

The attached Resolution allows the Executive Committee to implement AB 361 by making the findings discussed above. These findings will be in effect for 30 days or until the Executive Committee makes findings that the conditions listed therein no longer exist, whichever is shorter. The findings can be extended by the Executive Committee upon a finding that conditions supporting the findings included in the Resolution still exist. The authorization to meet remotely will also apply to any Committees that meet during the 30-day effective period.

AB 361 will allow for virtual meetings during other state-proclaimed emergencies, such as earthquakes or wildfires, where physical attendance may present a risk. AB 361 is scheduled to sunset January 1, 2024.

Prior Action(s):

January 17, 2022: The Executive Committee affirmed the findings of the I-REN Executive Committee in Resolution Number 01-22, adopted on December 13, 2022, which are:

a. The Governor proclaimed a State of Emergency on March 4, 2020, related to the COVID-19 pandemic, which State of Emergency continues to exist today; and b. State or local officials have recommended measures to promote social distancing.

December 13, 2022: The Executive Committee adopted Resolution Number 01-22; A Resolution of the Executive Committee of the Inland Regional Energy Network authorizing virtual Committee meetings pursuant to AB 361.

Fiscal Impact:

This item is for informational purposes only; therefore, there is no fiscal impact.

Attachment(s):

[Attachment 1 - Resolution Number 01-22; AB 361 findings](#)

RESOLUTION NUMBER 01-22

A RESOLUTION OF THE EXECUTIVE COMMITTEE OF THE INLAND REGIONAL ENERGY NETWORK AUTHORIZING VIRTUAL COMMITTEE MEETINGS PURSUANT TO AB 361

WHEREAS, the Inland Regional Energy Network (“I-REN”) is committed to preserving and nurturing public access and participation in meetings of the Executive Committee; and

WHEREAS, as a “legislative body” under the Ralph M. Brown Act (Cal. Gov. Code 54950 – 54963) and as required by the MEMORANDUM OF AGREEMENT NO. 22-1002767 BY AND BETWEEN COACHELLA VALLEY ASSOCIATION OF GOVERNMENTS AND SAN BERNARDINO ASSOCIATED GOVERNMENTS AND WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS FOR 2022-2027 INLAND REGIONAL ENERGY NETWORK (I-REN), all meetings of I-REN’s Executive Committee are open and public so that any member of the public may attend and participate in WRCOG’s meetings; and

WHEREAS, starting in March 2020, in response to the spread of COVID-19 in the State of California, the Governor issued a number of executive orders aimed at containing the COVID-19 virus; and

WHEREAS, among other things, these orders waived certain requirements of the Brown Act to allow legislative bodies to meet virtually; and

WHEREAS, the Governor’s executive order related to the suspension of certain provisions of the Brown Act expired on September 30, 2021; and

WHEREAS, on September 16, 2021, the Governor signed AB 361 (in effect as of October 1, 2021 – Government Code Section 54953(e)), which allows legislative bodies to meet virtually provided there is a state of emergency, and either (1) state or local officials have imposed or recommended measures to promote social distancing; or (2) the legislative body determines by majority vote that meeting in person would present imminent risks to the health and safety of attendees; and

WHEREAS, such conditions now exist in I-REN, specifically, a State of Emergency has been proclaimed related to COVID-19 and state or local officials are recommending measures to promote social distancing.

NOW THEREFORE, BE IT RESOLVED by the Executive Committee of the Inland Regional Energy Network as follows:

Section 1. Recitals. The Recitals set forth above are true and correct and are incorporated into this Resolution by this reference.

Section 2. Findings. Consistent with the provisions of Government Code Section 54953(e), the Executive Committee finds and determines that (1) a State of Emergency related to COVID-19 is currently in effect and (2) state or local officials have recommended measures to promote social distancing in connection with COVID-19.

Section 3. Remote Teleconference Meetings. Based on the findings and determinations included herein, the Executive Committee will conduct remote teleconference meetings under the provisions of Government Code Section 54953(e) and shall provide public access to its meetings as provided in Section 54953(e).

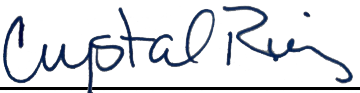
Section 4. Effective Date of Resolution. This Resolution shall take effect upon adoption and shall be effective for 30 days unless extended by a majority vote of the Executive Committee in accordance with Section 5 of this Resolution.

Section 5. Extension by Motion; Supersede. The Executive Committee may extend the application of this Resolution by motion and majority vote by up to 30 days at a time, provided that it makes all necessary findings consistent with and pursuant to the requirements of Section 54953(e)(3). Any such extension may be made before or after the expiration of the preceding 30-day period.

Section 6. Full and Fair Access. In making the findings included herein, the Executive Committee specifically relies on Section 8(b) of Statutes 2021, c.165 (AB 361, § 3, effective September 16, 2021) which provides as follows:

- (b) The Legislature finds and declares that [the changes made by AB 361 to] Section 54953 of the Government Code, all increase and potentially limit the public's right of access to the meetings of public bodies or the writings of public officials and agencies within the meaning of Section 3 of Article I of the California Constitution. Pursuant to that constitutional provision, the Legislature makes the following findings to demonstrate the interest protected by this limitation and the need for protecting that interest:
- (1) By removing the requirement that public meetings be conducted at a primary physical location with a quorum of members present, this act protects the health and safety of civil servants and the public and does not preference the experience of members of the public who might be able to attend a meeting in a physical location over members of the public who cannot travel or attend that meeting in a physical location.
 - (2) By removing the requirement for agendas to be placed at the location of each public official participating in a public meeting remotely, including from the member's private home or hotel room, this act protects the personal, private information of public officials and their families while preserving the public's right to access information concerning the conduct of the people's business.

PASSED AND ADOPTED by the Executive Committee of the Inland Regional Energy Network on December 13, 2022.



Crystal Ruiz, Chair
I-REN Executive Committee

Approved as to form:



Steven DeBaun
WRCOG Legal Counsel

AYES: 9 NAYS: 0 ABSENT: 0 ABSTAIN: 0

I-REN Executive Committee

Minutes

1. CALL TO ORDER

The meeting of the I-REN Executive Committee was called to order by Chair Crystal Ruiz at 2:00 p.m. on December 13, 2022, at the Rialto Civic Center, City Council Board Chambers, 150 S. Palm Avenue, Rialto, CA.

2. PLEDGE OF ALLEGIANCE

Committee member Oscar Ortiz led the Committee members and guests in the Pledge of Allegiance.

3. ROLL CALL

- CVAG:
 - City of Indio - Oscar Ortiz
- SBCOG:
 - City of Rialto - Deborah Robertson
 - County of San Bernardino - Curt Hagman
 - Town of Apple Valley - Art Bishop
- WRCOG:
 - City of Corona - Jacque Casillas
 - City of Jurupa Valley - Chris Barajas
 - City of San Jacinto - Crystal Ruiz

4. PUBLIC COMMENTS

There were no public comments.

5. AB 361 FINDINGS

A. Assembly Bill 361 Findings

Action:

1. Affirmed the findings of the I-REN Executive Committee in Resolution Number 01-22; adopted on December 13, 2022, which are:
 - a. The Governor proclaimed a State of Emergency on March 4, 2020, related to the COVID-19 pandemic, which State of Emergency continues to exist today, and
 - b. State or local officials have recommended measures to promote social distancing.

B. Summary Minutes from the December 13, 2022, Executive Committee Meeting

Action:

1. Approved the Summary Minutes from the December 13, 2022, Executive Committee meeting.

RESULT: APPROVED AS RECOMMENDED

MOVER: Bishop

SECONDER: Barajas

AYES: Ortiz, Robertson, Hagman, Bishop, Casillas, Barajas, Ruiz

6. REPORTS / DISCUSSION

A. Recap of Regulatory and Policy History of I-REN's Formation

Dr. Kurt Wilson, WRCOG Executive Director, reported that the concept of RENs has been around for a while. Conceptual discussions of I-REN began in 2017 with a number of individuals from each partner Council of Government (COG) met to discuss the possibility of creating the I-REN in order to attract local resources to this region - member COGs include the Coachella Valley Association of Governments (CVAG), the San Bernardino Council of Governments (SBCOG), and the Western Riverside Council of Governments (WRCOG). There are also two Program Administrators - SoCal Gas and Southern California Edison (SCE). The I-REN Business Plan was approved by the California Public Utilities Commission (CPUC) on November 18, 2021.

The following agreements between all parties were prepared:

1. Cost Sharing Cooperative Agreement - an agreement to pay for the consultants to develop the Business Plan.
2. Business Plan - formal proposal to the CPUC to become a Program Administrator / Regional Energy Network.
3. Joint Cooperation Memo - Regulatory requirement from the CPUC to capture how IL-REN, SoCal REN, SCE, and SoCal Gas will work together.
4. Memorandum of Agreement - delegates duties and responsibilities between CVAG, SBCOG, and WRCOG.
5. Governance and Operation Rules - Defines roles, responsibilities, and scopes of authority of CVAG, SBCOG, and WRCOG, establishes communication and decision-making channels, and delineates scopes of authority of each member COG.
6. Programs Agreement - Establishes mechanisms for I-REN to access funds through specified process, and establishes SoCal Gas as the Fiscal Agency and WRCOG as the Administrative Lead.

Committee member Curt Hagman expressed concerns as it relates to voting representation size of each COG and even / balanced funding amongst each COG.

Committee member Art Bishop indicated that he is excited to see I-REN grow.

Committee member Oscar Ortiz would like a more detailed review of revenues / population funding as it relates to his jurisdiction.

Committee member Jacque Casillas indicated that having a better understanding of what each subregion contributes and uses will help to define where I-REN is headed.

Committee member Chris Barajas indicated that he would like to see programs created that are open to all cities / jurisdictions, and it is the responsibility of each city / jurisdiction to secure funding for programs in their areas.

Committee member Hagman wants to ensure that all member COGs have the same fair opportunity to take care of their respective areas / constituents.

Committee member Deborah Robertson indicated that under I-REN, this region will be able to maximize efforts for resources.

Chair Ruiz indicated that all of the equality and passion of programs each member has expressed as a desire for their respective communities / districts will be obtained under the upcoming Strategic Plan and she is excited to see what the group comes up with, together.

Action:

1. Received and filed.

B. I-REN Business Plan Overview

Casey Dailey, WRCOG Director of Energy & Environmental Programs, reported that today's presentation will be provided by Frontier Energy and Blue Point Planning.

Margaret Marchant of Frontier Energy provided an overview on the Business Plan timeline. There were 34 letters of support that were submitted within the Business Plan to the CPUC. The CPUC's governance requirements for new RENs include having at least two local government entities within its governance structure. REN programs must either fill gaps in offerings by other Program Administrators, pilot innovative activities that could be expanded statewide, or serve hard to reach communities.

Ms. Marchant provided an overview of the differences in governance structure among SoCalREN, BayREN, and 3C-REN.

Committee member Curt Hagman asked how the other RENs are dealing with the division of resources.

Ms. Marchant responded that there are metrics used which are mandated by the CPUC, and RENs can also develop their own metrics.

RENs are mission driven to serve their constituents / communities. REN performance is measured by the progress toward goals, metrics, and targets. If goals are not met, future funding could be impacted.

Committee member Art Bishop asked if the future funding that could potentially be impacted for not meeting goals is annual funding, or 5-year funding.

Ms. Marchant responded that because I-REN applied for funding outside of the normal portfolio filing cycle, it is already approved for funding on an annual basis through the year 2027.

Committee member Bishop asked if staff are responsible for filing reports with the CPUC.

Mr. Dailey responded that as the lead administrator, WRCOG is responsible for filing reports with the CUPC. This Committee will have the opportunity to review and approve the reports prior to submittal to the CPUC.

Ms. Marchant continued with the mission, vision, and goals & strategies of I-REN. I-REN's mission is, "To actively participate in California's Clean Energy initiatives and build a stronger clean energy economy and community." I-REN's vision is to "connect residents, businesses, and local government to a wide range of energy efficiency resources to increase energy savings and equitable access throughout San Bernardino and Riverside Counties."

The Business Plan goals include the following:

1. Goal 1 - Build capacity and knowledge to enable local governments to effectively leverage energy efficiency services and to demonstrate best practices (Public Sector).
2. Goal 2 - Ensure there is a trained workforce to support and realize energy efficiency savings goals across sectors (Workforce, Education & Training Sector).
3. Goal 3 - Work closely with local building departments and the building industry to support, train, and enable long-term streamlining of energy code compliance (Codes and Standards Sector).

Goal 1 programs include a Technical Assistance and Strategic Energy Planning Program and a Public Buildings Normalized Metered Energy Consumption (NMEC) Program.

Committee member Hagman asked how much is subjective policy proposed by staff versus how much is required by the CPUC?

Ms. Marchant responded that the Business Plan, the budget, and strategic framework is what the CPUC has approved to spend funding on. There is flexibility, within reason, across the Programs.

Chair Ruiz indicated that these matters will be discussed in the Strategic Planning sessions.

Committee member Hagmans asked which consultants have been hired to date.

Mr. Dailey responded that Frontier Energy and subconsultant Blue Point Planning have been hired to support the launch and implementation of I-REN at a staffing level.

Ms. Marchant continued that the strategies and tactics for all goals were developed based on specific barriers cited by local jurisdictions and stakeholders.

I-REN's portfolio budget was prepared in a bottom-up process, meaning each function was analyzed for its needs and costs, and then justified against expenses for each year.

Committee member Bishop asked if the currently awarded funding will change every five years.

Ms. Marchant responded that at the end of the funding period, 2027, and when I-REN reapplies for additional funding, I-REN can apply for more money and even more market sectors. As stated earlier, future funding will be impacted if progress and goals are not exhibited and met.

Action:

1. Received and filed.

C. I-REN Strategic Plan Introduction

Casey Dailey, WRCOG Director of Energy & Environmental Programs, reported that the Business Plan is the "what" and the Strategic Plan is the "how."

Mindy Craig of Blue Point Planning reported that ongoing meetings with staff from each COG are occurring. Surveys will be released in the near future to all members and stakeholders as well to obtain information on what is needed, wanted, desired, etc., as it relates to projects. Meetings with each Committee member will also be scheduled to gather information on what the situation is today.

Because the three COGs are coming together as a region, I-REN will be able to co-create programs, policies, partnerships, and relationships across the region, which will enable I-REN to get projects out and on the ground much better than if each COG were to attempt this on its own. There may even be opportunities to create pilot projects / programs.

A draft Strategic Plan will be presented to this Committee likely in July 2023. The expected outcomes include:

1. 3-year Plan that includes measurable goals, strategies to ensure effective and efficient use of CPUC funding
2. Identification of priorities and partners
3. Integration of equity
4. Alignment of engagement and activities across members of I-REN

Ms. Craig asked each Committee member to briefly indicate what success means to them.

Committee member Chris Barajas indicated that success to him means getting this program up and running, creating a Strategic Plan that all participants benefit from as equally as possible, and giving the residents back the money that they put in (via the Public Goods charge on their utility bills), and creating beneficial programs.

Committee member Curt Hagman indicated that success to him means to be cognizant of the current environment, to train a workforce and get them deployed, to have the expertise to help member jurisdictions efficiently spend funding for projects that may currently be on the table, and to earn an A+ on I-REN's credit rating.

Committee member Art Bishop asked if I-REN has the ability to form a non-profit and seek funding from other agencies?

Ms. Craig responded that I-REN does have that ability. The CPUC would like to see I-REN leveraging, for example, funding from the U.S. Department of Energy.

Committee member Oscar Ortiz indicated that success to him would be for I-REN to make a big push into renewable energy throughout all communities, and finding a way to create savings for not only

residents, but local governments and their partners. Lastly, to priorities communities which are most in need of assistance for climate resiliency projects.

Committee member Jacque Casillas indicated that success to her would include being effective, efficient, under promising and over delivering, not setting sights too far ahead, and making sure I-REN is getting the buy-in from cities. Also, that I-REN has used up every single dollar it has been awarded, and have projects in the queue.

Chair Ruiz indicated that success to her would include buy-in from all cities and districts, and stakeholder participation.

Ms. Craig asked if there is anything in particular this Committee wants to see in the Strategic Plan.

Chair Ruiz responded that she wants to see answers to the surveys.

Committee member Casillas responded that she wants to see examples of what other RENs have done and what the end of the cycle looked like for them.

Chair Ruiz would also like to see where the holes are and how can I-REN avoid them.

Committee member Ortiz responded that he wants to see history of other projects and financial projects moving forward.

Committee member Bishop responded that he wants to see survey results.

Margaret Marchant of Frontier Energy stated that the energy efficiency funding cannot be used for renewables according to current CPUC guidelines.

Action:

1. Authorized the initiation of the I-REN Organizational Strategic Plan.

RESULT: APPROVED AS RECOMMENDED

MOVER: Hagman

SECONDER: Casillas

AYES: Ortiz, Hagman, Bishop, Casillas, Barajas, Ruiz

D. Approval of I-REN Executive Committee 2023 Meeting Schedule

Casey Dailey, WRCOG Director of Energy & Environmental Programs, reported that a meeting schedule was initially presented in December 2022; however, the dates proposed did not work for the group.

The Committee discussed the proposed dates and chose the 3rd Tuesday of the month every month at 2:00 p.m. with the option of cancelling any meeting if need be. Additionally, meeting locations will alternate amongst member jurisdictions.

Action:

1. Approved the schedule of I-REN Executive Committee meetings for 2023.

RESULT: APPROVED AS RECOMMENDED

MOVER: Bishop

SECONDER: Hagman

AYES: Ortiz, Hagman, Bishop, Casillas, Barajas, Ruiz

E. I-REN Assistance with Additional Funding Opportunities

Kenyon Potter, CVAG Director of Energy & Sustainability, reported that there are a number of state and federal programs that have funding available. I-REN is in the position to be able to provide technical assistance to member jurisdictions' energy efficiency projects such as electric vehicle charging infrastructure and climate adaption and resiliency, for example. One of the questions that should be included in the survey that was mentioned earlier should be if a jurisdiction needs assistance, to let us know now, as some applications close in March 2023.

I-REN is already working on a grant to extend what is known as solar plus, to add heat pumps and other elements so a contractor can go online and get a permit.

Committee member Curt Hagman asked how to coordinate this type of work, which entity does it?

Casey Dailey, WRCOG Director of Energy & Environmental Programs, responded that Coordinating Committees and Working Groups were part of the Business Plan, and I-REN could also rely on the committee structures within each COG to bring communities into the conversation.

Committee member Jacque Casillas indicated that she really likes the idea of using bodies that already exist.

Action:

1. Received and filed.

7. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR

Chair Ruiz asked Committee members to submit their contact information to staff, who can create and share the list with all Committee members. Chair Ruiz would also like a color copy of the Business Plan.

8. UPCOMING PRESENTATIONS

- Consideration of Professional Service Agreements for Development and Implementation of I-REN Programs

9. ITEMS FOR FUTURE AGENDAS

There were no requests for future agenda items.

10. GENERAL ANNOUNCEMENTS

There were no general announcements.

11. NEXT MEETING

The next I-REN Executive Committee meeting is scheduled for February 21, 2023, on the Zoom platform with the option for Committee members to attend in-person.

12. ADJOURNMENT

The meeting was adjourned at 3:53 p.m.



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: I-REN Proposed Programs and Budget Allocations

Contact: Casey Dailey, WRCOG Director of Energy & Environmental Programs,
cdailey@wrcog.us, (951) 405-6720

Date: February 21, 2023

Requested Action(s):

1. Receive and file.

Purpose:

The purpose of this item is to update the I-REN Executive Committee and update on the strategies, tactics, objectives and budget associated with the achievement of I-REN approved Business Plan goals

Background:

Initiated in 2019, the Inland Regional Energy Network (I-REN) is a consortium of the Western Riverside Council of Governments, the Coachella Valley Association of Governments, and the San Bernardino Council of Governments (I-REN COG partners) that serve the Counties of Riverside and San Bernardino in the implementation of energy efficiency programs and services to support member agencies and the public. These partners joined together and submitted a Business Plan to the CPUC in order to establish locally administered, designed, and delivered energy efficiency programs. On November 18, 2021, the CPUC formally approved the I-REN Business Plan through 2027.

The Inland Regional Energy Network (I-REN) will serve as the backbone infrastructure of programs, services, and resources to benefit the cities and counties (and all public sector agencies) in the I-REN service territory in the development and implementation of projects designed to increase energy efficiency in public sector facilities. The vision for I-REN, as laid out in the Business Plan, is to connect local governments, businesses, and residents to a wide range of energy efficiency resources to increase energy savings and equitable access throughout San Bernardino and Riverside Counties.

I-REN's Business Plan identifies three major goals:

1. Build capacity and knowledge to enable local governments to effectively leverage energy efficiency services and to demonstrate best practices. **(Public Sector).**
2. Ensure there is a trained workforce to support and realize energy efficiency savings goals across sectors. **(Workforce, Education & Training).**
3. Work closely with local building departments and the building industry to support, train, and enable long-term streamlining of energy code compliance. **(Codes and Standards).**

I-REN's approved budget contemplates hiring a team of third party implementers to develop and administer approved programs and services for I-REN's member agencies. The budget also anticipates building capacity within each of the partner Councils of Governments (CVAG, SBCOG and WRCOG) through the hiring of full-time staff to serve as each agency's I-REN representatives to support the agency's respective member agencies. The budget also includes memberships (for I-REN and its member agencies) and sponsorships for many statewide energy efficiency organizations to facilitate I-REN's "active participation in California's Clean Energy initiatives to build a stronger clean energy economy and community."

Unlike many funding opportunities offered by / through government agencies (Caltrans, California Department of Housing and Community, California Energy Commission, etc.), funding for I-REN is not tied to a single 'project;' funding for Regional Energy Networks (RENs) is intended to fund energy efficiency programs and services specifically for hard to reach and disadvantaged communities and to fill gaps in services offered by Investor-Owned Utilities, such as Southern California Edison (SCE) and SoCal Gas. Additionally, the California Public Utilities Commission (CPUC) has determined that RENs have unique value in the energy efficiency landscape in California and has determined that ongoing funding is appropriate. As a result, funding for I-REN through 2027 could be considered to be the first of many rounds of funding to support the goals outlined in its Business Plan, enabling a long-term sustainable program. For example, both SoCal REN and BayREN have been funded since 2012, with 3C-REN being funded since 2018.

The following is a high level summary of the I-REN proposed programs and services contemplated in the Business Plan, as well as a discussion on the overall I-REN annual budget and how each of the proposed programs and services fit into the overall budget.

Public Sector Programs: 2022-2027 Budget: \$29.6M + \$10.75M incentives (Average \$4.93M annually + \$1.79 annual incentives, respectively).

Program 1: Technical Assistance and Strategic Energy Planning

Description of Program – I-REN will offer technical support for member agencies to increase energy efficiency in publicly-owned facilities. Additional support and technical services to design high performing, energy efficient buildings will also be provided through use of energy audits and project design support on publicly owned facilities. Additionally, Building Upgrade Concierge (BUC) software development will be part of the technical assistance provided to member jurisdictions, designed to be a one-stop-shop to access information on energy efficiency, building codes and standards, available rebates and grants, financing opportunities, access to energy consumption of publicly owned facilities, various types of reporting, and much more.

Reference to I-REN Business Plan Goal 1: Build capacity and knowledge to enable local governments to effectively leverage energy efficiency services and to demonstrate best practices (Public Sector Chapter).

Business Plan Goals	Intervention Strategy	Tactics	Objectives

Technical Assistance	S1.1 Develop a regional Building Upgrade Concierge (BUC) for local governments, special districts, and tribal communities with technical guidance and tools to inform and enable priority energy improvements.	T1.1.1: Establish person-to-person support for local governments to get higher levels of assistance and support for their EE projects.	Local governments have support and resources to develop and implement their strategic energy plans and energy efficiency projects.
Technical Assistance	S1.1 Develop a regional Building Upgrade Concierge (BUC) for local governments, special districts, and tribal communities with technical guidance and tools to inform and enable priority energy improvements.	T1.1.2: Develop or enhance strategic energy plans to connect local government goals related to climate, resilience, and economic development to energy efficiency programs and adoption.	Local governments have support and resources to develop and implement their strategic energy plans and energy efficiency projects.
Technical Assistance	S1.1 Develop a regional Building Upgrade Concierge (BUC) for local governments, special districts, and tribal communities with technical guidance and tools to inform and enable priority energy improvements.	T1.1.3: Create resources for the public sector to tap into EE and distributed energy resources programs offered by other providers and IOUs.	Local governments have support and resources to develop and implement their strategic energy plans and energy efficiency projects.

The annual budget allocation for these programs and services is approximately \$2,718,000.

- **Examples of similar programs** - Southern California Regional Energy Network (SoCalREN) offers a non-resource Public Agency Energy Efficiency Project Delivery Program (PDP) that provides project management and technical support throughout the entire project lifecycle, including technical assistance, procurement assistance, construction management support, financing support, benchmarking support, and access to actionable reports on energy data. Technical assistance provided by the SoCalREN PDP includes customized technical engineering support from project identification to completion, including investment grade audits to identify all energy saving opportunities, and technical performance specifications.

Program 2: Public Buildings Normalized Metered Energy Consumption (NMEC) Program

Description of Program – this Program will provide incentives and financing for savings based on energy reduction achieved over three to five years, with a special focus on HVAC improvements to community-serving buildings. With the help of I-REN's technical assistance, member agencies will identify and implement qualified projects and receive long-term savings that help pay for the projects, creating a "revolving loan fund" structure. The money saved on the monthly electric bill will help pay for the improvements.

- **Examples of similar programs** – SoCal REN has a Metered Savings Program which determines eligibility based on energy savings potential, not measure type. Therefore, it is offered for a variety of project types, including for buildings and non-buildings (e.g., streetlights).

Reference to I-REN Business Plan Goal 1: Build capacity and knowledge to enable local governments to effectively leverage energy efficiency services and to demonstrate best practices (Public Sector Chapter).

Business Plan Goals	Intervention Strategy	Tactics	Objectives
Incentives & Financing	S1.2 Establish incentives and leverage existing financing mechanisms to assist local governments with implementing energy efficiency projects in public buildings.	T1.2.1: Deliver a resource offering to provide incentives for savings based on Normalized Metered Energy Consumption (NMEC) achieved over three to five years.	Help local governments afford and finance a range of energy efficiency upgrades.
Incentives & Financing	S1.2 Establish incentives and leverage existing financing mechanisms to assist local governments with implementing energy efficiency projects in public buildings.	T1.2.2: Leverage sustaining financing mechanisms for HVAC upgrades in public buildings.	Help local governments afford and finance a range of energy efficiency upgrades.

The annual budget allocation for these programs and services is approximately \$1,790,000.

Workforce, Education & Training Programs: \$15.1M total from 2022-2027 (Average \$2.51M annually) .

Program 1: I-REN Energy Fellowship

Description of Program: The training and deployment of 26 fellows every year to public sector agencies (cities, counties, etc.) within Riverside and San Bernardino Counties. Fellows would come from colleges and universities in Riverside and San Bernardino Counties and would focus their efforts on their jurisdictions' efforts on I-REN-related energy efficiency projects and activities.

The annual budget allocation for this Program is approximately \$806,000.

Reference to I-REN Business Plan Goal 2: Ensure there is a trained workforce to support and realize energy efficiency savings goals across sectors (WE&T Chapter).

Business Plan Goals	Intervention Strategy	Tactics	Objectives
Developing the region's new green workforce	S2.2 Facilitate industry engagement and development of job pathways to identify demand and jobs for a trained workforce.	T2.2.1 Convene and engage partners and organizations to define and establish a green workforce.	Increase the number of skilled energy efficiency workers in the region.
Developing the region's new green workforce	S2.2 Facilitate industry engagement and development of job pathways to identify demand and jobs for a trained workforce.	T2.2.2 Reinforce pathways from high school, trade schools, and colleges into jobs in the energy efficiency workforce, in collaboration with established community partners.	Increase the number of skilled energy efficiency workers in the region.

Developing the region's new green workforce	S2.2 Facilitate industry engagement and development of job pathways to identify demand and jobs for a trained workforce.	T2.2.3 Facilitate identifying opportunities for building companies and local workforce partners to network and connect.	Increase the number of skilled energy efficiency workers in the region.

Program 2: Energy Certification Program

Description of Program: Professional certifications for approximately 10 - 25 individuals per certification program to provide continued education for existing public sector staff and members of the public.

- Certified Energy Analyst – training and exams for 25 individuals
- Certified Energy Auditor – training and exams for 25 individuals
- Energy Management Professional
- Building Science Principles – intro-level accreditation for city and community members

The annual budget allocation for this program is approximately \$70,000.

Program 3: Training for Existing Workforce stakeholders

Description of Program: 1 - 2 webinars / courses per month to begin to create an on-demand library of trainings with focus on energy efficiency needs (HERS, HVAC, heat pumps, insulation, etc.) for local chapters of builders, architects, electricians, facility maintenance.

The annual budget allocation for this program is approximately \$60,000.

- **Examples of similar programs** – 3C-REN has created 55 on-demand webinar trainings that cover the high need training tailored for the 3C-REN service territory. These webinars are recorded and stored online to create an on-demand library. Sample webinars include: home assessments for decarbonization, multi-family energy savings program introductions, energy code, and specific best practices for specialized equipment like HVAC, hot water systems space conditioning/heating, etc. 3C-REN continues to produce 1 - 2 webinars every month on additional energy efficiency topics.

Program 4: Participation and Membership in California's Energy Efficiency Landscape

Description of Program: I-REN and member agency memberships in statewide organizations and forums like the California Climate and Energy Collaborative (CCEC), Local Government Sustainable Energy Commission (LGSEC), and California Energy Alliance (CEA), whose missions directly align with I-REN program and policy goals. Participation in these organizations will provide energy efficiency training to member and I-REN staff to facilitate implementation and deployment of energy efficiency programs.

The annual budget for this activity is approximately \$302,000.

- **Examples of similar programs** – 3C-REN, BayREN, and SoCal REN jointly and annually fund the CCEC that brings together REN member agencies and public agencies across the state to discuss high priority energy, climate, upcoming energy code changes and policies, and environmental justice initiatives. BayREN pays annual membership fees to LGSEC for their member agencies to give them access to valuable information and resources that can benefit their

region.

Reference to I-REN Business Plan Goal 2: Ensure there is a trained workforce to support and realize energy efficiency savings goals across sectors (WE&T Chapter).

Business Plan Goals	Intervention Strategy	Tactics	Objectives
Local training for existing workforce	S2.1 Establish local partnerships with existing and potential training providers in the region to deliver targeted and relevant energy efficiency training for contractors and other industry stakeholders.	T2.1.1 Assess training opportunities available in the region.	Create a robust local network of training programs that increase capacity and knowledge related to energy efficiency in the building industry.
Local training for existing workforce	S2.1 Establish local partnerships with existing and potential training providers in the region to deliver targeted and relevant energy efficiency training for contractors and other industry stakeholders.	T2.1.2 Offer “train the trainer” support to providers on energy efficiency topics and trends. Encourage providers to focus on the needs of the local market.	Create a robust local network of training programs that increase capacity and knowledge related to energy efficiency in the building industry.
Local training for existing workforce	S2.1 Establish local partnerships with existing and potential training providers in the region to deliver targeted and relevant energy efficiency training for contractors and other industry stakeholders.	T2.1.3 Facilitate the development of multiple sites / delivery mechanisms for contractor and industry training programs.	Create a robust local network of training programs that increase capacity and knowledge related to energy efficiency in the building industry.

I-REN Codes & Standards Sector Programs – 2022-2027 Budget: \$9.39M (Average \$1.56M annually).

Program 1: Codes & Standards Training & Education Program

Description of Program: This is a program to establish and implement training and education for building department staff and the building industry to support, understand, and effectively implement energy efficiency codes and standards (C&S), including where gaps exist in the Statewide IOU Compliance Improvement program and enforcement activities. The Program will also include outreach to engage, educate, and involve regional construction firms, architects, industry experts, and building departments, and support compliance and enforcement within regional energy efficiency programs and customers.

- **Examples of similar programs** – 3C-REN has a Codes and Standards Program called Energy Code Connect (ECC), which provides trainings, forums and technical code support for public and private sector building professionals. In recent years ECC has offered three core services: training events, regional forums, and the Energy Code Coach. BayREN also offers a Codes and Standards Program that, through trainings and forums, seeks to assist local governments with energy policies and energy code compliance by providing support for Bay Area local governments to increase energy performance of buildings by improving energy code compliance.

Business Plan Goals	Intervention Strategy	Tactics	Objectives
Training	S3.1 Establish an ongoing training program to assist building department staff and the building industry to support, understand, and effectively implement energy efficiency codes and standards.	T3.1.1 Develop training curriculum to address gaps in compliance with current requirements. Offer ongoing training on changes and trends in C&S.	Improve understanding of energy efficiency codes and standards among local building departments and the building industry to increase implementation and compliance.
Training	S3.1 Establish an ongoing training program to assist building department staff and the building industry to support, understand, and effectively implement energy efficiency codes and standards.	T3.1.2 Support local governments and the building industry during transitions to new codes to deliver effective messaging and resources and increase timely compliance with updated requirements.	Improve understanding of energy efficiency codes and standards among local building departments and the building industry to increase implementation and compliance.
Outreach	S3.2 Implement an outreach program to engage, educate and involve regional construction firms and building departments, and support compliance and regional EE programs and customers.	T3.2.1 Foster the development of an online Code Hub community for sharing best practices amongst building departments and the building industry.	Make code compliance a valuable element of the region's energy efficiency goal attainment with engagement regionwide.
Outreach	S3.2 Implement an outreach program to engage, educate and involve regional construction firms and building departments, and support compliance and regional EE programs and customers.	T3.2.2 Expand local jurisdiction relationships to host regional forums for the building industry and public sector.	Make code compliance a valuable element of the region's energy efficiency goal attainment with engagement regionwide.

Program 2: Codes & Standards Technical Support Program

Description of Program: This Program is to develop technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes to support improved enforcement and compliance. I-REN will also develop regionally appropriate model ordinances, vet and refine them with participating local governments, provide ongoing technical assistance for adoption and implementation, and deliver model ordinance updates to reflect the triennial code cycle.

- **Examples of similar programs** – 3C-REN's ECC Program (described above) provides technical support to building departments. The ECC Program will also offer a reach code support service to all cities in the northern portion of the 3C-REN territory, and advocate for the use of IOU and CCA programs in the southern portion of the territory. The BayREN C&S program (described above) also provides technical support focused on increasing adoption of local energy policies, and serves as a bridge between local governments and the California Energy Commission to ensure that the voice of local governments is heard when state policies are developed.

Reference to I-REN Business Plan Goal 3: Work closely with local building departments and the

building industry to support, train, and enable long-term streamlining of energy code compliance (Codes and Standards Chapter).

Business Plan Goals	Intervention Strategy	Tactics	Objectives
Technical Assistance	S3.3 Develop technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes.	T3.3.1 Identify and address the areas of greatest need for improved code compliance, in collaboration with local governments and the building industry.	Deliver locally informed resources and tools that streamline code compliance and enforcement and increase permit closeout.
Technical Assistance	S3.3 Develop technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes.	T3.3.2 Improve consistency in code enforcement and compliance resources across the region by facilitating cooperation between local governments.	Deliver locally informed resources and tools that streamline code compliance and enforcement and increase permit closeout.
Technical Assistance	S3.3 Develop technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes.	T3.3.3 Evaluate and develop model ordinances and policies for use regionally.	Deliver locally informed resources and tools that streamline code compliance and enforcement and increase permit closeout.

The annual budget allocation for both programs listed above is approximately \$791,000.

I-REN Staffing and Overhead

I-REN has estimated \$2.25M annually into its budget for Direct Implementation and Administrative costs for all three COGs, as part of fulfilling the I-REN Business Plan's goal to increase capacity. The intent was for each partner COG to hire a full-time Program Manager and two full-time Management Analyst positions to assist with implementing I-REN's suite of programs throughout their respective jurisdictions. It should be noted that staffing and hiring decisions for each respective COG is up to that agency; time can be split however the COG determines to be the most effective use of the funding. Additionally, I-REN has set aside approximately \$400k for WRCOG's overhead costs as the lead agency.

The following table shows the total programmed budget for I-REN.

Proposed Program, Task or Activity	Estimated Budgeted Amounts
Public Sector Technical Assistance Programs	\$2,500,000
Public Sector Direct Financial Incentives	\$1,790,000
Public Sector Building Upgrade Concierge	\$218,000
Codes & Standards Programs	\$791,000
I-REN Marketing & Outreach	\$250,000
I-REN Energy Fellowship Program	\$806,000
I-REN Energy Certification & Training Programs	\$130,000
Unallocated Workforce, Education & Training Budget	\$440,000
Participation and Membership in California's Energy Efficiency Landscape	\$302,000
Frontier Implementation Support (<i>existing contract</i>)	\$250,000
I-REN Staffing (3 COGs)	\$2,250,000
WRCOG Overhead (<i>for fiscal, admin and other related</i>)	\$400,000
I-REN COGs Event Sponsorships	\$100,000
Total	\$10,227,000

Prior Action(s):

None.

Fiscal Impact:

All costs associated with this item are included in WRCOG's adopted Fiscal Year 2022/2023 Agency Budget under the Energy & Environmental Department.

Attachment(s):

None.



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: Contract Approvals for Implementers for I-REN's Business Plan Sector Programs.

Contact: Casey Dailey, Director of Energy & Environmental Programs, cdailey@wrcog.us, (951) 405-6720

Date: February 21, 2023

Requested Action(s):

1. Authorize the WRCOG Executive Director to execute the following contracts:
 - a. Contract #2023-80-2080-001 between the Western Riverside Council of Governments and The Energy Coalition for Public Sector Energy Efficiency Program Services for a not to exceed amount of \$7,500,000 for a three-year term with no more than two options to renew or amend.
 - b. Contract #2023-80-2080-002 between the Western Riverside Council of Governments and Alternative Energy Systems Consulting, Inc., for Building Upgrade Concierge (BUC) Software Development Services for a not to exceed amount of \$655,000 for a three-year term with no more than two options to renew or amend.
 - c. Contract #2023-80-2080-003 between the Western Riverside Council of Governments and Frontier Energy, Inc., for I-REN Codes and Standards Program Services for a not to exceed amount of \$2,374,000 for a three-year term with no more than two options to renew or amend.
 - d. Contract #2023-80-2080-004 between the Western Riverside Council of Governments and ICF Resources, LLC., for I-REN Portfolio-wide Marketing and Communication Services for a not to exceed amount of \$750,000 for a three-year term with no more than two options to renew or amend.

Purpose:

The purpose of this item is to recommend approval of contracts for implementers for I-REN's Business Plan Sector Programs.

Background:

Initiated in 2019, the Inland Regional Energy Network (I-REN) is a consortium of the Western Riverside Council of Governments, the Coachella Valley Association of Governments, and the San Bernardino Council of Governments (I-REN COG partners) that serve the Counties of Riverside and San Bernardino in the implementation of energy efficiency programs and services to support member agencies and the public. These partners joined together and submitted a Business Plan to the CPUC in order to establish locally administered, designed, and delivered energy efficiency programs. On November 18, 2021, the CPUC formally approved the I-REN Business Plan through 2027.

The I-REN Business Plan was designed to align with the current Program Administrator Business Plan Timeframe to 2025 with the objective to develop framework that will guide I-REN through its launch

phase and into a sustainable future as a program implementer beyond the 2022-2027 cycle.

State-funded energy efficiency programs in California are divided into two types: resource programs that lead directly to quantifiable energy and demand savings, and non-resource programs that may lead to savings, but are primarily designed for other purposes including equity, market support, workforce education and training, and market transformation. The majority of the activities outlined in I-REN's Business Plan are non-resource programs designed to support and enhance the activities of other Program Administrators, with a focus on developing programs for local government members who are underserved.

On November 18, 2021, the California Public Utilities Commission (CPUC) formally approved the I-REN Business Plan with a budget of \$65M for program years 2022–2027 for three sectors: Public Sector, Codes and Standards Sector, and Workforce Education & Training Sector. Within each Sector, the Business Plan identifies six specific programs, two for each Sector, that it will focus on.

For the Public Sector, the two programs are 1) to develop and implement a Technical Assistance and Strategic Energy Planning Program, and 2) to develop and implement a Public Buildings Normalized Metered Energy Consumption (NMEC) Program.

For the Codes and Standards Sector, the two programs are 1) to develop and implement a Training and Education Program, and 2) to develop and implement a Technical Support Program.

For the Workforce Education and Development Sector, the two programs are 1) to develop and implement a Training and Education Program and 2) to develop and implement a Workforce Development Program.

All of these Programs will be described in more detail later in this Staff Report.

Promptly after receiving approval from the CPUC, the I-REN team began to coordinate its launch and develop necessary documents. These documents, which are now being finalized, include the Program Agreement, Memorandum of Agreement between the three COG partners, the Governance and Operations Rules, which helped I-REN to establish the new Brown Act I-REN Executive Committee, and several Requests for Proposals (RFPs). During the launch phase, I-REN often collaborated with other RENs to learn of their best practices and what steps to take to overcome challenges during launch. One important recommendation from the other RENs was to develop and release RFPs for the programs identified in the I-REN Business Plan as quickly as possible, otherwise valuable time would be lost in serving our inland cities and communities and may not be received favorably in the eyes of the CPUC when I-REN's performance is reviewed.

Prior to the formation of the I-REN Executive Committee, and due to the sensitivity of losing valuable program time, on August 9, 2022, I-REN released four RFPs for the following services: 1) Public Sector, 2) Codes and Standards (C&S) Programs, 3) Building Upgrade Concierge (BUC) software development and deployment, and 4) REN-wide Marketing and Outreach (M&O). With the intent of bringing contracts to the I-REN Executive Committee for approval after it was formed, the RFPs were broadcast through multiple channels, including PlanetBids, our COG partners, websites, and other relevant channels, reaching approximately one thousand potential bidders. I-REN gave responders just over five weeks to submit their proposals, due by September 16, 2022. I-REN received a total of 13 proposals from highly qualified bidders.

Between November 8 - 10, 2022, the I-REN team, consisting of staff from each partner COG, conducted 12 interviews with the top proposers, evaluated and discussed amongst the team after each interview, and selected the top candidate for each RFP to enter contract negotiations. Contracts were prepared and contract negotiations commenced. The attached contracts have been reviewed and approved by the consultant and by WRCOG's legal counsel and await final approval of this I-REN Executive Committee.

The RFPs are included as attachments to this Staff Report as well as the proposals submitted by each contractor selected to enter into contract negotiations. Below is a summary of each RFP and a brief description of each company selected.

I-REN Public Sector Background

I-REN's public sector offerings will serve the members of the three Councils of Government (COGs) represented in I-REN, including the Coachella Valley Association of Governments (CVAG), San Bernardino Council of Governments (SBCOG), Western Riverside Council of Governments (WRCOG), and the cities, school districts, water districts, special districts, and tribal communities they represent. These regional programs will target, but not be limited to, upgrades to existing public buildings and facilities with high energy use and older equipment. While the offerings will consider all public building types, there will be a focus on community-serving buildings such as community centers, libraries, senior centers, schools, and fire and police buildings. Through energy efficiency projects in these facilities, I-REN can provide benefits that will flow to hard-to-reach, disadvantaged, low income, and other vulnerable communities. The I-REN programs will be multi-beneficial in nature, layering energy efficiency strategies with financing services, greenhouse gas reductions, community resilience, and climate adaptation measures.

Local governments in the I-REN service territory have limited capacity to complete energy upgrades and are challenged to maintain and upgrade their facilities due to lack of funding for capital improvements, a lack of awareness related to energy efficiency and other energy efficiency program opportunities, limited time and staff resources, along with conflicting priorities. Further, State mandates such as building energy benchmarking (AB 802) requirements, energy code compliance, and climate adaptation planning are additional unfunded regulations and requirements on local governments and are difficult to meet given competing priorities. These challenges have been exacerbated in recent years due to the COVID-19 pandemic, the associated economic downturn, and increased pressure on local government agencies to respond to a variety of issues.

To address these challenges, I-REN will leverage its existing public sector partnerships and networks across the region to offer technical assistance, implement incentive program options, and improve access to financing, as indicated in the scope of work. Implementing these initiatives will further I-REN's goals of encouraging resilience and continuous capacity building for local governments, thereby strengthening their ability to serve their community through energy efficiency projects in their own facilities, while also saving on building operations costs and contributing to local and statewide goals for energy savings, climate resilience, and greenhouse gas emissions reduction.

I-REN's Public Sector Program Objectives:

1. Ensure local governments have the support and resources to develop and implement their

- strategic energy plans and energy efficiency projects.
2. Help local governments afford and finance a range of energy efficiency upgrades through innovative financing options.

Scope 1: Public Sector Technical Assistance and Strategic Energy Planning Program Implementation

This Scope of Work includes professional services for the tasks and deliverables for implementation of I-REN's Public Sector Technical Assistance and Strategic Energy Planning Program (TA Program). This Program is a non-resource, equity segment energy efficiency program that will establish a regional Building Upgrade Concierge (BUC) for local governments, special districts, and tribal communities (collectively, "public sector customers") with technical guidance and tools to inform and enable priority energy improvements.

Insufficient staff time and resources is one of the major barriers to implementing energy efficiency retrofits in public sector buildings. I-REN's Public Sector TA Program will provide concierge-style support to help fill gaps in staff capacity and resources at these local government jurisdictions. I-REN can also provide additional staffing support through its Workforce Education & Training (WE&T) internship initiative, which will be coordinated with its Public Sector energy efficiency activities. I-REN's TA Program will build local government's capacity to tackle complex public sector facility energy improvement projects, from helping with benchmarking to navigating options and approaches for maximizing their investments and energy savings.

Local governments, special districts, and tribal jurisdictions vary widely in their current situation with regard to energy efficiency project implementation. Through the RFP process, I-REN sought a consultant who will meet with these departments and facilities staff where they are, assess their current situation and resources, and offer personalized support and resources to move their projects forward. To implement the Program, the consultant will provide person-to-person technical assistance to local governments to support Public Sector energy efficiency projects. The consultant will also assist local governments with strategic energy planning and benchmarking to connect local government goals related to climate, resilience, and economic development to energy efficiency programs and adoption.

In addition to staff capacity constraints, other common barriers include complex program requirements to receive funding, risk aversion to new or unproven technology, a lack of data to support their decision-making process, or limited technical expertise and knowledge of energy projects. To overcome these barriers, the consultant will develop tools and resources to increase awareness of and participation in energy efficiency programs such as the I-REN Public Buildings NMEC Incentive Program included in the Public Sector RFP (Scope 2), as well as other federal, state, and local energy efficiency and distributed energy resource programs. This work will be conducted in close coordination with the parallel development of the BUC software solution and will allow I-REN to serve as a clearinghouse for Public Sector energy efficiency and distributed energy resource program information.

The consultant will provide leadership for Program design activities in collaboration with the I-REN team. The Program's design must be aligned with the I-REN BP, D.21-11-013, and all other applicable requirements for REN energy efficiency programs. The consultant will be responsible for, but not be limited to, the activities listed below:

- Develop a concierge-style program delivery model that supports I-REN's goals for the TA

Program, overcomes member participation barriers, and prioritizes service to vulnerable communities.

- Support I-REN in engaging with local and regional stakeholders to ensure the Program design fits the needs of local governments in the region.
- Establish coordination process with other I-REN energy efficiency programs, staff, Energy-Efficiency Fellows, services, and implementers, e.g., the Public Buildings NMEC Program and Public Sector Financing Services included in the Public Sector RFP, to maximize Program participation and benefits to customers.
- Coordinate with BUC software provider to inform solution design and ongoing enhancements.
- Develop culturally specific strategies in coordination with the Marketing & Outreach consultant to reach communities where language, socio-economic status, race, ethnicity, etc., have historically been a barrier.
- Identify and implement strategies for outreach to local jurisdictions and agencies to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.
- Provide concierge-style, person-to-person support via phone, email, and in person for public sector customers to assess jurisdictions' needs and get higher levels of assistance and support for their energy efficiency projects.
- Assist participants through multiple stages of engagement: strategic energy planning and benchmarking, project opportunity scoping, incentive program identification and participation, contracting and procurement, installation, and ongoing operations and commissioning.
- Develop or enhance strategic energy plans to connect local government goals related to climate, resilience, and economic development to energy efficiency programs and adoption.
- Coordinate with Energy-Efficiency Fellows for Public Sector work where appropriate, in collaboration with I-REN Workforce Education & Training (WE&T) internship initiatives.
- Maintain communication to monitor status and encourage progress; follow up on completed projects to ensure efficient operations and ongoing maintenance, and address facility staff turnover and retraining needs.
- Provide Program-specific content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum (JCM), Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Collect Program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of Program performance.
- Contribute to Program performance analysis and evaluation, measurement, and verification (EM&V) activities for tracking program achievements and informing continuous improvement.

Scope 2: Public Buildings Normalized Metered Energy Consumption (NMEC) Incentive Program Implementation

The Public Sector RFP also sought professional services for the tasks and deliverables to support I-REN's Public Buildings NMEC Incentive Program (NMEC Program). The I-REN Public Sector NMEC Program is an equity segment energy efficiency resource program intended to provide incentives for meter-based energy savings achieved over three to five years. Incentivized measures could include any measure that reduces energy usage, e.g., HVAC tune ups and retrofits, exterior and interior lighting and smart controls, operations and maintenance, etc. The Program would be open to all member agency facilities including those operated by county and city government, school districts, special districts, and tribes, who pay into the public goods charge funds.

Program outreach will focus initially on public gathering spaces such as community and neighborhood centers, health and recreation centers, senior centers, teen centers, and libraries. Implementing energy efficiency projects at these locations will serve multiple goals including, but not limited to, those described here:

- Upgrades and retrofits to HVAC and lighting equipment, both interior and exterior, will improve comfort and safety at facilities that benefit vulnerable populations such as children, elders, low income, disadvantaged, and underserved communities.
- Higher efficiency equipment, appliances and controls such as cooling-dominated HVAC loads as well as improvements to operations and maintenance will lower energy bills for local governments, reducing overhead and freeing up funds for other projects.
- Completion of projects at these high-visibility locations will support achieving local and statewide energy efficiency and greenhouse gas emissions reduction goals while also positioning local governments as energy efficiency leaders within their communities.

The Program will use an NMEC approach to calculate savings and demonstrate persistence of savings. By using NMEC to calculate savings, the program will help protect against unrealized savings. Combined with technical assistance and reinforcement of operations and management best practices, public sector customers will experience maximized savings.

Scope 3: Public Sector Financing Services

The 3rd scope of the Public Sector RFP sought professional services for the tasks and deliverables described below, to support I-REN's Public Sector programs and activities through the provision of financing services to participants in the programs listed in scopes 1 and 2. The financing services solicited in this Scope of Work would layer with technical assistance services provided through I-REN's Public Sector Technical Assistance and Strategic Energy Planning Program, and/or with incentives provided through the Public Buildings NMEC Incentive Program, to provide additional benefit to public sector customers.

A wide variety of financing mechanisms are available for energy efficiency projects, from traditional loans and financing from banking institutions to specialized products designed specifically for energy efficiency. However, the public sector is challenged by many barriers in trying to take advantage of these options. Staff time and resources are constrained, the array of options is confusing, and it can be unclear how local governments, special districts, and tribes would participate, given their unique position as publicly funded agencies.

I-REN can bridge this gap by identifying financing mechanisms and creative funding sources, evaluating their appropriateness for various public sector jurisdictions and facility types in the I-REN service territory, and then assembling a tailored set of options to present to local governments, special districts, and tribes. I-REN can support local jurisdiction staff and decision-makers in navigating through the complexities of financing options, choosing a pathway and applying for funds, and then serve as a technical assistance resource for project implementation and reporting.

For its initial focus, I-REN proposes to target HVAC upgrades in community buildings including but not limited to recreation centers, libraries, senior centers, and the like. HVAC replacement at a large facility is costly, and the intervention of financing through I-REN's Public Sector initiative could mean the

difference between replacing a system with baseline equipment and moving up to a more efficient system that will deliver better performance and bill savings, as well as supporting energy savings and climate action goals.

Budget Parameters

I-REN's budget was established by the CPUC when the I-REN Business Plan was approved on November 18, 2021. The not-to-exceed amounts for the Public Sector contract are as follows:

1. Public Sector Technical Assistance Program and Strategic Energy Planning Program shall not exceed \$4,951,993 for the initial three-year term of the contract.
2. Public Buildings Normalized Metered Energy Consumption (NMEC) Incentive Program Implementation shall not exceed \$6,446,950 for the initial three-year term of the contract.
 - a. Included in the overall not-to-exceed amount of Scope 2 contract is \$4,500,000 in direct customer incentives.
3. Public Sector Financing Services shall not exceed \$599,610 for the initial three-year term of the contract.

Proposer understands that Proposer is not entitled to the full not-to-exceed amounts outlined in this section. The not-to-exceed amount merely represents the maximum funding available within the applicable budget sectors for these particular services. For all three scopes described above, the total not-to-exceed amount is \$7,500,000 for the initial three-year term of the contract with no more than two one-year options to renew or amend. The remaining \$4,500,00 of budget will go directly towards customer incentives.

About The Energy Coalition

Bidders were prompted to bid on one, two, or three of the Scopes listed in the RFP. The Energy Coalition (TEC), in partnership with Alternative Energy Systems Consulting, Inc., (AESC), TRC Engineers, Inc., (TRC), and PFM Financial Advisors, LLC, (PFMFA) submitted a proposal for all three Scopes of the Public Sector RFP and, after interviews were conducted, was selected by the I-REN selection team to move forward into contract negotiations.

TEC is a California-based 501(c)3 nonprofit with 45 years of experience designing and implementing strategies that transform energy use and inspire sustainable energy action. The TEC project team has the experience and expertise to perform the tasks and meets the required qualifications. Collectively, their experience advancing energy efficiency spans over 200 public agencies, the four California Investor-Owned Utilities (IOUs), Community Choice Aggregators (CCAs), and Regional Energy Networks (RENs) throughout California. TEC has a proven track record of successfully working with disadvantaged communities (DACs), low-income communities, and hard to reach areas (HTR). TEC, together with its partners, has successfully designed and currently implements the portfolio of SoCalREN Public Agency Programs. These programs provide comprehensive energy efficiency project management, technical assistance, normalized metered energy consumption (NMEC) incentives, access to financing, and education and capacity building opportunities to participants, with a focus on DAC and HTR communities. Additionally, TEC has extensive experience implementing IOU-administered Local Government Partnership (LGP) resource and non-resource programs including the first utility-local government partnership in 1994 which served as the model for the utility LGPs statewide.

Building Upgrade Concierge (BUC) Software Development

The BUC Software RFP sought professional services for software to support I-REN's public sector energy efficiency programs targeting local governments, special districts, and tribal communities (collectively, "public sector customers"). The software services will support I-REN staff and implementer(s) in providing technical guidance and tools to inform and enable priority energy improvements through the programs and activities offered by I-REN. The solution should also enable I-REN to serve as a clearinghouse for energy efficiency and distributed energy resource program information in general, for I-REN programs as well as programs offered by other program administrators.

Broadly, I-REN anticipates needing an information technology solution and services with elements that may include but are not necessarily limited to the following:

- Database of information and documents including:
 - Energy efficiency, distributed energy resource, and other relevant programs and financing opportunities
 - Other informational resources and collateral related to energy efficiency, distributed energy resources, and other relevant topics
- Customer-facing portal with capabilities including:
 - Gather enrollment information from interested parties and evaluate enrollees based on eligibility criteria
 - Display a tailored list of opportunities to the interested party based on the enrollment information they input
 - Provide other informational resources relevant to the interested party
 - Connect the interested party to I-REN program staff to begin person-to-person next steps
- Back-end portal for I-REN administrative staff, program staff, I-REN Energy- Efficiency Fellowship interns ("RENterns"), program implementers, and other consultant teams, with capabilities including:
 - Customer relationship management system to collect data, record interactions with participants, and automate communications and tasks
 - Customizable dashboard for tracking relevant statistics and performance metrics
 - Reporting capabilities to support I-REN organizational and administrative needs, as well as compliance with CPUC requirements
- Flexibility to expand beyond public sector offerings to accommodate tracking of other I-REN activities, relationships, metrics, and other information and resources as necessary.

Budget Parameters

I-REN's budget was established by the CPUC when the I-REN Business Plan was approved on November 18, 2021. I-REN's approved budget is further broken down by sector and though there is limited flexibility to shift funds within a sector, we cannot exceed the annual approved amounts without a formal CPUC filing. The not-to-exceed amount for this contract is as follows:

- A \$10,000 per month fee that includes AESC launching, hosting, maintaining, and customizing the software to perform the functionalities mentioned in this proposal.
- \$1,000 per iPad installed at the suggested locations.
- An up to \$80,000 per year Time & Materials budget to perform any additional customization and

reporting requested as part of Task 4 (if beyond the current capabilities of the software).

As a result, AESC estimates \$55,000 for the iPad kiosks; \$360,000 for software; and \$240,000 for special Time & Materials tasks over the 3-year program for a total of \$655,000.

Time & Materials will be charged per the hourly rates listed below, and the hourly rate will hold for the three years 2023-2024-2025:

Director / Principal - \$273

Senior Program Manager - \$237

Program Manager / Engineer Section Lead - \$223

Senior Engineer - \$205

About Alternative Energy Systems Consulting, Inc. (AESC)

Founded in 1994 as a private corporation, AESC is an energy consultancy that delivers solutions in energy efficiency, renewable energy, distributed energy resources, and software for utilities, regulators, public entities, and private enterprises throughout the United States. AESC combines technical excellence, Integrated Demand Side Management experience, and a broad skillset to provide a complete suite of engineering and management services. AESC's team includes experts in energy efficiency program implementation, engineering, water and wastewater system optimization, distributed energy resources (DERs), measurement and verification (M&V), and Normalized Metered Energy Consumption (NMEC) tool / software development, codes and standards, and demand response.

With four offices in California (including Carlsbad and Pasadena), their roots and primary clients are in the southern California region, specifically within, and adjacent to, WRCOG, CVAG, and SANBAG territories. Through their engineering and program management work, they understand local energy politics and, in some cases, helped form regional policy, such as advisory roles to the CPUC and SoCalREN. Relatedly, through SoCalREN, AESC has provided management support and energy engineering services to stimulate the identification and implementation of public sector energy retrofits for approximately 30 agencies. Their key utility and municipal clients in this region include SCE, PG&E, SDG&E, SoCal Gas, SCPPA, CVAG, Coachella Valley Water District, the Cities of Moreno Valley, Colton, West Covina, San Dimas, and Vernon, the Pasadena Water & Power, the City of Los Angeles, LADWP, San Diego County, and the City of Carlsbad.

AESC's software practice began in 1996 to develop custom tools and incentive calculators for the first California statewide Standard Performance Contract on behalf of SCE, PG&E and SDG&E. Since then, they have optimized these tools and expanded their capabilities to offer robust software and web-based solutions, such as with Praxis by AESC, which they are proposing here. Praxis is a secure, web-based software platform developed to help utilities and project developers accelerate and streamline each phase of the energy project development lifecycle. It is also the same software being proposed for NMEC services within The Energy Coalition's proposal for public sector implementation services.

REN-Wide Portfolio Marketing and Communication

The I-REN-wide Marketing & Outreach (M&O) consultant will provide leadership for marketing and communications services for the entire I-REN region and its energy efficiency portfolio (Public Sector,

Codes & Standards, and Workforce Education & Training) as a whole. I-REN, as a local government, has a mission to equitably serve the rural and marginalized communities, and is well positioned to have a positive impact in the I-REN region on energy efficiency and climate resiliency.

The Scope of Work and associated deliverables for the I-REN M&O consultant will provide support for program-specific marketing and outreach efforts, working in close coordination with I-REN program staff, program implementers, and other consultants to ensure consistency of branding and messaging across all programs and activities. The consultant will also employ innovative and adaptive marketing and communication strategies to overcome barriers in the region and increase awareness of energy efficiency opportunities. Moreover, tracking the results of various approaches and having a feedback loop with I-REN staff and program teams for continuous improvement will help I-REN ensure equitable access to energy efficiency program benefits.

Based upon the RFP evaluation process, ICF Resources, LLC, is recommended for contract award for the M&O services for the I-REN Program under RFP No. 22-11. For over 50 years, ICF has been involved in Energy Efficiency and worked extensively in the California energy efficiency industry for the last 20 years. This organization also has more than 30 years of utility and energy efficiency sponsor marketing experience. Their service office is located in Irvine, CA. Some of the similar energy marketing and customer engagement projects ICF have worked on include Bay REN, SoCal REN, PG&E, Seattle City Light, SoCal Gas, and SCE. ICF is knowledgeable about the energy efficiency industry and has experience with the applicable regulatory agencies in regards to the diverse and hard to reach target communities for the I-REN Program. This firm has clearly demonstrated a thorough understanding of the deliverables associated with the Scope of Work (SOW), proposed an overall solid team, and has demonstrated industry knowledge and experience. Therefore, staff is recommending a contract award with ICF Resources, LLC, to provide Marketing and Outreach Services for the I-REN program, with a not-to-exceed (NTE) amount of \$750,000 for a term through December 31, 2025, with no more than two, one-year options to renew.

Codes and Standards Program

Energy code enforcement has historically been difficult for local jurisdictions, particularly smaller communities with fewer resources. Conflicting priorities and a focus on life and safety codes relegates energy code to a secondary (or tertiary) position. I-REN's service territory includes many jurisdictions that face significant challenges in enforcing energy codes and standards with their current resources and capacity. These jurisdictions are small in population size, geographically dispersed, challenged by extreme climate conditions, and disadvantaged by pollution, and other factors. The same challenges also apply to the development of local reach codes.

As an organization led by and dedicated to serving local governments, I-REN has a unique opportunity to provide flexible and adaptable solutions to help bridge the gap and assist these jurisdictions. The objectives of I-REN's Codes and Standards (C&S) Programs will be to improve the understanding of energy efficiency codes and standards among local building departments and the building industry to increase implementation and compliance and enforcement, make code compliance and enforcement a valuable element of the region's energy efficiency goal attainment, deliver locally informed resources and tools that streamline code compliance and enforcement and increase permit closeout, and finally, to provide information to local governments on policy tools available at the local level, including reach codes.

Two Scopes of Work (SOWs) will be developed to achieve these objectives. The first SOW, the C&S Training and Education Program, will establish and implement training and education for building department staff and the building industry to support, understand, and effectively implement energy efficiency codes and standards, including where gaps exist in the Statewide IOU Compliance Improvement Program and enforcement activities. The Program will also include outreach to engage, educate, and involve regional construction firms, architects, industry experts, and building departments, and support compliance and enforcement within regional energy efficiency programs and customers.

The second SOW, the C&S Technical Support Program, will develop technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes to support improved enforcement and compliance. I-REN will also develop regionally appropriate model ordinances, vet and refine them with participating local governments, provide ongoing technical assistance for adoption and implementation, and deliver model ordinance updates to reflect the triennial code cycle.

After interviewing applicants, staff recommends that Frontier Energy, Inc., (Frontier) be selected to execute the C&S Programs under RFP No. 22-09. Frontier Energy has a long history of being at the forefront of C&S work in California, including experience implementing programs with other RENs. Frontier Energy has been the prime consultant for BayREN's C&S program since 2013. Frontier Energy has also supported the design and implementation of 3C-REN's Energy Codes Connect and Building Performance Training Program. Frontier Energy has over 20 years of support for updates to the California Building Energy Efficiency Standards (Title 24, Part 6) and has also been the statewide Reach Program lead for single- and multi-family for 2019 and 2022 cycles. Perhaps most notably, they have worked as consultants for I-REN since our inception to establish and implement our Business and Strategic plans.

Staff, therefore, recommends a contract with Frontier Energy to develop I-REN's C&S programs with a NTE amount of \$1,582,253 over three years for the Training and Education Program (SOW 1), and NTE \$791,464 over three years for the Technical Support Program (SOW 2) for a total amount of \$2,374,000. As is the case for the other consultant agreements, the contract term is through December 31, 2025, with no more than two, one-year options to renew.

Prior Action(s):

None.

Fiscal Impact:

All costs associated with the development of I-REN's Program Implementation are included in WRCOG's adopted Fiscal Year 2022/2023 Agency Budget under the Energy & Environmental Department.

Attachment(s):

[Attachment 1 - Public Sector Program Development and Implementation Services](#)

[Attachment 2 - Building Upgrade Concierge Software Services](#)

[Attachment 3 - Codes and Standards Program Development and Implementation Services](#)

[Attachment 4 - IREN-wide Marketing and Communication Services](#)

Attachment 1a

IREN Public Sector RFP 22-10

REQUEST FOR PROPOSAL NUMBER 22-10

Inland Regional Energy Network (I-REN)
Public Sector Energy Efficiency Program Services

August 9, 2022



Western Riverside Council of
Governments 3390 University
Avenue, Suite 200
Riverside, CA 92501
(951) 405-6700
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1. SUMMARY

In 2012, the California Public Utilities Commission (CPUC) authorized a new model for administering energy efficiency programs outside the traditional Investor-Owned Utility (IOU) administered paradigm. These new models are known as Regional Energy Networks (RENs).

The CPUC sought for the RENs to address the following three operational areas:

- 1) Undertake programs that the IOUs cannot or do not intend to do.
- 2) Target hard to reach areas and disadvantaged communities.
- 3) Design programs that have the potential to be scaled to larger geographic areas.

In addition to these directions provided by the CPUC, RENs were also directed to address Workforce Education & Training (WE&T); Technology development; and programs within the field of Water / Energy Nexus. The goal of a REN is to implement and administer energy efficiency programs the current IOUs cannot or do not have the available resources to implement within their service territory. In addition to this goal, RENs look to fill the economic and geographical gaps of distant, hard to reach, and disadvantaged communities that IOUs cannot access or have a difficult time accessing to promote energy efficiency opportunities.

For the past two years, the Western Riverside Council of Governments (WRCOG) as the lead contracting agency, has partnered with and has been strategizing with the Coachella Valley Association of Governments (CVAG) and San Bernardino Associated Governments (SANBAG) on development of a REN to service the Inland counties of Riverside and San Bernardino, with WRCOG acting as the lead agency. This tri-COG group hereby collectively referred to as the Inland REN ("I-REN" or "I-REN Team") for the purposes of this program, has submitted a Business Plan to the CPUC, and has been approved to become a REN Program Administrator (PA), with the desire to address CPUC goals and objectives described in rulemaking 13-11-005 concerning Energy Efficiency Rolling Portfolios, Policies, Programs, Evaluation, and Related Issues. The I-REN Business Plan addresses three sectors – the Public Sector, the Codes & Standards Sector, and the Workforce, Education, & Training Sector. Throughout these sectors there will be a strong focus on hard-to-reach communities and disadvantaged communities within the I-REN territory.

The I-REN Business Plan was approved by the CPUC on November 18, 2021, with a budget of \$65 million to be funded through program years 2022 to 2027. The I-REN Team is seeking competitive bids for one or more consultants to assist the I-REN Team with program design, outreach, implementation, and other tasks described in the Scope of Work for the following programs and services:

1. Public Sector Technical Assistance and Strategic Energy Planning Program Implementation
2. Public Buildings Normalized Metered Energy Consumption (NMEC) Incentive Program Implementation
3. Public Sector Financing Services

Proposers responding to this RFP may bid on one or more of the scopes of work listed above and detailed further in this document.

WRCOG is a joint powers authority whose purpose is to unify Western Riverside County so that it can speak with a collective voice on important issues that affect its members. Representatives from eighteen (18) cities in Western Riverside County, the Riverside County Board of Supervisors, and the Eastern and Western Municipal Water Districts have seats on the WRCOG Executive Committee, the policy setting Board for the Agency. The Riverside County Superintendent of Schools is an ex-officio member of the Executive Committee. As a Joint Powers Authority, WRCOG examines a range of regional matters critical to Western Riverside County's future.

SANBAG is a joint powers authority representing its member agencies on regional issues in San Bernardino County. SANBAG member agencies include 23 cities and San Bernardino County.

CVAG is also a joint powers authority and is the regional planning agency coordinating government services within the Coachella Valley and Eastern Riverside County. CVAG's member agencies include 10 cities, Riverside County, the Agua Caliente Band of Cahuilla Indians, the Cabazon Band of Mission Indians, the Torres Martinez Desert Cahuilla Indians, and the Twenty-Nine Palms Band of Mission Indians.

For more information about WRCOG please visit the website at www.wrcog.us.

For more information about SANBAG please visit the website at <http://gosebcta.com>.

For more information about CVAG please visit the website at www.cvag.org.

2. SUBMISSIONS

All Proposal must be submitted via PlanetBids by **the Proposal Due Date listed in Section 6, Schedule of Events, no later than 5:00 p.m. Pacific Standard Time (PST)** at <https://pbsystem.planetbids.com/portal/36405/portal-home>.

Proposals shall include a Table of Contents listing all sections, disclosures, etc., and their corresponding page numbers. **Please review Section 12 for additional details.** It shall be the responsibility of the Proposer to submit the Proposal and all other required items specified in this RFP via [PlanetBids](#) at or before 5:00 p.m. PST on the Proposal Due Date listed in Section 6, Schedule of Events. WRCOG will not accept any Proposal received after the Proposal submission time and date.

3. QUESTIONS AND ANSWERS REGARDING THIS RFP

Any questions concerning technical specifications or Scope of Work requirements must be submitted in [PlanetBids](#) by 5:00 p.m. on **the date listed in Section 6, Schedule of Events**.

4. PRE-PROPOSAL MEETING

WRCOG will be hosting a pre-Proposal meeting on the date listed in Section 6, Schedule of Events, to discuss this RFP. The meeting will convene via Zoom at:

<https://us02web.zoom.us/j/81202939285?pwd=Z3RGM3dRcWZ3TFpiNEl4a3dCQ1ITQT09>

Participation is encouraged but not mandatory.

5. BUDGET PARAMETERS

I-REN's budget was established by the CPUC when the I-REN Business Plan was approved on November 18, 2021. The not-to-exceed amounts for this RFP are as follows:

- 1) Public Sector Technical Assistance Program and Strategic Energy Planning Program shall not exceed \$5,000,000 for the initial three-year term of the contract.
- 2) Public Buildings Normalized Metered Energy Consumption (NMEC) Incentive Program Implementation shall not exceed \$6,600,000 for the initial three-year term of the contract.
 - a. Note: performance-based pricing proposals are highly encouraged from NMEC Incentive Program proposers to optimize savings delivery for this program.
 - b. Included within the overall not-to-exceed amount of \$6,600,000, the NMEC Incentive Program has approximately \$1,500,000 in direct customer incentive funding per year to work with.

- 3) Public Sector Financing Services shall not exceed \$600,000 for the initial three-year term of the contract.

Proposer understands that Proposer is not entitled to the full not-to-exceed amounts outlined in this section. The not-to-exceed amount merely represents the maximum funding available within the applicable budget sectors for these particular services. Pursuant to Section 11 of this RFP, the overall cost of Proposer's Proposal will be a primary consideration in the evaluation and selection of the award of the agreement. It is also possible that these not-to-exceed amounts may be altered based on budget needs and WRCOG reserves the right to alter the not-to-exceed amounts in light of budget considerations.

The contract term for this RFP shall be three years from the date of execution with the option of two one-year extensions.

6. SCHEDULE OF EVENTS

Event	Date
1. RFP Distribution	8/09/22
2. Pre-Proposal Meeting via Zoom	8/22/22 at 2:00 p.m. PST
3. Questions from vendors about scope or approach due	8/23/22 at 5:00 p.m. PST
4. Answers to questions from vendors about scope or approach posted to the PlanetBids portal	8/30/22
5. Proposal Due Date	9/16/22 at 5:00 p.m. PST
6. Review of Proposals	9/19/22 – 9/30/22
7. Potential Interviews	10/03/22 – 10/07/22
8. Anticipated decision and selection of vendor(s)	10/10/22 – 10/21/22
9. Anticipated commencement date of work	11/05/22 - 11/15/22

The interview schedule may be staggered, depending on the number of Proposals received, and could span multiple weeks.

7. WRCOG RIGHTS

Award of a contract resulting from this RFP will be based upon the most responsive Proposal or Proposals which will be most advantageous to WRCOG in terms of cost, functionality, and effectiveness in meeting goals and objectives, and other factors as specified in this RFP.

A. WRCOG reserves the right to:

- Disqualify any and all Proposals that are not submitted in accordance with the required format described in this RFP.
- Reject any and all Proposals submitted.
- Request additional information.
- Issue Addenda to this RFP.
- Award all or part of the work contemplated in this RFP.
- Remedy errors in the RFP.
- Cancel the entire RFP.

- Issue a subsequent RFP.
 - Approve or reject the use of a particular subcontractor / supplier.
 - Negotiate with any, all, or none of the Proposers. If WRCOG is unable to negotiate final contract Terms and Conditions that are acceptable to WRCOG, WRCOG reserves the right to award the contract to another Proposer(s).
 - Accept other than the lowest priced Proposal.
 - Award a contract without interviews, discussions, or negotiations.
 - Award a contract to one or more Proposers.
- B. WRCOG may, at its discretion, and without explanation to prospective Proposer(s), at any time, choose to discontinue this RFP without obligation to such prospective Proposer(s).
- C. All Proposers should be aware of the insurance requirements for Contract Award. The Certificate of Insurance must be provided by the successful Proposer(s) prior to Contract Award. A contract may not be awarded if insurance requirements are not met.
- D. WRCOG does not reimburse for the cost of Proposal preparation, even in the event of RFP cancellation.
- E. Communication between the Proposer(s) and any member of the Proposal Review Committee during the selection process is prohibited, except in the manner expressly authorized in this RFP. Violation of this restriction is grounds for disqualification of the communicating Proposer's(s) Proposal.
- F. Every Proposal submitted is considered a firm offer that must be valid for a minimum of ninety (90) calendar days.
- G. If applicable, WRCOG prefers that software developed under WRCOG's contract not incorporate proprietary and / or third-party software components. This does not preclude the development of deliverables, which interface with commonly-available, off-the-shelf software. However, contractors must determine in advance whether WRCOG already has, or is willing to procure, appropriate licenses for any proprietary and/or third-party software that would be required. Contractors must also provide the impacts of any enhancements and upgrades. WRCOG will require delivery of documentation and source code for all electronic intellectual property developed under a WRCOG contract prior to releasing final payment to the contractor/consultant.

8. ADDENDA

WRCOG reserves the right to revise the RFP documents. Any WRCOG changes to the requirements will be made by written addenda to this RFP. Any written addenda issued pertaining to this RFP shall be incorporated into the terms and conditions of any contract resulting from this RFP. Addenda will be posted on PlanetBids. It is the responsibility of the Proposer(s) to check PlanetBids to determine if any addenda have been issued. WRCOG will not be bound to any modifications to or deviations from the requirements set forth in this RFP as the result of oral instructions. Proposers shall acknowledge receipt of addenda in their Proposal. Failure to acknowledge receipt of all addenda may cause the Proposal to be deemed non-responsive to this RFP and be rejected without further evaluation.

9. NOTIFICATION OF RIGHT TO PROTEST CONTRACT AWARD

Proposer(s) have the right to protest the contract award. A written protest must be filed with WRCOG's Energy & Environmental Director within five (5) working days after the decision of award is made. WRCOG will not accept any verbal protests. The protest must be a detailed, written statement of the protest grounds and reference the RFP Number and name of the designated Contracts Administrator. Grounds for a protest are that WRCOG failed to follow the selection procedures and

adhere to requirements specified in this RFP or any addenda or amendments, there has been a violation of conflict of interest as provided by California Government Code Section 87100 et seq., or violation of State or Federal law. WRCOG will only consider those specific issues addressed in the written protest. The protest must be submitted to WRCOG via 1) certified mail and 2) e-mail using the contact information provided below.

Name	Casey Dailey, Director of Energy & Environmental Programs
Address	3390 University Avenue, Suite 200, Riverside, CA 92501
Phone	(951) 405-6720
Email	cdailey@wrcog.us

A written response from WRCOG will be directed to the protesting Proposer(s) within fourteen (14) calendar days of receipt of the protest, advising of the decision with regard to the protest and the basis of the decision.

10. CONFLICTS OF INTEREST

All Proposers responding to this RFP must avoid organizational conflicts of interest which would restrict full and open competition in this procurement. An organizational conflict of interest means that due to other activities, relationships, or contracts, a Proposer is unable, or potentially unable, to render impartial assistance or advice to WRCOG; a Proposer's objectivity in performing the work identified in the Scope of Work is or might be otherwise impaired; or a Proposer has an unfair competitive advantage. In addition to the above requirements, all Proposers shall disclose any financial, business, or other relationship with WRCOG, WRCOG's member agencies, their respective elected decision-makers, and/or their respective staff that may have an impact upon the outcome of the procurement process and/or the proposed agreement, including but not limited to, past communications with any of the parties listed in this Section 10 that relate to the subject of this RFP.

11. CRITERIA

Any award to be made pursuant to this RFP will be based upon the Proposal with appropriate consideration given to operational, technical, cost, and management requirements. Evaluation of offers will be based upon each Proposer's responsiveness to the RFP and the total price quoted for all items covered by the RFP.

The following elements will be the primary considerations in evaluating all submitted Proposals and in the selection of a Proposer(s):

- A. Completion of all required responses in the correct format.
- B. Qualifications and experience with similar projects and clients.
- C. Key staff that will actually be working on the proposed tasks.
- D. The extent to which Proposer's proposed solution fulfills WRCOG-stated requirements as set forth in this RFP.
- E. An assessment of the Proposer's ability to deliver the indicated services in accordance with the specifications set out in this RFP.
- F. The Proposer's stability, experience, and record of past performance in delivering relevant services.
- G. Availability of sufficient high-quality personnel with the required skills and experience for the specific approach proposed.
- H. Overall cost of Proposer's Proposal.

12. PROPOSAL INFORMATION, ORGANIZATION, AND CONTENT

This RFP contains three scopes of work and Proposers may respond to one or multiple scopes in their proposals. A Proposer wishing to respond to multiple scopes should submit one overall proposal with scope-specific content included where appropriate according to the guidance below. Proposals should clearly indicate which scope(s) is/are included, and clearly label scope-specific content where appropriate. Proposer's submittal in response to this RFP will be incorporated into a final agreement between WRCOG and the selected Proposer(s). All Proposals shall contain, at a minimum, the following information:

- A. Title Page
- B. Table of Contents
- C. Cover Letter
- D. Firm Capabilities
- E. Approach and Understanding of the Scope of Work Plan
- F. Appendix A: References
- G. Appendix B: Project Team Staffing
- H. Appendix C: Company Overview

The page limit for Items A - F is **45 total pages**. There is no page limit on appendices.

Title Page

The following must be provided on the title page:

- RFP number
- Title of the project indicating scope(s) included in proposal
- Name and address of proposing firms and/or individuals
- Phone and Fax of Proposer
- Primary contact person
- Email address of the primary contact person
- Signature of the individual authorized / obligated to commit the Proposer to this project.

Table of Contents

A clear identification of the materials by section and page numbers are to be included in the Table of Contents.

Cover Letter

The cover letter should be brief (two pages maximum) and outline the Proposer's general approach, qualifications, and experience. In order to address the needs of this procurement, WRCOG will accept teams to propose in which proposing firms work cooperatively in presenting integrated solutions. Proposer's(s') team arrangements may be desirable in that they will enable the companies involved to complement each other's unique capabilities, while offering the best combination of performance, cost, and delivery for financial assistance being provided under this RFP. WRCOG will recognize the integrity and validity of Proposer's(s') team arrangements provided that:

- The arrangements are clearly identified and relationships are fully disclosed; **and**

- A primary (lead) individual is designated who will be fully responsible for all contract performance.

Firm Capabilities

All Proposals must provide a comprehensive, yet concise description of the Proposer's(s') individuals' capabilities including the following:

- A track record of providing successful assistance on similar disciplines and tasks highlighted in the "Request for Detailed Scope of Work and Budget" section.
- A track record of providing successful services to similar governmental entities.
- Descriptions of the key staff that will actually be working on the proposed tasks and their experience working on similar issues.
- If responding as a firm, the ownership, size, and location of the office responsible for providing services to WRCOG.
- If responding as a firm, its legal organization (e.g., corporation, partnership) and year of incorporation.
- If responding as a firm, a description of the firm's equal employment opportunity and non-discrimination policies.
- If responding as firm, a summary of the firm's minority and female recruitment efforts and the percentage of minority and female officers, partners, or the equivalent.
- A statement, in one page or less, of any other relevant factors that should be considered by WRCOG in evaluating the Proposal.

Proposals will be evaluated by a Proposal Review Committee on the basis of the Proposer's(s') skills and experience, proposed cost, presentation and completeness of Proposal, and the ability and willingness to work with WRCOG, its management, and references.

Proposers to this RFP should be mindful that WRCOG's selection process prioritizes experience, knowledge, and abilities of key individuals more so than experience associated with a particular firm. WRCOG has found that successful completion of a project is heavily reliant on the key staff that will be working with WRCOG on a regular basis.

Approach and Understanding of the Scope of Work Plan

Within a single overall proposal document, Proposer should include a separate and clearly labeled "Approach and Understanding of the Scope of Work Plan" section for each scope of work, if bidding on more than one scope. Proposers are encouraged to propose enhancements or procedural or technical innovations to the Scope of Work that do not materially deviate from the objectives or required content of the project. **WRCOG is requesting that the response to this portion of the RFP be limited to 45 total pages.** There is no page limit on appendices.

Proposer(s) shall:

- Provide a narrative, which addresses the Scope of Work, and shows understanding of WRCOG's needs and requirements.
- Describe the approach to completing the tasks specified in the Scope of Work. The work plan shall be of such detail to demonstrate the Consultant's ability to accomplish the project objectives.
- Sequentially outline the activities that would be undertaken to complete the tasks and specify who would perform the tasks.
- Include a timeline for the proposed work. Note that I-REN is interested in having a "soft launch" of

one or more of its programs by the end of 2022, with full deployment for 2023.

- E. Furnish detailed and itemized pricing for the proposed work, including an estimate of hours required to complete the specified tasks along with a total anticipated budget.
- F. Identify methods that consultant will use to ensure quality control as well as budget and schedule control for the project.
- G. Identify any special issues, problems, or risks that are likely to be encountered in this project and how the Proposer would propose to address them.

Also, please provide hourly billing rates for staff you are proposing to include on this RFP for services not directly identified in the Scope of Work.

Appendix A: References

Please provide three (3) references, including names and contact information. If bidding on more than one scope of work, provide at least one (1) reference for each scope area included in proposal, as part of the three (3) total references. References should not include any WRCOG staff or WRCOG Committee members.

Appendix B: Project Team Staffing

Please include biographies and relevant experience of key staff who would be assigned to the project. Please describe coverage levels of employees who would be assigned to this project. If bidding on more than one scope of work, clearly identify which scope(s) key staff would support. Affirm that no employees working on the engagement have ever been convicted of a felony.

Appendix C: Company Overview

Please provide the following for your company:

- Official registered name (Corporate, D.B.A., Partnership, etc.), Dun & Bradstreet Number, Primary and secondary SEC numbers, address, main telephone number, toll-free number(s), and fax number(s).
- Primary key contact name, title, address (if different from above address), direct telephone, and fax number(s).
- Person authorized to contractually bind the organization for any Proposal against this RFP.

13. REQUEST FOR DETAILED SCOPE OF WORK AND BUDGET

Within a single overall proposal, Proposers may respond to **one or more** of the Scopes of Work included in this RFP. The requested SOWs are listed here and detailed in the sections following the public sector background information below.

1. Public Sector Technical Assistance and Strategic Energy Planning Program Implementation
2. Public Buildings Normalized Metered Energy Consumption (NMEC) Incentive Program Implementation
3. Public Sector Financing Services

I-REN's Public Sector energy efficiency programs (Scopes 1 and 2) and financing services (Scope 3) will necessarily be developed and implemented in close coordination with each other and with other I-REN programs and REN-wide activities, regardless of the number of consultants hired through this RFP.

NOTE: This work will also be conducted in close coordination with the parallel development of a

software solution to support I-REN public sector energy efficiency activities. That work is currently being solicited under an RFP for Building Upgrade Concierge (BUC) Software Services for Public Sector Energy Efficiency. That RFP is also available through PlanetBids.

Programs and activities proposed for these scopes of work must be aligned with I-REN's Energy Efficiency Business Plan (I-REN BP),¹ CPUC Decision 21-11-013 approving the I-REN BP,² and all other applicable requirements for REN energy efficiency programs.

Tasks listed within each scope are provided as guidelines. Proposers may recommend supplemental tasks but must explain their rationale. For the scope(s) included in a Proposer's response, all tasks and deliverables must be identified as distinct line items with accompanying narrative and costs.

I-REN Public Sector Background

I-REN's public sector offerings will serve the members of the three Councils of Government (COGs) represented in I-REN, including the Coachella Valley Association of Governments (CVAG), San Bernardino Council of Governments (SANBAG), Western Riverside Council of Governments (WRCOG), and the cities, school districts, water districts, special districts, and tribal communities they represent. These regional programs will target, but not be limited to, upgrades to existing public buildings and facilities with high energy use and older equipment. While the offerings will consider all public building types, there will be a focus on community-serving buildings such as community centers, libraries, senior centers, schools, and fire and police buildings. Through energy efficiency projects in these facilities, I-REN can provide benefits that will flow to hard-to-reach, disadvantaged, low income, and other vulnerable communities. The I-REN programs will be multi-beneficial in nature, layering energy efficiency strategies with financing services, greenhouse gas reductions, community resilience and climate adaptation measures.

Local governments in the I-REN service territory have limited capacity to complete energy upgrades and are challenged to maintain and upgrade these facilities due to lack of funding for capital improvements, a lack of awareness related to energy efficiency and other energy efficiency program opportunities, limited time and staff resources, along with conflicting priorities. Further, State mandates such as building energy benchmarking (AB 802) requirements, energy code compliance, and climate adaptation planning are additional unfunded regulations and requirements on local governments and are difficult to meet given competing priorities. These challenges have been exacerbated in recent years due to the COVID-19 pandemic, the associated economic downturn and increased pressure on local government agencies to respond to a variety of issues.

To address these challenges, I-REN will leverage its existing public sector partnerships and networks across the region to offer technical assistance, implement incentive program options, and improve access to financing, as indicated in the scopes of work in this RFP. Implementing these initiatives will further I-REN's goals of encouraging resilience and continuous capacity building for local governments, thereby strengthening their ability to serve their community through energy efficiency projects in their own facilities, while also saving on building operations costs and contributing to local and statewide goals for energy savings, climate resilience, and greenhouse gas emissions reduction.

I-REN's Public Sector Program Objectives

- a. Local governments have the support and resources to develop and implement their strategic energy plans and energy efficiency projects.
- b. Help local governments afford and finance a range of energy efficiency upgrades through

¹ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

² D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

innovative financing options.

Scope 1: Public Sector Technical Assistance and Strategic Energy Planning Program Implementation

This scope of work includes professional services for the tasks and deliverables described below, for implementation of I-REN's Public Sector Technical Assistance and Strategic Energy Planning Program (TA Program). This program is a non-resource, equity segment energy efficiency program that will establish a regional Building Upgrade Concierge (BUC) for local governments, special districts, and tribal communities (collectively, "public sector customers") with technical guidance and tools to inform and enable priority energy improvements.

Insufficient staff time and resources is one of the major barriers to implementing energy efficiency retrofits in public sector buildings. I-REN's TA Program for the public sector will provide concierge-style support to help fill gaps in staff capacity and resources at these local government jurisdictions. I-REN can also provide additional staffing support through its energy efficiency fellowship interns workforce education & training (WE&T) initiative, which will be coordinated with its public sector energy efficiency activities. I-REN's TA Program will build local government's capacity to tackle complex public sector facility energy improvement projects, from helping with benchmarking to navigating options and approaches for maximizing their investments and energy savings.

Local governments, special districts, and tribal jurisdictions vary widely in their current situation with regard to energy efficiency project implementation. I-REN seeks a consultant who will meet these departments and facilities staff where they are, assess their current situation and resources, and offer personalized support and resources to move their projects forward. To implement the program, the consultant will provide person-to-person technical assistance to local governments to support public sector energy efficiency projects. The consultant will assist local governments with strategic energy planning and benchmarking to connect local government goals related to climate, resilience, and economic development to energy efficiency programs and adoption.

In addition to staff capacity constraints, other common barriers facing the public sector include complex program requirements to receive funding, risk aversion to new or unproven technology, a lack of data to support their decision-making process, or limited technical expertise and knowledge of energy projects. To overcome these barriers, the consultant will develop tools and resources to increase public sector awareness of and participation in energy efficiency programs such as the I-REN Public Buildings NMEC Incentive Program included in this RFP (Scope 2) as well as other federal, state, and local energy efficiency and distributed energy resource programs. This work will be conducted in close coordination with the parallel development of the BUC software solution and will allow I-REN to serve as a clearinghouse for public sector energy efficiency and distributed energy resource program information.

Task 1.1: Program Design

The consultant will provide leadership for program design activities in collaboration with the I-REN team. The program's design must be aligned with the I-REN BP,³ D.21-11-013,⁴ and all other applicable requirements for REN energy efficiency programs. The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN team within 2 weeks of final contract.
- Develop a concierge-style program delivery model that supports I-REN's goals for the TA Program, overcomes public sector participation barriers, and prioritizes service to vulnerable

³ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

⁴ D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

communities.

- Support I-REN in engaging with local and regional stakeholders to ensure the program design fits the needs of local governments in the region.
- Define program eligibility guidelines and program team roles; document program processes and procedures and develop participant forms and other collateral.
- Establish coordination process with other I-REN energy efficiency programs, staff, Energy-Efficiency Fellows, services, and implementers, e.g., the Public Buildings NMEC Program and Public Sector Financing Services included in this RFP, to maximize program participation and benefits to customers.
- Identify other public sector energy efficiency programs and related offerings in the region and establish coordination process with program administrators to identify eligibility requirements and participation processes, to inform resources and assistance provided to I-REN public sector customers.
- Develop regionally-focused tools and resources to increase energy efficiency and distributed energy resource program participation in the public sector and allow I-REN to serve as a clearinghouse for relevant information.
- Coordinate with BUC software provider to inform solution design and ongoing enhancements.

Anticipated deliverables:

- Kick-off meeting agenda and notes
- Program Manual
- Implementation Plan content, e.g., program process flow, diagram, logic model
- Participant forms and other collateral
- Coordination process documentation
- Regionally-focused tools and resources to increase awareness of and participation in energy efficiency and distributed energy resource program participation in the public sector

Task 1.2: Outreach & Engagement

Program-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable. The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials.
- Recommend and develop marketing and outreach collateral in various formats targeted to public sector customer audiences.
- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier.
- Identify and implement strategies for outreach to local jurisdictions and agencies to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.
- Collaborate with local governments, tribes, and special districts to design and deliver messaging to the community to promote local leadership in energy efficiency by highlighting success stories from local strategic energy plans and projects.
- Set targets and milestones for outreach and engagement and report on progress.

Anticipated deliverables:

- Outreach plan with targets and milestone schedule

- Content for an e-newsletter targeted to local government audiences
- Comprehensive website content including a listing of events, resources and tools for local governments
- Content and strategy for targeted use of social media, and other channels to promote public sector resources
- Case studies highlighting local project success stories
- Other outreach materials as recommended by consultant

Task 1.3: Program Implementation

The consultant will lead all program implementation activities in coordination with the I-REN team, with responsibility for each activity listed below:

- Establish and actively manage communication with local governments, special districts, and tribal communities; identify energy efficiency champions, department decisionmakers, and facility staff and build relationships with them.
- Provide concierge-style person-to-person support via phone, email, and in person for public sector customers to assess jurisdictions' needs and get higher levels of assistance and support for their energy efficiency projects.
- Assist participants through multiple stages of engagement: strategic energy planning and benchmarking, project opportunity scoping, incentive program identification and participation, contracting and procurement, installation, and ongoing operations and commissioning.
- Develop or enhance strategic energy plans to connect local government goals related to climate, resilience, and economic development to energy efficiency programs and adoption.
- Coordinate with Energy-Efficiency Fellows for public sector work where appropriate, in collaboration with I-REN workforce education & training (WE&T) initiatives.
- Deliver resources for the public sector to tap into energy efficiency and distributed energy resources programs offered by I-REN and other program administrators.
- Maintain communication to monitor status and encourage progress; follow up on completed projects to ensure efficient operations and ongoing maintenance, and address facility staff turnover and retraining needs.
- Document and report on program implementation activities and participant interactions.
- Conduct regular (e.g., weekly or biweekly) meeting with I-REN to provide status updates.

Anticipated deliverables:

- Documentation of participant interactions
- Monthly and quarterly status reports
- Meeting agendas and status updates

Task 1.4: Other Services

The consultant will also be responsible for the activities listed below:

- Provide program-specific content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum (JCM), Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Collect program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Contribute to program performance analysis and evaluation, measurement and verification

(EM&V) activities for tracking program achievements and informing continuous improvement.

Anticipated deliverables:

- Program-specific content and edits or updates to content for I-REN regulatory filings
- Program data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements
- Analysis of program performance and recommendations for future program improvements

Scope 2: Public Buildings NMEC Incentive Program Implementation

This RFP seeks professional services for the tasks and deliverables described below, to support I-REN's Public Buildings NMEC Incentive Program (NMEC Program). The I-REN Public Sector NMEC program is an equity segment energy efficiency resource program intended to provide incentives for meter-based energy savings achieved over three to five years. Incentivized measures could include any measure that reduces energy usage, e.g., HVAC tune ups and retrofits, exterior and interior lighting and smart controls, operations and maintenance, etc. The program would be open to all public sector facilities including those operated by county and city government, school districts, special districts, and tribes.

Program outreach will focus initially on public gathering spaces such as community and neighborhood centers, health and recreation centers, senior centers, teen centers, and libraries. Implementing energy efficiency projects at these locations will serve multiple goals, including but not limited to those described here:

- Upgrades and retrofits to HVAC and lighting equipment both interior and exterior will improve comfort and safety at facilities that benefit vulnerable populations such as children, elders, and low income, disadvantaged, and underserved communities.
- Higher efficiency equipment, appliances and controls such as cooling-dominated HVAC loads as well as improvements to operations and maintenance will lower energy bills for local governments, reducing overhead and freeing up funds for other projects.
- Completion of projects at these high-visibility locations will support achieving local and statewide energy efficiency and greenhouse gas reduction goals while also positioning local governments as energy efficiency leaders within their communities.

The program will use an NMEC approach to calculate savings and demonstrate persistence of savings. By using NMEC to calculate savings, the program will help protect against unrealized savings. Combined with technical assistance and reinforcement of operations and management best practices, public sector customers will experience maximized savings.

Task 2.1: Program Design

The consultant will provide leadership for program design activities in collaboration with the I-REN team. The program's design must be aligned with the I-REN BP,⁵ D.21-11-013,⁶ and all other applicable requirements for REN energy efficiency programs. The program must also comply with any and all applicable CPUC guidance regarding NMEC, such as the current version of the NMEC Rulebook. The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN team within 2 weeks of final contract.

⁵ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

⁶ D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

- Develop an NMEC program delivery model that supports I-REN's goals for the program, overcomes public sector participation barriers, and prioritizes service to vulnerable communities.
- Support I-REN in engaging with local and regional stakeholders to ensure the program design fits the needs of local governments in the region.
- Define and document program eligibility guidelines and verification process; program team roles; and other relevant program processes and procedures.
- Design NMEC incentive structure and payment process.
- Document NMEC savings calculation methodology and develop measurement and verification (M&V) plan in compliance with all relevant CPUC guidance and requirements.
- Establish close coordination processes with the other I-REN Public Sector offerings included in this RFP:
 - Coordinate with the I-REN Public Sector TA program to develop a seamless participation pathway for customers from the TA program into the NMEC program.
 - Coordinate with the Public Sector Financing Services to provide concierge-style services to customers for layering financing with their NMEC projects.
- Develop participant forms, agreements, and other program collateral.
- Coordinate with BUC software provider to inform solution design and ongoing enhancements.

Anticipated deliverables:

- Kick-off meeting agenda and notes
- Eligibility guidelines and verification process
- NMEC incentive structure and payment process
- Documentation of NMEC savings calculation methodology
- Program Manual
- Implementation Plan content, e.g., program process flow, diagram, logic model, NMEC M&V plan
- Documentation of coordination process with the TA program and Public Sector Financing Services
- Participant forms, agreements, and other collateral

Task 2.2: Outreach & Engagement

Program-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant with support from and in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable.

The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials.
- Recommend and develop marketing and outreach collateral in various formats targeted to public sector customer audiences, in close coordination with I-REN marketing consultant and TA program implementer as applicable.
- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier.
- Coordinate with I-REN's TA program implementer and financing services provider as applicable to identify and implement strategies for outreach to local jurisdictions and agencies to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.

- Coordinate with I-REN's TA program implementer and financing services provider as applicable to collaborate with local governments, tribes, and special districts to design and deliver messaging to the community to promote local leadership in energy efficiency by highlighting success stories from local projects.
- Set targets and milestones for outreach and engagement and report on progress.

Anticipated deliverables:

- Outreach plan with targets and milestone schedule
- Content for an e-newsletter targeted to local government audiences
- Comprehensive website content describing program
- Content and strategy for targeted use of social media, and other channels to promote public sector incentives
- Content for case studies highlighting local project success stories
- Other outreach materials as recommended by consultant.

Task 2.3: Program Implementation

The consultant will lead all program implementation activities in coordination with the I-REN team, with responsibility for each activity listed below:

- Coordinate closely with the TA program to guide customers seamlessly from technical assistance into NMEC program participation.
- Also, in coordination with the TA program, establish and actively manage communication with local governments, special districts, and tribal communities; identify energy efficiency champions and build relationships with them.
- Provide concierge-style person-to-person support for public sector customers entering the NMEC program.
- Assist participants through multiple stages of engagement: project opportunity scoping, contracting and procurement, installation, M&V, and incentive payment.
- Document and report on program implementation activities, e.g., participant interactions, project pipeline, active project statuses, risk mitigation, etc.
- Conduct regular (e.g., weekly or biweekly) meeting with I-REN to provide status updates.

Anticipated deliverables:

- Documentation of program implementation activities
- Monthly and quarterly status reports
- Meeting agendas and status updates

Task 2.4: Other Services

The consultant will also be responsible for the activities listed below:

- Develop and perform quality assurance and quality control (QAQC) processes to ensure participant eligibility, avoid double-dipping with other ratepayer-funded programs, prevent program "gaming," etc.
- Request and collect data from IOU program administrators sufficient to support baseline and savings calculation methodology, as applicable.
- Collect and provide I-REN program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Provide program-specific content and/or review of content as needed for I-REN regulatory

documents and filings, e.g., JCM, Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.

- Contribute to program performance analysis and EM&V activities for tracking program achievements and informing continuous improvement.

Anticipated deliverables:

- Documentation of QAQC processes
- Program-specific content and edits or updates to content for I-REN regulatory filings
- Program data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements
- Analysis of program performance and recommendations for future program improvements

Scope 3: Public Sector Financing Services

This RFP seeks professional services for the tasks and deliverables described below, to support I-REN's Public Sector programs and activities through the provision of financing services to participants in the programs listed in SOWs 1 and 2. The financing services solicited in this scope of work would layer with technical assistance services provided through I-REN's Public Sector Technical Assistance and Strategic Energy Planning Program, and/or with incentives provided through the Public Buildings NMEC Incentive Program, to provide additional benefit to public sector customers.

A wide variety of financing mechanisms are available for energy efficiency projects, from traditional loans and financing from banking institutions to specialized products designed specifically for energy efficiency. However, the public sector is challenged by many barriers in trying to take advantage of these options. Staff time and resources are constrained, the array of options is confusing, and it can be unclear how local governments, special districts, and tribes would participate, given their unique position as publicly funded agencies.

I-REN can bridge this gap by identifying financing mechanisms and creative funding sources, evaluating their appropriateness for various public sector jurisdictions and facility types in the I-REN service territory, and then assembling a tailored set of options to present to local governments, special districts, and tribes. I-REN can support local jurisdiction staff and decision-makers in navigating through the complexities of financing options, choosing a pathway and applying for funds, and then serve as a technical assistance resource for project implementation and reporting.

For its initial focus, I-REN proposes to target HVAC upgrades in community buildings including but not limited to recreation centers, libraries, senior centers, and the like. HVAC replacement at a large facility is costly, and the intervention of financing through I-REN's Public Sector initiative could mean the difference between replacing a system with baseline equipment and moving up to a more efficient system that will deliver better performance and bill savings, as well as supporting energy savings and climate action goals.

This scope of work seeks a professional consultant to lead the services described above, through the delivery of the following tasks.

Task 3.1: Financing Services Design

The consultant will be responsible for developing a financing offering consisting of one or more financing mechanisms that can be layered with the TA and NMEC public sector programs, to overcome upfront-cost financial barriers for public sector jurisdictions pursuing energy efficiency and climate resiliency projects. Financing services proposed must be aligned with the I-REN BP,⁷ D.21-11-

⁷ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

013,⁸ and all other applicable requirements for REN energy efficiency and financing programs.

- Conduct a kick-off meeting with the I-REN team within 2 weeks of final contract.
- Develop financing offering and delivery model that layers with I-REN's TA and NMEC programs, overcomes public sector participation barriers, and prioritizes service to vulnerable communities.
- Support I-REN in engaging with local and regional stakeholders to ensure the financing offering fits the needs of local governments in the region.
- Define eligibility guidelines, terms and conditions, and other processes and procedures for participation in financing services.
- Establish coordination process with I-REN's TA and NMEC programs to ensure a seamless experience for customers in layering financing with the projects they pursue in other programs.
- Develop participant forms, agreements, and other collateral.
- Provide financing-related content for inclusion in other I-REN program manuals, IPs, etc.
- Coordinate with BUC software provider to inform solution design and ongoing enhancements.

Anticipated deliverables:

- Kick-off meeting agenda and notes
- Financing offering documentation and procedures
- Participant forms, terms and conditions, and other collateral
- Program manual and IP content

Task 3.2: Marketing & Outreach

Financing-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant with support from and in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable. Messaging regarding financing services should be incorporated in I-REN's TA and NMEC program outreach collateral wherever applicable.

The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials.
- Develop financing marketing and outreach plan, set targets and milestones, and report on progress.
- Recommend and develop standalone collateral and/or content to add to other I-REN program collateral for marketing and outreach targeted to public sector customer audiences.
- Collaborate with TA and NMEC program implementers as applicable to include financing content in outreach to local jurisdictions and agencies to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.

Anticipated deliverables:

- Outreach plan with targets and milestone schedule
- Standalone and/or added content for various outreach formats, e.g., e-newsletter, website, social media, and other channels
- Content for case studies highlighting local project success stories; other outreach materials as recommended by consultant

⁸ D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

Task 3.3: Financing Implementation

The consultant will lead all financing implementation activities in close coordination with the TA and NMEC programs and I-REN team, with responsibility for each activity listed below:

- Coordinate closely with the TA and NMEC programs to guide customers in layering financing with their projects in the other programs.
- In coordination with I-REN staff, Energy-Efficiency Fellows, and the TA and NMEC programs, establish and actively manage communication with local governments, special districts, and tribal communities; identify energy efficiency champions and build relationships with them.
- Provide concierge-style person-to-person support for public sector customers to assist in them through multiple stages of engagement: navigating the financing options available to them, the decision process, and the follow-through to implement the financing mechanisms selected for projects.
- Document and report on financing implementation activities, e.g., participant interactions, financed projects and statuses, risk mitigation, etc.
- Conduct regular (e.g., weekly or biweekly) meeting with I-REN to provide status updates.

Anticipated deliverables:

- Documentation of financing implementation activities
- Monthly and quarterly status reports
- Meeting agendas and status updates

Task 3.4: Other Services

The consultant will also be responsible for the activities listed below:

- Provide financing-related content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum, Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Collect financing-related data as applicable to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Contribute to financing-related performance analysis and evaluation, measurement and verification (EM&V) activities for tracking I-REN public sector portfolio achievements and informing continuous improvement.

Anticipated deliverables:

- Financing-specific content and edits or updates to content for I-REN regulatory filings
- Financing-related data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements
- Analysis of financing-related performance and recommendations for future improvements

14. CONTACT AND REQUESTS FOR CLARIFICATION

The principal contact for WRCOG will be Benjamin Druyon, Program Manager, (951) 405-6727, bdruyon@wrcog.us, or a designated representative, who will coordinate the assistance to be provided by WRCOG to the Proposer. Throughout the RFP Process, Proposer may not contact the following parties regarding this procurement: (1) any other members of WRCOG's staff; (2) members of WRCOG's legislative body; (3) and/or representatives of WRCOG's member agencies that may vote on or influence the proposed agreement. Any and all inquiries and comments regarding this RFP must be communicated pursuant to the process described in this Section 14. WRCOG may, in its sole

discretion, disqualify any Proposer who engages in any prohibited communications.

All questions, requests for interpretations or clarifications, either administrative or technical must be submitted via the [WRCOG PlanetBids portal](#). All questions, requests for interpretations or clarifications, if answered, will be answered in writing, conveyed to all interested firms, and posted on the WRCOG PlanetBids portal. To ensure a response, questions must be received via the WRCOG PlanetBids portal by the date and time listed in Section 6 – Schedule of Events. Any communications submitted past this deadline will not be answered.

15. TERMS AND CONDITIONS

Any Proposer or person submitting a Proposal shall state their willingness to agree to the following terms and conditions:

- A. The awardee must be fully committed to the mission of I-REN.
- B. Termination - A termination agreement is to be negotiated between the parties that includes provisions on termination for cause and termination for convenience.
- C. Oral Presentations - Any individual or firm who submits a Proposal in response to this RFP must be willing to make oral presentations related to contract-related activities at the request of the I-REN Team or management.
- D. Compensation - The total value of this contract is undefined and contains the option of renewal at the discretion of WRCOG. The schedule of compensation will be mutually negotiated. The compensation plan will include payment based upon an assessment of the vendor's attainment of specific, measurable outcomes or "performance benchmarks," which will be mutually developed between WRCOG and the selected Proposer(s).

16. WRCOG STANDARD PROFESSIONAL SERVICES AGREEMENT

The successful Proposer(s) will be required to sign WRCOG's standard Professional Services Agreement (PSA) in order to receive the contract award. Proposer(s) must identify in their Proposal any concerns or objections they would have with any of the PSA terms and conditions if selected for contract award. Proposer(s) shall propose alternative language for consideration in their Proposal. If WRCOG is unable to negotiate final contract Terms and Conditions that are acceptable to WRCOG, WRCOG reserves the right to award the contract to another Proposer. The agreement is available in PlanetBids in the Documents tab as part of this RFP.

17. DIVERSE BUSINESS ENTERPRISES (DBE)

Consistent with the California Public Utilities Code and California Public Utilities Commission (CPUC) policy objectives as set out in CPUC General Order 156, Proposers that execute a contract with WRCOG for I-REN work will be required to complete a Supplier Diversity Questionnaire after the contract has been executed. WRCOG asks that all Proposers refrain from directly or indirectly providing this information when responding to this RFP.

WRCOG encourages all eligible Proposers to get certified with the CPUC as a diverse business enterprise.

For overview information on the CPUC Supplier Diversity Program, please visit the program homepage (<https://www.cpuc.ca.gov/supplierdiversity/>). For information on the certification process and requirements, please visit the Certifications page (<https://www.cpuc.ca.gov/Certifications/>).

Attachment A: Scoring Criteria

Inland Regional Energy Network (I-REN) Public Sector Energy Efficiency Program Services

Evaluation Criteria	Max. Possible Points
<u>TECHNICAL APPROACH</u> • Tasks & approach clearly described • Creative/innovative approach • Project intent has been met	30
<u>CONSULTANT FIRMS</u> <u>Prime Consultant</u> • Familiar with regional and local issues • Experience with similar projects of the same size and scope <u>Sub-Consultants (if any)</u> • Each sub provides unique service(s) to the team • Subs are fully capable of performing their tasks	30
<u>PROJECT MANAGEMENT</u> • Qualifications of key individuals • Time commitment of key individuals	15
<u>PROJECT COSTS</u> • Realistic cost for services to be performed	20
<u>REFERENCES</u> • Similar projects completed on time and within budget	5
TOTAL	100

Attachment 1b

The Energy Coalition
Public Sector Proposal



Response to Request for Proposal (RFP) for Inland Regional Energy Network (I-REN) Public Sector Energy Efficiency Program Services

RFP # 22-10 · Scopes 1, 2, and 3

September 16, 2022

Submitted by:

Craig Perkins, President & Executive Director
The Energy Coalition

Proposing Firm:

The Energy Coalition, 525 Technology Drive Ste 350, Irvine CA 92618
Phone: (949) 701-4646 · Fax: (949) 701-4644
Primary contact: Laurel Rothschild, Vice President of Energy Programs,
lrothschild@energycoalition.org

With Support From:

AESC, 2445 Impala Dr, Carlsbad, CA 92010
TRC, 21 Griffin Road North, Windsor, CT 06095
PFMFA, 555 West 5th St, Suite 3500, Los Angeles, CA 90013

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Cover Letter

September 16, 2022

RE: Response to Request for Proposal 22-10 Inland Regional Energy Network (I-REN) Public Sector Energy Efficiency Program Services

The Energy Coalition (TEC), in partnership with Alternative Energy Systems Consulting, Inc. (AESC), TRC Engineers, Inc. (TRC), and PFM Financial Advisors LLC (PFMFA), collectively referred to as the “TEC project team”, is pleased to submit the enclosed proposal to Western Riverside Council of Governments (WRCOG) for the I-REN Public Sector Energy Efficiency Program Services. The TEC project team offers a unique combination of extensive public sector advisory services and technical expertise to support the members of the three Councils of Government in I-REN along with the cities, school districts, water districts, special districts and tribal communities they represent to implement energy efficiency projects and realize resiliency benefits across the region.

TEC is a California-based 501(c)3 nonprofit with 45 years of experience designing and implementing strategies that transform energy use and inspire sustainable energy action. As a social change organization, TEC helps public agencies leap into the future of clean energy. As a respected leader in the energy sector, TEC has a history of driving results for energy efficiency, education and marketing and outreach programs.

The TEC project team has the experience and expertise to perform the tasks and meets the required qualifications. Collectively, our experience advancing energy efficiency spans over 200 public agencies, the four California investor-owned utilities (IOUs), Community Choice Aggregators (CCAs), and Regional Energy Networks (RENs) throughout California. TEC has a proven track record of successfully working with disadvantaged communities (DACs), low income communities, and hard to reach areas (HTR).

The TEC project team is well positioned to support I-REN to develop comprehensive public agency program service offerings that will create real benefits throughout the region. Our team understands the growing climate risks Inland Empire communities face including air quality, drought, extreme heat, flooding, landslides, and wildfire. Not only do these climate hazards have significant and adverse impacts on public health and safety, but they disproportionately affect the most vulnerable communities. There is an increasingly urgent need for public agencies to incorporate facility-based resilience and build capacity to support their communities in adapting to climate change.

Building upon the work and partnerships completed through the LGPs implemented by the three I-REN Councils of Government (COGs) and WRCOG’s Resilient IE initiative, the TEC project team can support I-REN to deliver energy programs to contribute to the region’s resilience and climate adaptation. Our proposed approach is informed by the I-REN’s public sector goals to ensure local governments have the support, resources, and financing concierge services necessary to meet them where they are and overcome barriers to implementing strategic energy plans and energy efficiency projects.

Through TEC’s proposed approach as the lead implementer for all three public sector programs, participants will benefit from a streamlined and straightforward experience. A single point of contact—a TEC project manager (PM)—will deliver wrap-around services

across all public sector programs. The PM will act as participating agencies' concierge, bringing appropriate resources and expertise when needed. In order to properly address the barriers and challenges faced by the public agencies in the Inland Empire, TEC will tailor services to meet each agency and projects' needs and priorities. This approach offers multiple benefits, layering energy efficiency planning and strategies with financing services, greenhouse gas reductions, community resilience, and climate adaptation.

TEC, together with its partners, has successfully designed and currently implements the portfolio of SoCalREN Public Agency Programs. These programs provide comprehensive energy efficiency project management, technical assistance, normalized metered energy consumption (NMEC) incentives, access to financing, and education and capacity building opportunities to participants, with a focus on DAC and HTR communities. Additionally, TEC has extensive experience implementing IOU-administered Local Government Partnership (LGP) resource and non-resource programs including the first utility-local government partnership in 1994 which served as the model for the utility LGPs statewide. From 1998-2017, TEC partnered with five cities within the Inland Empire through an LGP ahead of their transition to locally-formed LGPs.

We appreciate the opportunity to provide services to WRCOG in support of I-REN. By submitting this Proposal, the TEC project team agrees to the terms and conditions as outlined in the RFP and does not have any objections to the WRCOG Professional Services Agreement. As the project team lead, TEC will be fully responsible for all contract performance if awarded.

For communications pertaining to this proposal, please contact Laurel Rothschild at lrothschild@energycoalition.org or (949) 732-1071.

Sincerely,



Craig Perkins
President and Executive Director
The Energy Coalition

Firm Capabilities

Firm Background

The Energy Coalition (TEC), in partnership with Alternative Energy Systems Consulting, Inc. (AESC), TRC Engineers, Inc. (TRC), and PFM Financial Advisors LLC (PFMFA) collectively known as the “TEC project team”, offers a unique combination of extensive public sector advisory services and technical expertise to support the I-REN member agencies, school districts, water districts, special districts and tribal communities with implementing energy efficiency (EE) projects. The TEC project team has strong relationships among the members from working side by side for over eight years delivering EE and financing programs to public agencies. Our positive, long-term working relationships are an asset to the I-REN that will enable our team to respond to WRCOG’s needs efficiently and effectively.

The TEC project team is uniquely positioned to deliver WRCOG’s project objectives and meet WRCOG’s aggressive timeline for a soft launch of programs by the end of 2022. To accomplish these goals, we will leverage our understanding of public sector customer needs, our deep bench of technical experts, and our knowledge of the energy industry.

We offer WRCOG the following benefits to support the I-REN:

- **Robust public sector experience:** The TEC project team has decades of experience supporting local governments and public agencies across California, including first hand experience providing services to the I-REN member agencies.
- **Local expertise:** our team has familiarity with regional issues and a real understanding of local barriers to EE.
- **Experience designing and implementing energy programs:** The TEC project team has worked together and individually managed energy projects of similar size and scope to I-REN’s needs, with a particular focus on serving DACs and underserved communities.
- **Scalable resources:** The TEC project team has resources stationed across the state and nation to provide responsive and thorough support.
- **Technical engineering and financing expertise:** TRC and AESC bring comprehensive engineering and NMEC expertise to the project. PFMFA is an industry leader in public financing, with particular expertise in energy efficiency financing and energy incentive programs.

The Energy Coalition (TEC)

The Energy Coalition (TEC) is a California-based nonprofit organization that has been serving communities since the mid-1970s and was established as a 501(c)3 corporation in 2004. TEC has over 45 years experience designing and implementing strategies that transform energy use, generate capital, and inspire responsible energy actions. Our mission is to empower communities to leap into the future of clean energy. TEC has a distributed workforce with a staff of over 75 people and four offices in downtown Los Angeles, Irvine, Oakland, and San Diego. Several of our staff are based in the Inland Empire and surrounding areas, enabling the team to provide service coverage to WRCOG throughout the I-REN region.

TEC is a respected leader in the energy sector with a history of designing and implementing

innovative EE programs that deliver results, particularly within the public sector. TEC's public sector initiatives include design and implementation of the SoCalREN EE Project Delivery Program, the Distributed Energy Resources Disadvantaged Communities Project Delivery Program (known as Pathway to Zero), the Public Agency Normalized Metered Energy Consumption Program (known as the Metered Savings Program), the Streamlined Savings Pathway Program, various Local Government Partnership programs including the Central Coast Leaders in Energy Action Program (CC-LEAP), and SoCalREN's Revolving Loan Fund financing program. TEC pioneered the regional one-stop approach implemented by SoCalREN to help public agencies achieve their energy reduction goals. **Through the public sector program's we've supported, TEC has served over 200 public agencies in Southern California and helped communities save over 100 million kWh in annual energy savings, save \$16 million on annual utility bills, and secure over \$25 million in utility incentives.** TEC has also supported public agencies with their resiliency efforts through the SoCalREN, which helped public agencies identify and implement distributed energy resource (DER) and sustainability opportunities.

AESC

AESC is an energy engineering and consulting firm that drives solutions in EE, renewable energy, DERs, and software for utilities, governments, and the private sector. AESC combines technical excellence, integrated demand side management (IDSM) experience, and a broad set of skills to provide a complete suite of engineering and management services. AESC's 55-person team includes experts in EE engineering, retro-commissioning, water and wastewater system optimization, DERs, measurement and verification, tool/software development, codes and standards, and demand response. AESC was founded and incorporated as a C Corporation in 1994.

AESC's engineering, technical, and program management team is headquartered in Carlsbad, CA. The primary staff for this engagement, including the proposed Program Manager, are based in the Carlsbad and the Pasadena offices. AESC can offer engineering resources in Fresno and Oakland to provide additional flexible capacity.

For over a decade, AESC has provided energy engineering and technical consulting services to local governments in California participating in investor-owned utility LGP programs. AESC has also supported the SoCalREN Public Agency Programs with technical engineering services since 2013. Starting in 2014, AESC was contracted directly with Coachella Valley Association of Governments to provide benchmarking and energy auditing services to interested member municipalities. Since 2014, AESC has completed over 110 ASHRAE Level 3 energy audits for a broad range of facility types for the City of Los Angeles' General Services Department resulting in significant upgrades to many of the city's facilities.

TRC

TRC is a registered professional engineering firm established in 1995. TRC is an established, financially stable, and privately held company with over 5,700 technical professionals and support personnel across 140 offices throughout the United States, including 20 in California. TRC will deploy Irvine and Riverside based employees to support I-REN program implementation. TRC is a technology-neutral delivery agent with three decades of advanced energy solution design and delivery experience for publicly owned utilities, municipalities,

public agencies, CCAs, regional energy networks, and IOUs across California and the United States working to advance DER and renewable energy solutions.

TRC offers a unique mix of seasoned engineers, technical experts, and public agency advisors who will deliver concierge service to each public sector customer. In various energy capacities, TRC has worked with more than 100 public sector customers in California. TRC has set itself apart from competitors by identifying and delivering EE projects that fit the customer's needs, budget, cost savings and energy savings goals.

TRC has a track record of providing successful assistance to the public sector. For over 10 years, TRC has specialized in providing impartial technical assistance services to Southern California local government jurisdictions, including building benchmarking, energy audits, DER audits, incentive application support, project implementation support, technical specification development, and specialized tool development. TRC has assisted over 20 California municipalities with energy roadmaps and planning services. TRC has worked with WRCOG through their LGP to secure valuable rebates for the installation of thousands of LED streetlights. TRC also currently holds a technical assistance based contract with Riverside Public Utility (RPU) serving large commercial and industrial customers with energy audit services.

As implementers of multiple third-party programs in California, TRC is uniquely positioned to help public sector customers sift through incentive options and determine the best fit for their projects, avoiding incentive "double dipping." TRC also has extensive measurement and verification experience, ranging from collecting data trends within existing energy systems, to performing complex building sub-metering.

PFMFA

PFM Financial Advisors is a Limited Liability Company – Partnership formed in 2016. PFMFA has developed a specifically focused Environmental Finance Group to provide consulting and financing assistance to government entities. These services leverage PFMFA's in-house quantitative modeling expertise with an understanding of environmental programs and incentives. PFMFA's focus is on the cost-effective financing of energy efficiency and water conservation upgrades, greenhouse gas reduction strategies, and energy and environmental programs including REN's and Property Assessed Clean Energy (PACE). Through a combination of financing and incentives the goal is to maximize operational savings to realize neutral or positive cash flow benefits upon completion.

PFMFA currently provides support as a financial advisor for EE and DER work for customers served by the SoCalREN. PFMFA advises SoCalREN on project funding options in order to support program reach and uptake. These services include evaluation of funding and financing options, economic projections to support agency decisions, creation of pooled funding vehicles, and consulting related to issuing various types of municipal bonds, notes, certificates of participation, other securities and directly placed debt. PFMFA also assists in the structuring, sale, and closing of long and short-term bond obligations during the contract period for transactions seeking funding.

Finally, TEC, AESC, TRC, and PFMFA confirm that there are no conflicts of interest, actual or apparent, that would limit each entity's ability to provide the services described.

Staff Background

TEC has assembled an experienced team to implement the I-REN Public Sector EE Programs. The TEC project team brings extensive knowledge and experience in public agency services, project management, benchmarking, EE, DERs, energy audits, construction, incentive application support, measurement and verification, finance, regulatory policy, marketing, and stakeholder engagement. As the energy landscape rapidly changes, our experts stay current and continue to contribute best practices and cutting edge solutions to reduce costs and energy use. See Appendix B for key personnel bios by firm.

All four firms have adopted equal opportunity employment and non-discrimination policies and practices in compliance with local and federal laws. Each firm is committed to diversity, equity, and inclusion (DEI) and have taken strides to uphold DEI values that are reflected in their business operations and service delivery.

TEC and its partners strive to attract and retain a diverse workforce and have implemented various recruitment strategies to reflect diversity in the candidate pool, including reaching out to minority and women professional networks, establishing relationships with educational institutions, and partnering with workforce development fellowship programs. TEC's employee population is 53% minority and 67% female and its executive team is 25% minority and 75% female.

Relevant Experience and Track Record

The TEC project team has decades of experience designing and implementing energy programs for the public sector, including a long history of providing successful services to local government agencies. AESC, TRC, and PFMFA have worked alongside TEC on numerous programs and projects and also bring their own unique expertise. The TEC team has considerable experience developing and implementing public sector EE programs including the scope-specific experience outlined in the sections below.

Scope 1 and Scope 3

The SoCalREN Public Agency Programs, including the Project Delivery Program, Pathway to Zero, Metered Savings Program and SoCalREN's Revolving Savings Fund financing program. The programs, at no cost to agencies, support the identification of energy saving measures and provide concierge services

to take agency staff from design through construction to completion of EE projects. These projects range from simple LED street lighting upgrades to complex heating, ventilation and air conditioning (HVAC) upgrades to DER audits across entire portfolios of buildings. TEC also supports regulatory filings related to SoCalREN, identifies grant opportunities for agencies and partners, manages administration and budgets with eleven subcontractors for the programs, and manages marketing and outreach activities for all public agency

“ ”

“Your hard work is taking our City to platinum. It is like having more City staff available to complete projects we couldn't do otherwise since we just don't have the time.”

Joe Susca, Senior Management Analyst,
City of Culver City, on working with TEC staff on
energy efficiency projects through SoCalREN

programs. The Programs, administered by the County of Los Angeles, are available to more than 700 public agencies in Southern California (service population of over 20 million).

AESC and TRC have been engineering consultants for the SoCalREN Programs since their inception in 2013. Both firms provide management support and energy engineering services to identify and implement public sector energy retrofits. Specifically, they provide project identification, comprehensive energy audits, incentive and rebate application support and technical reviews (including on-bill financing), project design, contractor selection support, construction support, and project close out documentation.

TEC has partnered with PFMFA to provide tailored **financial advisory services** to public agencies. Together, TEC and PFMFA deliver financing solutions to SoCalREN agencies through the SoCalREN Revolving Savings Fund and other funding sources, including Energy Lease Financing (ELF), utility On-Bill Financing (OBF), and CEC loans. PFMFA also worked with WRCOG to implement a Regional Streetlight Program. PFMFA worked closely with each of the 111 participating cities to determine their individual needs and financial goals for owning the streetlights in their respective jurisdictions. Through the Regional Streetlight Program, over 63,000 SCE-owned and operated streetlights were inventoried and approximately 48,000 were available for acquisition, retrofit, and ongoing maintenance by a third-party provider. The financing solution was done via direct placement lease agreements with 15-year terms. The total amount financed for all of the cities was over \$48 million and the total net savings over the first 20 years is estimated at over \$70 million. .

Local Government Partnership Programs, including the Community Energy Partnership, Greater LA Energy Partnership, Westside Leader Energy Partnership, and the Central Coast Leaders in Energy Action Program. TEC led the development and subsequent implementation of the very first local government partnership model, working with Southern California Edison (SCE) and the City of Irvine (then known as the Irvine Regional EE Initiative). This initiative grew into a pilot collaboration called the Community Energy Partnership (CEP) among ten Southern California cities (including the IE cities of **Palm Desert, Cathedral City, Corona, Moreno Valley, and San Bernardino**), SCE, Southern California Gas Company (SoCalGas) and TEC. Its mission was to build positive relationships among cities, energy consumers, and their serving utilities, and to **educate communities about sustainable and efficient energy practices**. The CEP served as the first partnership model, which has been replicated statewide by all four investor-owned utilities. Following the retirement of the CEP, TEC continued to implement the Westside Partnership and Greater LA Energy Partnership programs, a collaboration among Southern California cities, SoCalGas, SCE, and TEC. Through these LGPs, TEC built trusted relationships with the partner cities, other LGP implementers such as the three I-REN COGs, and supported the LGP cities to implement EE projects. TEC designed and now implements the Central Coast Leaders in Energy Action Program (CC-LEAP), an LGP administered by Pacific Gas and Electric (PG&E). CC-LEAP offers start-to-finish EE services to help public agencies implement EE projects. A diverse range of public agencies participate in CC-LEAP, from cities and counties to school districts and community services districts. To date, the program has supported more than 3.4 million kWh and \$700,000 in lifetime savings for participating agencies.

Partner Technical Assistance Program, where TRC was a primary engineering service provider to SCE LGP agencies for over 12 years. TRC worked with several public agencies within the I-REN territory. TRC helped public sector customers to complete more than 100 EE projects, with over 5 million kWh/year in energy savings.

Scope 2

SoCalREN's Metered Savings Program, which TEC designed and implements. The program uses normalized metered energy consumption (NMEC) to measure energy savings at the meter before and after project implementation. This method reduces the complexity of multi-measure projects, allowing for deeper energy savings with expedited project completion. The program has a high level of data collection and tracking needs to substantiate energy savings claims. As a resource program, EE savings from these projects contribute to SoCalREN sector goals, state EE goals, and EE portfolio cost-effectiveness calculations. The program includes energy savings reports to verify persistence of savings and provide continuous energy monitoring for facility managers. To date, ten projects have been delivered through the Metered Savings Program, resulting in more than 1.9 million kWh savings, with an additional 7 million kWh savings in the pipeline. Through this program, TEC has provided energy support services to cities, counties, K-12 school districts, water/wastewater agencies, and other special districts.

AESC is currently the EE third party program implementer for PG&E's Wastewater Optimization program (<https://www.aesc-inc.com/rapids/>) and the statewide Energy Strategy and Support program (<https://www.aesc-inc.com/soc-ess/>), which includes deemed, custom, and site-based NMEC savings methodologies. AESC serves as a lead implementer for PG&E's Market Access program, using a population-based NMEC approach to measure and incentivize savings during the summer peak periods. AESC supports municipalities' energy resiliency efforts through existing California utility programs, including PG&E and Community Choice Aggregators such as Silicon Valley Clean Energy.

TRC has also provided NMEC measurement and verification (M&V) services across a large variety of projects with a specialization in public sector customers. For example, TRC recently completed a large multi-year emerging technology upgrade project for a Southern California city hall facility. The project used NMEC procedures from utility meter and sub-meter data, along with data gathered by the installed automated, self-powered shades, lighting controls and sensors, to reduce costs of evaluating deep retrofit savings. The project demonstrates the NMEC M&V value to public agencies.

Other Relevant Factors

TEC offers extensive experience and expertise in regulatory activities drawn from over twenty years of serving as implementers for various state EE programs. We understand all reporting and filing activities relevant to RENs. TEC has managed regulatory and data reporting requirements in compliance with California Public Utilities Commission (CPUC) specifications, responding to program evaluation, measurement, and verification (EM&V) related data requests, and adapting programs in response to relevant regulatory proceedings. Furthermore, TEC has provided support to Program Administrators with various duties including drafting Business Plans and Program Implementation Plans (IPs), preparing and submitting budget advice letters, providing comments to relevant CPUC proceedings, and compiling required annual, quarterly, and monthly CPUC reports.

TEC's active participation in California's energy policy landscape is very complementary to the desired scope of work of I-REN. TEC participates as a member of the California EE Coordinating Committee (CAEECC) and is a party to multiple CPUC proceedings. TEC is also represented on the Board of Directors of the Local Government Sustainable Energy Coalition, helping craft and coordinate strategies and opportunities for local governments to be energy leaders and influence statewide energy policies.

Approach and Understanding of Scope of Work Plan

Introduction

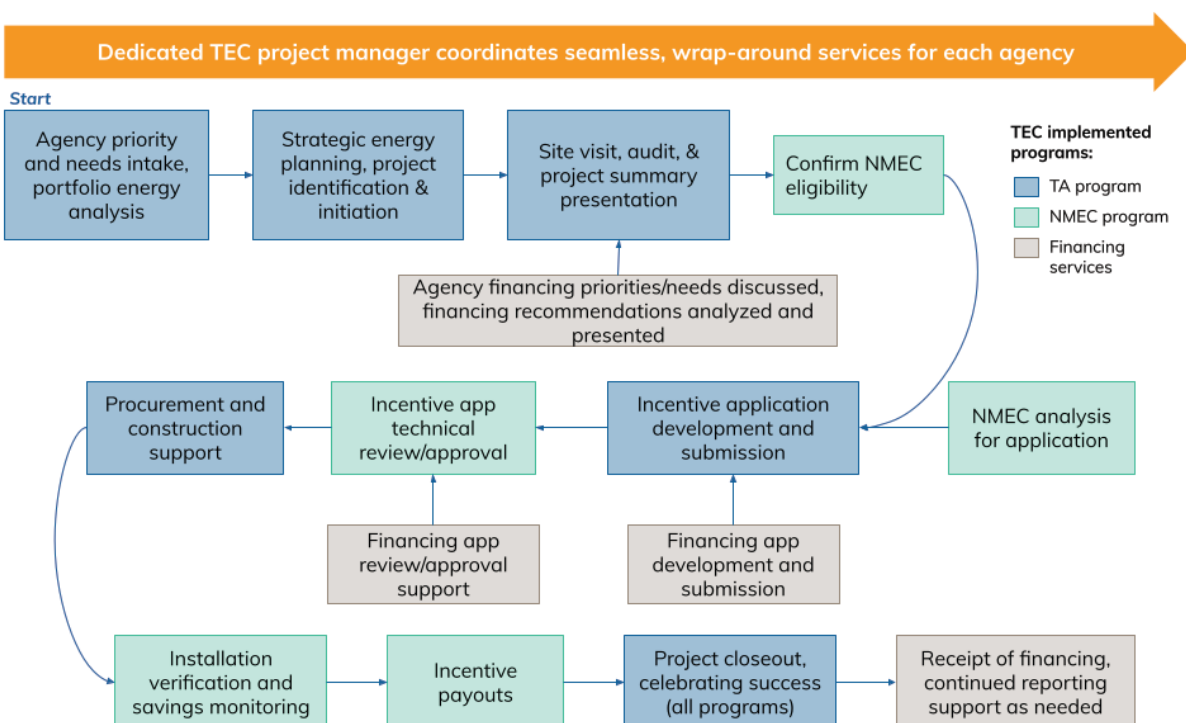
The energy landscape is changing dramatically and rapidly. TEC believes the future of energy is local. Regional Energy Networks, and specifically I-REN, are poised to play a significant leadership role in our transition to a low carbon, decentralized, resilient and localized clean energy future.

Building on the foundation of trust and energy interest fostered by the LGPs implemented by the three I-REN COGs and the WRCOG's Resilient IE initiative, the TEC team offers a proven strategy to improve public agencies' energy performance and advance their position as energy leaders within their communities. The program designs meet the requirements of REN EE¹ programs and will deliver on the goals of the I-REN public sector programs, Business Plan and relevant state goals. This team, with TEC as the lead, will collaborate closely with I-REN stakeholders, including other implementers, to ensure I-REN's unique value is front and center in service delivery and that disadvantaged, low-income, and other vulnerable communities receive the support needed to implement their strategic energy plans and EE projects. With the I-REN's support services, these communities will be more resilient and prepared to withstand extreme heat and other impacts of climate change in the region.

Through TEC's proposed approach as the lead implementer for all three public sector programs, participants will benefit from a streamlined and straightforward experience. A single point of contact—a TEC project manager (PM)—will deliver wrap-around services across all public sector programs. The PM will act as participating agencies' concierge, bringing appropriate resources and expertise when needed (Figure 1). In order to properly address the barriers and challenges faced by the public agencies in the Inland Empire, TEC will tailor services to meet each agency and projects' needs and priorities. This approach offers multiple benefits, layering energy efficiency planning and strategies with financing services, greenhouse gas reductions, community resilience, and climate adaptation.

¹ As defined in D.21-11-013

Figure 1: Diagram of Wrap-Around Public Sector Services Delivered by TEC PM



TEC acknowledges the need for high quality products to be delivered on time. We have internal protocols to ensure program deliverables meet rigorous standards and are completed within established timelines. All deliverables will be quality checked for accuracy and reasonableness. TEC uses internal checklists and develops schedules to ensure quality before delivering products to agencies.

TEC assiduously develops and evaluates program strategies to control costs and ensure efficient project and service delivery. TEC also continuously monitors its overall program budget and will take appropriate action to deliver on program goals within budget. Additionally, TEC drives continuous improvement through feedback and lessons learned from staff, subconsultants, agency participants, and stakeholders to ensure that the program is operating as cost effectively as possible.

Task 1: Public Sector Technical Assistance and Strategic Energy Planning Program Implementation

Public agencies face substantial barriers to completing comprehensive energy projects, including constrained staff time and resources, a lack of capital, and insufficient data to support their decision-making processes. TEC's proposed program focuses on assisting public agencies, with an emphasis on underserved communities, to overcome these barriers. Our proposed program offers customized and objective project management, financial and engineering services through a concierge-style approach that helps agencies meet their climate, energy, and resiliency goals. Each participating agency will be assigned a dedicated project manager (PM) for streamlined, end-to-end service delivery that provides high touch customer service from EE project identification through completion. The PM serves as the

point of contact for the project team supporting each agency, including a TEC program manager, TEC project coordinator, and assigned engineering or financing consultant depending on the scope of the activities. The PM works side by side with agencies to develop or update strategic energy action plans and/or identify strategies to implement their existing plans. The PM will introduce public agencies to I-REN's public sector portfolio of programs and other energy programs for a seamless experience that avoids customer confusion.

Task 1.1: Program Design

Program Kick-Off

Within two weeks of the contract being signed, TEC's contract manager will initiate a kick off meeting with the I-REN team to review the program scope and milestones. In coordination with I-REN, TEC will also schedule introductory meetings with awarded implementers for the Building Upgrade Concierge (BUC) and other public sector scopes to lay the groundwork for streamlined coordination. During the introductory meeting, each public sector implementer will present overviews of their program offerings so all parties have a strong understanding of coordination opportunities. TEC will distribute meeting agendas and detailed meeting notes to ensure alignment on strategies and next steps.

Initial Design and Ramp Up

During the program design phase, TEC will incorporate insight from the program kick-off discussions and previous public sector program implementation experience into an Implementation Plan (following the EE IP template) and an initial Program Manual. These resources will outline the program delivery model and articulate how services will support I-REN's regional resilience goals, capacity building goals, and local and statewide climate goals. The resources will include: program eligibility guidelines, program team roles, program processes and procedures, barriers and mitigation strategies, and coordination protocols within the I-REN programs. TEC can help I-REN deliver a public webinar to review and collect feedback on the IP before the final version is posted on the California Energy Data and Reporting System (CEDARS).

Soft Launch

In parallel to the initial design and ramp up phase, TEC will prepare a soft program launch prior to the end of 2022, and immediately following the posting of the IP to build excitement and interest in the new I-REN programs. TEC will coordinate with I-REN to develop an initial list of target agencies based on regional priorities. Customers who enroll in I-REN's Public Sector Technical Assistance and Strategic Energy Planning Program (TA Program) during the soft launch will receive assistance with benchmarking activities such as building out or updating their portfolios in Energy Star Portfolio Manager (ESPM) or compliance support for California's Building Energy Benchmarking Program (also known as AB 802). This soft launch will allow I-REN to engage key agencies as soon as possible and offer targeted support to demonstrate early success.

As part of the program's soft launch, TEC will develop an enrollment form and other collateral to engage with customers and inform them of program benefits. Collateral will be finalized in coordination with the I-REN team.

Stakeholder Coordination

Throughout the program design phase, TEC will engage with local and regional stakeholders including Coachella Valley Association of Governments (CVAG), SANBAG, and WRCOG. Engagement with these associations helps ensure that program services and messaging will fulfill the unique needs of the I-REN communities. Initial engagement activities with the councils of government (COGs) will include workshops and surveys to collect feedback, glean insights, and identify best practices for the program's design and strategies.

TEC will also identify other EE programs and offerings in the region to establish coordination processes and protocols. TEC will review the existing I-REN Joint Cooperation Memo (JCM) to identify programs with complementary offerings. TEC will leverage its public sector IOU and third party program expertise to inform coordination efforts. TEC will initiate meetings with I-REN and other program administrators and implementers to share details about the TA Program's offerings and confirm other programs' eligibility requirements, participation processes, targeted customers, measures supported, and other details that will inform the TA Program's resources and assistance for overlapping customers. Before these meetings, TEC will align with I-REN on coordination strategies that will most benefit I-REN and its public sector participants. These coordination meetings will culminate in coordination protocols that all parties can reference when supporting public sector customers.

Throughout program design and implementation, TEC will engage with regional stakeholders including the Inland Southern California Climate Collaborative (ISC3) and the local IOUs as appropriate.

Regionally-focused Tools and Resources

Based on stakeholder feedback and TEC's assessment of regional needs, TEC will coordinate closely with the BUC program lead to support the development of regionally-focused tools and resources to increase EE and DER program participation, as follows:

- EE and DER incentive program resource hub listing all active programs that serve public agencies in the I-REN territory. The hub will house a matrix outlining program participant eligibility requirements, EE measure opportunities, incentive rates, and other key information like vendor lists for midstream EE programs.
- Interactive map of regional energy projects where I-REN agencies can learn about their peer achievements and identify go-to references for project questions. The map will be developed based on research conducted by TEC, information collected from stakeholders, agency participants, and through projects completed by the TA Program.

During the design phase, TEC will continually assess opportunities for additional tools and resources to inform the BUC software provider, support BUC enhancements, and help I-REN serve as a clearinghouse for relevant information.

Updates to Design and Coordination With Other I-REN Programs and Stakeholders

TEC will incorporate stakeholder feedback and any modifications identified during the soft launch into the Implementation Plan and Program Manual as appropriate. TEC will develop additional supporting tools and templates if necessary for the launch of the program. TEC will design external-facing templates that can be customized to each agency and region as needed to ensure deliverables reflect each agency's unique priorities.

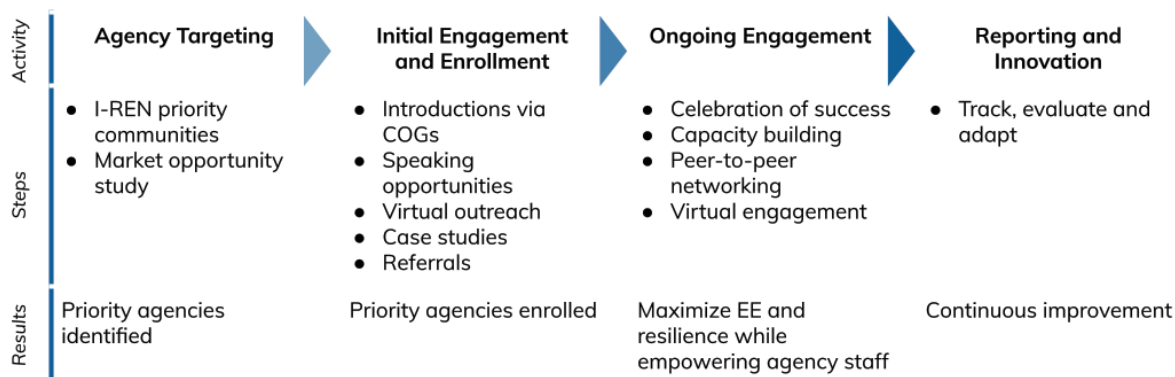
Task 1.2: Outreach and Engagement

TEC proposes coordinated outreach and engagement among all I-REN public sector programs and services with the **I-REN TA Program serving as the entry point for agency participation in public sector programs and services**. Agency outreach will focus on the comprehensive suite of end-to-end EE services available across the I-REN public sector program portfolio. This will minimize customer confusion by reducing the number of I-REN implementer touch points and simplifying information on public sector offerings. This will also ensure all outreach and marketing efforts are cohesive and align with the vision, branding and marketing strategies set by the I-REN and I-REN's marketing consultant. After enrollment, the PM will facilitate introductions and services from the other public sector programs.

TEC will implement a multi-pronged outreach and engagement strategy to encourage agency enrollment. During the program design phase, TEC's engagement team, led by TEC's Engagement Program Manager, in coordination with the I-REN marketing consultant, will develop a marketing and outreach plan with a documented process to engage with agencies in the eligible service area. This approach will include coordinated outreach and engagement where the TA Program serves as the entry point to the I-REN NMEC and Financing Programs. Key strategies that will be identified and implemented according to an aligned upon schedule are described in more detail below.



Figure 2: Outreach and Engagement Strategy



Agency Targeting

Given the broad range of agency types and limited resources, TEC will create a targeted outreach and engagement plan based on multiple factors including: 1) I-REN priority communities such as tribal, low-income, DACs and other vulnerable communities; and 2) a market opportunity study, which will provide a high-level assessment of energy-savings potential within the region. Details on these factors are below.

- **I-REN priority communities:** During the program kick-off meeting, TEC will work with the I-REN team to confirm priority hard to reach communities, as identified in the RFP. TEC will then develop a list of target agencies for enrollment, leveraging existing data sources such as CalEPA's CalEnviroScreen 4.0 and the California Department of Housing and Community Development.
- **Market opportunity study:** TEC will pull information from various data sources, including information from the I-REN COGs, to assess long-term energy savings opportunities in the region. First, TEC will collect information on agency size, facility counts, and facility square footage. Second, if available, TEC will incorporate agency energy use and tariff analysis to more directly analyze energy savings potential. Third, TEC will incorporate additional indicators agency by agency, where available (e.g. wastewater treatment plant operational capacity, K-12 school district population), as a proxy for energy consumption.

TEC's enrollment target list for the program will include I-REN priority agencies and agencies with high energy savings potential.

Initial Engagement and Enrollment

TEC will leverage insight from the workshops and surveys conducted as part of Task 1.1. to identify new and existing outreach channels that will resonate within the region. The strategies will include channels with proven success for public sector customers based on TEC's experience enrolling 200+ agencies in SoCalREN. TEC recognizes that there is not a one-size-fits-all approach to regional outreach, and therefore will leverage multiple strategies to engage with traditionally hard-to-reach communities, including:

- Direct introductions through I-REN COGs or partners
- Speaking opportunities hosted by I-REN or partners such as workshops, webinars, conferences, and events
- Virtual channels such as the I-REN website, social media, and press releases
- Development and distribution of project case studies to demonstrate agency success through the program (reference Appendix C for example case study)
- “Refer a friend” campaigns to encourage enrolled agencies to recommend enrollment to peer agencies.

TEC will adapt the activities outlined above based on feedback and results to achieve continued engagement by existing and potential program participants.

Ongoing Engagement

Celebrating success. TEC recognizes that celebrating agency energy and resilience accomplishments encourages continued participant engagement, helps agencies demonstrate leadership within their communities, increases enrollment, and appeals to the competitive nature of neighboring public agencies. TEC will collaborate with local governments, tribes, and special districts to celebrate success by highlighting project achievements through the following channels:

- **Project impact report:** This report is delivered after construction is completed and agencies receive any applicable funding and financing. It highlights the life cycle energy savings, cost savings, and greenhouse gas (GHG) reduction benefits of the EE project. This deliverable can be shared among agency staff and with the general public to promote EE’s community benefits and position the agency as a regional energy leader. An example of a similar report can be found in Appendix C.
- **Legislative body and/or community check presentations:** TEC will facilitate check presentations to governing boards, councils, or other community recognized avenues. The check presentation will spotlight the financial resources secured by the agency, in partnership with I-REN, to advance the agency’s energy and resilience goals.
- **Social media posts:** TEC will develop content highlighting agency achievements for the I-REN team to post on I-REN social media platforms, such as LinkedIn, Twitter, and Instagram.

Capacity building. The capacity building service will offer practical and essential training for agency staff on topics ranging from funding and financing to critical facility resilience to operations and maintenance best practices. This service will empower public agencies to make improvements to their facilities and infrastructure to ensure that energy and resilience strategies persist over time. Depending on the topic and the target agency staff, the capacity building series can be conducted via webinars, in-person workshops, or other formats.

Peer-to-peer networking. One of the most beneficial services a REN can offer is the connection to peer agencies working on similar initiatives. TEC will assess the existing peer-to-peer working groups offered throughout the region and complement these groups by offering a space for agency staff to share and learn best practices for energy projects and plans.

Virtual engagement. TEC will work with I-REN and CivicPlus to produce and distribute content through the website and social channels showcasing TA Program highlights, educational content, and BUC resources for public agencies. E-newsletter content will be developed for local government audiences. This content can be used to reach new audiences and to provide continuous engagement and education for existing enrolled agencies.

Reporting and Continued Innovation

TEC will identify milestones and targets for evaluation at the outset of coordination activities and will work with I-REN to create an appropriate avenue and schedule for reporting on progress toward goals. TEC anticipates continued fine-tuning of the outreach and engagement process as the I-REN enrollment, project process, and coordination between program implementers is solidified. As this process evolves, reporting tools and strategies will be adjusted accordingly to ensure effective performance and continued innovation.

Task 1.3: Program Implementation

TEC's proposed program design aligns with I-REN's vision to connect local governments to EE resources to increase energy savings and equitable access throughout San Bernardino and Riverside Counties. Recognizing that each agency is unique, the program will offer a customizable and comprehensive suite of services including strategic energy planning, benchmarking, and turnkey EE project support. Program services will be available for all public building types, with a focus on community buildings such as community centers, libraries, senior centers, schools, and fire and police buildings that are located in DACs, low-income, and other hard to reach areas.

Enrollment/Agency Kick-Off

Agency enrollment begins with a kick-off meeting where we present program offerings and engage in open dialogue to get to know the agency and their needs. TEC will also share next steps for program participation, including execution of a non-binding enrollment form, required prior to allocation of all I-REN public sector services. The form will indicate a main point of contact, the "Energy Ambassador", for the agency's program participation. An agency is considered enrolled once they sign the form to confirm acknowledgement of program participation, responsibilities, and services. TEC will invite the COGs to enrollment meetings, where applicable, to increase agency trust in the program. Once enrolled, each agency is assigned a dedicated PM, supported by the project team, who will act as a concierge to all public sector program offerings, including NMEC, Financing Services, and the BUC.

Concierge Service Delivery

TEC's goal is that agencies see the PM as a trusted and unbiased third party advisor and "go-to" resource when making energy decisions. The PM will offer customized support through the Energy Ambassador's preferred communication channels and engage with the agency staff to build a trusted relationship. During project development, the PM will engage with additional agency staff, such as facility managers, who can identify existing facility equipment conditions and pain points.

Energy Resiliency Roadmap Development

After the enrollment meeting, the PM will engage with the Energy Ambassador to take a deeper dive into agency goals and conduct an iterative feedback process to develop a customized strategic energy plan, or “Energy Resiliency Roadmap”. The Roadmap will outline a phased course of action to meet the agency’s needs and priorities. Alternatively, agencies with existing energy plans will be offered support to update those plans.

Figure 3: Energy Resiliency Roadmap Delivery Process



During the initial phase of Roadmap development, TEC will:

- Collect agency asset energy data, building square footage information, critical facility and infrastructure lists, cooling centers, and other available facility data
 - Assist agencies in requesting energy data from their utility representatives as needed
- Review existing Climate Action Plans, Energy Action Plans, vulnerability assessments, and hazard mitigation plans such as assessments and strategies developed through Resilient IE
- Request information on energy (renewable and EE) projects completed within the last five years at agency facilities (this can be completed in coordination with the COGs based on previous LGP efforts where applicable)
- Take inventory of existing ESPM building portfolios
- Assess grid reliability and public safety power shutoff (PSPS) events applicable to the portfolio.

Data will be processed and analyzed through two platforms: TEC’s portfolio energy analysis tool (Appendix C: Comparative Energy Analysis) and ESPM. If needed, TEC will help agencies update or create building portfolios in ESPM. With insights from these two powerful tools, TEC will develop an energy assessment that offers agencies a holistic picture of their portfolio-wide energy consumption and how their buildings compare to similar facilities across the nation. Non-energy data such as CalEnviroScreen 4.0 will be reviewed to assess progress toward energy, climate, and resiliency goals.

TEC will then present the portfolio energy analysis section of the Energy Resiliency Roadmap to the agency and, based on the agency’s long term goals, discuss site prioritization for program services. TEC will guide the agency to focus on critical facilities/infrastructure and cooling centers that will offer long-term resiliency benefits to the community, particularly where there are existing grid vulnerabilities.

Based on feedback and discussions with the agency, TEC will finalize and present the full Energy Resiliency Roadmap that outlines a comprehensive plan to unlock the benefits of EE. I-REN stakeholders such as the regional COGs will be invited to participate in these meetings with the agencies. The Roadmap also will include an assessment on community

climate and energy vulnerabilities (climate, social and economic) and identifies resilience opportunities to address those threats. I-REN technical services and resources will also be outlined in the Roadmap. Other external energy programs and funding options, such as statewide or IOU third party programs that fill gaps and help agencies overcome barriers where program services are not available, will be described at a high level.

Roadmap Implementation Services

Each Roadmap will include a custom mix of I-REN EE services depending on each agency's priorities and unique needs. If an agency has a time-sensitive project, the PM can work with the Energy Ambassador to evaluate it upon enrollment and the Roadmap can be completed in parallel. The TA Program services offered to help agencies implement their roadmaps include building benchmarking compliance and EE project implementation, described in depth below.

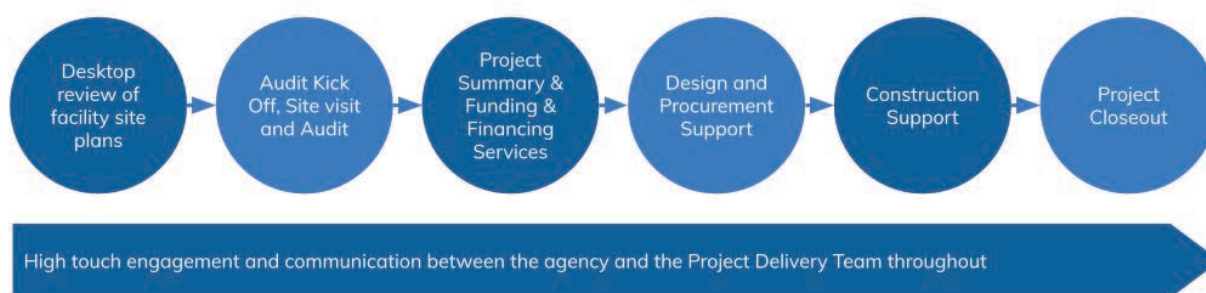
California Building Energy Benchmarking Compliance (AB 802)

California Assembly Bill (AB) 802 requires energy benchmarking for all commercial buildings 50,000 square feet or larger. Building information in ESPM is submitted to the California Energy Commission to comply with these regulations. TEC has supported over 150 public sector buildings with benchmarking compliance and can offer this support to I-REN agencies.

EE Project Implementation

The Energy Resiliency Roadmap may prioritize up to three sites for immediate EE project implementation. Additional sites for mid and long term project support will be addressed based on the timelines outlined in the Roadmap. Project implementation follows the below steps outlined in the figure below.

Figure 4: Project Implementation Services



Desktop Review: The first step during project implementation is conducting a desktop review of facility site plans and equipment data. These building plans and datasets are shared with an assigned engineering consultant (TRC or AESC) for review to ensure the subsequent site visit is cost effective and efficient. The same engineering consultant will support the entire project to streamline the agency experience. During this phase, the PM will coordinate with the BUC to collect relevant site information, including a list of opportunities identified in their customer facing portal to consider for further investigation.

Audit Kick Off, Site Visit and Audit: After the desktop review, the PM will schedule an audit kick-off meeting with the Energy Ambassador and other key agency staff. During this meeting, the project engineer will ask site-specific questions to guide the site visit and audit and to ensure resources are invested wisely and focused on equipment in need of upgrades. After walking the site, the engineer will develop a preliminary list of EE retrofit measures or operational and maintenance improvements for further detailed analysis. Any information required to support resilience opportunity identification, such as DERs, will also be collected at this time. At this stage, TEC and its engineering consultant will leverage the BUC, NMEC, and Financing Services team to identify applicable additional energy program resources, available incentive offerings, and financing opportunities.

The preliminary measures list will include high-level energy savings, cost estimates, and estimated utility incentive amounts based on applicable energy incentive programs. The agency will then confirm with the PM which measures they wish to implement and select an incentive program pathway.

If an agency opts to pursue I-REN's NMEC incentive program, the engineering consultant will complete the audit calculations, detailed to the level of rigor required to submit an incentive application.² This two-phased approach (from the preliminary measure list preparation to the comprehensive audit calculations) ensures resources are allocated to the implementation of viable measures and that agency decision-makers are supportive of the preliminary measures list before the program invests in full engineering calculations. TEC has learned through experience working with public agencies that full ASHRAE level II audits are typically not necessary to obtain public agency buy-in. So, this resource-intensive deliverable will only be provided when required to advance a project.

Project Summary, Funding and Financing Services: After agency buy-in on measures, the PM will consult with I-REN financing services staff and BUC team to confirm available funding and financing pathways for the project. Next, the PM will schedule a meeting to review the findings of the energy audit and financial analysis with the project engineer, the Energy Ambassador and key agency staff. Additional stakeholders will be offered an invitation, including the representative regional COG. The project summary will be developed through a combination of the engineer's audit calculations and a financing calculator tool. A sample project summary along with snapshots from TEC's financial calculator tool are included in Appendix C.

The project summary's purpose is to provide the Energy Ambassador with a comprehensive document to build project buy-in. The summary outlines the EE measures identified during the site visit and a financial analysis with project benefits such as estimated energy savings, GHG emission reductions, cost savings, water savings, and incentive amounts. These metrics will all be tied into the agency's relevant energy, resiliency, and climate goals. The project summary also includes a funding and/or financing plan through the summary of

² During the program design phase, TEC will align with I-REN on preferred approaches for coordination and level of continued project support for participants who choose to pursue incentive program opportunities through other program administrators (PA). There may be significant opportunities to manage I-REN TA Program Resources through coordinated approaches with other PAs.

financial metrics and cash flow analysis for funding options identified by the I-REN Public Sector Financing Services team such as cash, utility On-bill Financing (OBF), CEC Energy Conservation Act Assistance (ECAA) low and no-interest loans, and ESCO financing. Finally, the project summary outlines the project timeline to ensure program and agency alignment on implementation expectations.

Energy Resiliency Opportunity Report³

Based on the recommendations outlined in the Energy Roadmap, an Energy Resiliency Opportunity Report will be delivered in tandem with the project summary. This report will provide agencies with a high level analysis and identification of resources for DER and resilience strategy next steps. The analysis will assess facilities identified for resiliency opportunities (e.g. DERs) based on existing infrastructure, energy needs and back-up requirements, as well as community benefit to vulnerable populations. TEC will coordinate with the BUC team to ensure that all information and resources about DERs and resilience are included. The Energy Resiliency Opportunity Report is intended to help an agency identify prime candidates for future DER and resilience capital investment projects; however, given the limitations of California's EE ratepayer funding, in depth DER technical assistance will not be offered through the I-REN TA Program.

Once the agency has appropriate staff approval to move forward with EE project implementation, TEC will assist with applicable incentive applications. If the project is channeling to the I-REN Public Buildings Normalized Metered Energy Consumption Incentive Program (NMEC Program), the project team will develop a Project Feasibility Study to demonstrate program influence and submit the application to the public sector NMEC Program for review and approval. If the project is not eligible for the I-REN NMEC Program, it will be channeled to alternative incentive programs such as SCE or SoCalGas core and third party programs or other EE administrator programs. If the agency elects to leverage financing for the project, the project team will support financing applications through I-REN financing services as outlined in Task 3.

Design and Procurement Support: TEC has helped public agencies design and procure over 600 energy projects and has a strong understanding of the barriers public agencies face when it comes to procurement. Agency staff often do not have the time or technical expertise to develop measure performance specifications to use when they are seeking to procure contracting. TEC provides customized assistance to agencies tailored to their preferred procurement method and requirements. Agencies may choose to self-perform the work, manage their own competitive bid solicitation, or select another approach such as leveraging ESCOs or cooperative procurement contracts. The project manager can also assist agencies with council or board approvals by packaging materials, developing presentations, and more depending on the agency's needs.

Construction Support: Once an agency authorizes construction, the PM will ensure the project scope is implemented as designed so expected EE savings are realized and

³ An example of a deliverable similar to the Energy Resilience Opportunity Report can be found in Appendix C.

incentives and financing are secured. Given that the public agency will be the “project owner of record”, they will be responsible for all construction contracts and costs and designating a construction manager. The TEC team will play a supporting role by reviewing contractor submittals for EE measures to verify work is performed according to design specifications and applicable incentive program requirements.

Project Closeout: Once construction is completed, the PM and engineering consultant will support the agency with any training necessary to operate and maintain the new equipment so all expected project benefits are delivered. The project engineer will also be available to ensure that equipment is properly operating and commissioned. TEC will support any post-project incentive requirements, such as the development and submission of an Installation Report for the NMEC Program. During project closeout, TEC will share details about installed measures and savings with the I-REN marketing team to help the agency celebrate success and the BUC program to display achievements in their portal. TEC will annually use ESPM reports to share energy consumption insights and building performance improvements to help the agency track and ensure persistence of energy savings. During these touch points, TEC will determine if additional agency support or training new facility staff is required to overcome maintenance and staff turnover challenges.

Workforce Capacity Building

TEC has a long history of supporting workforce development through its 10+ years of experience implementing workforce, education and training programs across the state. We recognize the critical role these activities play in training the workforce to meet California’s growing demand for energy professionals. In coordination with I-REN, TEC will develop an I-REN’s EE Fellowship for new professionals to gain real world experience and support I-REN public sector programs’ success. TEC envisions that fellows can support building benchmarking activities. Depending on the term of the fellowship, Fellows may also be tapped to support other program services like incentive application development, site equipment inventories, or resiliency-related research for the Energy Resiliency Opportunity Report.

Risk Mitigation Strategies

Public agencies face a multitude of barriers to implementing EE projects. Key risks and solutions are outlined below:

- **Public agency staff turnover:** TEC recognizes that public agencies experience high staff turnover rates; COVID-19 and the “great resignation” have only exacerbated these issues. When an Energy Ambassador changes roles or leaves their agency, TEC will coordinate with the agency to identify a new project contact. If this is not feasible and TEC loses contact, or if agencies become unresponsive, TEC will work closely with the regional COGs to identify a new staff person at the agency to continue delivering services.
- **Agency staff juggle numerous priorities:** Public agency staff often have many responsibilities beyond energy projects. TEC’s goal is to minimize burdens on the public agency staff and simplify their decision making process. TEC will accomplish

this by developing a strong relationship with the agency to understand their needs and how to best serve them.

- **Customer inability to fund projects:** Through TEC's experience in the public sector, we acknowledge that project financing is consistently identified as a top barrier to project implementation. Many agencies are not willing to take on loans to finance projects, particularly those with interest rates. To overcome this challenge, TEC will support additional funding and/or financing opportunities in coordination with I-REN Financing Services. TEC will also coordinate closely with agency staff to help their projects get budgeted in Capital Improvement Plans where possible.
- **Market impacts:** Inflation and supply chain disruptions can threaten project completion. TEC has experience working through these barriers. We include project cost buffers and disclaimers to account for inflation impacts to project cost between project identification and equipment purchase. TEC builds in anticipated supply chain delays into project timelines and collects and shares information about industry lead times from and with agencies with similar projects throughout the region.

Program Reporting

TEC will work closely with I-REN to document program implementation activities and participant interactions. TEC has developed a customized Customer Relationship Management platform on Salesforce for energy project tracking and customer information. The list below includes a few examples of data that will be collected and reported on:

- Participant information: name, address, Energy Ambassador contact details
- Project details: energy savings identified and completed (kWh, kW, therms), project milestones, bill savings, program services provided
- Incentive program information: milestones, program pathway, energy savings
- Financing leveraged: financing product used, dollar amount
- Facility information: site address, site use, ESPM building type
- EE measures installed and respective energy savings
- Events with participants: enrollment kick off, Energy Resiliency Roadmap meetings, audit kick off, project summary presentations etc.

Based on I-REN's desired frequency, TEC will share program status updates through a dashboard that will include engagement, enrollment, project successes and other information to ensure the program is on track to meet its goals and to keep stakeholders informed of program operations and outcomes.

Task 1.4: Other Services

TEC will leverage its extensive experience and expertise to support all aspects of regulatory reporting, including filings, data collection, and EM&V.

Regulatory Reporting

As requested by I-REN, TEC will provide program-specific content and/or will review I-REN JCMs, annual reports, Advice Letters and data requests. Requests will be fielded by the TEC contract manager and assigned to TEC staff with time for internal review before submitting

to I-REN for feedback. TEC will also proactively consider any potential program-specific edits or content for I-REN regulatory filings and alert I-REN as appropriate.

Data Collection, Reporting and Analysis

Proper data collection and reporting is the foundation of communicating program success. Data collection protocols and systems for the public sector programs will be established during the program design period in coordination with I-REN and the BUC team to ensure successful reporting of metrics and indicators. The data will be collected, reported, and maintained throughout program implementation by TEC PMs and TEC project coordinators working directly with agencies. Program managers will perform general quality control and coordinate with the contract manager on any trends or issues to be discussed with I-REN. TEC's project analyst will support program performance analysis as requested and the contract manager will support any EM&V requests from I-REN as needed. Any improvements identified will be coordinated and implemented through the TEC contract manager.

TEC pursues continuous improvement for all programs. Beyond EM&V studies, and as an ongoing practice, TEC will look for opportunities to improve program performance and share recommendations with I-REN. At a minimum, TEC will perform an annual performance analysis and present recommendations for short-term and long-term planning.

Budget for Tasks 1.1 - 1.4

Public Sector Technical Assistance Program and Strategic Energy Planning			
Task	Total Cost	Estimated TEC Labor Hours	Timeline
Task 1.1: Program Design	\$61,455	420	<0-60 days from NTP
Task 1.2: Outreach & Engagement	\$120,580	882	<60-120 days from NTP; ongoing
Task 1.3: Program Implementation	\$4,698,218	28,327	>45 days from NTP, starting with a soft launch
Task 1.4: Other Services	\$71,740	379	Ongoing
TOTALS	\$4,951,993	59,596	

Task 2: Public Buildings Normalized Metered Energy Consumption (NMEC) Incentive Program Implementation

California has an ambitious goal of doubling EE savings by 2030. For public agencies to contribute to statewide EE goals and improve their aging infrastructure, they need resources. This is especially true for hard-to-reach, disadvantaged, and low-income communities that serve vulnerable populations. Most existing EE programs require bringing facilities above Title 24 standards, which can deter public agencies from acting due to financial

constraints—leaving below-code facilities with the largest EE opportunities “stranded.” I-REN’s NMEC Program will offer a way to access “stranded” savings with comprehensive project delivery support. The NMEC Program will use a normalized metered energy consumption approach to measure energy savings at the meter, incentivizing savings that have historically been excluded from traditional EE programs or are considered to be industry standard practice (ISP). The program will focus on underserved communities by offering enhanced incentives to hard-to-reach, disadvantaged, and low-income communities.

The program’s intent is to support public agencies, with a focus on public gathering spaces, to reduce energy and costs in their facilities and infrastructure. The NMEC Program will contribute to this effort by achieving the following objectives:

1. Support comprehensive lighting and HVAC projects to improve the comfort and safety of vulnerable populations
2. Deliver deep energy savings to public agencies at high visibility locations to position local governments as EE leaders within their communities and to meet local and state EE and GHG goals
3. Provide technical expertise and appropriate training to facility personnel to maximize persistence of energy and bill savings.

Task 2.1: Program Design

Public agencies face substantial barriers, exacerbated by the COVID-19 pandemic, to completing comprehensive energy projects. TEC’s proposed program focuses on assisting public agencies to overcome these barriers through incentives for holistic building energy projects that create safe and healthy hubs for community members and better buildings for public sector workers. The following table shows common barriers and TEC’s approach to overcome them.

Table 1: Strategies to overcome barriers

Public Agency Barriers	TEC’s Strategies to Overcome Barriers
Limited staff time and resources	Public agency staff juggle many priorities and often have responsibilities beyond EE. Through close coordination with the I-REN TA Program, the NMEC Program will alleviate staff time necessary to make their energy projects a reality.
Lack of public agency capital	By offering incentives to program participants, and enhanced incentives to underserved communities, the capital costs of each project will be reduced, requiring less out of pocket funding from each public agency.
Limited access to actionable data for informed decision making	TEC provides pertinent EE project data and metrics tailored to enable an agency to make informed decisions throughout a project’s lifecycle and post-installation for persistence in savings.

Buildings in need of repair that are below code	TEC utilizes a NMEC approach that captures energy savings that are below code and encourages more comprehensive projects that are not limited to above-code measures.
Lack of staff training to assure persistence in savings	TEC supports facility staff training led by the contractor as well as developing facility maintenance plans for staff use and transitions. Additionally, TEC provides ongoing energy performance reports to facility staff 3-years post installation.

The NMEC Program will integrate seamlessly with the I-REN TA and Financing Services Programs to provide public agencies with a turnkey solution and frictionless experience. The program entry and participation process will typically follow these steps:

1. Enrollment, project identification, and audit in the TA Program
2. EE measures identified as viable NMEC candidates through the TA Program
3. Agency selects to pursue NMEC incentives
4. TA Program supports NMEC incentive application Project Feasibility Study (PFS)
5. NMEC Program performs application technical review, M&V plan development, and approves project for incentives
6. Financing Services Program supports with additional financing applications to layer with NMEC incentives
7. TA Program supports project implementation
8. NMEC Program supports incentive closeout, M&V, persistence of savings activities (including applicable training), and incentive payments

Throughout the design phase, TEC will coordinate with the BUC software provider to integrate NMEC opportunities and information into their platform.

Program Kick-Off

Within two weeks of the contract being signed, TEC's contract manager will initiate a kick off meeting with the I-REN team to review the program scope and milestones. In coordination with I-REN, TEC will also initiate introductory meetings with implementers for the BUC and other public sector scopes to lay the groundwork for coordination that ensures a seamless I-REN program participant experience. During the initial introductory meeting, each public sector implementer will present overviews of their program offerings so all parties have a strong understanding of coordination opportunities and how to ensure streamlined customer experiences across the portfolio. Agendas for these meetings, along with detailed meeting notes, will be distributed to the I-REN team to ensure alignment on strategies and next steps. As a follow-up to the meeting, TEC will work with the other public sector program implementers to outline a program coordination process so all stakeholders have a clear idea of synergies and avoid duplication.

Initial Design and Ramp Up

Implementation Plan

During the design phase, TEC's program manager will incorporate insight from the program kick-off discussions and expertise delivering an NMEC incentive program for SoCalREN to develop an Implementation Plan and Program Manual following the CPUC EE IP template. The IP will include details on program processes and procedures, a logic model, incentive structure and payment process, target market, and tactics to overcome regional public sector participation barriers. The IP will also include the NMEC savings calculation methodology and M&V plan in compliance with all relevant CPUC guidance and requirements. The Program Manual, which is a required attachment to the IP, will include details on program coordination across I-REN's public sector program portfolio and customer eligibility requirements, among other required elements per the CPUC template. Additionally, TEC can help I-REN deliver a public webinar to review and collect feedback on the IP before the final version is posted on CEDARS.

Program Stakeholder Coordination

Throughout program design and implementation, TEC's contract manager and team will engage with local and regional stakeholders to ensure NMEC Program services are responsive to regional needs and energy resilience priorities. Stakeholders include, but are not limited to, WRCOG, SANBAG, CVAG, the Inland Southern California Climate Collaborative (ISC3), and the local IOUs. These stakeholders will help TEC ensure that program design and messaging resonates with the I-REN territory's unique needs. Initial engagement activities with COGs will include workshops and surveys to collect feedback on the program's design.

Program Eligibility and Incentive Structure

The NMEC Program is available to all agencies enrolled in the I-REN TA Program. The program will be open to all public sector facilities with an initial focus on public gathering spaces such as community and recreation centers, senior and teen centers, and libraries. The program will incentivize any measure that reduces energy consumption at the site. To be eligible for the program, projects must be estimated to realize a minimum of 10% savings from the existing baseline, have access to interval data, and the building cannot be scheduled or designated for major redesign or re-use. The customer must agree to post-installation M&V and must notify the program of any non-routine events (NREs) for data reconciliation to confirm actual energy savings. NREs are permanent or semi-permanent changes in the building equipment or use that may have an impact on energy usage. As part of the eligibility verification process, TEC will also complete an NMEC predictability analysis.

As an equity program, TEC proposes offering public agency facilities that support vulnerable populations a higher incentive rate. A pay-for-performance payment process will pay out a portion of project incentives at project completion and the remainder following the completion of the EM&V period. The program manager will perform an analysis of existing program incentive structures options for public agencies before finalizing the payment process for I-REN. Eligibility guidelines, the verification process, incentive structure and payment process will be clearly documented and vetted with I-REN.

Program Forms and Collateral

Throughout the design phase, TEC will develop forms, materials, and collateral for program launch. Marketing materials will be developed with support from the I-REN marketing team to provide education and awareness about the program (discussed in more detail in Task 2.2). The NMEC program manager will oversee the development of the NMEC Program PFS, which will adhere to CPUC guidelines. The PFS serves as the customer agreement to pursue incentives through the program. Additional forms to be developed include the quarterly savings report, the M&V plan, final M&V report, and predictability analysis which are described in more detail in Task 2.2 below.

Task 2.2: Outreach and Engagement

TEC will coordinate outreach and engagement with the I-REN TA Program and financing services to encourage public agency participation in the Program and maintain a seamless I-REN experience. The I-REN NMEC Program will bring EE funding to regions that have been historically underserved by traditional EE programs. TEC recognizes that the wide array of EE funding and financing programs available on the market brings with it increased risk of customer confusion. TEC's marketing and outreach approach will prioritize 1) reaching underserved agencies and 2) reducing customer confusion through inclusive and comprehensive design.

Marketing and Outreach Collateral Development

TEC's marketing and outreach strategy will target agencies through workshops, webinars, conferences, fact sheets, case studies, website content, and other engagement opportunities to build agency awareness of program resources, capacity, and expertise. TEC will begin outreach and marketing efforts by reviewing existing I-REN collateral to ensure branding and messaging alignment and to identify where NMEC Program engagement may be infused into existing and planned I-REN marketing channels, including the TA and Financing Services programs.

TEC will facilitate a series of NMEC Program workshops, webinars, and localized outreach events within I-REN territory to promote the program and recruit participants. TEC will also coordinate with the other I-REN public sector program implementers to complement and support their outreach efforts.

Upon contract execution, TEC will design a comprehensive communications and outreach plan, informed by existing I-REN engagement efforts, and will share the plan with I-REN for review. The communications and outreach plan will set targets and milestones for engagement activities and will outline a methodology for reporting on program engagement. Upon I-REN approval, TEC will implement the communications and outreach plan.

Marketing and outreach collateral may include:

- NMEC Program launch workshop (in-person and webinar options) within 60 days of contract execution
- NMEC Program fact sheet
- Regular content for e-newsletters targeted to local government audiences

- NMEC Program slide deck for standalone presentations or to fold into I-REN public sector presentations
- Case studies showcasing the health, safety, financial, and resilience benefits of holistic facility upgrades through the NMEC Program

Culturally Specific Marketing Strategies

TEC recognizes that there is not a one-size-fits-all approach to EE program design and outreach. We will call upon regional stakeholders for insights into engaging communities where cultural factors such as language, socioeconomic status and other challenges have led to participation barriers. Additionally, TEC will leverage the following marketing and outreach design components to reach communities that have faced historical barriers to leveraging EE programs:

- In-person program outreach in public gathering spaces such as community and recreation centers, senior and teen centers, and libraries
- Dedicated program support email address and phone number for increased program accessibility and ongoing receipt of program questions and feedback
- Region-specific marketing and outreach materials, in regionally appropriate language(s) with simple jargon-free language, where needed.

Marketing and Outreach Coordination with I-REN TA Program and Financing Services

TEC proposes coordinated outreach between all I-REN public sector programs, with the I-REN TA Program as the entry point for agency participation in I-REN services. A dedicated PM will be assigned to each agency upon enrollment in the TA Program, and the same PM will guide the agency through the NMEC Program and financing services for qualifying projects. This singular point of contact will build agency trust and reduce confusion across programs. TEC will engage key agency decision makers, such as public works staff, financing department staff, facility managers, and elected officials during initial program outreach and during key milestones of EE projects.

Agency outreach will focus on the comprehensive suite of end-to-end EE services available across the I-REN public sector portfolio. To ensure effective outreach and reduce agency confusion, TEC will design NMEC Program collateral to seamlessly integrate into TA Program and financing services collateral.

Celebration of Success

Celebrating the success of agency energy projects encourages more enrollments, repeat program engagement, demonstrates agency leadership within agency's communities, and appeals to the competitive nature of neighboring public agencies. In addition to introductory slide decks, fact sheets, and case studies, TEC will develop the following outreach materials to celebrate local EE leadership and project success stories:

1. **Project Impact Report.** The Project Impact Report will highlight the lifecycle energy savings, cost savings, and GHG reduction benefits of completed EE projects. This deliverable can be shared among agency staff and with the general public to

promote the community benefits of EE and position the agency as a regional energy leader.

2. **Legislative Body and/or Community Check Presentations.** TEC will promote local EE success by facilitating check presentations to governing boards, councils, or other community-recognized avenues (Figure 5). The check presentation will spotlight the financial resources secured by the agency, in partnership with I-REN, to advance the agency's energy goals.
3. **Social Media Posts.** TEC will develop social media content spotlighting agency achievements for the I-REN team to post on I-REN social media platforms. Examples of TEC's social media posts are included in Appendix C.



Figure 5. Inland Empire Utilities Agency SCE check presentation

Marketing and Outreach Coordination with Regional Stakeholders

TEC recognizes the value of working alongside COGs and other regional stakeholders to guide localized messaging, implement customized outreach, and build agency trust. Leveraging lessons learned from TEC's successful SoCalREN regional partner model, TEC will work with regional stakeholders to develop unique outreach strategies to increase program participation and equitable distribution of program resources across local governments, tribes, school districts, and special districts. Strategies may include regional EE working groups, competitions, or other innovative initiatives that respond to local energy priorities. TEC will partner with the COGs to develop an annual forum for celebrating agencies that are saving energy through the I-REN NMEC Program. These events will bring positive publicity to agencies already implementing energy retrofits, encouraging future projects, while building interest from other public agencies that may not yet be enrolled in the I-REN public sector programs, or who have not yet taken action to save energy. Key public agency stakeholders, including elected officials, will be invited to attend to increase program visibility. These events will bolster I-REN's role as a facilitator of local energy action while showcasing the value of the I-REN public sector programs to Inland Empire public agencies.

Task 2.3: Program Implementation

TEC's proposed program design aligns with I-REN's vision to connect local governments to a wide range of EE resources to increase energy savings and equitable access throughout San Bernardino and Riverside Counties. The program offers a pathway for agencies to maximize energy and cost savings through technical assistance, persistence of savings reports, and reinforcement of operations and management best practices. The PM assigned through the TA Program will also act as the agency's advisor for the NMEC Program, acting as a single point of contact "concierge" for the agency. Figure 6 below reflects the key steps and flow of an NMEC project, starting with project identification, which is supported by the TA Program. Once a project is identified as a viable candidate, subsequent activities are handled by the NMEC Program team.

Figure 6: NMEC project life cycle



Project Eligibility and Savings Risk Assessment

The public buildings NMEC incentive program will be available to all agencies enrolled in the public TA Program. The PM will assess if an agency's project meets the minimum criteria to participate in the NMEC Program. The PM will work closely with the NMEC Program manager to ensure the project meets all eligibility requirements. TEC will screen for site-level projects that have pre-installation savings estimates greater than or equal to 10% of annual consumption.

Upon initial eligibility verification, the public agency will sign a participation agreement acknowledging an understanding of program requirements, a commitment to install measures as proposed, and the risks of not doing so. The NMEC Program manager will stay connected with the agency through the PM to reduce risk and ensure the pre-installation savings calculations are conservative. In the event that the project site savings turn out to be less than 10% of annual consumption, potential reasons for the shortfall will be investigated. The two main causes for projects falling below the 10% threshold after implementation include:

1. One or more measures not installed or not installed as planned
2. An unidentified NRE affecting energy usage.

Project Application

Once initial project eligibility and program requirements are confirmed, the PM will work closely with the agency and NMEC Program manager to gather all interval data⁴ required for the NMEC technical partner, Alternative Energy Systems Consulting, Inc. (AESC), to conduct detailed analysis and confirm that the project is a good candidate for an NMEC approach. Once confirmed, the NMEC Program manager will work with AESC and the PM to prepare the NMEC incentive application for agency approval and signature. Both the NMEC application and M&V plan will follow the industry-standard International Performance Measurement & Verification Protocol (IPMVP) Option C approach and comply with the CPUC requirements for site-based NMEC Programs per the latest version of the NMEC Rulebook. The goals of the M&V Plan are to:

- Verify the energy savings identified during the audit and design phase
- Ensure that the project savings are at least 10% of the facility's annual consumption
- Monitor data for NREs and unusual trends to identify potential system issues.

⁴ In TEC's experience, collecting energy data from the utility providers can be time consuming; utility company delays can persist for 1-4 months. To overcome this challenge, TEC identified an alternative energy data collection platform, Utility API, that will streamline data collection by allowing the agency to provide a one time authorization for continued data collection.

Application Review and Approval

Once the application is submitted, the NMEC Program manager will coordinate with a technical reviewer from AESC or TRC to review and approve the incentive application. The technical reviewer will perform a thorough review of the project application to verify project calculation methodology and project costs, the M&V plan, project influence, and ensure the project meets all applicable CPUC requirements. If questions arise or additional information is requested by the technical review team, the NMEC Program manager will coordinate with the PM to facilitate responses. Throughout this process, the PM will provide the agency with frequent status updates. Applications will be uploaded to the CPUC Custom Measure and Project Archive (CMPA).

Once approved, the NMEC Program manager will send an approval letter to the agency and PM with anticipated project savings and incentive amounts. As an equity segment program, incentives rates for underserved agencies will be twice the standard rate to prioritize projects at facilities that benefit vulnerable populations. The PM will work closely with the agency through project design, procurement, and construction under the TA Program scope to ensure energy savings are delivered as anticipated.

Installation Verification

Upon EE measure installation and commissioning, the PM will notify the NMEC Program manager that the project is completed. The NMEC Program manager will coordinate with the technical review team to conduct a post-installation inspection to verify all measures were installed as specified in the project application. If planned measures were not implemented or were installed differently than specified, the PM will work with the project development engineer to update savings and incentive metrics.

Project Completion Incentive

Based on TEC's experience implementing and participating in pay-for-performance NMEC Programs with public agencies, we recommend that the program provide an initial partial incentive payment upon project completion to help subsidize project costs. The remaining incentive will be paid out after the M&V reporting period when persistent savings achievements have been verified.

Operations and Maintenance (O&M) Plan and Training

TEC will collaborate with the agency and project contractor to update the Operations and Maintenance (O&M) manual at the facility for the measures installed, or to create one if none exists, to maximize energy savings. The O&M manual includes a description of the implemented measures, including setpoints, sequences of operation, and system diagrams, and O&M requirements to maintain these measures. The O&M requirements typically include a checklist of maintenance tasks and a schedule for performing them. Checklists are kept for each piece of equipment and updated after maintenance tasks are performed. The O&M manual will include a schedule of regular review and updating of occupancy or operational changes to ensure changes do not impact the measures installed. TEC can also provide training for facility personnel on the use of the O&M manual. The PM will offer a quarterly

check-in with facility staff for 2-3 years after installation to answer questions and provide additional training, if required.

Persistence of Savings

After project completion, the project enters the post-installation M&V reporting period. During this 12-month period, agencies will be able to monitor their energy consumption through quarterly savings reports (see Figure 7 and sample in Appendix C) and via access



Figure 7. Sample quarterly savings report

to Praxis by AESC, a data-secure, web-based software platform that enables users to perform population or site-based NMEC M&V of payable savings for completed projects. Praxis was developed in compliance with CalTRACK methods and follows ASHRAE Guideline 14, International Performance Measurement and Verification Protocol (IPVMP), and other industry best practices. Praxis tracks all pertinent statistical criteria and other parameters to ensure the energy model's accuracy and predictive power. Praxis conducts ongoing measure monitoring during the performance period through data visualization, tracking, and reporting features. Access to this software will provide direct feedback to facility personnel that may not have access to utility bills and will empower staff to manage and track their energy usage. The PM and NMEC Program manager will present these reports to the facility staff so they understand how the information was collected and analyzed, and also to identify any potential NREs.

Quantifying Metered Savings

Modeling

TEC utilizes baseline and post-installation modeling algorithms to quantify project energy savings. Modeling may be based on change-point models originally developed under ASHRAE Research Project 1050. Change-point models are a series of dependent piecewise linear relationships between energy use and ambient temperature. The change-point models are named by the number of parameters in the model and whether they apply to heating or cooling energy use. After each model is developed, the change-points and coefficients of the slopes of each line segment will have been determined, along with their goodness-of-fit metrics.⁵ Other algorithm models may also be explored and used based on the project and facility type and any applicable CPUC NMEC rulings.

To develop energy models, the data may be grouped into different bins based on building operating periods. Such bins may include occupied or unoccupied periods, weekdays, weekends, or holidays, or in-session versus out of session periods, as are common in schools and universities. Thus, different models may be developed in the baseline period according to these unique operation periods, as they will have different responses to ambient temperature. After acceptable models are developed for each period, they may be combined using an indicator variable. This approach applies to both baseline and post-installation period data.

At the end of the post-installation period, both baseline and post-installation models are normalized using the nearest Typical Meteorological Year (TMY) weather conditions for the building's climate zone. Both baseline and post-installation models are normalized to TMY conditions. The difference between the total normalized baseline energy use and the total normalized post-installation energy use defines the total normalized savings. The normalized savings are claimed as the savings for the measures installed in each participating building.

Non-Routine Events

NREs are events unrelated to weather, normal operation, and EE measures that impact energy use. NREs include changes in building occupancy, equipment shut-downs, major renovations such as changes in facility size, or a steady increase in building loads due to factors such as the addition of personal heaters, new electric vehicle charging capabilities, and/or the addition of on-site renewable energy generation. The potential for NREs occurring during a metered savings project is not insignificant and continuous customer contact, ongoing monitoring of the building, and frequent comparison to the predicted building performance are necessary to detect them. When NREs occur, it is necessary to determine whether they add load (reduce savings) or decrease load (increase savings), how significant they are, and how to properly quantify them.

The agency or facility staff will be responsible for notifying the PM and program of any NREs via a detailed narrative describing the changes that have occurred and the duration of the

⁵ See ASHRAE RP-1050 for change-point modeling details and ASHRAE Guideline 14-2014 for metrics on modeling goodness-of-fit.

NRE. Depending on their significance, NRE impacts on building energy use are quantified using engineering calculations supported by audit information and/or measured energy use data, or directly from the building's metered energy use data. Each NRE is described and the methodology for quantifying their impacts, data, and analysis, are provided with the final M&V report (example in Appendix C).

Savings Persistence Incentive and Marketing

Once the metered savings are quantified and weather normalized, the agency is eligible to receive the savings persistence incentive for the remaining balance of “trued-up” incentives based on the project's realized savings. TEC will provide incentive check presentations to the agency's legislative body and/or at community events to spotlight the financial resources secured by the agency, in partnership with I-REN, to advance the agency's energy goals. The agency will also receive a project impact report (Appendix C) to show the life cycle benefits of the project as well as a project case study that can be shared with agency management and council/board members. Sharing the project success will position local governments as EE leaders in their communities and inspire further energy-saving actions.

Continued Persistence of Savings

After the 12-month post-installation reporting period and savings persistence incentive payout, the agency will continue to monitor their energy consumption through ongoing quarterly savings reports for up to three years after project completion. The reports will be accessible through the same proprietary software and will provide continued feedback to facility personnel to manage and track the facility's energy usage. The agency staff will also have periodic check-ins with the PM and NMEC Program manager throughout years 2 and 3 to answer questions and ensure the project's energy and cost savings are maximized.

Program Progress Updates

TEC will conduct recurring meetings with the I-REN team to provide program updates. Meetings will include status reports on active and potential projects, project pipeline growth, risk mitigation strategies, participant interactions, and progress towards goals. TEC will also provide program updates and coordinate with the BUC software provider to inform solution design and ongoing enhancements.

Task 2.4: Other Services

Activities

Quality Assurance and Quality Control

To verify project quality through the NMEC Program and ensure ratepayer funds are being properly utilized, TEC will incorporate a number of quality assurance guidelines and procedures, as outlined below.

1. TEC will perform a preliminary project review for each facility (or site) that an agency is interested in upgrading after the project engineer recommends potential NMEC project eligibility. This will ensure the project is a good candidate for the NMEC

Program and that appropriate resources are offered. The review will consist of the following:

- Reviewing 12 months of site energy consumption for weather normalized goodness-of-fit and non-routine events
 - Confirming data collection capabilities at facility(ies) or site(s) and the completeness and quality of datasets
 - Checking that any solar, storage or EV charging systems at the facility are separately metered
 - Reviewing history of past energy-related projects to determine if a 10% reduction in annual energy consumption is feasible
 - Obtaining information from participants regarding potential changes to end use including electric vehicles, installation of solar panels, building operation or application, and occupancy during the course of the project (next 3 years).
2. TEC will mitigate “double dipping” by coordinating with the local and statewide IOUs and/or third party program implementers. In coordination with I-REN, TEC will develop a process to inform either the IOUs or third party implementers about I-REN supported NMEC projects. Through this process, I-REN will avoid situations where equipment for a project is purchased from a vendor participating in a statewide program (e.g. Illuminate California), and that vendor also claiming EE program savings for the sale/installation of the equipment.
 3. The NMEC Program will diligently manage “gaming” or “free ridership” by only offering services to agencies who truly would not have installed a project without the benefit of incentives. TEC is very familiar with the CPUC’s rigorous custom project influence requirements and recognizes the importance of ensuring that customers who do not need incentives are taking resources from those who do.

Regulatory Reporting

TEC will leverage its extensive experience and expertise to support all aspects of regulatory reporting, including filings, data collection, and EM&V. As requested by I-REN, TEC will provide program-specific content and/or will review I-REN JCMs, annual reports, Advice Letters and data requests. Requests will be fielded by the TEC contract manager and assigned to TEC staff with time for internal review before submitting to I-REN for feedback. TEC will also proactively consider any potential program-specific edits or content for I-REN regulatory filings and alert I-REN as appropriate.

Data Collection, Reporting, and Analysis

Proper data collection and reporting is the foundation of tracking and communicating program success. Data collection protocols and systems for the public sector programs will be established during the program design period in coordination with I-REN, the IOU program administrators and the BUC team to ensure successful CPUC reporting of metrics, indicators and other measures of program performance. As an equity segment program, TEC PMs and coordinators will collect, report, and maintain equity segment metrics throughout program implementation. Program managers will perform general quality control and coordinate with the contract manager on trends or issues to be discussed with I-REN. TEC’s assigned project analyst will support program performance analysis as requested and

the contract manager will support any EM&V requests from I-REN as requested. Any improvements identified will be implemented through the TEC contract manager.

TEC pursues continuous improvement for all programs. Beyond EM&V studies, and as an ongoing practice, TEC will look for opportunities to improve program performance and share recommendations with I-REN. At a minimum, TEC, led by the contract manager, will perform an annual analysis of performance and present recommendations for short-term and long-term planning.

Budget for tasks 2.1 - 2.4

Public Buildings Normalized Metered Energy Consumption			
Task	Total Cost	Estimated TEC Labor Hours	Timeline
Incentives	\$4,500,000	n/a	-
Task 2.1: Program Design	\$61,390	397	<0-60 days from NTP
Task 2.2: Outreach & Engagement	\$53,710	385	<60-120 days from NTP; ongoing
Task 2.3: Program Implementation	\$1,774,925	8,850	>60 days from NTP
Task 2.4: Other Services	\$56,925	319	Ongoing
TOTALS	\$6,446,950	9,951	-

Task 3: Public Sector Financing Services

Project financing is often cited as the number one barrier to EE project implementation. Staff and capital resource constraints, the COVID-19 pandemic, supply chain delays, and increasing labor and equipment costs are squeezing already constrained public agencies. Public agencies also have varying internal funding and financing requirements and may lack the resources and expertise to navigate the options available to them. It can be challenging for public agencies to dedicate resources to the rigorous application and reporting requirements for many funding opportunities. These challenges are even more pronounced in DAC, low-income, and other hard to reach communities.

The I-REN Public Sector Financing Services Program will help agencies overcome financing barriers by helping them navigate the complexities of project financing and developing tailored recommendations to address each agency's specific financing needs and priorities. TEC will design the program to help agencies use multiple incentive and financing resources in tandem with the I-REN TA and NMEC Programs. Through TEC's proposed approach as the lead implementer for all three public sector programs, participants will benefit from a streamlined and straightforward experience. Appropriate resources for each agency's needs will be delivered by the same point of contact, the TEC PM, across all public sector programs.

Task 3.1: Financing Services Design

Program Kick-Off

Within two weeks of the contract being signed, TEC's contract manager will initiate a kick off meeting with the I-REN team to review the scope of services and contract milestones. TEC will also meet with awarded implementers for the BUC and other public sector scopes to lay the groundwork for coordination that ensures all participating agencies benefit from a seamless I-REN experience. During the initial introductory meeting, each public sector implementer will present overviews of their program offerings so all parties have a strong understanding of coordination opportunities and how to ensure streamlined customer experiences across the portfolio. Agendas and detailed meeting notes will be distributed to the I-REN team to ensure alignment on strategies and next steps. As a follow-up to the meeting, TEC will work with the other public sector program implementers to outline a program coordination process so all stakeholders have a clear idea of synergies and avoid duplication.

Local and Regional Stakeholder Engagement

TEC recognizes the value of working alongside trusted regional experts to customize services and messaging to their communities. Engagement with these stakeholders will enhance the I-REN's Financing Services Program by using their local and regional knowledge, existing relationships with member agencies, and their professional relationships that extend beyond EE.

Throughout the program design phase, TEC's engagement program manager will engage with local and regional stakeholders in the territory including CVAG, SANBAG, WRCOG, and ISC3 to design services for unique needs of agencies in the I-REN territory. TEC will conduct stakeholder engagement activities, including workshops and surveys to collect feedback on what financing mechanisms, resources, and messaging has worked well in this region. TEC will continue to collect feedback from stakeholders throughout program implementation to ensure services are adapted as new regional priorities and financing opportunities emerge.

Services Design and Ramp-Up

TEC's financing services program manager will incorporate insights from the program kick-off and stakeholder engagement to develop content for I-REN's TA and NMEC Program IPs and Program Manuals. This content will detail I-REN's financing services to alleviate financial barriers to public sector EE project implementation, while prioritizing vulnerable and underserved communities. Key components of TEC's proposed financing services model include the items detailed in the sections below.⁶

Energy Financing Services Advising

Each agency will be assigned a dedicated TEC PM to serve as an EE project financing advisor. Should TEC serve as the lead implementer for all I-REN public sector scopes, each participating agency will be assigned one TEC PM to guide the agency through all I-REN

⁶ Additional services may be identified through stakeholder discussions.

public sector offerings, creating a seamless customer experience. The PM will share funding and financing opportunities available to the agency and will educate the agency on the most beneficial financing mechanisms options for any given project. TEC's subconsultant, PFMFA, will provide additional financial advisory services to help the agency point of contact, or "Energy Ambassador", explain financing options in detail to their financing department to build internal buy-in. Services may include review of energy savings performance contracts, third-party loan terms and conditions, and other similar requests. TEC and PFMFA's successful partnership to deliver public sector financing services is exemplified through assistance provided by the SoCalREN to the City of Palmdale. TEC and PFMFA helped Palmdale secure a private EE loan for \$990,250 and submit a Revolving Savings Fund application for over \$1M.

Financing Resource Library

To increase services reach across I-REN territory, TEC will develop a comprehensive EE financing resources library that will be available to all I-REN enrolled public agencies via the program website.

Green Revolving Fund Set Up Support

TEC's PM, in coordination with PFMFA, can also support agencies with the set up of internal green revolving funds, like we did for WRCOG's Sustainability and Efficiency Revolving Fund (SERF) or Temecula's Energy Temecula Energy Efficiency Asset Management (TEAM) Fund. A Green Revolving Fund (GRF) is an internal capital pool that is dedicated to funding energy efficiency, renewable energy, and/or sustainability projects that generate cost savings. A portion of those savings are then used to replenish the fund (i.e. revolve), allowing for reinvestment in future projects. This establishes an ongoing funding vehicle that drives energy efficiency and sustainability while generating cost savings and ensuring capital is available for important projects.⁷

Financing Resources and Application Assistance

Many EE programs offer incentives or financing on a reimbursement basis after successful project completion. However, public agencies often lack the up-front capital to invest in EE retrofits. TEC PMs will educate participating agencies on bridge financing programs, energy performance financing, and other low-or-no up-front financing options to expedite EE projects in the absence of up-front capital. The PM will also help participating agencies apply for long-term EE financing. Example project financing pathways are listed in the table 2 below.

Table 2: Project Financing Pathways

Project Financing Pathways	
Energy Services Company (ESCO)	ESCOs offer tailored EE project financing (both on- and off-balance sheet) to agencies to deliver low-to-no up-front cost EE projects. TEC will educate agencies on the processes and key considerations for

⁷ US DOE Better Buildings Solution Center, Green Revolving Funds.

<https://betterbuildingssolutioncenter.energy.gov/toolkits/green-revolving-funds> Accessed September 9th, 2022.

Performance Contracting	working with ESCOs. TEC will also offer unbiased third-party reviews of an ESCO's cash flow pro forma for identified projects. TEC will also advise agencies on Government Code 4217, an expedited alternative procurement pathway enabling agencies to pursue an ESCO option.
SoCalREN Revolving Savings Fund	TEC will coordinate with SoCalREN to understand the viability of this pathway for I-REN program participants. Underserved agencies may be able to access SoCalREN's 0% interest loans. Through the I-REN Financing Services Program, TEC will offer agencies support in applying for these loans.
SCE and SCG 0% On-Bill Financing (OBF)	OBF allows customers to repay the costs of EE upgrades through energy cost savings directly on their utility bills. SCE and SCG allow customers to use OBF and EE incentives. The TEC PM will assist the agency with applying for utility OBF and EE incentives through the I-REN NMEC Program or other incentive programs. TEC has supported OBF applications for nearly 1,200 service accounts, securing over \$19 million for public agency customer EE retrofits.
CEC Energy Conservation Assistance Act Loans	The CEC offers 0% interest loans to school districts and 1% interest loans to other public agencies to finance EE and energy generation projects. TEC will support agencies through the application process to secure loans for the energy projects.
IBank California Lending for Energy and Environmental Needs Statewide EE Program (SWEEP) Loans	SWEEP Loans can finance a wide array of EE measure types including HVAC, lighting, and energy management systems. The TEC PM will offer agencies necessary support to complete loan applications.

TEC monitors for emerging grants and financing opportunities for public agencies and anticipates that new financing programs will emerge in the coming months from the Bipartisan Infrastructure Law and the Inflation Reduction Act. TEC can work with single or multiple agencies, including regional stakeholders, to develop innovative grant applications to take advantage of available funding. Given the extensive resources required to apply for grant funding, these program services will be offered on a limited basis and only to I-REN's most vulnerable communities including DACs, low-income, and other hard to reach populations.

TEC will also consider innovative partnerships with private financing companies like [BlocPower](#) to connect agencies to new financing mechanisms to fill additional gaps. TEC's I-REN financing services model will adapt to new market offerings.

Services Eligibility and Coordination with I-REN TA and NMEC Programs

All public agencies in I-REN territory are eligible for financing services, with priority offered to the territory's vulnerable communities. In alignment with the TA Program's concierge-style approach, public agencies will access I-REN's Financing Program offerings by first enrolling in the TA Program. Coordination between I-REN's TA, NMEC, and financing services will be seamless. While TEC is proposing to lead implementation of all public sector programs, we are committed to successful coordination with other implementers as applicable. TEC will deliver streamlined coordination through the following program elements:

- **Integrating financing services content into I-REN Program Manuals and IPs.**
- **A singular PM for wrap-around I-REN TA, NMEC, and financing services.** The PM will provide EE project development support via benchmarking, EE audits, and financial analyses and will connect the participating agency to I-REN financing services and assist with applicable financing applications.
- **Including financing services in TA Program project identification and financial analysis.** TEC will integrate educational information on I-REN financing services and project financing pathways into each TA Program project summary.
- **Integrated financing support with I-REN NMEC incentives.** TEC will assist public agencies with applying for financing opportunities in tandem with NMEC EE incentives. The PM will collect all necessary documentation from the I-REN NMEC Program or other incentive program to submit financing applications on behalf of the agency.

TEC's program manager and communications team will develop collateral and forms to educate agencies about financing options and to mitigate the risk of agencies discontinuing projects, ensuring responsible use of ratepayer funds. Collateral and forms developed will include:

- **Matrix of project financing opportunities:** TEC will guide program participants to the financing opportunities that will best meet their needs. However, TEC will also create a matrix of financing opportunities for agency review and consideration. Table 2 above illustrates sample opportunities that will be included.
- **Financing Services Form:** A non-binding participation form will outline I-REN's no-cost financing services and the requirements from the agency to progress the project. Agency signature ensures continued willingness to work with I-REN to secure financing and move the project into implementation.

Program Coordination with I-REN BUC Software

TEC is committed to integrating I-REN financing services into BUC software to create a program design and user interface that works for public agency staff. TEC will also provide feedback for ongoing enhancements to the BUC software to ensure seamless coordination between BUC and I-REN financing services.

Task 3.2: Marketing and Outreach

TEC's engagement program manager will implement a coordinated outreach and engagement strategy with the other I-REN public sector programs as outlined in Tasks 1.2 and 2.2. TEC's financing services program manager will develop messaging about the program's financing services to be incorporated in the TA and NMEC Programs' outreach to

local agencies. TEC will also leverage the market opportunity study and I-REN priority communities identified in task 1.2 to inform financing services outreach. While the TA Program will serve as the primary entry point for public agency I-REN EE program participation, TEC will coordinate across public sector scopes to ensure the agency experience across programs is clear and streamlined.

Marketing and Outreach Collateral Development

Within 60 days of contract execution, TEC's program manager will coordinate with the communications manager to develop a marketing and outreach plan, outreach targets, and milestones. Key marketing and outreach strategies to be implemented include:

- Financing services launch workshop (in-person and webinar options)
- Financing services fact sheet (example in Appendix C)
- Financing services slide deck for standalone presentations or to fold into I-REN public sector-wide presentations alongside TA and NMEC Program services
- Case studies showcasing the benefits of EE funding and financing
- Content creation for newsletter features
- Legislative body and/or community check presentations
- Program achievements and information highlighted on social media platforms, including LinkedIn, Twitter, and Instagram

In addition to the marketing and outreach plan, TEC will continue to collect feedback from local public agencies on financing questions, concerns, and requests for information on new funding opportunities. TEC will deliver bi-annual financing workshops to address hot topics and keep public agencies engaged in the financing services offerings. TEC will also support the TA and NMEC Program implementers at public agency meetings with key decision makers to ensure project financing questions can be answered directly.

All marketing and outreach strategies will be finalized in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN implementers as applicable. TEC will also collect stakeholder feedback on marketing collateral to ensure it resonates with local communities. Before distributing or sharing any collateral, TEC will confirm that it adheres to I-REN branding, templates, and other relevant guidelines. Lastly, TEC will provide I-REN with progress updates on marketing and outreach efforts at requested intervals.

Task 3.3: Financing Implementation

TEC's proposed program design aligns with I-REN's vision to connect local governments to a wide range of EE resources to increase energy savings and equitable access throughout San Bernardino and Riverside Counties. TEC recognizes that the numerous EE funding and financing programs bring a risk of customer confusion, which may dissuade already resource-constrained agencies from taking advantage of available programs. TEC will minimize customer confusion through a concierge-style approach that allows for seamlessly combining TA, NMEC, and financing services resources. TEC's implementation strategy will initially target HVAC EE upgrades in recreation centers, libraries, senior centers, and other community centers in vulnerable communities in alignment with I-REN's Financing Services objectives.

Financing Services Participant Experience

The TEC team will work closely with I-REN staff, energy efficiency fellows, and other public sector implementers to foster relationships with public agencies and their designated Energy Ambassadors. TEC's financing services approach will include the program design elements outlined in task 3.1, will be closely coordinated with the TA and NMEC Programs, and will include the following activities:

1. During EE project development, the TEC PM will review current financing resources and hold discussions with the agency to identify agency-specific financial barriers, limitations and priorities. PFMFA may join these meetings if needed.
2. After the TA Program delivers an EE audit, TEC will develop a tailored **financial analysis** (leveraging a specialized EE financing calculator tool -Appendix C) to review all funding and financing mechanisms available and generate a recommendation that maximizes the project's financial benefit to the agency and addresses the agency's financial barriers.
3. In coordination with the TA and NMEC Programs, TEC will develop and deliver a **project summary** (Appendix C) that highlights the most financially beneficial funding/financing pathway for the agency. The proposal will include key financial metrics like simple payback (SPP), return on investment (ROI), net present value (NPV), and a year-over-year cash flow analysis.
4. Once a program financing pathway is selected, the PM will provide application assistance, objective third-party advising, and other supportive services to assist the agency with pursuing their selected financing program(s).
5. Public agencies may also receive support to implement a green revolving fund that can provide a continuous funding stream for EE projects.

Financing Services Implementation Documentation and Reporting

TEC will document key program implementation activities and participant interactions. When TEC leads any agency or I-REN meetings, we will share meeting agendas and minutes to set expectations for all parties. TEC has developed a customized Customer Relationship Management platform on Salesforce for energy project tracking, event tracking, and customer information that includes the following data: agency information, financing services provided, financing leveraged, facility information, EE measures installed, and events with participants.

TEC will document and share program status updates based on I-REN's desired frequency (e.g. weekly, bi-weekly). On a monthly and quarterly basis, TEC will share a dashboard to highlight key metrics of success.

Task 3.4: Other Services

TEC will leverage its extensive experience and expertise to support all aspects of regulatory reporting, including filings, data collection, and EM&V.

Regulatory reporting

As requested by I-REN, TEC's contract manager will provide program-specific content and/or will review I-REN JCMs, annual reports, Advice Letters and data requests. Requests will be fielded by the TEC contract manager and assigned to TEC staff with time for internal review before submitting to I-REN for feedback. TEC will also proactively consider any potential program-specific edits or content for I-REN regulatory filings and alert I-REN as appropriate.

Data Collection, Reporting, and Analysis

Data collection protocols and systems will be established during program design in coordination with I-REN and the BUC team to ensure successful reporting of financing-related data for CPUC reporting, program metrics, targets, indicators and other measures of performance. The data will be collected, reported, and maintained throughout program implementation by TEC PMs and project coordinators. TEC's financing services program manager will perform quality control and coordinate with the contract manager on any trends or issues to be discussed with I-REN. TEC's project analyst will support program performance analysis as requested and the contract manager will support any EM&V requests. The TEC contract manager will coordinate any improvements identified via reporting and analysis.

TEC pursues continuous improvement for all programs. Beyond EM&V studies, and as an ongoing practice, TEC will look for opportunities to improve program performance and share recommendations with I-REN. At a minimum, TEC will perform an annual analysis of performance and present recommendations for short-term and long-term planning.

Budget for Tasks 3.1 - 3.4

Public Sector Financing			
Task	Total Cost	Estimated TEC Labor Hours	Timeline
Task 3.1: Financing Services Design	\$32,020	209	<0-30 days from NTP
Task 3.2: Marketing & Outreach	\$34,480	251	<30-90 days from NTP; ongoing
Task 3.3: Financing Implementation	\$503,020	3,758	>30 days from NTP
Task 3.4: Other Services	\$30,090	174	Ongoing
TOTALS	\$599,610	4,392	

Appendix A: References

TEC is pleased to provide the following project references and corresponding contact information. These projects highlight TEC's experience designing and implementing public sector EE programs similar to I-REN's described scope of work.

Scope 1, 2 and 3 Reference

SoCalREN's Public Agency Programs

TEC designed and is currently implementing the SoCalREN Public Agency Energy Efficiency Programs including the Project Delivery Program, Pathway to Zero, Metered Savings Program, and Revolving Savings Fund. The programs, at no cost to agencies, support the identification of energy saving measures and work together to provide concierge services to take agency staff from design through construction to accomplish energy efficiency projects. Services include start-to-finish project management support, technical assistance, access to financing, competitively bid specialty contractors, development and processing of incentive applications, and more. These programs, administered by the County of Los Angeles and funded by California utility ratepayers under the auspices of the CPUC, are available to more than 700 public agencies in Southern California (service population of over 20 million). **Through the SoCalREN, TEC has served over 200 public agencies in Southern California and helped communities save over 100 million kWh in annual energy savings, save \$16 million on annual utility bills, and secure over \$25 million in utility incentives.** TEC has also supported public agencies with their resiliency efforts through the SoCalREN, which has helped public agencies identify and implement DER and sustainability opportunities.

Name: Lujana Medina, Manager, Environmental Initiatives, County of Los Angeles – ISD Environmental and Energy Services

Phone: (323) 881-3971

Email: lmedina@isd.lacounty.gov

Scope 1 and 3 Reference (TA Program and Financing Services Program)

City of Palmdale's Comprehensive Participation in SoCalREN

Through implementation of the SoCalREN Public Agency Programs, TEC, with engineering support from TRC, identified 15+ EE projects and supported pipeline development of accumulated energy savings of 8.2 million kWh, 267 kW, 82,000 therms, and over \$2.2 million in monetary incentives across the City's portfolio. The City has pursued projects and resources through all five SoCalREN resource and non-resource programs that TEC implements. TEC, with financing advisory services from PFMFA, also helped the agency secure a private EE loan for \$990,250 and also recently supported the submission of a Revolving Savings Fund application for over \$1M. The positive impacts of these projects include cost savings, improved outdoor environment and health, and increased safety. Throughout its experience with the TEC-implemented programs, the City has commented that it feels its project team is an extension of its own staff, and relies on the Programs to find and implement EE projects.

Name: Benjamin Lucha, Environmental Resources Manager, City of Palmdale

Phone: (661) 267-5308

Email: blucha@cityofpalmdale.org

Scope 2 Reference (NMEC Program)

El Monte Union High School District NMEC HVAC projects at five high schools: Ledesma High School, Rosemead High School, Arroyo High School, El Monte High School, and South El Monte High School

Through implementation of the SoCalREN Public Agency Programs, TEC identified EE projects at five of the District's high schools and supported the District with submitting applications to the SoCalREN Metered Savings Program, an NMEC Program designed and implemented by TEC. Through participation in the program, the District will save over 8,473,750 kWh, 146,636 therms, and \$1,271,515 across the lifetime of the EE measures. The district also received technical assistance from TEC to review a battery storage opportunity to improve resiliency and plans to install the battery in 2022.

Name: Lena Luna, Facility and Energy Manager, El Monte Union High School District

Phone: (626) 444-9005

Email: lena.luna@emuhsd.org

Scope 3 Reference (Financing Services Program)

Pomona Library and Palomares Park Financing for Lighting and HVAC Projects

Through implementation of the SoCalREN Public Agency Programs, TEC identified EE projects at two community-centered sites and supported the City of Pomona with layering multiple funding and financing mechanisms to help the City overcome funding constraints and move the projects forward. TEC, with support from PFMFA, helped the City apply for and secure a SoCalREN Revolving Savings Fund loan for over \$1.5M, SCE NMEC Program incentives totaling \$28,000, and a \$300,000 loan from SCE's On-Bill Financing program.

Name: Julie Carver, Environmental Compliance Supervisor, City of Pomona

Phone: (909) 620-3628

Email: Julie.Carver@Pomonaca.gov

Appendix B: Project Team Staffing

TEC, AESC, TRC and PFMFA have assembled an experienced and talented group of employees to perform the tasks described in the scope of work. Following is a brief summary of the role and experience of each team member. All firms affirm that no employees working on the engagement have been convicted of a felony. TEC, as the prime, is committed to establishing a local presence, and has identified key staff with directly relevant experience to support the I-REN Public Sector programs.

Firm Support Across Project Scopes				
	TEC	AESC	TRC	PFMFA
Scope 1	X	X	X	
Scope 2	X	X	X	
Scope 3	X			X

TEC (Scopes 1, 2 and 3)

Craig Perkins, Executive Director and President

Craig Perkins provides leadership, oversight and strategic input for all TEC contracts, programs and policy work. Prior to joining TEC in 2008, he was the Director of Environmental and Public Works Management for the City of Santa Monica, where he served for over 25 years. Craig has extensive experience designing and implementing energy programs and policies, which involve outreach strategies to key stakeholder groups, including the creation of the Regional Energy Networks, implementation of Energy Upgrade California in Los Angeles County, the Los Angeles County Southern California Regional Energy Center Pilot, directing Santa Monica's award-winning Sustainable City Plan, Solar Santa Monica Program, and Energy Independence Plan. Craig has played a key leadership role in shaping regulatory policies that have resulted in successful program implementation. Craig holds a B.A. in Sociology from UC Berkeley and Master's Degrees in Political Science and Latin American Studies from UCLA and in Public Administration from California State University, Dominguez Hills.

Laurel Rothschild, Vice President

Laurel Rothschild is the Senior Manager overseeing TEC's energy programs including SoCalREN Public Agency Programs. With over 16 years of experience in the industry, Laurel is a recognized expert in EE and the mechanics of energy programs. She has a keen understanding of the various energy stakeholders across the state. She is an active member of the CAEECC on behalf of TEC and a participant in the CAEECC Underserved, EE Portfolio Filing Process, and Equity Metrics working groups. Laurel is experienced in developing Program IPs, working with EM&V consultants on program evaluations, responding to data requests, developing joint cooperation memos and coordination protocols, convening the SoCalREN Advisory Committee, facilitating the newly formed CalREN group, and working

with local government agencies on securing funding for energy programs. Laurel has a B.S. in Business Economics from UCSB, is a Certified Energy Auditor (CEA), and a LEED Accredited Professional in Operations in Maintenance (LEED AP O+M).

If awarded, Laurel will provide executive oversight and support for I-REN on Scopes 1-3, and specifically will be involved in program design.

Rebecca Hausheer, Director of Energy Services

Rebecca Hausheer oversees the design, implementation, and contract management of a diverse portfolio of EE and DER programs including the SoCalREN Public Agency Programs, CC-LEAP, and Public Power-Up. Combined, these programs serve over 200 participating public agencies across California. With over 10 years of experience designing and implementing EE programs in the public sector, Rebecca brings expertise developing regulatory compliance documents including IPs, Business Plans, and JCMs. Rebecca leads her contracts with an eye for continuous improvement and deployment of cost-effectiveness strategies. Rebecca holds a B.A. in Psychology from UCLA, a Master's degree in Environmental Science and Management from UCSB, and holds a certificate from Stanford's Energy Innovation and Emerging Technologies Program.

If awarded, Rebecca will be the contract manager for Scopes 1-3 and will ensure all deliverables are met on time and within budget, and will manage and oversee all tasks.

Meaghan Lavery, Director of Marketing, Education and Outreach

Meaghan Lavery oversees marketing and outreach activities for TEC and its programs. She recently led all marketing and outreach services for the launch of Clean Power Alliance, the largest CCA in California. She also supported the development and implementation of the SoCalREN communications plan at program launch and continues to oversee all marketing and outreach activities for the SoCalREN Public Agency Programs. Meaghan currently leads all outreach activities for TEC's Bassett Avocado Heights Advanced Energy Community (BAAEC) project. In these roles, she manages program budgets, oversees various subconsultants, program websites, collateral creation, engagement workshops and conferences and events. Meaghan brings over fifteen years of experience in project management, marketing and communications.

If awarded, Meaghan will provide oversight on marketing and outreach activities for Scopes 1-3.

Julie Castro, Assistant Director

Julie Castro provides oversight and direction on SoCalREN's engagement and enrollment activities and oversees the coordination and management of SoCalREN's regional partnerships, which is made up of COGs and other local organizations. She also provides direction and guidance on SoCalREN's energy resiliency and DER initiatives and has extensive experience delivering energy projects for public agencies. Julie has experience developing benchmarking tools to enhance data-driven insights and decision-making. Julie previously worked as the Director of Strategic Partnerships at Chai Energy, a behavioral energy efficiency technology start up. She has a Master of Urban and Regional Planning from UCLA and a B.A. in Global Studies and International Studies from UCSB.

If awarded, Julie will oversee the team responsible for engagement, stakeholder coordination, and resiliency related activities outlined in Scopes 1-3.

Lauren Seymour, Assistant Director

Lauren Seymour manages the SoCalREN Public Agency Programs and EE project implementation team members to ensure all program goals and objectives are met. Lauren has experience reviewing energy policies to identify program impacts, drafting IPs, and participating in several statewide working groups, including the CPUC NMEC and Custom Project working groups. Lauren previously acted as the SoCalREN Metered Savings Program program manager and now continues to provide support in an advisory role. Lauren previously worked as an energy industry research specialist and was an Energy Fellow at the U.S. Department of Energy. She has a Masters in Public Affairs with a focus on Energy Policy from the University of Texas at Austin and a B.A. in International Affairs and Spanish from the University of Nevada, Reno.

If awarded, Lauren will provide overall guidance and management of the EE project delivery team for Scopes 1-3.

Cody Bruder, Program Manager

Cody Bruder oversees a team of PMs and project coordinators to deliver energy projects for public agencies through the SoCalREN Public Agency Programs. He serves as the Program Manager on SoCalREN's NMEC Metered Savings Program and ensures project compliance with all CPUC NMEC guidelines. Code also serves as SoCalREN's water and wastewater subject matter expert. He brings expertise in statistical analysis, financial modeling, triple-bottom line model building, and energy-related policy. He holds a Masters in Science in Environmental Policy and Planning and a Bachelor of Science in Evolutionary Anthropology from the University of Michigan. Cody is locally-based in the Inland Empire.

If awarded, Code will act as the Program Manager and day-to-day point of contact between TEC and I-REN for Scope 2.

Casey Novell, Program Manager

Casey Novell oversees a team of PMs and project coordinators to deliver energy projects for public agencies through the SoCalREN Public Agency Programs. She also manages SoCalREN's support on Los Angeles County's Facilities Reinvestment Program which is investing \$750 million dollars over the next five years on over 200 capital improvement and deferred maintenance projects. She also facilitates coordination with all third party program implementers offering overlapping programs and services in SoCalREN territory and oversees all GIS projects for the programs. Casey previously designed and implemented educational outreach campaigns for the Cal Poly Humboldt Office of Sustainability and supported the development of the Bear River Band of Rohnerville Rancheria Tribal Nation's Renewable Energy Sovereignty Master Plan. She has a B.S. in Environmental Science with a concentration in Energy and Climate and a minor in Environmental Ethics from Cal Poly Humboldt.

If awarded, Casey will act as the Program Manager and day-to-day point of contact between TEC and I-REN for Scope 3. She will also lead any coordination efforts with other EE program administrators and implementers for Scopes 1-3.

Jake Anderson, Program Manager

Jake Anderson currently manages SoCalREN's regional partner energy resiliency initiative and is actively working with eight public agencies to assess climate and grid vulnerabilities to help them identify and prioritize locations and next steps to create local resilience hubs. He also manages SoCalREN's benchmarking activities through ESPM and leads agency building benchmarking compliance initiatives (AB 802). Jake previously managed TEC's LGP implementation and EE project delivery for both the LGPs and SoCalREN. Jake holds a B.S. in Earth and Environmental Science with a minor in Global Sustainability from UC Irvine.

If awarded, Jake will manage the day-to-day implementation of Scope 1 activities.

Ivana Dorin, Program Manager

Ivana manages engagement, education, and outreach activities for TEC and its programs. She has over ten years of experience serving the energy needs of communities and supporting local governments with energy strategic planning and the rollout of benchmarking requirements to LGPs. Ivana has worked with several local governments across Southern California on developing energy efficiency projects, energy action plans, and energy related messaging and outreach. She holds a B.A. in Environmental Policy from UCSD and an M.A. in Environmental Policy from Colorado State University.

If awarded, Ivana will lead engagement with agencies, COGs, and other stakeholders for Scopes 1-3.

Taylor Rosetti, Program Manager

Taylor Rosetti manages communications and marketing efforts for TEC. She has over seven years of experience in communications for impact-driven companies, nonprofit organizations, and government initiatives. At TEC, she has supported SoCalREN Public Agency Programs, Clean Power Alliance's launch communications, and the Bassett Avocado Heights Advanced Energy Community, and has developed branding for several LGPs and other programs. Prior to TEC, Taylor worked as a Senior Analyst at Blue Garnet, a boutique social impact consulting firm. She holds a Bachelors in Business Administration from the College of William and Mary, where she studied marketing, entrepreneurship, and environmental science and policy.

If awarded, Taylor will manage the day-to-day marketing and outreach activities across Scopes 1-3.

Donald Ries, Senior Project Manager

Don Ries manages a portfolio of energy efficiency projects for five public agencies, including the City of San Bernardino, through the SoCalREN Public Agency Programs. He has served public agencies in various roles across his 35+ year career, including as Customer Accounts Program Manager with WRCOG/Western Community Energy, Utility Energy Manager for Orange County Public Works, and Electrical Specialist for the City of Corona DWP. Don has extensive energy experience, first hand public sector experience, and strong relationships with agencies and industry professionals across the region. He is a Certified Energy Manager (CEM), Certified Energy Procurement Professional (CEP), Demand-Side Management Professional (DSPM), Certified Sustainable Development Professional (CSDP),

Certified Energy Auditor (CEA), and Certified Occupational Safety Specialist (COSS). Don is locally based in the Inland Empire.

If awarded, Don will act in a project manager role and key point of contact for agencies across Scopes 1-3.

Anthony Segura, Project Manager

Anthony Segura supports project delivery for a portfolio of energy efficiency projects for the SoCalREN Public Agency Programs. Anthony also serves as SoCalREN's Energy Service Company (ESCO) subject matter expert. Prior to joining TEC, Anthony was a Senior Analyst at the Western Riverside Council of Governments, where he supported local governments agencies in both San Bernardino and Riverside Counties with energy efficiency resources. He has a Masters of Public Administration from California Baptist University and a Bachelor of Science in Environmental Science with a concentration in Natural Science from UC Riverside. Anthony is locally based in the Inland region.

If awarded, Anthony will act in a project manager role and key point of contact for agencies across Scopes 1-3.

Alina Bonto, Project Manager

Alina Bonto supports project delivery for a portfolio of energy efficiency and distributed energy resources projects for the SoCalREN Public Agency Programs. Alina also provides program expertise and project management support on SoCalREN's NMEC Metered Savings Program. She has over 3 years of experience in environmental consulting. Prior to TEC, Alina worked at VCA Green as an Assistant Project Manager, where she managed and tracked sustainable building development projects. Alina holds a Bachelor of Arts in Environmental Science and a minor in Business Administration from Whittier College.

If awarded, Alina will act in a project manager role and key point of contact for agencies across Scopes 1-3.

Elsie Varela, Project Manager

Elsie Varela supports energy efficiency project delivery for public agencies, including the City of Barstow and the Inland Empire Utilities Agency, through the SoCalREN Public Agency Programs. Elsie has expertise in utility energy analysis and public sector EE project financial analysis. She is passionate about environmental engineering, has four years of experience in learning and knowledge management, and is bilingual in English and Spanish. Before TEC, Elsie obtained a Bachelors of Science in Environmental Engineering from UC San Diego.

If awarded, Elsie will act in a project manager role and key point of contact for agencies across Scopes 1-3.

Amy Whitehouse, Project Manager

Amy Whitehouse supports engagement, education, and outreach activities for TEC and its programs. Through SoCalREN Public Agency Programs, Amy manages relationships with regional partners and leads enrollment of new agencies. In addition, Amy develops and coordinates outreach, education and capacity building for public agencies. Amy is a co-chair for the Environmental Education Working Group in San Diego, which connects STEM professionals and resources to the larger San Diego community. Amy has a B.A. in

Environmental Studies with concentration in writing and a B.A. in Sociology from Gettysburg.

If awarded, Amy will support agency enrollment, outreach, and stakeholder coordination activities for Scopes 1-3.

Mallory Schaefer, Senior Project Coordinator

Mallory Schaefer supports engagement and enrollment goals, assists with educational events, and supports LGP projects. She previously served two AmeriCorps VISTA terms in Flagstaff, Arizona, where she supported a variety of initiatives, including acquiring funding and developing curriculum for a Makerspace in an off-grid rural school. She also worked five summers at a Girl Scout camp in Prescott, Arizona, starting as an Art Instructor and Unit Counselor and moving to Assistant Camp Director. Mallory holds a Bachelor of Science in Environmental and Sustainability Studies from Northern Arizona University.

If awarded, Mallory will support the successful implementation of engagement and outreach activities related to Scopes 1-3.

Rachel Morales, Senior Project Coordinator

Rachel Morales supports project delivery for public agency energy efficiency and distributed energy resources projects through the SoCalREN Public Agency Programs. Rachel also supports customized facility energy benchmarking services leveraging the ESPM platform. Prior to TEC, Rachel worked at environmental nonprofit organizations, where she facilitated community outreach events, supported partnership developments, and assisted with educational events. She holds a Bachelor of Science in Environmental Science with a concentration on Earth Science from the University of California, San Diego. Rachel is locally based in the Inland Empire region.

If awarded, Rachel will support project managers deliver EE projects through Scopes 1-3.

Amanda Hassan, Senior Project Coordinator

Amanda Hassan supports project delivery for public agency energy efficiency and distributed energy resources projects through the SoCalREN Public Agency Programs. She provides meeting support, maintains project records, develops comparative energy audits and project proposals, and maintains Energy Star Portfolio Manager accounts for benchmarking deliverables. She holds a Bachelor's degree in Political Science from UC Santa Barbara. Amanda is locally based in the Inland Empire region.

If awarded, Amanda will support project managers deliver EE projects through Scopes 1-3.

Jasmine Pineda, Project Coordinator

Jasmine Pineda supports project delivery for public agency energy efficiency and distributed energy resources projects through the SoCalREN Public Agency Programs. She holds a Masters of Science in Environmental Science and Policy from Johns Hopkins University and a Bachelor of Science in Sustainability Studies from UC Riverside. Jasmine is locally based in the Inland Empire region.

If awarded, Jasmine will support project managers deliver EE projects through Scopes 1-3.

AESC (Scopes 1 and 2)

Mayda Bandy, Senior Manager

Mayda has been supporting SoCalREN for more than two years and is an expert in TEC and SoCalREN processes. Prior to AESC, she worked at San Diego Gas & Electric as an EE program manager, and the San Diego Water District. Her experience positions her for success as the program manager representing AESC on this effort for scopes 1 and 2.

Fernando Miramontes III, Senior Engineer

At AESC since 2014, Fernando performs energy audits for a large variety of governments facilities. He currently supports AESC's wastewater program, RAPIDS, in which he identifies and analyzes potential EE measures and develops energy action plans. His experience includes pumps, motors, wastewater process and lighting systems and crosses the commercial, industrial, and residential markets. Fernando regularly submits incentive applications on behalf of customers for the utility EE programs. This experience affords Fernando the expertise to provide comprehensive support for I-REN local governments for scopes 1 and 2.

Derick Baroi, Senior Engineer

With 20 years of experience, the last four at AESC, Derick supports energy facility auditing at various local government facilities and works on AESC's RAPIDS program. He performs engineering data analysis and calculations to support wastewater and other government agencies. His expertise with this sector makes him an ideal candidate to support I-REN for scopes 1 and 2.

Nicholas Bonse, Engineer

Nick has been providing energy audits to local governments for the last six years. For the last four years his work with municipal facilities has focused on energy resiliency, combining EE with solar and batteries, enabling publicly-owned buildings to temporarily island from the grid during outages.

Anthony Fierro, Energy Analyst

Since 2020, Anthony has been supporting AESC with on-site inspections and technical assessments. He has reviewed projects ranging from commercial EE measures to residential solar and storage implementations. Prior to AESC, Anthony served as a technical reviewer for Southern California Edison's Customized Incentive Program, reviewing HVAC, lighting, controls, and pumping projects and performed ASHRAE Level 1 audits.

Keith Valenzuela, Engineer Section Lead

Keith has been working on facility auditing and utility application support and reviews over the last 15 years at AESC. As one of AESC's NMEC experts, Keith has reviewed numerous IPMVP Option C, and more recently NMEC, projects, and has provided M&V guidance on many projects. Keith also supports PG&E's Market Access Program with project application reviews and NMEC savings claims.

TRC (Scopes 1 and 2)

John Rossi, PE, BEAP, Oversight

John Rossi, PE, BEAP, has 11 years of experience supporting public agencies and commercial and industrial customers in modeling and sizing energy systems, including renewable energy and storage equipment. He has managed projects for the City of Santa Ana, the City of Los Angeles, and SCE's Local Government Energy Leader Partnership Program. He works directly with more than 25 local government agencies to identify, develop, and assist in implementing EE and DER projects.

Mr. Rossi is a professional engineer and has a B.S., Mechanical Engineering, California Polytechnic State University, and is a member of the American Society of Mechanical Engineers.

If awarded, John will support oversight of TRC's work responsibilities for scopes 1 and 2.

Lake Casco, PE, Program Manager

Lake Casco, PE, has diverse experience in the field of advanced energy. He is skilled in developing deemed measures, reviewing energy code, calculating energy savings, and estimating project costs. He also performs whole building energy audits, where he calculates savings, evaluates financial metrics, and drafts reports. Mr. Casco has developed Excel, Visual Basic, SharePoint, and GIS web application based tools for energy-related purposes for public agency and utility customers. He has also led the development of site and portfolio-wide ZNE and decarbonization audits and roadmaps.

If awarded, Lake will provide program management of TRC's work responsibilities for scopes 1 and 2.

Stephen Brett Reno, PE, Program Manager

Stephen Brett Reno, PE, is a project engineer with six years of experience developing energy saving and energy generating construction measures. He is the technical lead for SoCalREN projects across eight cities. He completes energy audits, identifies and calculates EE and DER measures, and guides measures through technical reviews. He views projects including lighting, HVAC, building automation, solar photovoltaic systems, battery energy storage systems, and electric vehicle charging.

If awarded, Stephen will provide program management of TRC's work responsibilities for scopes 1 and 2.

Arun Sanjeevi, PE, BEMP, LEED O+M, Project Engineer

Arun Sanjeevi is a Project Engineer in TRC's Advanced Energy group. Arun is responsible for ASHRAE Level II and III audits, identifying EE measures, performing energy savings calculations, and writing audit reports. Arun's expertise includes energy modeling, new building commissioning, and retro-commissioning (RCx).

If awarded, Arun will provide project engineering services for scopes 1 and 2.

Randy VanSise, CEM, CDSM, CWEP, EIT, Project Engineer

Randy VanSise has experience developing EE projects for commercial and industrial customers in the United States and Canada. Randy's expertise includes field investigation, building modeling, data collection, savings analysis, and incentives applications.

If awarded, Randy will provide project engineering services for scopes 1 and 2.

Annie Hur, Project Engineer

Annie Hur has experience in energy engineering, helping clients achieve their goals of operating their buildings more energy efficiently. Her experience includes conducting site audits, performing data analysis, calculating energy savings, modeling buildings, ESA CAM bid reviews, SCE workpapers, and writing technical reports. She has been involved with Proposition 39, on-bill financing, and 0% CEC Loan projects as well. Annie's background includes support from service to public clients, including school districts and municipalities, primarily located in California.

If awarded, Annie will provide project engineering services for scopes 1 and 2.

Sophiya Jeffery, Project Engineer

Sophiya Jeffery is a graduate from Pennsylvania State University earning a bachelor's degree in Energy Engineering. She has been exposed to renewable sources of energy through her courses in Penn State. She is now undergoing training and acquiring on-the-job experience in the field of EE consulting and engineering for commercial and industrial buildings.

If awarded, Sophiya will provide project engineering services for scopes 1 and 2.

Debrudra Mitra, Project Engineer

Debrudra Mitra completed his Bachelors degree in Mechanical Engineering and Masters degree in Energy Science and Technology from Jadavpur University, India in 2014 and 2016 respectively. His master thesis focused on studying sustainable building envelopes. He also completed Master of Engineering in Mechanical Engineering from Iowa State University in 2019. His research area of interest is on sustainable building energy systems. He mainly focused on developing developing control strategies and evaluate their impact on energy performance in building system. He has the experience in real life residential and commercial building energy modeling. In addition, he also works on data-driven modeling of building system and soil characteristics predictions.

If awarded, Debrudra will provide project engineering services for scopes 1 and 2.

Ryan Sparks, Project Engineer

Ryan Sparks recently graduated from California Polytechnic State University, San Luis Obispo with both bachelors and masters degrees in mechanical engineering. His degrees concentrated in HVAC and thermofluidics, respectively. From this education and his various internships, Ryan has experience with energy audits, energy modeling, and HVAC design.

If awarded, Ryan will provide project engineering services for scopes 1 and 2.

Divya Neelganti, Project Engineer

Divya Neelganti is a graduate from Northeastern University holding a Master's in Energy Systems with a background in electrical engineering. She has experience in energy and solar

engineering through her course work, as well as projects and internship during her masters. She supports building EE engineering and DER consulting.

If awarded, Divya will provide project engineering services for scopes 1 and 2.

PFMFA (Scope 3)

Michael Berwanger, Managing Director

Mike Berwanger is the Head of PFMFA's Western Region and Western Utility and CCA group. Mike works with utility clients throughout the western region and leads PFMFA's advisory relationships with a majority of utilities in California. Mike has expertise in the most complex forms of utility financings including prepayment, tax-equity, and tax-credit financing structures used for the acquisition of gas and renewable energy. Mike has assisted utility clients in obtaining over \$50 billion in financing as a financial advisor and previously as a banker. Prior to joining PFMFA in 2008, Mike served as a Director with a major investment bank, working extensively with utility and CCA customers. He is a registered Municipal Advisor Representative (Series 50) and registered Municipal Supervisor (Series 54).

If awarded, Michael will provide oversight to PFM scope lead for scope 3.

Woodson Powell, Senior Managing Consultant

Woodson joined PFMFA in 2016 and works as a member of the Environmental Financing Group providing quantitative and analytical support for various clients. His present duties include structuring, sizing, and pricing new money and refunding municipal bond issues, assessing municipal issuers' outstanding debt, and performing analysis of refunding opportunities. His recent client experience includes: WRCOG, SANBAG, EBCE, SVCE, Pioneer, CCCE, Grant PUD, LADWP, Met Water, and Alameda County Water District. Woodson has assisted clients in obtaining \$8 billion in financing for green energy and general infrastructure projects. Woodson graduated from Pomona College with a B.A. in Economics. He is a Registered Municipal Advisor Representative (Series 50).

If awarded, Woodson will be the PFM lead for scope 3.

Faisal Alif, Analyst

Faisal joined PFMFA in July 2021 and has served several California clients including the City of Anaheim, Anaheim Public Utilities and West Basin Municipal Water District. Faisal's experience includes the structuring of lease revenue bonds, certificates of participation, general obligation bonds, revenue bonds, variable rate demand bonds, and a variety of derivative products including fixed payer swaps, basis swaps, and indexed floater cost of fund swaps. Faisal received a B.A. in Economics from the University of California, Los Angeles. He is a Registered Municipal Advisor Representative (Series 50).

If awarded, Faisal will provide financial support services for scope 3.

Appendix C: Company Overview and Work Samples

Company Overview

	Prime	Subcontractor	Subcontractor	Subcontractor
Official registered name	The Energy Coalition, a non-profit corporation	Alternative Energy Systems Consulting, Inc.	TRC Engineers, Inc.	PFM Financial Advisors, LLC
D&B #	040274244	84-870-3955	05-418-3884	08-054-4391
SEC File #	N/A	N/A	N/A	867-02030
Primary/secondary SIC; NAICS codes	SIC: 8748; NAICS: 541690	SIC: 8711, 7371 NAICS: 541330, 541690, 541350, 926110	SIC: 8711; NAICS: 541330/541620	SIC: 6282001 NAICS: 523930/541611
Address	525 Technology Drive, Suite 350, Irvine, CA 92618	2445 Impala Dr, Carlsbad, CA 92010	21 Griffin Road North, Windsor, CT 06095	555 West 5th St, Suite 3500, Los Angeles, CA 90013
Phone	(949) 701-4646	(760) 931-2641	(503) 975-7925	(213) 489-407
Fax	(949) 701-4644	N/A	N/A	(213) 489-4085
Primary key contact	Laurel Rothschild, Vice President of Energy Programs, 525 Technology Drive Ste 350, Irvine CA 92618, phone: (949) 732-1071, fax: (949) 701-4644	Antonio Corradini, President & Principal Engineer, (858) 344-4293, fax: None	Paul M David, Vice President, 255 California Street, Suite 400, San Francisco, CA, 94111, cell number (503) 975-7925, FAX number: N/A	Woodson Powell, Senior Managing Consultant 555 West 5th St, Suite 3500, Los Angeles, CA 90013 Phone: (213) 415-1633 Fax: N/A

Person authorized	Craig Perkins, President and Executive Director	Antonio Corradini, President & Principal Engineer	Paul M David, Vice President	Mike Berwanger, Managing Director

Work Samples

Relevant work samples related to the various scopes are briefly described below and included in the subsequent pages.

Scope 1: Appendices/Work Sample Summary

1. **Project Case Study:** highlights a school district case study example
2. **Project Impact Report:** highlights the lifecycle energy savings, cost savings, and greenhouse gas reduction benefits of the energy efficiency project, helping celebrate success and local energy leadership
3. **Comparative Energy Analysis:** deliverable that analyzes and presents utility data across the Agency's portfolio to identify project opportunities and integrates information from an Agency's Climate Action Plan alongside data from ESPM
4. **Project Summary:** deliverable that helps agencies make informed decisions about implementing EE by outlining identified measures, estimated energy and bill savings, financial metrics, and detailed cost breakdowns
5. **Financing Calculator Snapshot:** internal tool that calculates the financial metrics and EE program pathways of a potential project
6. **Energy Resilience Opportunity Report Example:** sample deliverable that provides preliminary high level review of DER and sustainability strategies

Scope 2: Appendices/Work Sample Summary

1. **Social Media Posts:** TEC routinely spotlights client achievements through various social media platforms, including LinkedIn, Twitter, and Instagram
2. **NMEC Quarterly Savings Report:** example of NMEC quarterly savings report shared with agencies to monitor their energy consumption
3. **NMEC Final Savings Report:** final M&V report to quantify verified metered savings after the post-installation reporting period and to determine the final persistence incentive
4. **Project Impact Report:** highlights the lifecycle energy savings, cost savings, and GHG reduction benefits of the EE project

Scope 3: Appendices/Work Sample Summary

1. **SoCalREN Financing Services Flyer:** collateral describing various financing services available at no-cost to participating public agencies
2. **Financing Calculator Snapshot:** tool that calculates the financial metrics and pathways of a potential project
3. **Project Summary:** deliverable that helps agencies make informed decisions about implementing EE by outlining identified measures, estimated energy and bill savings, financial metrics, and detailed cost breakdowns



Photo: ATLAS Elementary School

About the Project

In March of 2020, Ventura Unified School District (VUSD) completed an interior lighting upgrade project at 14 of their elementary and middle schools.

VUSD secured funding through Proposition 39 and wanted to ensure their funds were used as effectively as possible. The District utilized SoCalREN's expertise to provide financial analysis, navigate utility energy efficiency programs, and ensure the project met all Proposition 39 requirements.

To take advantage of the maximum amount of incentives, VUSD participated in SCE's Public Sector Performance-Based Retrofit Program, which measures energy savings based on actual metered energy consumption.

Project Delivery Program Services



Project
Management



Technical
Review



Financial
Analysis



Energy
Analysis



Audit/
Calculations



Design/
Scope of Work

**Equivalent to emissions reduced from annual energy savings*

Project Outcomes



\$3.2M

Lifetime cost savings



\$114,180

Incentives secured



146

Cars taken off
the road*



950,000+ kWh

Anticipated annual
energy savings

Project Summary

- **Energy efficiency measures:**
Interior LED lights and controls upgrade
- **Average % energy reduction across sites*:** 30%
- **Lifetime cost savings:** \$3.2M
- **Simple payback period:** 6.9 years
- **Gross project cost:** \$1.3M
- **Total Prop 39 grant secured:** \$2.2M
- **Measures estimated useful life:** 12 years
- **Impact:** 675 metric tons of GHG reduced
- **Project timeline:** Audit conducted August 2017; Construction completed July 2020

Benefits

VUSD is benefiting from the improved lighting quality and reduced maintenance costs this energy efficiency project has brought to their 14 facilities. In addition to creating better visibility in the classrooms and schools, the energy cost savings realized from this project can be allocated to other education priorities. By implementing energy efficiency upgrades, VUSD models leadership in energy action and sustainability while creating a learning environment where students and teachers can thrive.



Above: Lincoln Elementary School

Below: E.P. Foster Elementary School



Above: Sheridan Way Elementary School

About Ventura Unified School District

VUSD serves the County of Ventura community, spanning 18 elementary schools, 6 middle schools, and 5 high schools. They offer rich and varied academic programming, are committed to the arts across the District, and ensure their schools are healthy, green, and connected to the coast and community. All of their initiatives are pointed toward a common goal: maintaining excellent schools and learning environments where all children can explore, grow, and thrive as students in a modern world and be well prepared for the future ahead of them.

**Facilities included elementary schools (ATLAS-Saticoy, Blanche Reynolds, Citrus Glen, Elmhurst, E.P. Foster, Juanamaria, Junipero Serra, Lincoln, Montalvo, Poinsettia, Portola, Sheridan Way) and middle schools (Anacapa, Cabrillo)*

Project Summary

The County of [REDACTED] has been engaged with SoCalREN to assist with the County's forward-looking vision to increase energy efficiency while reducing ongoing costs. This project addressed older space-heating boilers operating at the Registrar-Recorder headquarters. These boilers were costing the County staff time and resources to maintain equipment that was operating well below nameplate efficiency. SoCalREN provided the County with turnkey services including, but not limited to, an energy efficiency audit, technical specifications, and scope of work support which resulted in developing a project which will save energy and County funds while reducing the County's Greenhouse Gas (GHG) and carbon footprint. The newly identified boilers have an efficiency of over 95%, saving over 15,000 therms and thousands of dollars annually while providing a more reliable space heating system, serving the needs of the headquarters. SoCalREN then coordinated with SoCal Gas to develop and submit an incentive application that included additional partnership incentives to reduce the cost of this project resulting in a shorter simple payback period.



Project Benefits

Improved reliability, increased occupant comfort, reduced maintenance costs, reduced utility costs, and reduced greenhouse gas emissions by 80.3 metric tons annually.

Project Impacts					
Measure Name	Energy Savings (kWh/therms)	Incentive (\$) if applicable	Utility Cost Savings (\$/yr) ¹	GHG Emissions Reduction (metric tons CO ₂) ²	Energy Savings Over Existing (%)
Space-Heating Boiler	15,152 Therms	\$17,991	\$17,012.14	80.3	23%

County Climate Action Plan Progress

GHG Emissions Reduction CAP Target	CAP Energy Efficiency Programs Target	Project contribution to Energy Efficiency CAP Target
1,950,849 ³ MT CO ₂ e	46,298 ⁴ MT CO ₂ e	0.2%

¹Based on site average utility rate of \$0.6654/therm

²Based on the [EPA emissions rate](#) of 0.0053 metric tons CO₂/therm

³ This number is not the project GHG reductions, it is the [County's Climate Action Plan](#) (Table 3-3) goal, the table shows that the boiler will contribute to this target.

⁴ This number is not a project metric, it is the County's Climate Action Plan (Table 4-1) goal, the table shows that the boiler will contribute to this target.

Project Impact



17 cars off the road equivalent⁵



\$340,240 cost savings over project lifetime



303,040 Therms savings over project lifetime

About ██████████ County

██████████ is the 14th most populous city in ██████████ County, and is in the top 86 Percentile of communities burdened by pollution in California per CalEnviroScreen 4.0



94 Percentile Solid Waste



96 Percentile Pollution Burden



90 Percentile Toxic Release

** all metrics in relation to other agency census tracts*

SoCalREN's No-Cost Services Leveraged

- ✓ Project Management
- ✓ Technical Review
- ✓ Savings Calculations

- ✓ Financial Analysis
- ✓ Design & Scope of Work
- ✓ M&V Plan



Total Estimated Value of SoCalREN's Services: **\$22,000**

Energy Champion Spotlight



██████████

In July 2021, this project was originally anticipated to be installed in February or March of 2022, which would have been after the downstream deemed program rebate application end of year (2021) deadline. ██████████ worked diligently to fast-track the project in order to meet this deadline. By October of 2021, ██████████ had provided specification documents, begun the permitting process, and put the project on track to be installed prior to the end of the year. Both boilers were installed before the winter holidays, months ahead of the original timeline, allowing ██████████ County to take advantage of the SoCalGas deemed program incentives and receive an additional 50% kicker (\$5,997).

⁵ Based on the EPA emissions rate of 4.63 metric tons CO₂e/vehicle/year

Prepared for
City of Sunnydale

Prepared by
The Southern California Regional Energy Network (SoCalREN) Public Agency Programs

Date
August 2021

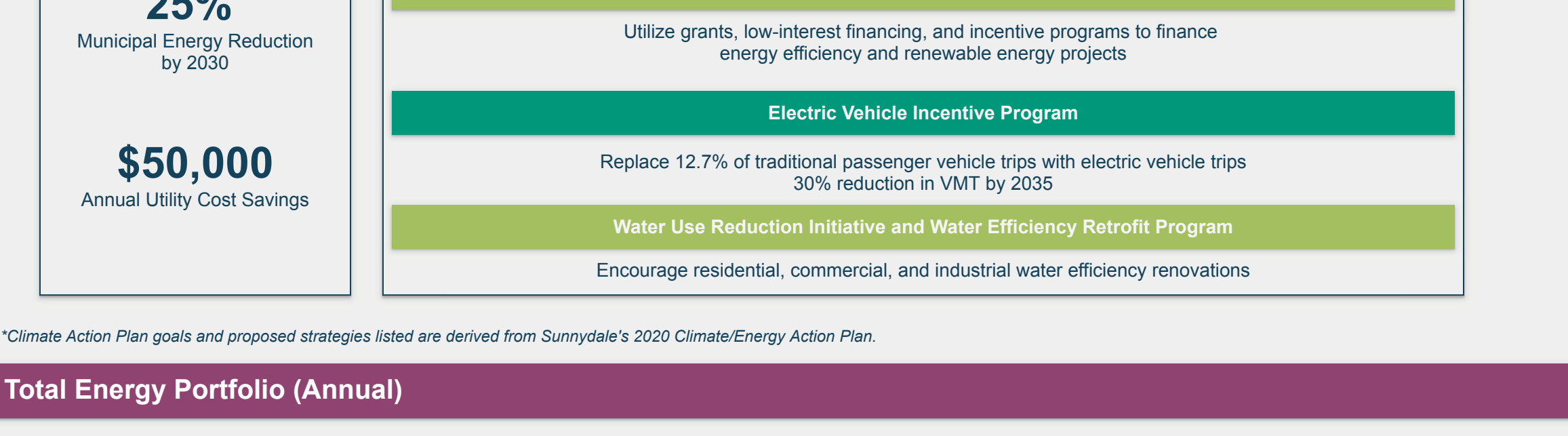
Table of Contents

1. Overview
2. Total Energy Portfolio
3. Water Pumping
4. Street & Traffic Lights
5. Outdoor & Park Lights
6. Agency Buildings
7. Non-Routine Event Impacts
9. Energy Star Portfolio Manager® - Energy Use Intensity
10. Pathway to Zero Map
11. Methodology

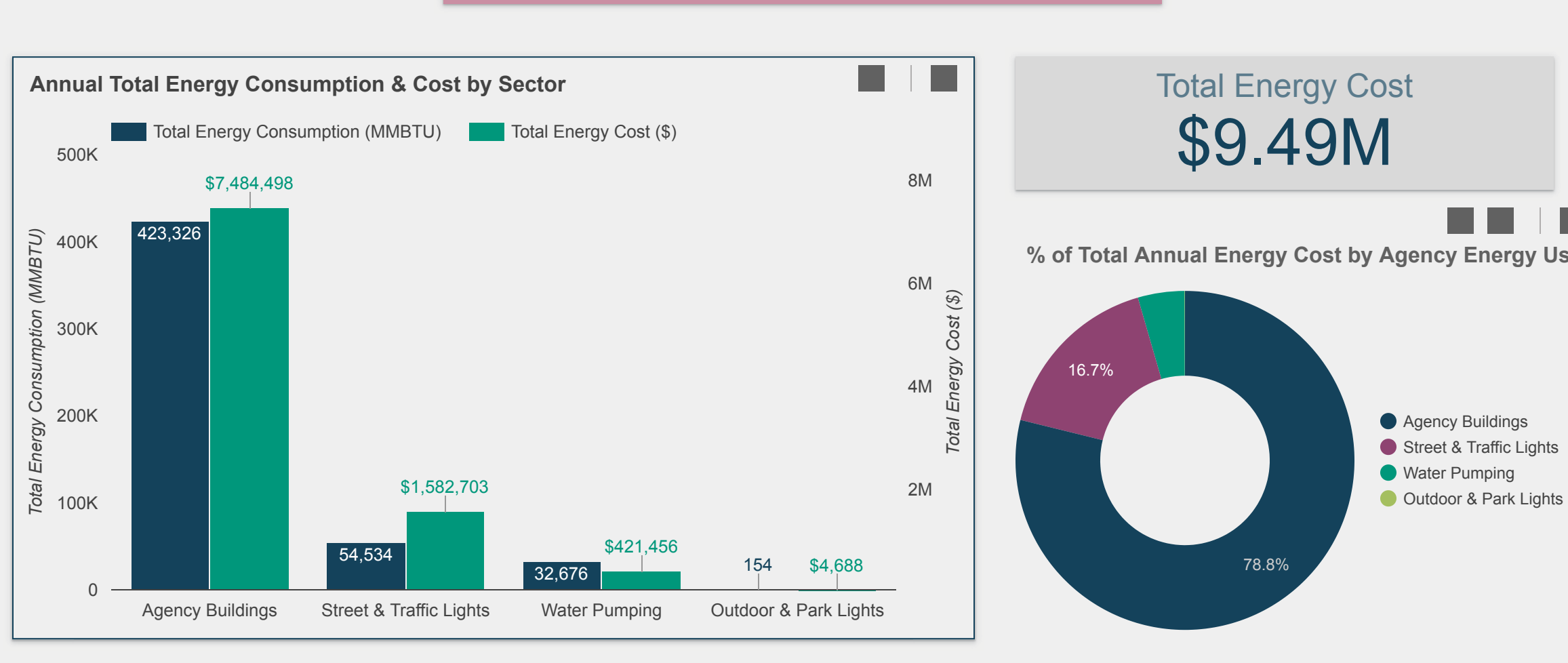
Overview

This report summarizes energy consumption and energy cost by sector (Street & Traffic Lights, Agency Buildings, Water Pumping, and Outdoor & Park Lights) for the City of Sunnydale, referred to as "Agency" herein. This analysis uses energy billing data and building characteristic data provided by the Utility and Agency to help identify opportunities for energy efficiency improvements across sectors. Once opportunities are identified, a more detailed screening of those facilities can be performed to further vet potential energy and cost-saving projects.

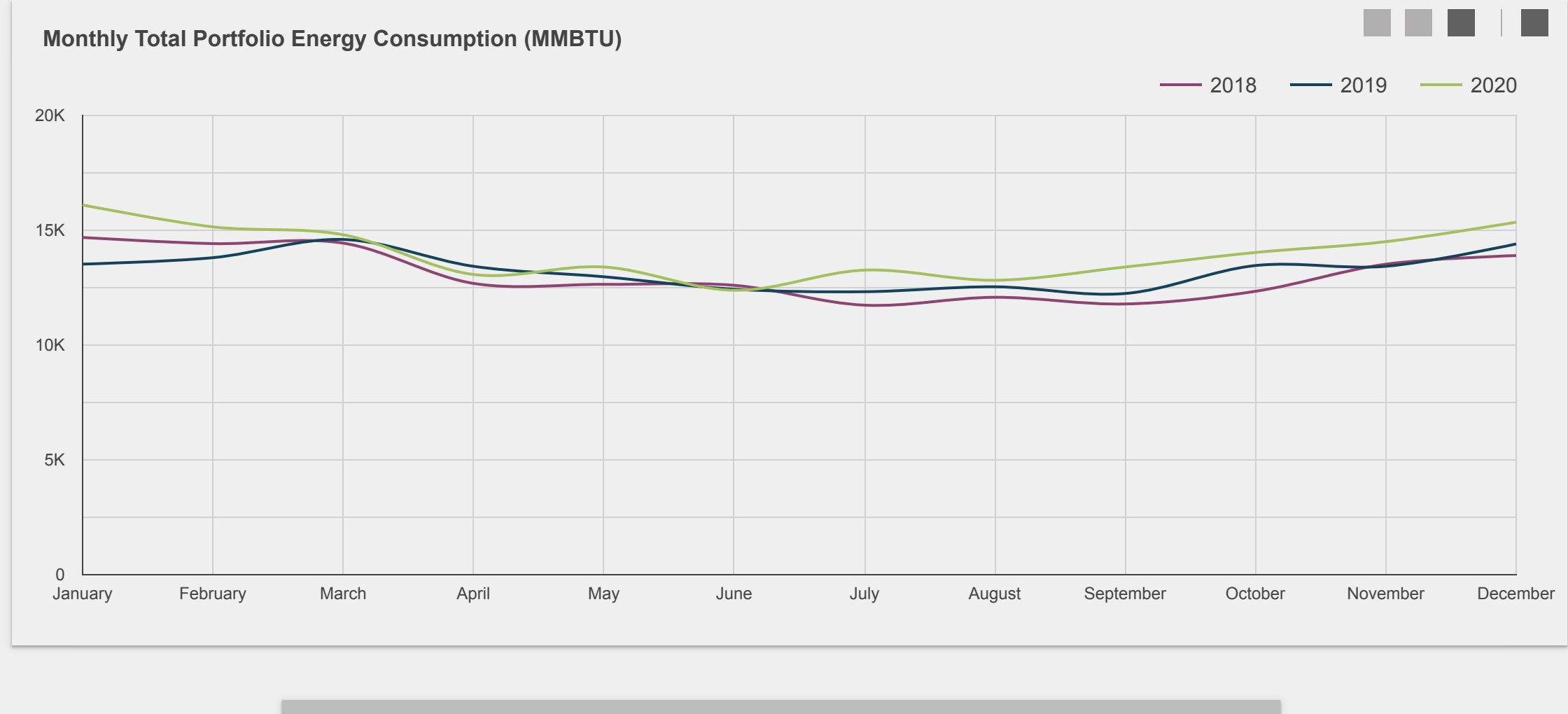
This report was created by the Southern California Regional Energy Network (www.socalren.org). Any questions about this report can be directed to your assigned Project Manager, [PM Name] at [PM]@energycalition.org.



Total Energy Portfolio (Annual)



Non-Routine Event (COVID) Impacts



Average Monthly Consumption by Sector (MMBTU)				
Sector	2018	2019	2020	Cumulative Average
Agency Buildings	10,686	11,015	11,768	11,156
Street & Traffic Lights	1,484	1,421	1,399	1,435
Water Pumping	898	826	854	860
Outdoor & Park Lights	4	4	4	4

Analysis Period Consumption

Total Consumption (MMBTUs)
159.2K
± 1%

Buildings 132.2K ± 3%	Street & Traffic Lights 17.0K ± -4%	Water Pumping 9.9K ± -8%	Outdoor & Park Lights 48.5 0%

Baseline Period

Jan 1, 2018 - Dec 31, 2018

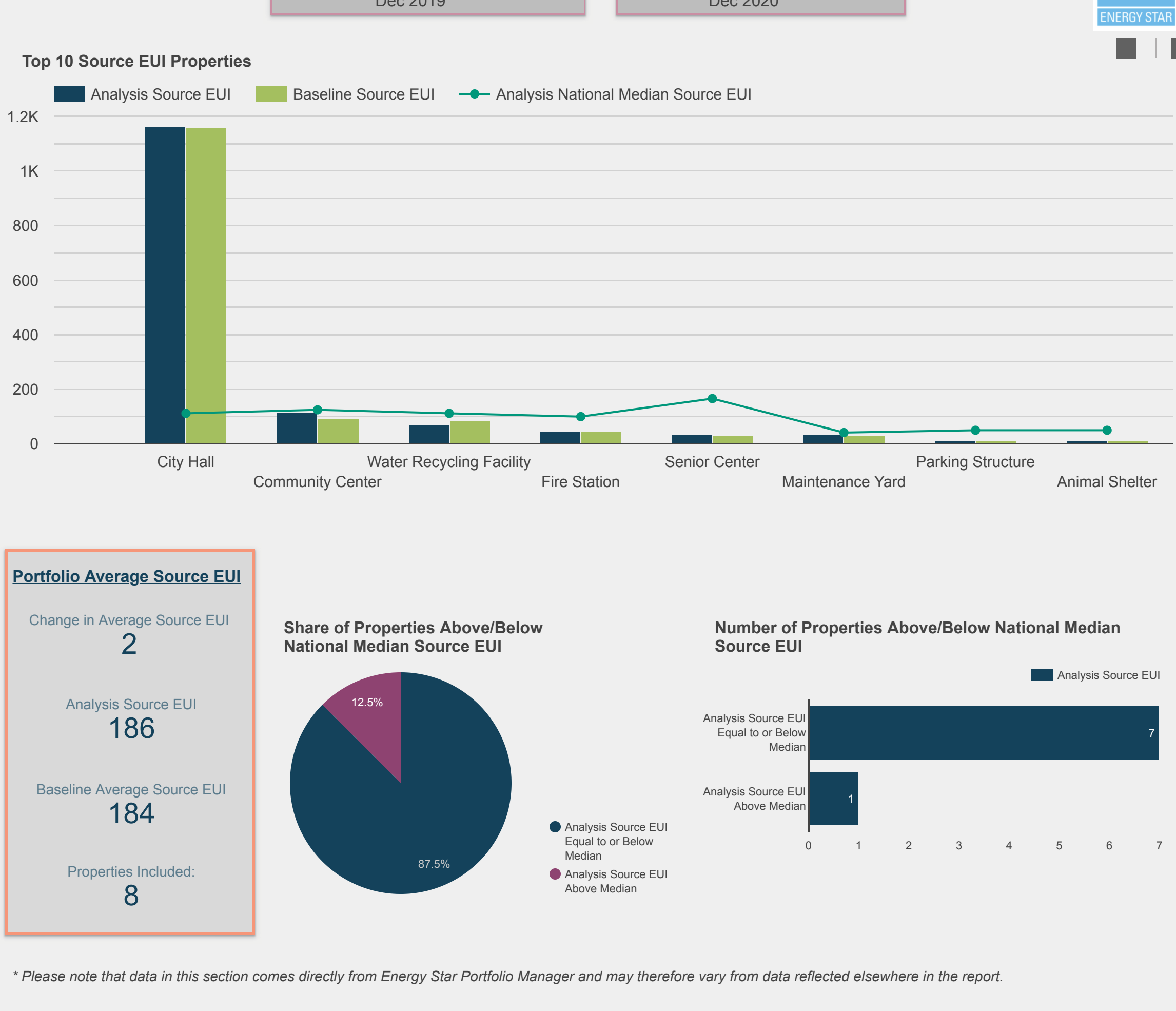
	Site Name	MMBTUs	Electricity Consumption (kWh)	Gas Consumption (therms)
1.	City Hall	38,744	987,829	353,738
2.	Community Center	17,203	4,256,879	26,790
3.	Water Recycling Facility	12,546	0	125,464
4.	Fire Station	8,490	1,958,445	18,076
5.	Performing Arts Center	6,950	1,275,255	25,985
6.	City Museum	4,585	1,343,748	0
7.	Pump Station 1	3,622	1,061,433	0
8.	Pump Station 2	2,823	827,316	0
9.	Parking Structure	2,342	686,362	0
10.	Senior Center	1,999	585,963	0
	Grand total	156,867	28,288,280	603,472

Analysis Period

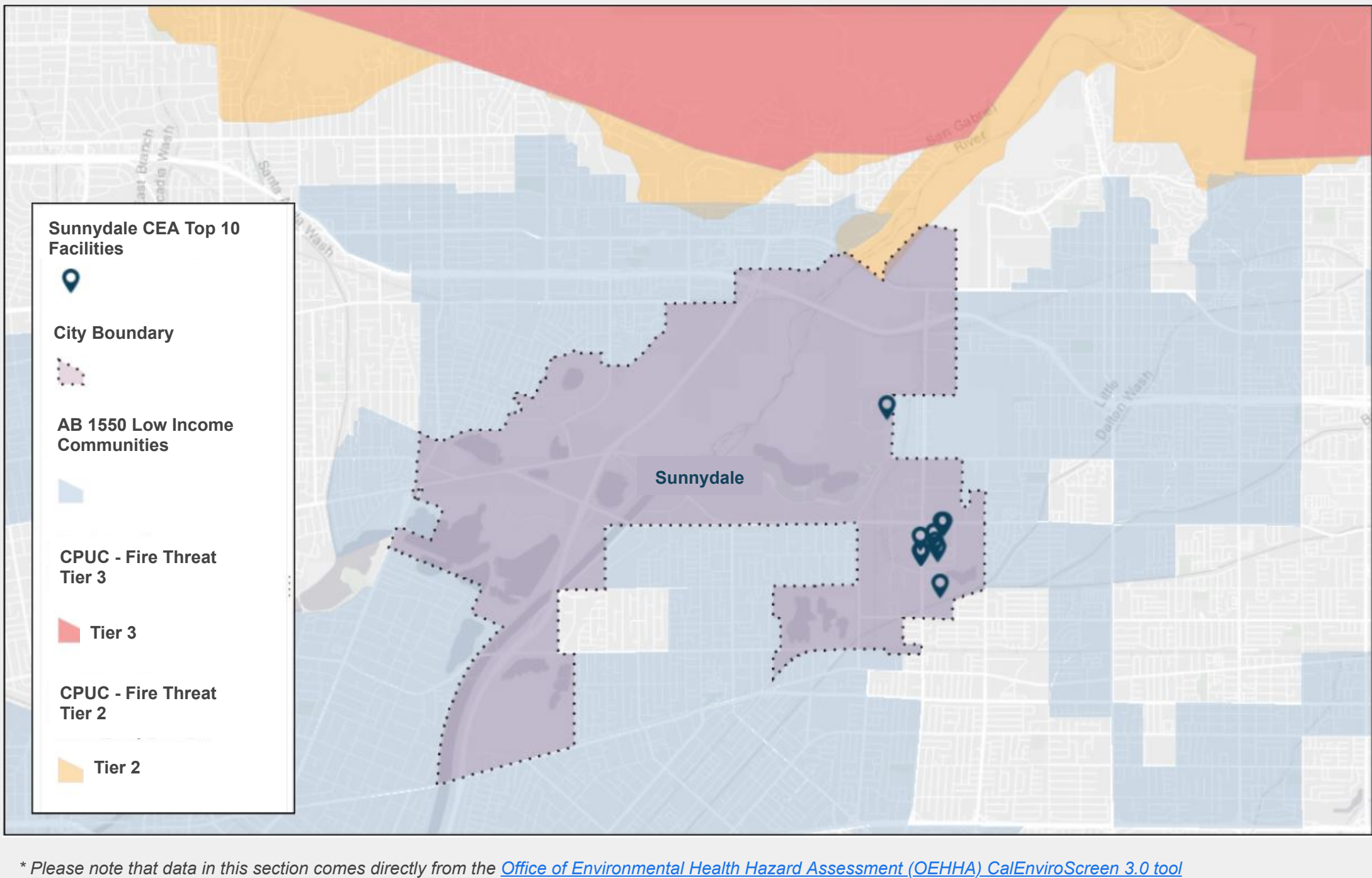
Jan 1, 2019 - Dec 31, 2019

	Site Name	MMBTUs	Electricity Consumption (kWh)	Gas Consumption (therms)
1.	City Hall	39,998	941,162	367,866
2.	Community Center	16,297	4,145,113	21,539
3.	Water Recycling Facility	11,792	0	117,919
4.	Fire Station	9,132	2,029,005	22,086
5.	Performing Arts Center	6,311	1,247,524	20,540
6.	Maintenance Yard	4,751	1,392,350	0
7.	City Museum	4,585	1,343,748	0
8.	Pump Station 1	3,266	957,075	0
9.	Pump Station 2	2,833	830,412	0
10.	Parking Structure	2,495	731,115	0
	Grand total	159,193	28,742,298	611,241

Energy Star Portfolio Manager® - Energy Use Intensity



Portfolio Pathway to Zero Map



* Please note that data in this section comes directly from the [Office of Environmental Health Hazard Assessment \(OEHHA\) CalEnviroScreen 3.0 tool](#)

Methodology

Data Sources

- Building information, energy usage and cost data used in this analysis were derived from: ENERGY STAR Portfolio Manager®, Green Button Connect, and utility consumption billing data provided by agency staff.
- Utility consumption billing data used in this analysis were derived from SCE electric tariffs and SCG gas tariffs.
- For more information about the utility tariffs included in this analysis refer to:
[SCG Gas Tariffs](#)
[SCE Electric Tariffs](#)
- Analysis period for electricity and gas results were based on usage during period January 1, 2020 - December 31, 2020.
- In some cases, multiple meters were associated with a single facility or asset type. For such facilities, to generate estimates of facility-wide energy use, energy usage and cost values were aggregated by summing energy usage and cost values for each day in the analysis period.
- GHG emissions metrics are calculated using the conversion 517 lb CO2/MWh + 11.91 lbs CO2/therm, based on energy mix data reported by Southern California Edison and the Southern California Gas Company [1,2].
- Any surcharges on your utility billing are excluded from this report
- Climate/Energy Action Plan goals and proposed strategies listed are derived from the city of Sunnydale's 2020 Climate/Energy Action Plan.

Total Energy Portfolio

- Total Energy Portfolio data represents an analysis of each agency facility type annual energy costs, annual energy consumption (kWh), GHG emissions and total annual energy costs for agency facility types based on MMBTUs.
- The following agency assets are included in the Total Energy Portfolio:
Water Pumping
Street & Traffic Lights
Buildings
Outdoor & Parks Lights

Street & Traffic Lights

- Street & traffic light data represents an analysis of annual energy costs, annual energy consumption (kWh), GHG emissions per SCE street & traffic light tariff type.
- Annual cost savings reflects only agency owned street lights in the analysis; assumed cost savings conversion is based on converting HPS to LED agency owned traffic and street lights [3].
- On average, agencies can save 50% on annual kWh consumption by converting HPS to LED, which also results in cost savings [3].

Energy Star Portfolio Manager® - Energy Use Intensity

- Data is derived from Energy Star Portfolio Manager®
- Data includes kBtu/ft2 for the top 10 highest source Energy Use Intensity (EUI) facilities for the analysis year
- Baseline period for source EUI results were based on usage from January 1, 2019 – December 31, 2019.
- Analysis period for source EUI results were based on usage from January 1, 2020 – December 31, 2020.

Data Quality

Certain properties did not have energy usage data for the range of analysis and were excluded:
- [Gas/Electric] [Tariff] [SA Number] [SA Address]
- Energy Star Portfolio Manager® [Address]

Sites associated with multiple meters were aggregated for the purposes of analysis:

End Notes

- [1] [Southern California Edison Corporate Responsibility Report \(2015\)](#).
[2] [California Air Resources Board Climate Change Scoping Plan](#)
Adams, L.S., Nicols, M.D., Goldstene, J. N. (2008).

[3] Based on SoCalREN previous project estimates.

Water Pumping

- Water pumping data represents an analysis of the top five highest energy consuming water and wastewater pumping SCE service accounts annual energy costs, annual energy consumption (kWh), GHG emissions and total annual energy costs based on MMBTUs.
- Water pump conversion data used in this analysis is derived on the assumption that 65% of all existing pumps need to be upgraded. Of the 65% of pumps requiring upgrades, it is assumed that the pumps will save 7.5% of their annual kWh consumption [3].

Outdoor & Park Lights

- Outdoor & park lights data represents an analysis of annual energy costs, annual energy consumption (kWh), GHG emissions, and total annual energycosts based on MMBTUs per SCE outdoor and park lighting tariff type.
- On average, agencies can save 50% on annual kWh consumption by converting HPS to LED, which also results in cost savings [3].

Agency Buildings

- Building summary data includes the following metrics for the top ten highest energy-consuming agency buildings (total annual energy costs): annual energy costs and annual energy consumption (kWh and therms).
- Annual comparison data includes the following metrics for the agency buildings with the greatest change (absolute value) in annual energy consumption (MMBTU) from baseline period to analysis period: annual energy costs, annual energy consumption (kWh and therms).
- Baseline period for electricity and gas results were based on usage during January 1, 2019 – December 31, 2019.
- Analysis period for electricity and gas results were based on usage during January 1, 2020 – December 31, 2020.

Number of Meters per Site

Fuel Type / # of Meters			
Site Name	Service Street Address	Electricity	Natural Gas
City Hall	1 Main St	14	3
	1685 MAIN ST	-	1
	Total	14	4
Maintenance Yard	6 Main St	11	-
	Total	11	-
Senior Center	9 Main St	5	-
	Total	5	-
Civic Center	10 Main St	1	3
	Total	1	3

Monthly MMBTU Consumption by Service Address

Service Street Address	Jan 2020	Feb 2020	Mar 2020	Apr 2020	May 2020	Jun 2020	Jul 2020	Aug 2020	Sep 2020	Oct 2020	Nov 2020	Dec 2020
1 Main St	3,477	3,159	3,456	3,187	3,325	3,084	3,518	3,562	3,293	3,696	3,278	3,459
2 Main St	1,335	1,298	1,249	1,370	1,372	1,677	1,765	1,724	1,820	1,633	1,662	1,470
3 Main St	2,131	2,221	1,525	1,250	1,427	874	551	396	485	1,044	1,562	1,751
4 Main St	929	932	758	680	790	822	849	832	1,031	869	813	878
5 Main St	818	837	638	507	531	133	760	485	570	526	564	638
6 Main St	387	357	384	401	375	402	411	387	514	434	374	360
123 Waterworks Ave	270	316	360	370	285	302	315	271	275	300	291	255
9 Main St	224	259	239	220	213	196	190	197	222	214	269	265
234 Waterworks Ave	226	225	241	214	216	225	186	202	223	208	223	210

Annual Energy Consumption Comparison

	Service Street Address	Meter Number	Electricity Consumption (kWh)	% Δ	Gas Consumption (therms)	% Δ
1.	1 Main St	5028868	0	-	1.1M	-
2.	2 Main St	V349P-000147	13.1M	-	0	-
3.	3 Main St	12886266	0	-	435.2K	-
4.	4 Main St	259000-015053	6.5M	-	0	-
5.	5 Main St	V349N-013210	3.9M	-	0	-
6.	123 Waterworks Ave	V349P-006442	3.2M	-	0	-
7.	2 Main St	14996283	0	-	93.8K	-
8.	234 Waterworks Ave	259000-069167	2.5M	-	0	-
9.	5 Main St	15739774	0	-	82.9K	-
10.	7 Main St	V349N-018447	2.3M	-	0	-
	Grand total		77.1M		2M	-

Central Coast ✓ LEAP

Public Agency Project Proposal

The Agency enrolled in CC-LEAP in 2020 to take advantage of no-cost energy efficiency services to help move projects from conception to completion. CC-LEAP audited the Public Agency Community Center in June 2022. Based on data collected on-site and provided by agency staff, CC-LEAP identified three energy efficiency measures for analysis in this proposal.

Benefits of this project include improved safety and reliability, increasing occupant comfort, reducing maintenance costs, hedging against increasing utility costs, and reducing greenhouse gas emissions by 500 metric tons annually.

Insert Agency logo or seal. Right-click this image and choose "Change Picture," browse to image and click "Insert".

Estimated Savings
\$1,200 per month
\$14,400 per year

Estimated Net Savings (NPV)
\$32,000
over project lifetime

Simple Payback Period
6.7 Years

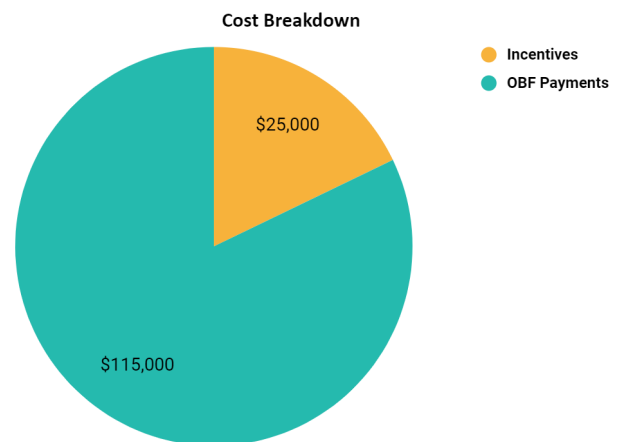
Monthly and annual savings include energy and maintenance cost savings.

Project Financials

Project Costs	
Gross Project Cost	\$140,000
Estimated Incentives	\$25,000
Net Project Cost	\$115,000
Estimated OBF	\$115,000
Remaining Project Cost	\$0

Additional costs, such as construction management or staff time, are not included in this table. Incentive and OBF reimbursements are not received until after the project has been completed and approved by PG&E.

Project Financial Metrics	
Net Present Value (NPV) - Cash Only	\$32,000
NPV with OBF & cash	\$55,000
Simple Payback Period (SPP)	6.7 years
Return on Investment (ROI)	1.5



Up-front capital requirements are often the greatest obstacle in pursuing energy efficiency retrofit projects. However, by utilizing the estimated \$25,000 in incentives and the estimated \$115,000 in OBF, Your Agency will be left with zero out-of-pocket cost.

	Pathway 1	Pathway 2	Pathway 3	Pathway 4	Pathway 5	Pathway 6	Pathway 7	Pathway 8
Gross Project Cost	\$800,000	\$800,000	\$800,000	\$800,000	\$800,000	\$800,000	\$800,000	\$800,000
Annual Energy Cost Savings	\$65,000	\$65,000	\$65,000	\$65,000	\$65,000	\$65,000	\$65,000	\$65,000
Annual Maintenance Cost Savings	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Incentives	\$20,000	\$20,000	\$0	\$0	\$0	\$20,000	\$0	\$0
OBF Loan	\$0	\$250,000	\$0	\$0	\$0	\$250,000	\$250,000	\$250,000
CEC Loan	\$0	\$0	\$0	\$800,000	\$800,000	\$0	\$550,000	\$550,000
RSF Loan	\$0	\$0	\$800,000	\$0	\$800,000	\$800,000	\$0	\$800,000
NPV	-\$31,496	-\$12,126	\$25,732	\$80,351	\$137,578	\$45,101	\$46,310	\$103,537
SPP	11.143	11.143	11.429	11.429	11.429	11.143	11.429	11.429
ROI	-0.04	-0.02	0.03	0.10	0.17	0.06	0.06	0.13



Pathway to Zero Report

City of Sunnydale - City Hall

Prepared by the SoCalREN Public Agency Programs

September 2021

Introduction to the Pathway to Zero Report

In addition to energy efficiency measures and with input from Sunnydale, SoCalREN has provided a preliminary high-level review for a number of distributed energy resources (DER) and sustainability topics, such as solar photovoltaics and battery storage, demand response, electric vehicle charging etc., and water meant to provide initial guidance for the City Hall. There is also information on rebates and incentives available. SoCalREN is not making recommendations on these strategies and the sections only contain high-level information.

Executive Summary

Pathway to Zero Strategy	Description	Next Steps
Demand Response (DR)	Includes DR measures and information on the Southern California Edison (SCE) DR Programs that this facility would be eligible for.	Coordinate with your SoCalREN Project Manager for potential additional support with this DER strategy. For more information please see the SCE Flyer , Open Automated Demand Response site and contact your SCE Account Representative.
Electric Vehicle Charging	Includes information on available incentives and estimated costs for installing charging stations.	Coordinate with your SoCalREN Project Manager for potential additional support with this DER strategy.
Solar Water Heating and SGIP Rebates from Southern California Gas	Includes information on available incentives for solar water heating systems.	Coordinate with your SoCalREN Project Manager for potential additional support with this DER strategy.
Photovoltaic and Battery Storage Systems	Includes high-level review of a PV and Battery Storage system and incentives available for battery storage. Also includes options to secure free detailed analyses of these systems.	Coordinate with your SoCalREN Project Manager for potential additional support with this DER strategy.
Green Rate Options	Includes options to reduce GHGs through a 50% and 100% renewable energy tariff available through SCE or a Community Choice Aggregation.	Contact your SCE Account Representatives to learn more and for next steps.
Permanent Load Shifting	Includes information on the facility peak demand and costs, how this option could help lower bills	Coordinate with your SoCalREN Project Manager for potential additional support



	and technologies that would enable the facility to do so.	with this DER strategy.
Water Efficiency	Includes a high-level screening to identify measures for water savings and information on rebates available for those measures.	Coordinate with your SoCalREN Project Manager for potential additional support with this DER strategy. Reach out to your water account representative and/or check www.socalwatersmart.com for additional water efficiency support resources and programs.

SCE Demand Response Programs

SCE offers technology incentives and Demand Response (DR) Programs to help agencies reduce power shortages in their community, relieve stress on the grid, and save money on their utility bills by reducing electricity demand during peak usage periods. SCE sends event notifications and communicates with the equipment at the customer site during a demand response event.

Automated Demand Response Technology Incentives or Auto-DR offers two incentive options:

Auto-DR Express	Incentive for systems that control standard technologies such as dimmable ballasts, temperature reset controls for HVAC and duty-cycling of HVAC compressors and fans that automatically reduce load during DR events. Earn up to \$300 per kW of pre-calculated DR load reduction.
Auto-DR Custom	Incentive for the purchase and installation of remotely activated equipment that facilitates sitewide automatic load reduction such as controls for lighting, motors, pumps, fans, air compressors, process equipment, HVAC load control devices, and more. Earn up to \$200 per kW of verified load reduction or 75% of actual eligible qualifying equipment and installation cost

Highlights

Features

Flexible incentives for the purchase and installation of technologies that reduce energy load

Benefits

- Receive discounted rates, incentives, or bill credits
- Personalized consultation to identify solutions that are ideal for your agency and to prevent curtailment of essential operations
- Advance notification of DR events to mitigate the impact on your operations
- Ability to enroll in more than one DR program at a time to earn incentives beyond those provided by a single program

To qualify for incentives, the agency must enroll and participate in at least one eligible DR program for a minimum of 36 consecutive months. Note that the agency can participate in more than one Program. The eligible DR Programs for City Hall are listed in the table below.

Program Name	Overview and Incentives to Participate	Requirements	Eligibility
Critical Peak Pricing (CPP)	Reducing energy usage for bill credits (reduced energy rates) from June through September.	12 month commitment	Open to non residential Bundled Service SCE customers
Real-Time Pricing (RTP)	Lower costs when reducing energy usage during high temperature high demand hours	12 month commitment	Open to non residential Bundled Service SCE customers

Summer Discount Plan (SDP)	SCE installs remote control device on the central A/C unit(s). Earn up to \$195 per A/C from June 1 to October 1.	Device installation and 12 month commitment	Open to non residential Bundled Service SCE customers
Capacity Bidding Program (CBP)	Establish monthly levels to earn savings on your electric bills for self aggregating.	Internet access approved installed and operating interval meter	Open to non residential Bundled Service SCE customers or may participate through a third party DR aggregator
Time of Use Base Interruptible Program (TOU-BIP)	Reduce energy use to a predetermined level with just 15 or 30 mins notice from SCE.	Ability to reduce at least 15% demand during events	Open to non residential customers with monthly demand of 200 kW or greater
Agricultural & Pumping Interruptible Program (AP-I)	Receive a year-round monthly bill credit for allowing temporary electric service interruption of your pumping equipment.	Device installation	Open to Agricultural and Pumping customers with a measured demand of 37 kW or greater, or with a connected load of 50 horsepower or greater

SCE also contracts with a number of authorized third-party DR Aggregators, who develop and manage their own DR programs. If SCE's programs don't meet your agency's needs, this allows you the flexibility to receive incentives from a third-party.

Next Step: Coordinate with your SoCalREN Project Manager for potential additional support with this DER strategy.

For more information please see the [SCE Flyer](#), [Open Automated Demand Response site](#) and contact your SCE Account Representative.

Electric Vehicle Charging

The Southern California Edison (SCE) *Charge Ready Transport Program* is an initiative to support the installation of electric vehicle (EV) charging equipment for customers that operate medium- or heavy-duty fleet EVs. Rebates are offered to offset a portion of the costs associated with purchasing EV charging equipment approved by SCE. This [webpage](#) includes information on the program. Please contact your SCE Account Representative for further information on the Charge Ready Transport Program.

The Southern California Edison (SCE) *Charge Ready Program* is an initiative to develop qualified charging stations to support California's air quality and greenhouse gas reduction objectives. It is now available to qualified customers as of July 2021. This [webpage](#) includes information on the program. Please contact your SCE Account Representative for further information on the *Charge Ready Program*.

The Cal eVIP South Central Coast Incentive Project is an initiative to support electric vehicle (EV) charging infrastructure throughout San Luis Obispo, Santa Barbara, and Ventura Counties. It is now available to qualified customers as of August 2021. More information on this program can be found on this [webpage](#).

The Cal eVIP Southern California Incentive Project (SCIP) is an initiative to support electric vehicle (EV) charging infrastructure throughout Southern California. As of July 2021, SCIP is currently oversubscribed in Los Angeles, Riverside, Orange, and San Bernardino Counties. More information on this program can be found on this [webpage](#).

Procurement of EV Infrastructure can also be provided through a cooperative procurement option facilitated by Sourcewell.

The California Building Code¹ requires that *new* non-residential facilities have a number of future EV charging stations based on the number of available parking. While *existing* facilities do not have to comply with these regulations, it acts as a good reference for sizing the number of EV charging stations. City Hall has an estimated 50 parking spaces, which would correspond to 2 EV charging spaces based on these code regulations resulting in an estimated cost between \$8,000-\$14,000 for Level 2 charging stations. There would be additional operational costs, mainly energy costs, if the agency uses an EV fleet.

Total Number of Total Parking Spaces	Number of EV Charging Spaces
0-9	0
10-25	1
26-50	2
51-75	4
76-100	5
101-150	7

¹ https://calgreenenergyservices.com/wp/wp-content/uploads/2019_california_green_code.pdf

151-200	10
201+	6% of total spaces

Level 2 (240V, 4 kW to 18 kW, AC²) EV charging stations costs range between \$4,000-\$7,000³ per station while DC Fast charging (480V, 50 kW to 350 kW, DC) is between \$10,000-\$40,000⁴ per station, including installation, labor, and permitting costs and excluding rebates and incentives. Installation costs will reduce with more charging stations as trenching costs will decrease. Trenching can cost between \$25-\$100 per foot, depending on the surface.

Next Step: Coordinate with your SoCalREN Project Manager for potential additional support with this DER strategy.

² www.jdpower.com/cars/shopping-guides/what-is-dc-fast-charging

³ www.ohmhomenow.com/electric-vehicles/ev-charging-station-cost

⁴ www.afdc.energy.gov/uploads/publication/evse_cost_report_2015.pdf

Solar Water Heating and SGIP Rebates from Southern California Gas

The Self-Generation Incentive Program (SGIP) focuses on the installation of new technologies that meet all or a portion of the electric energy needs of a facility by providing financial incentives to customers. The technologies along with the incentives associated with them are listed in the table below and information on the technologies can be obtained [here](#). SoCalREN can now provide detailed cost, energy, and incentive analyses for potential Solar Water Heating projects through the SoCalREN Benchmarking Call to Action (BMCTA) program, which is funded by the California Energy Commission's (CEC).

Note that solar water heating systems may only be cost-effective for specific facilities based on hot water demand and available space.

Self-Generation Incentive Program

Technology ⁵	Incentive	Incentive w/biogas adder
Waste Heat to Power technologies	\$2.00/W	\$0.60/W
Pressure Reduction Turbine ⁶	\$2.00/W	\$0.60/W
Internal Combustion Engine CHP, Microturbine CHP, Gas Turbine CHP, Steam Turbine CHP, Fuel Cell CHP	\$2.00/W	\$0.60/W

**Note: CHP stands for Combined Heat and Power. Further information on what CHP is and how it works can be found [here](#).*

The Self-Generation Incentive Program offers incentives for Pressure Reduction Turbines, which allow for water and wastewater systems to produce electricity through the water flow and pressure. Pressure Reduction Turbines are a great way to control system pressure and produce clean energy in systems with high flow rates and high pressure.

SoCalGas also offers incentives for renewable natural gas (RNG), the industry term for biogas that has been cleaned up to utility pipeline standards, for a wastewater treatment plant (WWTP) producing biogas. To be eligible for pipeline injection and incentives, digester gas is processed through a set of gas scrubbers to reduce or eliminate constituents. The gas also has to meet certain combustion performance requirements. Incentives are up to \$1/therm through the SoCalGas Biomethane Interconnector Monetary Incentive Program⁷, and are also available through the Self Generation Incentive Program (SGIP), and/or Biogas Conditioning/Upgrading Services (BCUS) Tariff.

Next Step: Coordinate with your SoCalREN Project Manager for potential additional support with this DER strategy.

⁵ Starting in 2020, technologies that utilize natural gas must use 100% renewable natural gas (RNG)

⁶ Pressure reduction turbine includes but is not limited to, any small turbine generator installed in an existing, man-made channel for delivery of water, steam or natural gas.

⁷<https://www.socalgas.com/smart-energy/renewable-gas/biomethane-monetary-incentive-program>

Photovoltaic and Battery Storage

In order to reduce solar system costs and have an appropriately sized system, energy efficiency measures should be installed *prior* to the installation of solar PV and battery storage systems. This evaluation accounts for energy consumption savings from the recommended EEMs.



Solar Potential for City Hall (1 Main St.) rooftop, from Google Sunroof. Note that some of this rooftop area may not be suitable for solar.

Power Purchase Agreements (PPA's) are also available for public agencies pursuing solar and battery storage. PPA's allow building owners to pay an agreed upon rate for solar generation and battery utilization. PPA's allow private solar contractors to claim the Investment Tax Credit (ITC) and the Modified Accelerated Cost-Recovery System (MACRS) depreciation schedule (26% and 25% of the total system cost, respectively) in 2021. Benefits of PPA's also include system performance guarantees and maintenance contracts to ensure performance.

Efficiency as a Service (EAAS) is a relatively new financial mechanism that allows public agencies to combine energy efficiency, DER strategies, and even microgrids under one contract. Similar to a PPA, an Energy Services Company (ESCO) creates an energy baseline of facilities for the agency and recommends energy efficiency and DER projects. The agency chooses the projects to pursue, and a contract is created that could last 5-15 years. The agency realizes the on-bill utility savings and pays for the projects based on the agreed upon rate, structured by the savings realized. This structure mitigates capital investment and risk to the agency.

⁸

⁸ For more information on Efficiency as a Service
<https://betterbuildingssolutioncenter.energy.gov/financing-navigator/option/efficiency-a-service>

SCE offers the Renewable Energy Self-Generation Bill Credit Transfer⁹ (RES-BCT) for public agencies. RES-BCT allows public agencies to export excess energy produced from renewable energy systems at a facility to the electrical grid in exchange for a bill credit that can be applied to eligible “benefitting accounts” associated with the public agency to reduce energy costs. See the [SEC RES-BCT FAQ](#) for more information.

Contact your SCE Account Rep for a technology feasibility analysis once a quote/bid has been provided (and before project implementation). This is an additional service that SCE provides to ensure that the proposed system design is compatible with SCE’s infrastructure.

Incentives for battery storage systems

Battery storage systems can qualify for SGIP (Self-generation incentive program), which will provide an incentive for battery storage capacity. The amount of incentive paid out by SGIP decreases as the size of the battery storage increases and as the storage duration increases. The table below shows the percentage of the base incentive that is available per the characteristics of the battery storage system.

Storage Duration	Percentage of base incentive rate			
0 - 2 hours	100%	50%	25%	0%
2 - 4 hours	50%	25%	12.5%	0%
4 - 6 hours	25%	12.5%	6.25%	0%
Greater than 6 hours	0%	0%	0%	0%
Energy Capacity	0 - 2 MWh	2 - 4 MWh	4 - 6 MWh	Greater than 6 MWh

Further, if the battery storage system is 30 kW or larger, only 50% of the SGIP incentive is paid up front. The remaining 50% is paid on a performance-based incentive over 5 years. See the SGIP handbook¹⁰ for all of the battery storage requirements and a detailed description of the performance-based incentive payout.

An additional incentive of 20% of the current incentive rate will be added for projects with battery storage equipment manufactured in an approved facility operating in California. In order for a project to be eligible for this additional incentive, it must demonstrate that at least 50% of the capital equipment value is manufactured by an approved California Manufacturer. Check www.selfgenca.com/documents/ca_manufacturer/approved for the latest list of approved California Manufacturers.

⁹www.sce.com/wps/portal/home/business/generating-your-own-power/renewable-energy-self-generation-bill-credit-transfer

¹⁰www.selfgenca.com/documents/handbook/2017

Note that the rate of the base SGIP incentive for battery storage starts at \$0.35/Wh and decreases based on the amount of incentives allocated. Check www.selfgenca.com/home/program_metrics/ for up to date incentive rates. At the time of this proposal, the current base incentive rate is \$0.35/Wh without claiming the Investment Tax Credit (ITC) and \$0.25/Wh for projects claiming the ITC.

As of April 2020, there are two new incentives associated with SGIP - Equity and Resiliency.

Equity (Non-Residential Storage): \$0.85/Wh (projects on waitlist, funds may be reallocated)

Additional SGIP incentives are available to local and state government agencies, education institutions, and non-profit organizations. To be eligible, these agencies must be located in a Low-Income or Disadvantaged Community OR the majority of their service region is Low-Income or Disadvantaged (be located in a census tract with Median Household Income below 80 percent of Statewide Median Income). SB 535 defines Disadvantaged Communities, AB 1550 defines Low-Income Communities. California Indian Country also applies. These incentives are in Step 5, which means funding is capped and applicants are approved at a first-come-first-serve basis.

Resiliency: \$1/Wh

In addition to both the traditional SGIP incentive (\$0.35/Wh) and the new Equity incentive for qualifying agencies (\$0.50/Wh), a Resiliency incentive can be added as well, for a potential total incentive amount of \$1.00/Wh. Agencies must meet all the following criteria:

- 1) Located in a High Fire Threat District OR has been affected by 2 or more Public Safety Power Shutoffs (PSPS) AND serve customers that are in Disadvantaged Communities or Low Income Communities
- 2) Be a police station, fire station, emergency response provider, emergency operations center, 911 call center, medical facility, private and public natural gas, electric, water, wastewater, or flood facility; jail or prison; utility designated PSPS shelter; cooling center; homeless shelter.
- 3) Design battery storage systems to include backup power capabilities

The Equity and Resiliency incentives are highly sought after and funds are rapidly changing. Reach out to the IOU administrators for the SCE SGIP service territory. Email inquiries can be directed to SGIPgroup@sce.com.

For more information, read the [SGIP Factsheet](#) from SCE and the [SGIP Non-Residential](#) pamphlet from the CPUC.

Next Step: Coordinate with your SoCalREN Project Manager for potential additional support with this DER strategy.

Green Rate Options

Green Rate Program

The Green Rate Program, offered by Southern California Edison, offers customers the option to purchase solar power equal to 50 percent or 100 percent of their electricity use. Program participants can de-enroll at any time, which is one of the many reasons organizations are enrolling. Other reasons to participate in the program include:

- Support in reaching sustainability goals
- Reducing your greenhouse gas emissions associated with electricity and contributing to a cleaner, healthier environment
- Leadership in Energy and Environmental Design (LEED) points under the Green Power credit
- Green-e Certification¹¹

The table below presents two options in which the City of Sunnydale can participate in the Green Rate Program: purchase of solar power equal to 50 percent or 100 percent of annual energy use while displaying the costs and emissions offset by participating in either scenario. Sunnydale would need to balance the benefits to participate against the premium to their utility bills that comes with participation.

Green Rate Program GHG Emission Reductions

Green Rate Program Hypothetical Options	Carbon Dioxide Emissions Offset (Metric ton CO ₂ eq)	Cars off the road equivalent offset	Annual Utility Bill Addition ¹²	
			\$0.02 Premium	\$0.04 Premium
50% Purchase	79.19	17	\$ 7,598	\$ 13,946
100% Purchase	158.38	33	\$ 15,195	\$ 27,892

For more information please see the SCE Flyer, and contact your SCE Account Representative.

Renewable Energy Self-Generation Bill Credit Transfer

The Renewable Energy Self-Generation Bill Credit Transfer (RES-BCT) program allows local governments and college campuses to generate energy for their own use. Energy that is not used can be exported to SCE's grid. All generation exported to SCE's grid is converted into "generation credits" and is applied to the accounts designated by the public agency. The RES-BCT program is available on a first-come, first-served basis. Please contact your SCE Account Representative for further information on this program. This [link](#) also includes more information.

Community Green Tariff Options

Clean Power Alliance offers participants the option to purchase renewable power equal to 36 percent, 50 percent, or 100 percent of their electricity use. Clean Power Alliance will purchase clean power, and Southern

¹¹ <https://www.green-e.org/>

¹² Actual premium can be determined based on the rate-tariff.

California Edison (SCE) will deliver it through its existing utility lines. Nothing else changes—SCE will continue to deliver power to your home or business, send just one bill, and be responsible for resolving any electricity service issues. Participants can choose to opt out at any time and remain with SCE. Reasons customers choose to participate include:

- Competitively-priced options for electricity
- Choice of energy providers
- Higher renewable content and lower greenhouse gas emissions
- Shape future incentives and programs

More information on options available from Clean Power Alliance can be found [here](#).

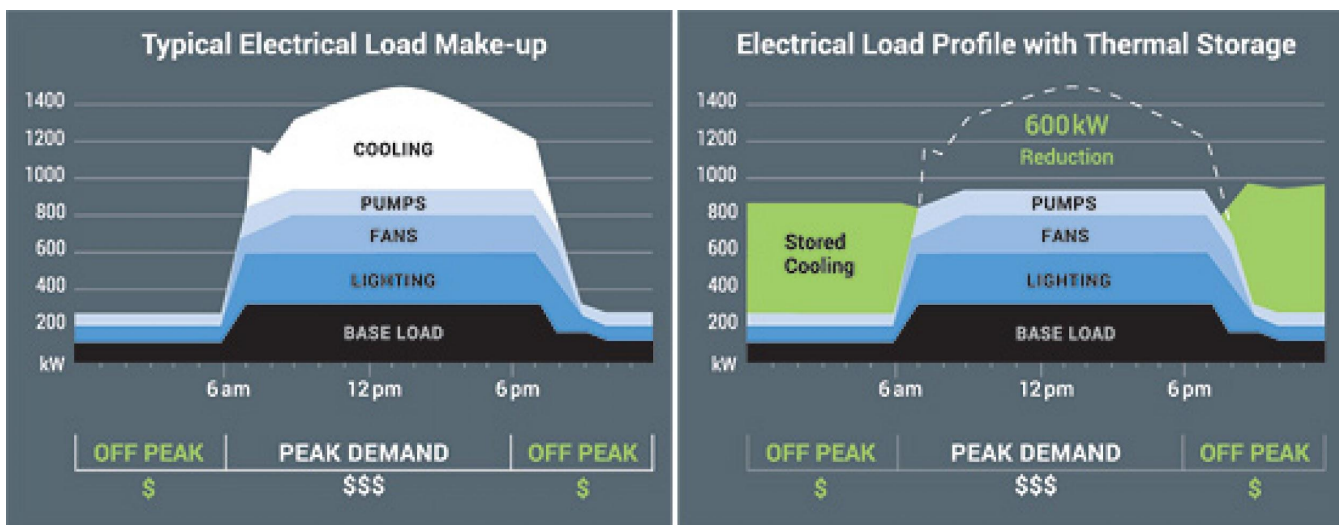
**Next Step: Contact your SCE Account Representatives
to learn more and for next steps.**

Permanent Load Shift

City Hall has an annual peak load of 265 kW and incurs nearly \$109,373 in annual demand charges. A big portion of these demand charges is triggered by HVAC loads. Through permanent load shifting equipment such as thermal energy storage systems¹³, City Hall can reduce the peak load and bill costs significantly. Thermal energy storage systems can be attached to HVAC systems and can consume electricity during off-peak hours when the utility rates are low to produce ice that will be used for cooling during peak demand hours. Benefits from these systems include reduced strain on the grid during peak hours, reduced building electricity demand, lower electricity costs for building, and improved HVAC system life.

In addition to thermal energy storage, battery storage can be used to shift electricity loads to lower demand periods. Battery storage can be implemented without solar PV and can store electricity during low peak (and low cost) periods to be used later during peak demand. This strategy works well if there is a specific source that is causing a spike in electricity demand.

The figure below illustrates the concept of using thermal energy storage in a HVAC system to shift peak electricity load. During off peak hours, the system will consume off-peak and low cost electricity to produce stored cooling to satisfy cooling during peak demand hours. While thermal energy storage applications will not provide noteworthy savings in electricity consumption (kWh), it will significantly reduce demand consumption (kW) and charges.



Note that the figure before is just for illustration and does not account for the current SCE time of use (TOU) rates.

¹³ Ice Energy is an example of such a system

SGIP incentives are available for HVAC systems with thermal energy storage. The amount of available incentive is based on the system size (in nominal tonnage), the efficiency of the system, the climate zone of the facility and the avoided compressor run time that the system can provide in a single discharge. See the SGIP handbook¹⁴ for more details on how to calculate the available incentive amount for these systems.

Note that the SGIP incentive is only for HVAC units that are at or above code at the time of their manufacturing.

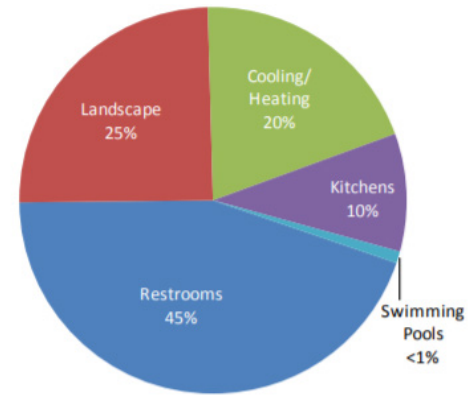
Next Step: Coordinate with your SoCalREN Project Manager for potential additional support with this DER strategy.

¹⁴ www.selfgenca.com/documents/handbook/2017 (pages 42-43)

Water Efficiency

The SoCalREN team performed a water usage analysis to identify potential opportunities for the City Hall to reduce water consumption and costs. 45% of the water used in the City Hall is related to restrooms. Other large uses include landscaping and cooling/heating.

Based on the facility's water uses, age of the building, service area eligibility, and cost of water for the City Hall, water efficiency measures are recommended to provide cost effective water savings.



The following information was collected and used in the analysis to identify water efficiency measures for the City Hall.

- Annual water consumption: 5 million gallons (potable water)
- Water billing rate: \$1 per 10 gallons for indoor use, \$2 per 10 gallons for outdoor use
- High efficiency restroom fixtures in place: Yes

Zero Net Water

A zero net water building, or water-neutral building, is a building where the amount of alternative water used, which comes from sustainable water sources, and water returned to the original water source is equal to the building's total water consumption. Zero net water buildings are designed to minimize total water consumption and maximize alternative water sources using strategies such as collecting rainwater, recycling greywater, using 'foam-flush' toilets, and developing on site water treatment capacity.

Next Step: Reach out to your water account representative and/or check www.socalwatersmart.com for additional water efficiency support resources and programs.

CalEnviroScreen Characteristics

City Hall is located in a census tract with a CalEnviroScreen¹⁵ rating in the 90-95 percentile, designating it as a disadvantaged community. The following table highlights the CalEnviroScreen characteristics. Note that all of these values are a percentile based on the characteristics from each census tract in California. Please refer to the [CalEnviroScreen map](#) for the complete details for the Facility's census tract.

CalEnviroScreen 3.0 Rating - Overall rating from CalEnviroScreen that takes into account the cumulative environmental, health and socioeconomic factors. Census tracts with a rating in the 75th percentile or above are considered to be a disadvantaged community	90-95
Pollution Burden - Average percentile for all exposure and environmental factors	92
Population Characteristics - Average percentile for all population and socioeconomic factors	76
Ozone - Percentile of ozone levels based on measurements from the California Air Resources Board	85
Pesticides - Percentile of toxic pesticides used within the census tract	0
Toxic Releases - Percentile of toxic chemicals released by industrial facilities that are detected in the air	81
Traffic - Percentile of traffic density, which is calculated by dividing the traffic volumes by the total road length for the year 2013	88
Drinking Water - Percentile of the average concentrations of water contaminants detected in the community's water system	83
Asthma - Percentile of the rate of residents in the community with asthma	34
Poverty - Percentile of residents with incomes less than two times of the federal poverty level	92
Unemployment - Percentile of residents who are unemployed and eligible for the labor force	51

¹⁵ www.oehha.ca.gov/calenviroscreen

Glossary of Key Terms

Term	Definition
AC	Alternating Current
CBP	Capacity Bidding Program
CEC	California Energy Commission
CHP	Combined Heat and Power
CPP	Critical Peak Pricing
CPUC	California Public Utilities Commission
DC	Direct Current
DER	Distributed Energy Resource
DR	Demand Response
EEM	Energy Efficiency Measure
ELF	Energy Project Lease Financing
EV	Electric Vehicle
GHG	Greenhouse gas
HVAC	Heating, ventilation and air-conditioning
LEED	Leadership in Energy and Environmental Design
NPV	Net Present Value
OBF	On-bill Financing
O&M	Operation and Maintenance
PLS	Permanent Load Shifting
PV	Photovoltaic
REopt	Renewable Energy Integration and Optimization modeling tool
RES-BCT	Renewable Energy Self-Generation Bill Credit Transfer

SCADA	Supervisory Control and Data Acquisition
SCE	Southern California Edison
SCG	Southern California Gas
SDP	Summer Discount Plan
SGIP	Self-generation Incentive Program
SIR	Savings to Investment Ratio
SoCalREN	Southern California Regional Energy Network
SPP	Simple Payback Period
SPURR	School Project for Utility Rate Reduction
TOU	Time-Of-Use
TOU-BIP	Time-Of-Use Base Interruptible Program



SoCalREN @_SoCalREN · Sep 1

We'd say that our public agency programs and services speak for themselves, but we don't have to when we get great feedback from the [#SoCal](#) communities we serve. Which of our programs will have you talking about newfound energy savings? Find out today. [100](#) socalren.icfstagingacquia.com/agencies/servi...

Southern California Even Access

@SoCalEVENAccess

Programs from LA County that reduce our reliance on private fossil fuel vehicles and clean up our transportation system!

socalevenaccess.org Joined June 2021

0 Following 1 Follower

Not followed by anyone you're following

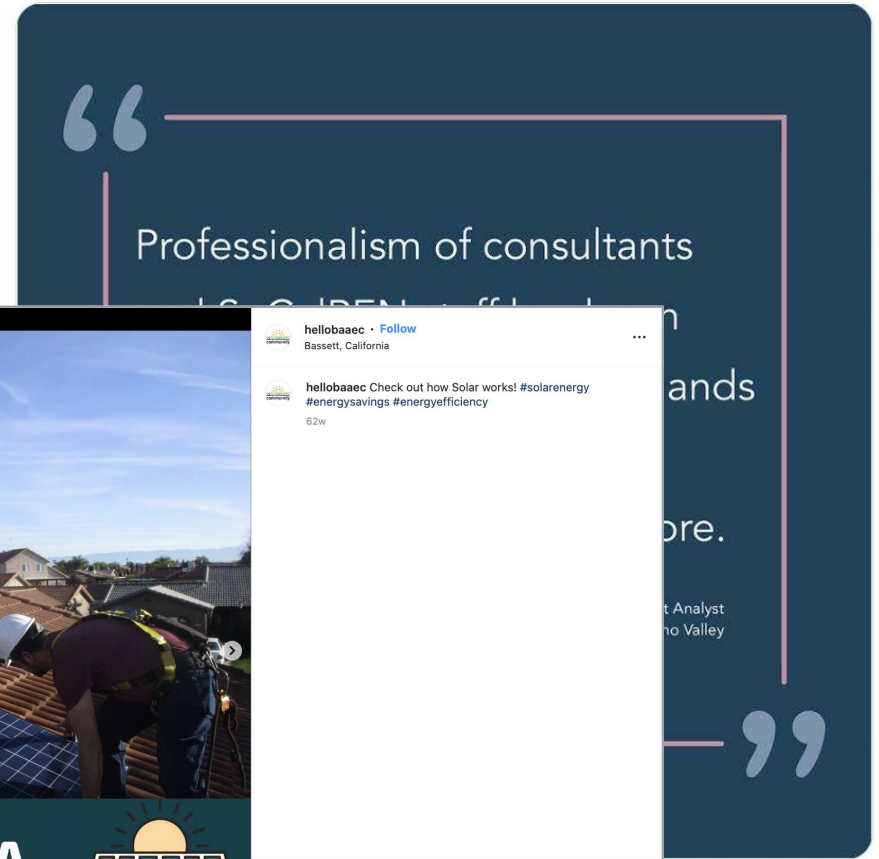
Tweets

Tweets & replies

Pinned Tweet



Southern California Even Access @SoCalEVENAccess
Hello Twitter! 🙌 Southern California Even Access helps residents get where you're going without the pollution. We're not active on Twitter, but we're happy to get in touch!





Periodic Measurement & Verification Report: City Parking Garage

Prepared by The Energy Coalition on behalf of SoCalREN Public Agency Programs
November 12, 2020

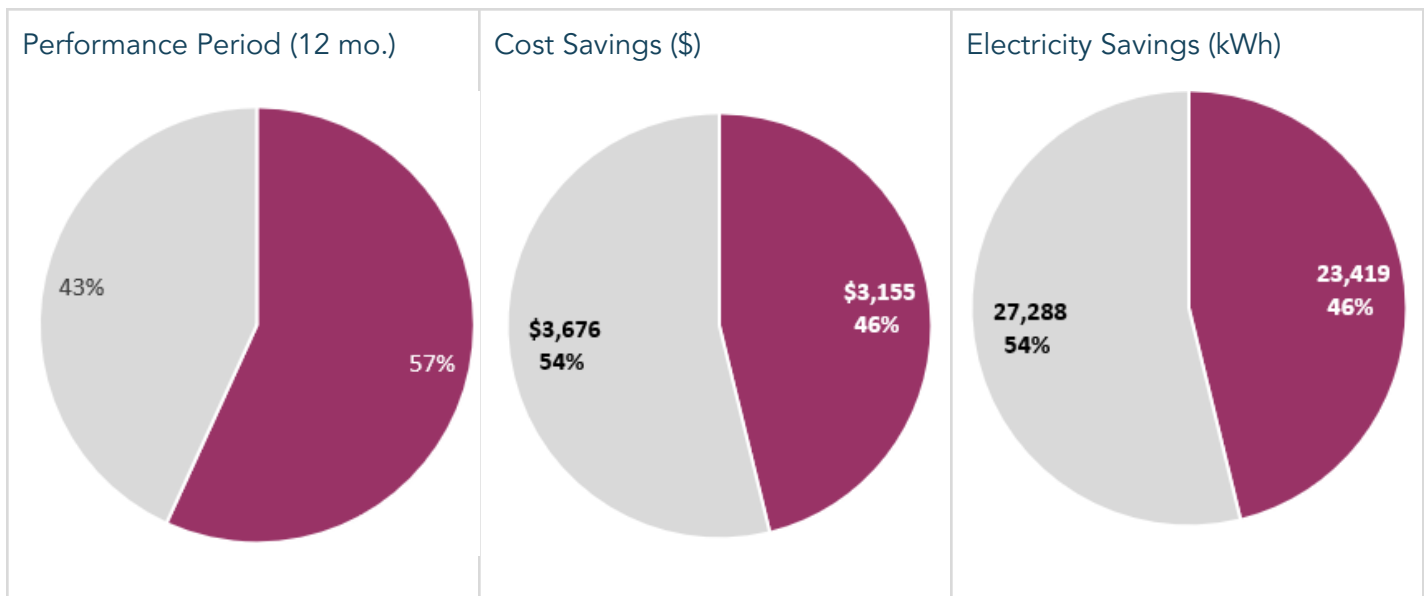
The SoCalREN Public Agency Programs believe in the power of public agencies to lead their communities towards a sustainable clean energy future. Through SoCalREN's Metered Savings Program, City has unlocked energy savings at its parking structure. To help track and manage energy reduction at the parking structure and ensure persistence of energy savings, SoCalREN has prepared the following report on energy use for the performance period 02/25/2020 - 07/31/2020.

Facility Information

Facility Address 1234 OceanAve, City, CA 90232	Year Built 1989	Primary Function Parking Garage
Square Footage 90,000 sq. ft.	Baseline Period 03/01/2018 – 02/28/2019	Reporting Period 02/25/2020 – 07/31/2020

Performance to Date

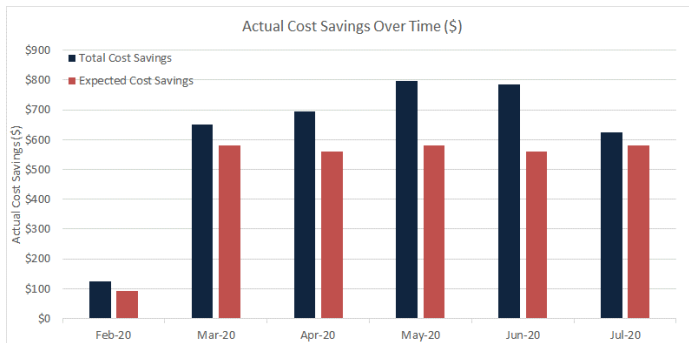
These charts display the actual savings for electricity consumption (kWh). The target values represent the values approved during program application review.



Note: The grey pie represents time spent in the performance period so far and the maroon represents the remaining time

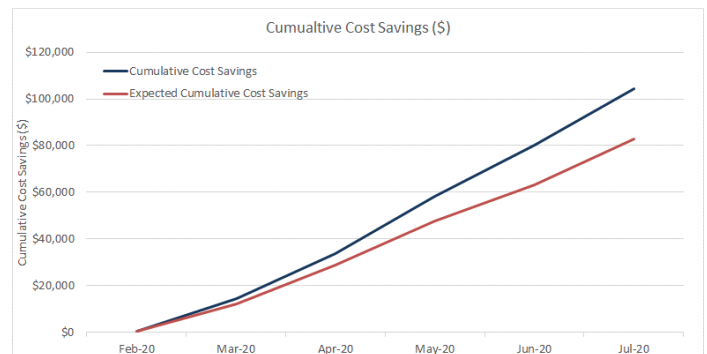
Total Cost Savings

This chart shows a month-by-month comparison of actual cost savings (\$). If an adjusted monthly savings target is available, this is displayed next to the actual savings to indicate how your building is performing compared to that prediction.



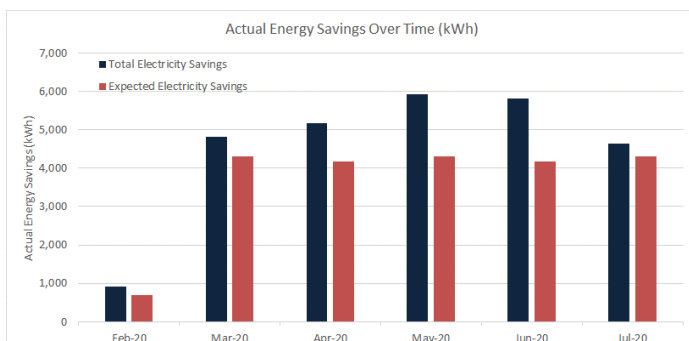
Cumulative Cost Savings

This chart shows how your cost savings are accumulating over time. The cumulative savings show the total cost savings (\$) since the beginning of the measurement period. If an adjusted savings target is available, this is displayed as well to indicate how your building is performing compared to that prediction.



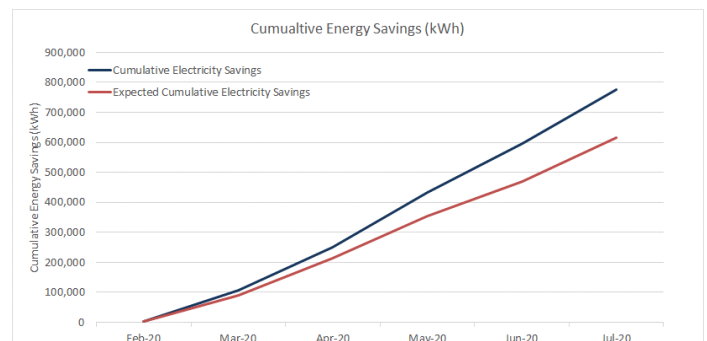
Total Electricity Savings

This chart shows a month-by-month comparison of the actual electricity consumption savings (kWh). If an adjusted monthly savings target is available, this is displayed next to the actual savings to indicate how your building is performing compared to that prediction.



Cumulative Electricity Savings

This chart shows how your building is performing over time. The cumulative savings shows the total electricity consumption savings (kWh) since the beginning of the measurement period. If an adjusted savings target is available, this is displayed as well to indicate how your building is performing compared to that prediction.





Glossary

Actual Savings – the difference between adjusted baseline consumption and actual consumption in the performance period.

Baseline Period – a specified time period before retrofit work began for use as a reference point in the calculation of savings.

Performance Period – once the retrofit work has been completed, this represents the time frame to track the actual savings.

Reporting Period – the time period of measured performance represented in this report. The reporting period starts at the beginning of the performance period and includes all actual data available at the time the report was generated.

Adjusted Baseline – baseline electric consumption adjusted for weather variations and non-routine adjustments.

Unadjusted Target – the original prediction of electric consumption and demand savings.

Adjusted Target – this is optional depending on the work performed. If available, it represents an updated prediction of savings that may take into account actual performance metrics in the performance period (e.g., updated weather).

Non-Routine Adjustments – Non-routine adjustments account for changes to the building performance during the reporting period outside of the energy conservation measures being tracked. Some examples include occupancy changes, conditioning of previously unconditioned spaces, altered sequence of operation of installed equipment, adding/removing machines or equipment, or other load changes that may distort actual savings achieved by your project.



Prepared by The Energy Coalition through Compass on behalf of SoCalREN Public Agency Programs.

If you have any questions, please contact Lauren Seymour at the email address meteredsavings@energycoalition.org or (949)-732-1081

Metered Savings Program

Final Savings Report

City of Mayberry - Neighborhood Parking Structure

Prepared For:

Southern California Regional Energy Network (SoCalREN)

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February 14, 2022

Savings Summary

This Final Savings Report provides a summary of the annual normalized energy savings, calculated using the reporting period (from 2/25/2020 0:00 through 2/28/2021 00:00) at the Mayberry City Neighborhood Parking Structure. The savings originate from implementation of lighting fixture upgrades.

The original expected electric savings as stated in the M&V Plan was 52,276 kWh over an entire year (365 days). The results show that the Mayberry Neighborhood Parking Structure would have an annual normalized energy savings of 67,823 kWh.

Table S-1: Annual Normalized Energy Savings

Electric Savings (kWh)	Electric Savings (kW)
67,823	9.45

Please note that a Preliminary Savings Progress Report was conducted following the first 5 months after implementation. The reporting period for this was selected to be from 2/25/2020 – 7/31/2020. Since conducted, Acme Utility Company (Acme) underwent a change to their billing format and therefore had a change in the service account numbers. New and updated energy usage was sent to Engineering Firm for the periods of 8/1/2019 – 7/31/2020, which affects the reporting period for this Final Savings Report.

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1. Introduction

The City of Mayberry participated in the Southern California Regional Energy Network (SoCalREN) Metered Savings Program to take advantage of the no-cost services available to help the agency move its energy efficiency project from conception to completion. This Final Savings Report describes in detail how normalized energy savings were calculated for the Mayberry Neighborhood Parking Structure. The Final Savings Report follows the measurement and verification (M&V) plan developed for this project. The M&V Plan is included as an attachment, in Appendix A. This document includes all data, descriptions of calculations and relevant information used for the savings analysis. The Final Savings Report presented here adheres to the requirements set forth by the AB 802 legislation, the California Public Utilities Commission (CPUC).¹

2. Terminology

Adjusted Baseline Energy Use: Energy use that would have occurred in the reporting period had no measures been installed. The adjusted baseline use is determined by inputting independent variable data collected during the reporting period into the baseline model.

Baseline Model: A mathematical model, developed using empirical modeling methods (such as regression analysis), using energy use and independent variable data collected during the baseline period.

Non-Routine Adjustment: Adjustments to baseline energy use made necessary by the occurrence of non-routine events. Such adjustments are necessary so that the resulting normalized savings are due to the project's installed the energy efficiency measures, and not due to other events that affect the energy use at the meter.

Non-Routine Event: An event occurring within the building that affects the energy use measured at the meter that is not due to the project's installed energy efficiency measures. Non-routine events may include equipment shut down for maintenance, added building load due to a data center, or sudden change in occupancy such as when building tenants move in or out.

Normalized Savings: Savings based on the overall reduction in normalized metered energy consumption. Savings from a project that are based on 'normal conditions' as agreed upon by project stakeholders. Normalized savings require that both baseline and reporting period energy use be adjusted to a common set of normal conditions.

Normal Conditions: A non-extreme set of conditions that is representative of conditions typically expected for the building and its operations. Savings estimated under normal conditions are expected to represent typical savings for the project and are not over- or under-estimated due to more extreme conditions that may occur in any given reporting period.

¹ Rulebook for Programs and Projects Based on Normalized Metered Energy Consumption, version 2.0, 1/7/2020, available at: <https://www.cpuc.ca.gov/-/media/cpuc-website/files/legacyfiles/n/6442463694-nmec-rulebook2-0.pdf>.

Reporting Period Model: A mathematical model, developed using empirical modeling methods (such as regression analysis), using energy use and independent variable data collected during the reporting period.

3. Project Description

Mayberry City partnered with SoCalREN to identify multiple high-value energy savings projects at the Neighborhood Parking Structure. The Neighborhood parking garage is a five floor 90,000 square foot partially subterranean structure constructed in 1989. The structure is served by Acme meter number 123000-654321.

The parking structure is in climate zone 9 and classified as an unconditioned storage space. The facility and equipment operating hours are as follows:

Facility Operating Hours	Equipment Operating Hours
8:00am-2:00am M-Th 8:00am-3:00am F-Sat 10:00am-1:00am Sun	8:00am-2:00am M-Th 8:00am-3:00am F-Sat 10:00am-1:00am Sun

An energy audit was conducted by SoCalREN on February 28, 2019 to identify several energy efficiency measures (EEM's). These EEM's have been estimated to save 31.4% of the building's baseline energy use.

3.1. Energy Efficiency Measures

Table 3.1 summarizes the energy savings measures recommended for the Neighborhood Parking Structure by SoCalREN. These measures are limited to Meter 123000-654321 and are expected to generate 31.4% of this meter's electric use in savings as a result of implementing the energy efficiency measures. For a complete detail of the recommended measures, please refer to the Project Feasibility Study (available in Appendix A).

Table 3-1: Energy Efficiency Measure Summary

EEM #	Measure Description	Electricity Savings	Electric Demand Reduction
		(kWh/yr)	(kW)
1	Interior LED Parking Garage Luminaires	49,299	3.7
2	Exterior LED Rooftop Stairwell Fixture Replacement	2,977	0.7
TOTAL ALL MEASURES		52,276	4.4

3.2. Verification of Measure Installation

SoCalREN verified the installation of energy conservation measures by reviewing contractor invoices and conducted a visual confirmation of measure installation on July 17, 2020. Based on the audit findings, the proposed LED lighting retrofit was completed site-wide except for a couple of fixtures. For more detail, the post-installation inspection and project cost information are included as attachments in Appendix A.

Table 3-2 displays the energy efficiency measures recommended and those that were verified as implemented.

Table 3-2: Energy Efficiency Measure Implemented

Energy Efficiency Measures Identified	Energy Efficiency Measures Implemented
Interior LED Parking Garage Luminaires	Interior LED Parking Garage Luminaires
Exterior LED Rooftop Stairwell Fixture Replacement	Exterior LED Rooftop Stairwell Fixture Replacement

An energy performance report was provided to the customer for informational purposes on 11/11/2020. This was 5 months after measure installation, which included the performance period date, total and cumulative electric savings, and total and cumulative cost savings to date. The energy performance report is provided and attached in Appendix A.

4. Measurement and Verification

4.1. Deviations from Planned M&V Activities

The M&V Plan for this project, completed in July 2019 described how savings would be determined for this project. It described how the electric energy (kWh) and demand (kW) would be quantified from the metered energy.

The COVID-19 pandemic occurred over the baseline and reporting periods. The first 2.5 weeks of the reporting period indicated that COVID had affected the energy usage. Because of this occurrence, a mini-modeled approach was conducted for the 5-month report to capture the true savings over the reporting period (2/25/2020-7/31/2021). Further details regarding this approach will be discussed in Section 6 of this report.

4.2. Baseline Training Period

The baseline training period is as follows:

Table 4-1: Original Baseline Training Period

Energy Source	Baseline Period	Baseline Training Period	
		Start	End
Electric (kWh)	Original	3/1/2018	2/28/2019

No changes were made to the baseline period. Implementation began on 3/1/2019. The baseline period included 1-year of energy use data immediately prior to the start of implementation. This ensured that the baseline conditions reflected the most recent operating conditions possible. All energy savings verified at the meter were therefore a direct result of the measures installed.

No outliers or NREs were detected in the baseline period.

4.3. Dependent Variables

Electric energy use (kWh), summed from Meter 123000-654321, was the dependent variable that was used in modeling and in the M&V analysis. The data was received from Acme Utility Company in 15-minute intervals and was cleaned and resampled to a daily time interval. The daily interval was chosen for modeling and analysis as it reduced variability in the dataset and allowed the model to achieve the recommended goodness-of-fit criteria.

4.4. Independent Variables

Ambient temperature, averaged to a daily interval, was used as the independent variable for the baseline model development, consistent with the M&V Plan.² Weather data was taken from the Mayberry Municipal Weather Station, which is 3.25 miles from the site.

4.5. Baseline Period Data Preparation

The table below describes the data preparation activities prior to model development. The energy use data had no missing data points. The weather data had missing points, but only amounted to 1.4% of the data in the baseline period. These missing points were inspected; if there were over 4 hours of missing data in a day, that day was removed from the weather data file used in the analysis.

² M&V Plan delivered in July 2019

Table 4-2: Data Issues and Preparation Actions Taken

Variable	Issue	Number Points Affected	Action Taken	Basis for Action Taken
kWh (dependent)	None	N/A	N/A	N/A
Temperature (independent)	Missing Data Points	Missing Temperature Points: 6/10/2018 (06 hrs) 6/26/2018 (10 hrs) 6/27/2018 (09 hrs) 8/9/2018 (05 hrs) 2/5/2019 (23 hrs)	Removed these dates from weather file	Four hours or more of missing data

4.6. Modeling Algorithm and Baseline Model Accuracy Metrics

The electric energy use was modeled using a variation of Lawrence Berkley National Lab's (LBNL) time-of-week and temperature (TOWT) model in the R programming language.³ This modeling algorithm uses indicator variables for each time-of-week (7 for daily data) to group similar operating periods during each week together. It also segments the range of temperatures into six line segments, assuring the same number of points define each line segment. Because a building's operating schedule and the ambient temperature are major drivers of energy use, the TOWT model was selected for this project.

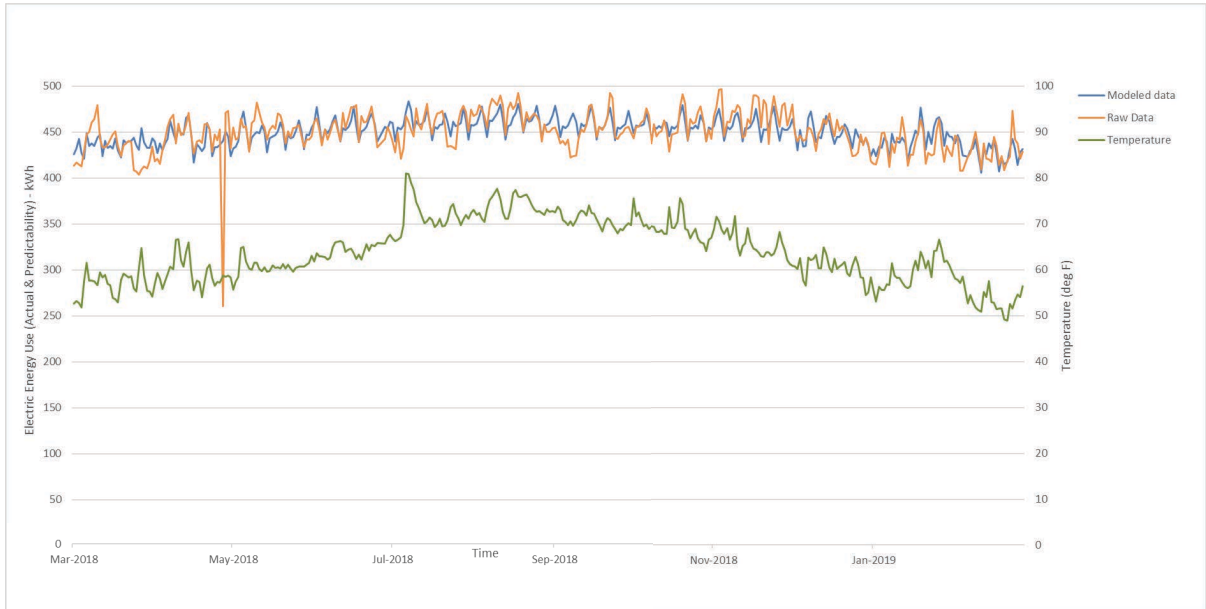
The TOWT modeling algorithm allows additional independent variables to be used, including indicator variables. Although, no indicator variables were added since the building's operating modes showed to be consistent with regularly scheduled operations expected from a parking garage.

The model's algorithm was modified to ensure all datapoints are weighed equally in the analysis (LBNL's published version adds increasing weight to the most recent 14 days used in the prediction of each day). The data was summed to a daily data interval to minimize variability within the data and achieve acceptable model goodness of fit criteria. Charts of the daily metered and modeled energy use with daily average ambient temperatures are provided in the attachments.

The electric consumption (kWh), as metered by 123000-654321, was consistent throughout the model training period. Figure 4-1 shows the baseline model developed for this project. The chart shows how closely the model (light blue line) follows the daily energy use patterns (orange line). Ambient temperature is shown by the green line.

³ LBNL's time-of-week and temperature model: <https://github.com/LBNL-ETA/RMV2.0>

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Model	Meter	Analysis Time interval	Baseline Period	R2	CV(RMSE)	NDBE	U (for at least 10% savings, 90% CI)
Electric, kWh	259000-047741	Daily	03/01/2018 – 02/28/2019	0.43	4%	0.00%	6.5%

4.7. Baseline Model Coverage Factor

Good modeling practice requires that models be developed from a dataset that includes the maximum range of dependent and independent variable values. We compared the baseline model training period to the normalized conditions represented by CALEE2018 weather data⁴ to determine how well represented the normal weather conditions were in the baseline training period. In addition, good practice required that models not be extrapolated more than 10% beyond the range of the independent variable data (e.g. ambient temperature) in the model training period.

The SoCalREN Metered Savings Program requires that a full year of baseline period data be used to develop the baseline model. Table 4-4 shows the minimum and maximum temperatures of the baseline period, their extended range, and the coverage factors determined from the comparison of the baseline period temperature range with those of the normalized condition temperatures.

For the Mayberry City Neighborhood Parking Structure, the energy use was estimated under normalized conditions defined by CALEE2018 weather data for greater Mayberry. Table 4-4 shows that the extended baseline training period captured 100% of the temperature values and 100% of the days in normal conditions dataset, leaving 0 days per year outside this range. The two temperature distributions have been plotted in Figure 4-2.

Table 4-4: Baseline Weather Coverage

Baseline Period		Extended Baseline Period		Temperature Coverage Factor	Days Coverage Factor	Days 'Uncovered'
Min Temp (°F)	Max Temp (°F)	Min Temp (°F)	Max Temp (°F)			
48	80	48	78	100%	100%	0

⁴ CALEE weather data available at: www.calmac.org/weather.asp.

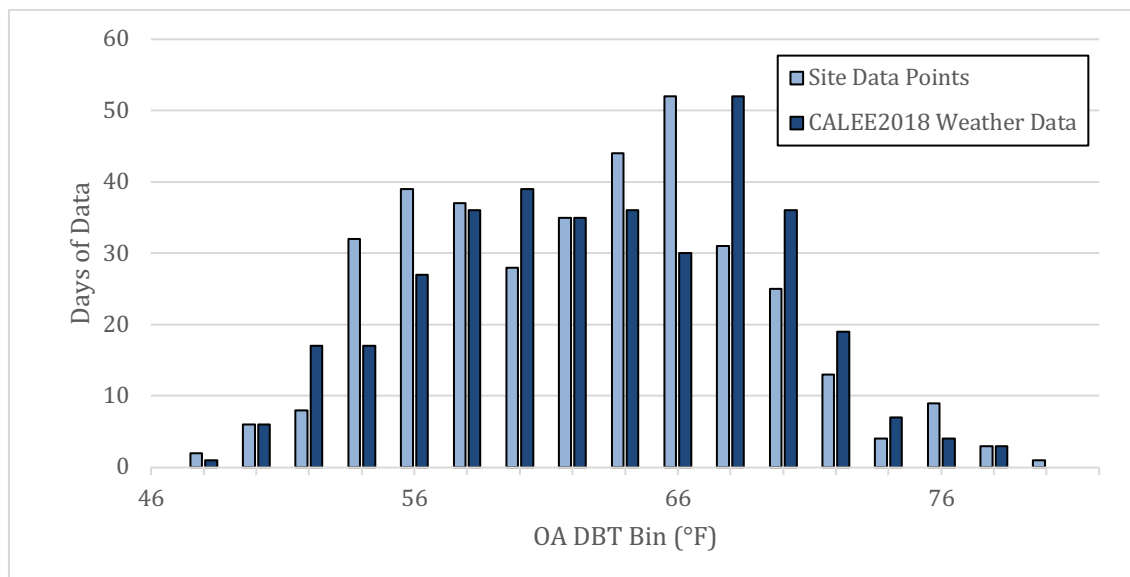


Figure 4-2: Baseline Weather Coverage

5. Reporting Period Model Development

5.1. Reporting Period, Variables, and Algorithm

The final reporting period dates were selected to be the year directly following the implementation of energy saving measures and based on the availability of data: 2/25/2020 – 2/28/2021.

The independent and dependent variables as well as the modeling algorithm were the same as those in baseline period.

5.2. Reporting Period Data Preparation

Table 5-1 below describes the data preparation activities prior to model development. The energy use data had no missing data points. The weather data had the most missing points, but only amounted to 1.1% of the data in the reporting period. These missing data points were inspected; if the number of hours with missing data within a day was greater than or equal to 4 hours, that day was removed from the weather data file used for analysis.

Table 5-3: Reporting Period Weather Coverage Factor

Reporting Period		Extended Reporting Period		Temperature Coverage Factor	Days Coverage Factor	Days 'Uncovered'
Min Temp (°F)	Max Temp (°F)	Min Temp (°F)	Max Temp (°F)			
48	84	48	78	100%	100%	0

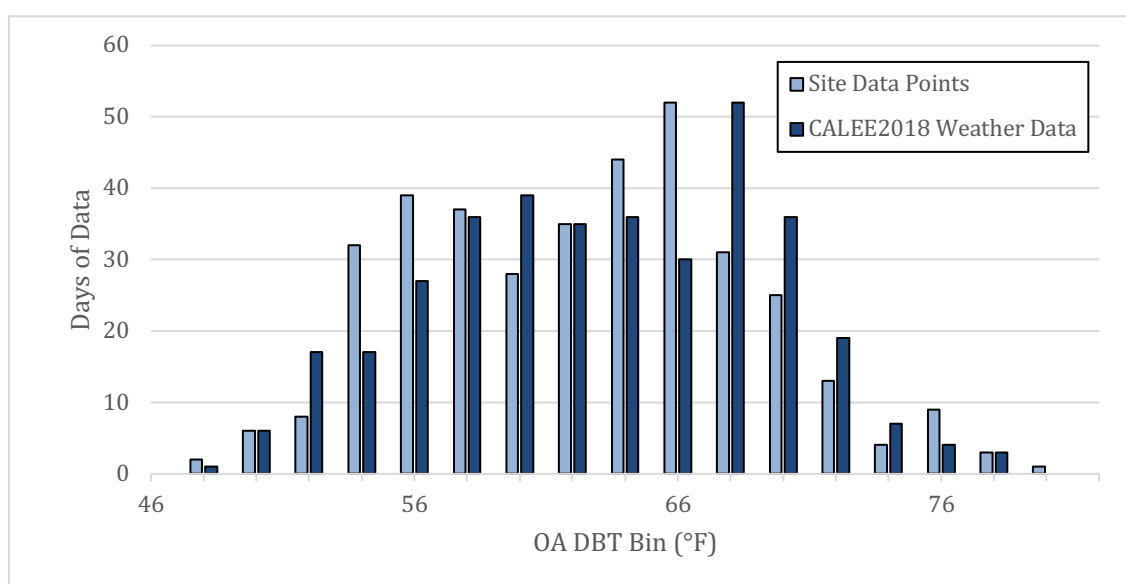


Figure 6-2: Reporting Period Weather Coverage

6. Performance and Savings

6.1. Energy Performance Tracking

An avoided energy use approach was used to track energy performance and savings throughout the performance period. This approach was used for the first 5 months of the reporting period (2/25/2020-7/31/2020). Please note, during this year, the COVID-19 pandemic had occurred. When analyzing the data, it was clear that the pandemic had affected the building's energy usage. To account for this, an average was based on the few weeks of energy use prior to the shutdown. Then, the savings were calculated based on the difference between the adjusted baseline and the average. For more detail on the adjustment for the COVID-19 impact, please refer to the 5-month energy performance report in Appendix A.

To stay consistent with the previous report, the same approach was utilized when tracking the energy performance throughout the entire performance period (2/25/2020-2/28/2021). Figure 6-1 shows the actual energy use (raw data), the adjusted baseline energy use (modeled data), and the average of the first 2.5 weeks of energy use prior to the shutdown (adjusted data) all over the

reporting period, along with the avoided energy use (savings). The adjusted baseline energy use was determined from the baseline model and the adjustment for COVID-19 and the independent variables (temperature) were determined from the performance period. Figure 6-2 shows the cumulative saved energy during the performance period (green area) compared to the expected energy savings (black line).

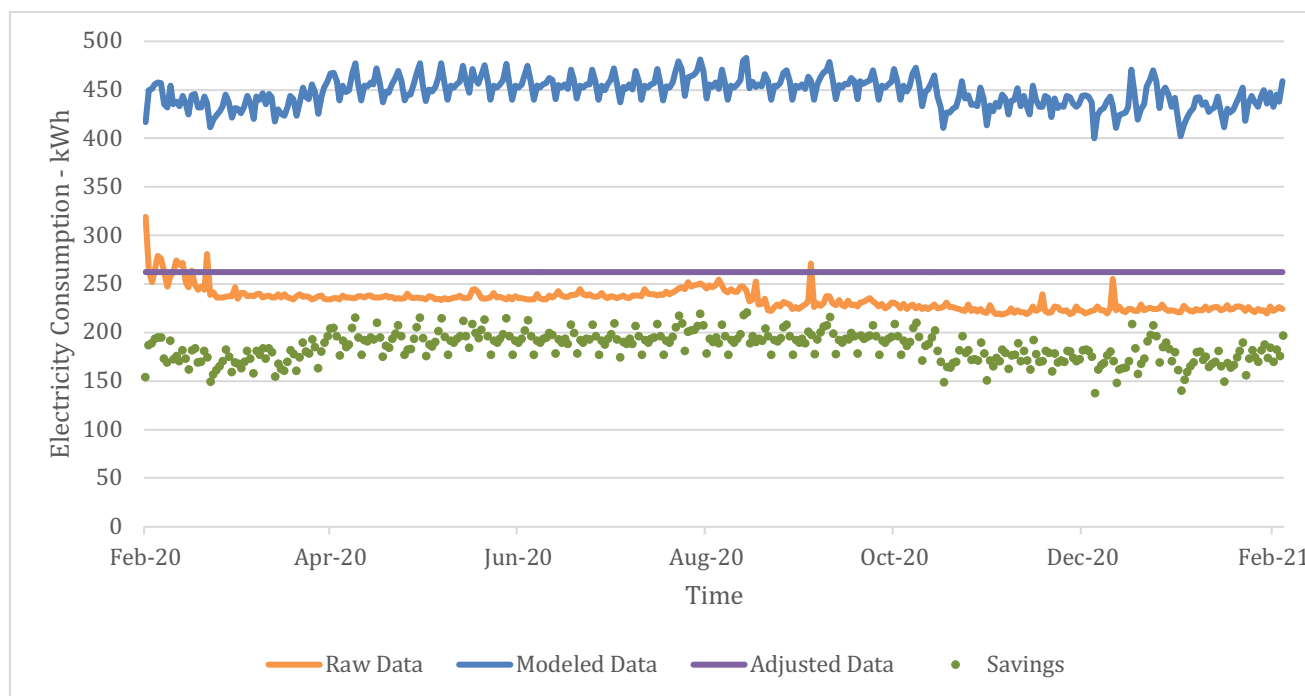


Figure 6-1: Avoided Energy Use (2/25/2020-2/28/2021)

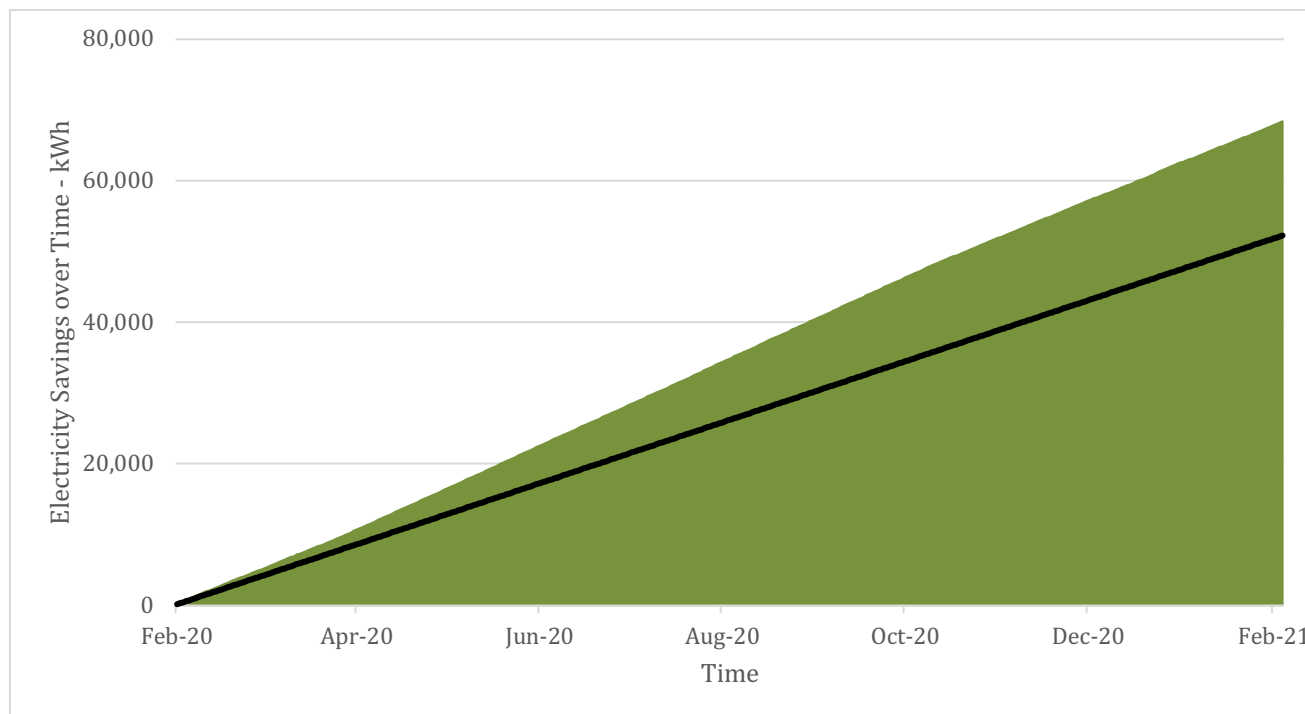


Figure 6-2: Cumulative Avoided Energy Use against Expectation (2/25/2020-2/28/2021)

Table 6-1: Avoided Energy Use and Uncertainty (2/25/2020-2/28/2021)

Adjusted Performance Period Use	Adjusted Baseline Use	Savings	Savings Fraction
97,073 kWh	165,500 kWh	68,426 kWh	41%

6.2. Reporting Period Non-Routine Events (NREs)

Due to the COVID-19 pandemic, a stay-at-home order was issued in March 2020. As previously mentioned, and seen in Figure 6-1, there is evidence of COVID impacts over the reporting period during the first 2.5 weeks. Adjustments for these impacts were made by taking an average of the few weeks of energy use prior to the shutdown. Then, the savings were calculated based on the difference between the adjusted baseline and the average. For this 12 month report, the normalized savings includes a calculation with and without the adjustment for COVID-19.

6.3. Normalized Savings and Uncertainty

Normalized savings are the reductions in energy use that would occur, had the facility operated under a normal set of conditions. In the Metered Savings Program per CPUC rules, normal conditions are defined with CALEE2018 climate zone data, which are weather conditions of a typical year (i.e. no extremely warm or cold weather conditions). Normalized savings are

defined as the normalized baseline energy use minus the normalized reporting-period energy use.

Normalized energy use was determined for both the baseline period and the reporting period, using CALEE Climate Zone⁵ weather data for greater Mayberry, CA. The normalized weather data was input into the baseline and reporting period models developed using the TOWT modeling algorithm. The total baseline energy use was determined by adding up the baseline model predictions with the CALEE Climate Zone data. Similarly, an annual post-installation estimate of energy use was determined by adding up the reporting period model's predictions under CALEE Climate Zone conditions. The normalized savings was determined as the difference between the normalized baseline and reporting period annual energy use.

Table 6-2: Normalized Savings

Analysis Time Interval	Normalized Savings	Adjusted Normalized Savings	Updated Normalized Savings %
Daily	78,138	67,823	41%

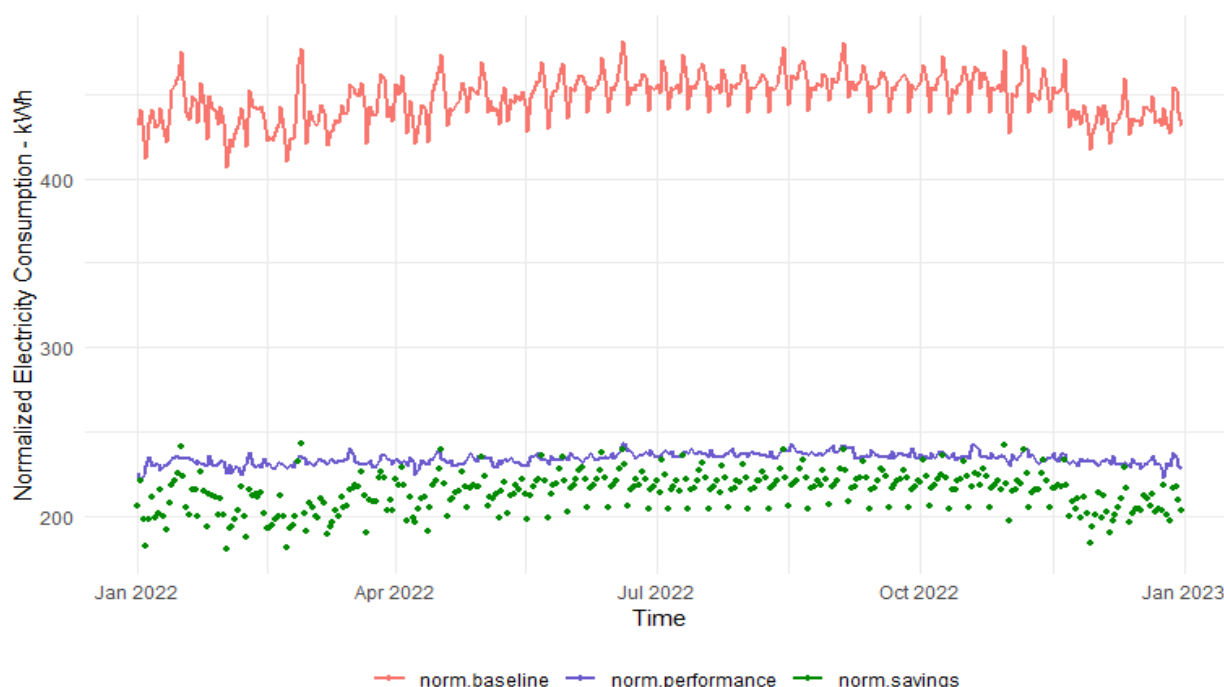


Figure 6-3: Normalized Savings (2/25/2020-2/28/2021)

⁵ <http://www.calmac.org/weather.asp>

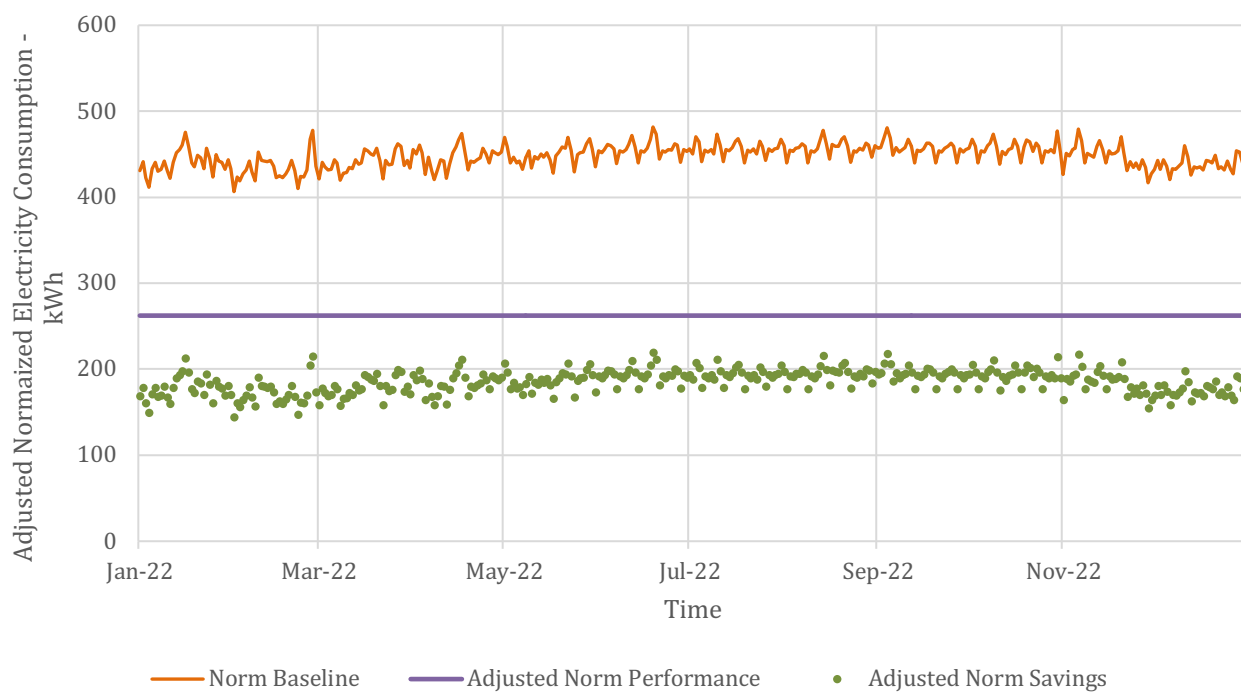


Figure 6-4: Adjusted Normalized Savings (2/25/2020-2/28/2021)

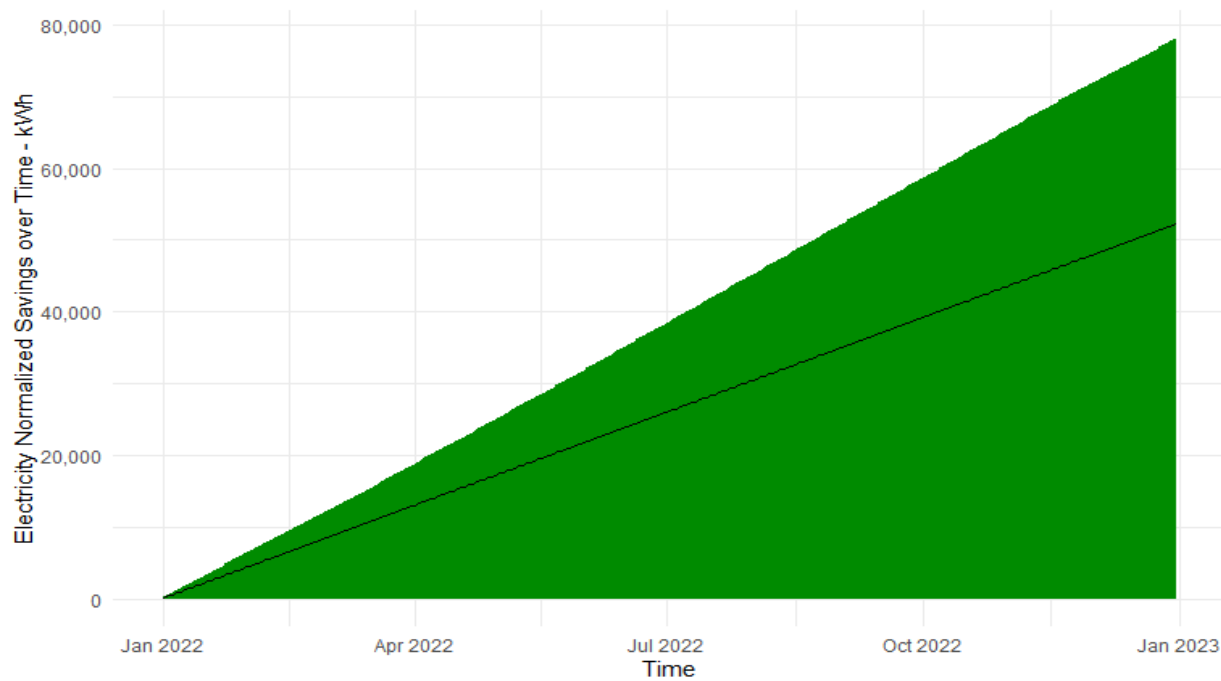


Figure 6-5: Cumulative Normalized Savings against expectation (2/25/2020-2/28/2021)

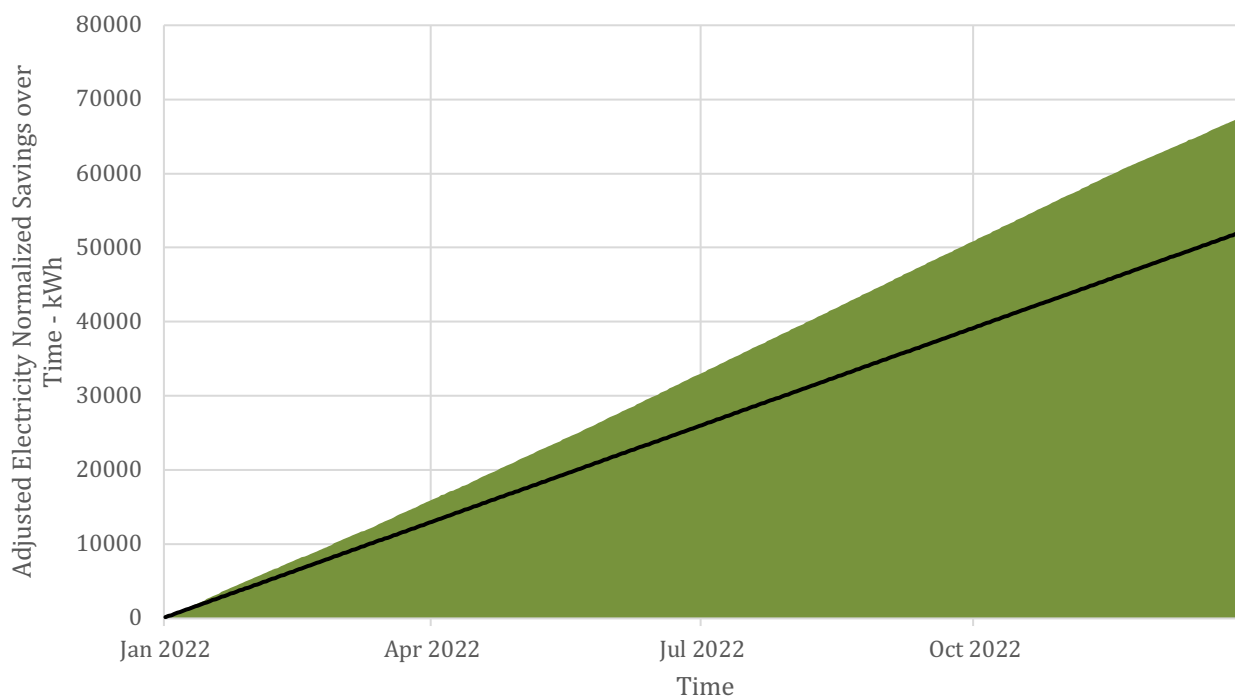


Figure 6-6: Cumulative Adjusted Normalized Savings against expectation (2/25/2020-2/28/2021)

The demand savings calculation followed the DEER Peak Demand Reduction Calculations as described in the 2020 Statewide Customized Offering Procedures Manual for Business (p.20). This requires any grid demand reduction to occur during the three consecutive hottest days, during 4pm-9pm, for the respective California Climate Zone. The Neighborhood Parking Structure is located in CA Climate Zone 8 which has a DEER Peak Period of September 1st through September 3rd between 4pm and 9pm. If the peak period falls on a weekend, the following three-days were utilized.

The DEER peak period for CA Climate Zone 8 was coincident with a weekend period. In this analysis the DEER peak hours were defined as 4pm – 9pm over Monday 9/5/22 to Wednesday 9/7/20.

Demand savings were based on energy models using hourly time intervals and were developed from the electric energy data for both the 12-month baseline period and the 12-month reporting period. Their accuracy metrics are shown in Table 6-3.

Table 6-3: Hourly Models Goodness of Fit Metrics

Period	Model	Analysis Time Interval	R ²	CV(RMSE)	NMBE
Baseline	TOWT	Hourly	0.92	7%	0.00%

Reporting	TOWT	Hourly	0.87	9%	0.00%

The CALEE Mayberry Municipal temperature data was used to adjust the baseline and reporting period hourly models to normal conditions. Then, the baseline normalized energy use and the post-implementation normalized energy use (computed in R) were averaged over the fifteen hours defined above. The average normalized baseline and reporting period demand were each determined by summing the energy use over the fifteen hours and dividing by fifteen hours. The normalized demand savings were calculated as the difference between the two averages in an excel workbook.

The annual normalized savings totals are shown in Table 6-4.

Table 6-4: Annual Normalized Energy Savings

Electric Savings (kWh)	Electric Savings (kW)
67,823	9.44

Appendix A: Referenced Attachments

Appendix	Document	Filename
A	Measurement & Verification (M&V) Plan	Attachment A - M&V Plan
B	Project Feasibility Study (PFS)	Attachment B - PFS
C	Post-Installation Inspection	Attachment C - Inspection Form
D	Project Costs – Summary invoice cover sheet; backup contractor Invoices	Attachment D - Lighting Audit Report
E	Quarterly Savings Report	Attachment E - Savings Report I
F	Updated Savings Report	This report and Attachment F – Normalized Savings Calcs
G	EUL Calculator	Attachment G - Weighted EUL Calculator
H	Lighting Calculations	Attachment H – Lighting Calcs

Appendix B: Data and Electronic Files

All data files including raw collected data, prepared data, and model prediction data are provided as Excel sheets. Energy use, ambient temperature data, CALEE2018 weather data, and additional independent variable data are included.

Raw Data Files

Data	Filename
Weather Data	Weather_Station_123.csv
CALEE2018 Weather Data	CALMAC Mayberry Muni.xlsx
ACME Interval Data Report	ACME BP 1005688592_City of Mayberry City_Contract 8001228878 NEIGHBORHOOD PARKING STRUCTURE.xlsx MAYBERRY CITY 1234567 IDR Reporting.xlsx BP 10012345672 MAYBERRY, CITY OF_Interval Data_Contract 800123456.xlsx

Prepared Data Files

Data	Filename
Ambient temperature, dew point temperature, wet bulb temperature, enthalpy, etc.	Processed Temp.xlsx
15 min interval electric energy usage	Processed Eload - Electric – kWh.xlsx
CALEE2018 weather data	Processed Normalized Temp.xlsx

R Scripts

Data	Filename
Normalized Savings calculations	Helper Functions.R
Normalized Savings calculations	Inputs.R
Demand Savings calculations	Demand Inputs.R

Additional Files

Data	Filename
Normalized Demand Savings Calculation	Demand Savings Calc

Results

Data	Filename
Empty folder that R code will output excel spreadsheet results	

All electronic files are provided in the compressed file named:

Support Documentation for Mayberry Neighborhood Parking Structure Final Savings Report.zip.

An instructions file is provided to guide the user to install R and R Studio, set up working directories, and run the normalized savings analysis. While the modeling algorithms and M&V method is public domain, this programming is the property of Engineering Firm and is being provided for transparency and review purposes only. We request that the code be provided only to those required to review this project, and no one else.

Project Summary

The County of [REDACTED] has been engaged with SoCalREN to assist with the County's forward-looking vision to increase energy efficiency while reducing ongoing costs. This project addressed older space-heating boilers operating at the Registrar-Recorder headquarters. These boilers were costing the County staff time and resources to maintain equipment that was operating well below nameplate efficiency. SoCalREN provided the County with turnkey services including, but not limited to, an energy efficiency audit, technical specifications, and scope of work support which resulted in developing a project which will save energy and County funds while reducing the County's Greenhouse Gas (GHG) and carbon footprint. The newly identified boilers have an efficiency of over 95%, saving over 15,000 therms and thousands of dollars annually while providing a more reliable space heating system, serving the needs of the headquarters. SoCalREN then coordinated with SoCal Gas to develop and submit an incentive application that included additional partnership incentives to reduce the cost of this project resulting in a shorter simple payback period.



Project Benefits

Improved reliability, increased occupant comfort, reduced maintenance costs, reduced utility costs, and reduced greenhouse gas emissions by 80.3 metric tons annually.

Project Impacts					
Measure Name	Energy Savings (kWh/therms)	Incentive (\$) if applicable	Utility Cost Savings (\$/yr) ¹	GHG Emissions Reduction (metric tons CO ₂) ²	Energy Savings Over Existing (%)
Space-Heating Boiler	15,152 Therms	\$17,991	\$17,012.14	80.3	23%

County Climate Action Plan Progress

GHG Emissions Reduction CAP Target	CAP Energy Efficiency Programs Target	Project contribution to Energy Efficiency CAP Target
1,950,849 ³ MT CO ₂ e	46,298 ⁴ MT CO ₂ e	0.2%

¹Based on site average utility rate of \$0.6654/therm

²Based on the [EPA emissions rate](#) of 0.0053 metric tons CO₂/therm

³ This number is not the project GHG reductions, it is the [County's Climate Action Plan](#) (Table 3-3) goal, the table shows that the boiler will contribute to this target.

⁴ This number is not a project metric, it is the County's Climate Action Plan (Table 4-1) goal, the table shows that the boiler will contribute to this target.

Project Impact



17 cars off the road equivalent⁵



\$340,240 cost savings over project lifetime



303,040 Therms savings over project lifetime

About [REDACTED] County

[REDACTED] is the 14th most populous city in [REDACTED] County, and is in the top 86 Percentile of communities burdened by pollution in California per CalEnviroScreen 4.0



94 Percentile Solid Waste



96 Percentile Pollution Burden



90 Percentile Toxic Release

** all metrics in relation to other agency census tracts*

SoCalREN's No-Cost Services Leveraged

- ✓ Project Management
- ✓ Technical Review
- ✓ Savings Calculations

- ✓ Financial Analysis
- ✓ Design & Scope of Work
- ✓ M&V Plan



Total Estimated Value of SoCalREN's Services: **\$22,000**

Energy Champion Spotlight



[REDACTED]

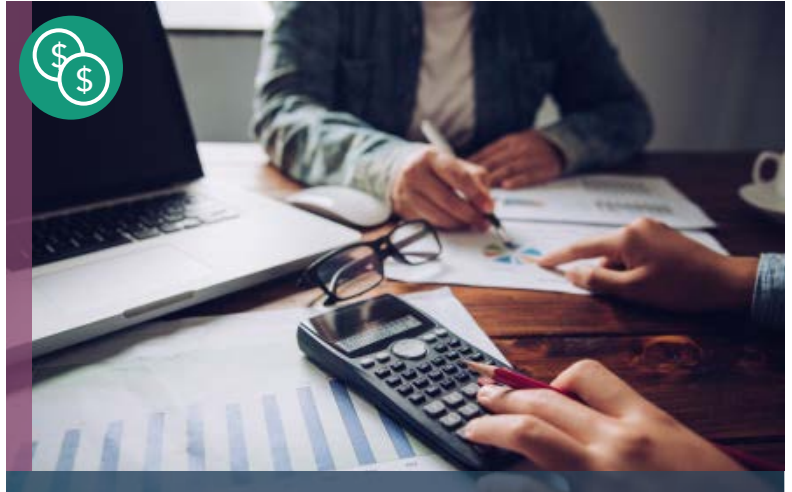
In July 2021, this project was originally anticipated to be installed in February or March of 2022, which would have been after the downstream deemed program rebate application end of year (2021) deadline. [REDACTED] worked diligently to fast-track the project in order to meet this deadline. By October of 2021, [REDACTED] had provided specification documents, begun the permitting process, and put the project on track to be installed prior to the end of the year. Both boilers were installed before the winter holidays, months ahead of the original timeline, allowing [REDACTED] County to take advantage of the SoCalGas deemed program incentives and receive an additional 50% kicker (\$5,997).

⁵ Based on the EPA emissions rate of 4.63 metric tons CO₂e/vehicle/year

Financing Services for Public Agency Energy Efficiency Retrofits

Energy retrofits save money and resources in the long run, but financing them can be a big challenge for public agencies. The Southern California Regional Energy Network (SoCalREN) Public Agency Programs offer a suite of free services to overcome this challenge and move projects to completion, including:

- **Tailored solutions** - SoCalREN can help identify financing solutions that best fit your agency's specific needs and circumstances.
- **Paperwork made easy** - once your agency decides how to finance your energy efficiency project, SoCalREN can assist your staff with completing financing and incentive applications for the project.
- **Financial advisor** - SoCalREN can provide initial access to objective financial advisory services through a qualified and certified financial advisor, available on request at no additional charge to work directly with your agency and ensure proper communication of financial options, structures, and obligations.
- **Exclusive financing options** - For on-bill financing or other options that pay out after construction completion, our Revolving Savings Fund can help bridge the gap while other funding is being secured. SoCalREN also offers Energy Project Lease Financing with flexible terms and low interest rates for energy efficiency, water conservation, and renewable energy projects.



SoCalREN is your objective third party resource for financing support—as a ratepayer funded program, we have no financial stake in your decisions. Our mission is to support public agencies to increase energy efficiency adoption. Our success is your success!

Results as of June 2020

100%

Agency Satisfaction with
Financing Services

\$31M

Incentives and
Financing Secured

44,551 Tons

Greenhouse gas emission
reduction from SoCalREN
agencies' annual energy
savings, equivalent to taking
9,500 cars off the road

\$7M

Annual Energy Cost Savings
for SoCalREN Agencies

**Contact your SoCalREN Project Manager
or email us at info@socalren.org to get started.**

Energy Efficiency Project Financing Opportunities for Public Agencies



SoCalREN Revolving Savings Fund

The SoCalREN Revolving Savings Fund (RSF) supports energy efficiency upgrades of public agency facilities by providing up-front financing to bridge the delay between construction and acquisition of long-term financing, such as On-Bill Financing (OBF) from the utility, California Energy Commission (CEC) loans, or agency budget allocation.

Advantages and Key Considerations

- 0% interest rate; one-time 1% service fee (waived through the end of 2020)
- Simple application, efficient processing and quick allocation of funds
- Loan term of up to 5 years with no loan minimum



California Energy Commission (CEC) Energy Conservation Assistance Act Low Interest Loans

The California Energy Commission's Energy Conservation Assistance Act (ECAA) program offers 1% interest loans to public agencies to finance energy efficiency and energy generation projects. 0% interest loans are also offered annually on a competitive basis to qualifying school districts.

Advantages and Key Considerations

- Maximum loan is \$3 million per application
- Applications are accepted on a first-come, first-served basis
- Loan can fund 100% of project costs within a 17 year maximum simple payback
- Loan must be repaid from energy savings within a maximum of 20 years



Utility On-Bill Financing (SCE & SoCalGas)

Utility On-Bill Financing (OBF) assists eligible customers finance energy efficiency projects that are eligible for utility incentives. OBF is a no-interest, no-fee loan repaid through the customer's monthly energy bill. All SCE/SCG business customers are eligible to take advantage of OBF.

Advantages and Key Considerations

- Loan terms are a maximum of 10 years
- Loan amounts between \$5,000-\$1 million, with a one-time option of a \$4 million loan
- Loans above \$250,000 may not be combined with rebates or other utility incentives
- Applications are accepted on a rolling basis



IBank California Lending for Energy & Environmental Needs (CLEEN) Center Low-Interest Financing

The IBank CLEEN Center offers financing for public agency energy generation, conservation, and storage projects through the Statewide Energy Efficiency Program (SWEEP) and the Light Emitting Diode (LED) Street Lighting Program. SWEEP finances facility energy efficiency projects; the LED program finances street lighting upgrade projects.

Advantages and Key Considerations

- All or any part of the costs of construction and renovation are eligible for financing
- Applicants must demonstrate project-readiness and feasibility to complete construction within 2 years after IBank's financing approval
- IBank prioritizes projects in areas with high unemployment rates, low median family income, declining or slow growth in labor force employment, or high poverty rates
- Applications accepted on a rolling basis

Contact your SoCalREN Project Manager for more information and help applying for any of these energy efficiency financing options!

	Pathway 1	Pathway 2	Pathway 3	Pathway 4	Pathway 5	Pathway 6	Pathway 7	Pathway 8
Gross Project Cost	\$800,000	\$800,000	\$800,000	\$800,000	\$800,000	\$800,000	\$800,000	\$800,000
Annual Energy Cost Savings	\$65,000	\$65,000	\$65,000	\$65,000	\$65,000	\$65,000	\$65,000	\$65,000
Annual Maintenance Cost Savings	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000
Incentives	\$20,000	\$20,000	\$0	\$0	\$0	\$20,000	\$0	\$0
OBF Loan	\$0	\$250,000	\$0	\$0	\$0	\$250,000	\$250,000	\$250,000
CEC Loan	\$0	\$0	\$0	\$800,000	\$800,000	\$0	\$550,000	\$550,000
RSF Loan	\$0	\$0	\$800,000	\$0	\$800,000	\$800,000	\$0	\$800,000
NPV	-\$31,496	-\$12,126	\$25,732	\$80,351	\$137,578	\$45,101	\$46,310	\$103,537
SPP	11.143	11.143	11.429	11.429	11.429	11.143	11.429	11.429
ROI	-0.04	-0.02	0.03	0.10	0.17	0.06	0.06	0.13

Central Coast ✓ LEAP

Public Agency Project Proposal

The Agency enrolled in CC-LEAP in 2020 to take advantage of no-cost energy efficiency services to help move projects from conception to completion. CC-LEAP audited the Public Agency Community Center in June 2022. Based on data collected on-site and provided by agency staff, CC-LEAP identified three energy efficiency measures for analysis in this proposal.

Benefits of this project include improved safety and reliability, increasing occupant comfort, reducing maintenance costs, hedging against increasing utility costs, and reducing greenhouse gas emissions by 500 metric tons annually.

Insert Agency logo or seal. Right-click this image and choose "Change Picture," browse to image and click "Insert".

Estimated Savings
\$1,200 per month
\$14,400 per year

Estimated Net Savings (NPV)
\$32,000
over project lifetime

Simple Payback Period
6.7 Years

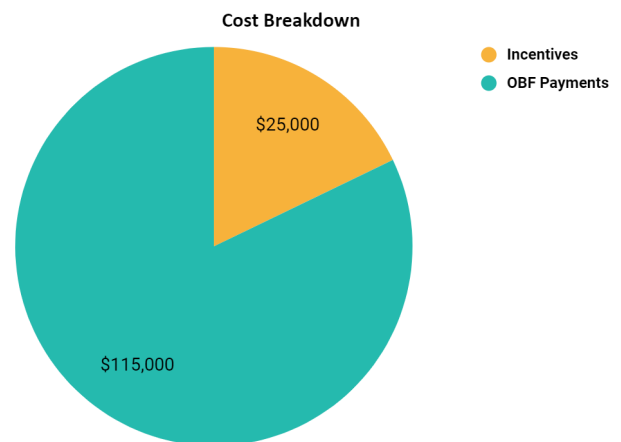
Monthly and annual savings include energy and maintenance cost savings.

Project Financials

Project Costs	
Gross Project Cost	\$140,000
Estimated Incentives	\$25,000
Net Project Cost	\$115,000
Estimated OBF	\$115,000
Remaining Project Cost	\$0

Additional costs, such as construction management or staff time, are not included in this table. Incentive and OBF reimbursements are not received until after the project has been completed and approved by PG&E.

Project Financial Metrics	
Net Present Value (NPV) - Cash Only	\$32,000
NPV with OBF & cash	\$55,000
Simple Payback Period (SPP)	6.7 years
Return on Investment (ROI)	1.5



Up-front capital requirements are often the greatest obstacle in pursuing energy efficiency retrofit projects. However, by utilizing the estimated \$25,000 in incentives and the estimated \$115,000 in OBF, Your Agency will be left with zero out-of-pocket cost.

Attachment 1c

WRCOG - IREN - Professional
Services Agreement - TEC-PS

**WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
PROFESSIONAL SERVICES AGREEMENT 2023-80-2080-001**

1. PARTIES AND DATE.

This Agreement is made and entered into this 17th day of January 2023, by and between the Western Riverside Council of Governments, a California public agency ("WRCOG"), and The Energy Coalition, a California 501(c)3 nonprofit ("Consultant"). WRCOG and Consultant are sometimes individually referred to as "Party" and collectively as "Parties."

2. RECITALS.

2.1 Inland Regional Energy Network

The Inland Regional Energy Network ("I-REN") is a consortium of WRCOG, San Bernardino Associated Governments ("SANBAG") and the Coachella Valley Association of Governments ("CVAG") for the purpose of establishing and operating a locally administered, designed, and delivered energy efficiency program. WRCOG is the administrative lead of I-REN and is responsible for entering into contracts on behalf of I-REN.

2.2 Consultant.

Consultant desires to perform and assume responsibility for the provision of certain professional services required by WRCOG on the terms and conditions set forth in this Agreement. Consultant represents that it is experienced in providing Public Sector Energy Efficiency program development services that meet the needs of the I-REN program as described in the Scope of Services, is licensed in the State of California, and is familiar with the plans of WRCOG.

2.3 Project.

WRCOG desires to engage Consultant to render such professional services for the **Public Sector Energy Efficiency Program Services** ("Project") as set forth in this Agreement.

3. TERMS.

3.1 Scope of Services and Term.

3.1.1 General Scope of Services. Consultant promises and agrees to furnish to WRCOG all labor, materials, tools, equipment, services, and incidental and customary work necessary to fully and adequately develop programs to support I-REN's Public Sector energy efficiency programs targeting local governments, special districts, and tribal communities necessary for the Project ("Services"). The Services are more particularly described in Exhibit "A" attached hereto and incorporated herein by reference, and which are stated in the proposal to WRCOG and approved by I-REN's Executive Committee. All Services shall be subject to, and performed in accordance with, this Agreement, the exhibits attached hereto and incorporated herein by reference, and all applicable local, state and federal laws, rules and regulations.

3.1.2 Term. The term of this Agreement shall be from **January 17, 2023 to December 31, 2025** with no more than two options to renew or amend unless earlier terminated

as provided herein. Consultant shall complete the Services within the term of this Agreement and shall meet any other established schedules and deadlines.

3.2 Responsibilities of Consultant.

3.2.1 Control and Payment of Subordinates; Independent Contractor. The Services shall be performed by Consultant or under its supervision. Consultant will determine the means, methods, and details of performing the Services subject to the requirements of this Agreement. WRCOG retains Consultant on an independent contractor basis and not as an employee. Consultant retains the right to perform similar or different services for others during the term of this Agreement. Any additional personnel performing the Services under this Agreement on behalf of Consultant shall also not be employees of WRCOG and shall at all times be under Consultant's exclusive direction and control. Consultant shall pay all wages, salaries, and other amounts due such personnel in connection with their performance of Services under this Agreement and as required by law. Consultant shall be responsible for all reports and obligations respecting such additional personnel, including, but not limited to, social security taxes, income tax withholding, unemployment insurance, disability insurance, and workers' compensation insurance.

3.2.2 Schedule of Services. Consultant shall perform the Services expeditiously, within the term of this Agreement, and in accordance with the Schedule of Services set forth in Exhibit "B" attached hereto and incorporated herein by reference. Consultant represents that it has the professional and technical personnel required to perform the Services in conformance with such conditions. In order to facilitate Consultant's conformance with the Schedule, WRCOG shall respond to Consultant's submittals in a timely manner. Upon request of WRCOG, Consultant shall provide a more detailed schedule of anticipated performance to meet the Schedule of Services.

3.2.3 Conformance to Applicable Requirements. All work prepared by Consultant shall be subject to the approval of WRCOG.

3.2.4 Substitution of Key Personnel. Consultant has represented to WRCOG that certain key personnel will perform and coordinate the Services under this Agreement. Should one or more of such personnel become unavailable, Consultant may substitute other personnel of at least equal competence upon written approval of WRCOG. In the event that WRCOG and Consultant cannot agree as to the substitution of key personnel, WRCOG shall be entitled to terminate this Agreement for cause. As discussed below, any personnel who fail or refuse to perform the Services in a manner acceptable to WRCOG, or who are determined by the WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, or a threat to the safety of persons or property, shall be promptly removed from the Project by the Consultant at the request of the WRCOG. The key personnel for performance of this Agreement are as follows:

**Craig Perkins, President/Executive Director
Laurel Rothschild, Vice President**

3.2.5 WRCOG's Representative. WRCOG hereby designates the Executive Director, or his or her designee, to act as its representative for the performance of this Agreement ("WRCOG's Representative"). WRCOG's Representative shall have the power to act on behalf of WRCOG for all purposes under this Contract. Consultant shall not accept direction or orders

from any person other than WRCOG's Representative or his or her designee.

3.2.6 Consultant's Representative. Consultant hereby designates Craig Perkins, President / Executive Director, or his or her designee, to act as its Representative for the performance of this Agreement ("Consultant's Representative"). Consultant's Representative shall have full authority to represent and act on behalf of the Consultant for all purposes under this Agreement. The Consultant's Representative shall supervise and direct the Services, using his best skill and attention, and shall be responsible for all means, methods, techniques, sequences, and procedures, and for the satisfactory coordination of all portions of the Services under this Agreement.

3.2.7 Coordination of Services. Consultant agrees to work closely with WRCOG staff in the performance of Services and shall be available to WRCOG's staff, consultants, and other staff at all reasonable times.

3.2.8 Standard of Care; Performance of Employees. Consultant shall perform all Services under this Agreement in a skillful and competent manner, consistent with the standards generally recognized as being employed by professionals in the same discipline in the State of California. Consultant represents and maintains that it is skilled in the professional calling necessary to perform the Services. Consultant warrants that all employees and sub- contractors shall have sufficient skill and experience to perform the Services assigned to them. Finally, Consultant represents that it, its employees and sub-contractors have all licenses, permits, qualifications, and approvals of whatever nature that are legally required to perform the Services, and that such licenses and approvals shall be maintained throughout the term of this Agreement. As provided for in the indemnification provisions of this Agreement, Consultant shall perform, at its own cost and expense, and without reimbursement from WRCOG, SANBAG, and/or CVAG for any services necessary to correct errors or omissions which are caused by the Consultant's failure to comply with the standard of care provided for herein. Any employee of the Consultant or its sub-consultants who is determined by WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, a threat to the safety of persons or property, or any employee who fails or refuses to perform the Services in a manner acceptable to WRCOG, shall be promptly removed from the Project by the Consultant and shall not be re-employed to perform any of the Services or to work on the Project.

3.2.9 Laws and Regulations. Consultant shall keep itself fully informed of and in compliance with all local, state and federal laws, rules and regulations in any manner affecting the performance of the Project or the Services, including all Cal OSHA requirements, and shall give all notices required by law. Consultant shall be liable for all violations of such laws and regulations in connection with Services. If the Consultant performs any work knowing it to be contrary to such laws, rules, and/or regulations, and without giving written notice to WRCOG, Consultant shall be solely responsible for all costs arising therefrom. Consultant shall defend, indemnify, and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers and agents free and harmless, pursuant to the indemnification provisions of this Agreement, from any claim or liability arising out of any failure or alleged failure to comply with such laws, rules or regulations.

3.2.10 Insurance.

3.2.10.1 Time for Compliance. Consultant shall not commence the Services under this Agreement until it has provided evidence satisfactory to WRCOG that it has secured all insurance required under this section, in a form and with insurance companies

acceptable to WRCOG. In addition, Consultant shall not allow any sub-contractor to commence work on any subcontract until it has provided evidence satisfactory to WRCOG that the sub-contractor has secured all insurance required under this section.

3.2.10.2 Minimum Requirements. Consultant shall, at its expense, procure and maintain for the duration of the Agreement, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Agreement by the Consultant, its agents, representatives, employees or sub-contractors. Consultant shall also require all of its sub-contractors to procure and maintain the same insurance for the duration of the Agreement. Such insurance shall meet at least the following minimum levels of coverage:

(A) Minimum Scope of Insurance. Coverage shall be at least as broad as the latest version of the following: (1) *General Liability*: Insurance Services Office Commercial General Liability coverage (occurrence form CG 0001 or exact equivalent); (2) *Automobile Liability*: Insurance Services Office Business Auto Coverage (form CA 0001, code 1 (any auto) or exact equivalent); and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

(B) Minimum Limits of Insurance. Consultant shall maintain limits no less than: (1) *General Liability*: \$1,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with general aggregate limit is used, either the general aggregate limit shall apply separately to this Agreement / location or the general aggregate limit shall be twice the required occurrence limit; (2) *Automobile Liability*: \$1,000,000 per accident for bodily injury and property damage; and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation limits as required by the Labor Code of the State of California. Employer's Liability limits of \$1,000,000 per accident for bodily injury or disease.

3.2.10.3 Professional Liability. Consultant shall procure and maintain, and require its sub-consultants to procure and maintain, for a period of five (5) years following completion of the Services, errors and omissions liability insurance appropriate to their profession. Such insurance shall be in an amount not less than \$2,000,000 per claim. This insurance shall be endorsed to include contractual liability applicable to this Agreement and shall be written on a policy form coverage specifically designed to protect against acts, errors, or omissions of the Consultant. "Covered Professional Services" as designated in the policy must specifically include work performed under this Agreement. The policy must "pay on behalf of" the insured and must include a provision establishing the insurer's duty to defend.

3.2.10.4 Insurance Endorsements. The insurance policies shall contain the following provisions, or Consultant shall provide endorsements on forms supplied or approved by WRCOG to add the following provisions to the insurance policies:

(A) General Liability.

(i) Commercial General Liability Insurance must include coverage for (1) Bodily Injury and Property Damage; (2) Personal Injury / Advertising Injury; (3) Premises / Operations Liability; (4) Products / Completed Operations Liability; (5) Aggregate Limits that Apply per Project; (6) Explosion, Collapse and Underground (UCX) exclusion deleted; (7) Contractual Liability with respect to this Agreement; (8) Broad Form Property Damage; and (9) Independent Consultants Coverage.

(ii) The policy shall contain no endorsements or provisions limiting coverage for (1) contractual liability; (2) cross liability exclusion for claims or suits by one insured against another; or (3) contain any other exclusion contrary to the Agreement.

(iii) The policy shall give WRCOG, its Directors, officials, officers, employees, volunteers and agents insured status using ISO endorsement forms 20 10 01 and 20 37 10 01, or endorsements providing the exact same coverage.

(iv) The additional insured coverage under the policy shall be "primary and non-contributory" and will not seek contribution from WRCOG's, SANBAG's, or CVAG's insurance or self-insurance and shall be at least as broad as CG 20 01 04 13, or endorsements providing the exact same coverage.

(B) Automobile Liability.

(i) The automobile liability policy shall be endorsed to state that: (1) WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents and volunteers shall be covered as additional insureds with respect to the ownership, operation, maintenance, use, loading or unloading of any auto owned, leased, hired, or borrowed by the Consultant or for which the Consultant is responsible; and (2) the insurance coverage shall be primary insurance as respects WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents, and volunteers, or if excess, shall stand in an unbroken chain of coverage excess of the Consultant's scheduled underlying coverage. Any insurance or self-insurance maintained by WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents, and volunteers shall be in excess of the Consultant's insurance and shall not be called upon to contribute with it in any way.

(C) Workers' Compensation and Employers Liability Coverage.

(i) Consultant certifies that he/she is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and he/she will comply with such provisions before commencing work under this Agreement.

(ii) The insurer shall agree to waive all rights of subrogation against WRCOG, its Directors, officials, officers, employees, agents, and volunteers for losses paid under the terms of the insurance policy which arise from work performed by the Consultant.

(D) All Coverages. Defense costs shall be payable in addition to the limits set forth hereunder. Requirements of specific coverage or limits contained in this section are not intended as a limitation on coverage, limits, or other requirement, or a waiver of any coverage normally provided by any insurance. It shall be a requirement under this Agreement that any available insurance proceeds broader than or in excess of the specified minimum insurance coverage requirements and/or limits set forth herein shall be available to WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers and agents as additional insureds under said policies. Furthermore, the requirements for coverage and limits shall be (1) the minimum coverage and limits specified in this Agreement; or (2) the broader coverage and maximum limits of coverage of any Insurance policy or proceeds available to the named insured; whichever is greater.

(i) The limits of insurance required in this Agreement may be satisfied by a combination of primary and umbrella or excess insurance. Any umbrella or excess insurance shall contain or be endorsed to contain a provision that such coverage shall also apply on a primary and non-contributory basis for the benefit of WRCOG (if agreed to in a written contract or agreement) before WRCOG's own insurance or self-insurance shall be called upon to protect it as a named insured. The umbrella / excess policy shall be provided on a "following form" basis with coverage at least as broad as provided on the underlying policy(ies).

(ii) Consultant shall provide WRCOG at least thirty (30) days prior written notice of cancellation of any policy required by this Agreement, except that the Consultant shall provide at least ten (10) days prior written notice of cancellation of any such policy due to non-payment of premium. If any of the required coverage is cancelled or expires during the term of this Agreement, the Consultant shall deliver renewal certificate(s) including the General Liability Additional Insured Endorsement to WRCOG at least ten (10) days prior to the effective date of cancellation or expiration.

(iii) The retroactive date (if any) of each policy is to be no later than the effective date of this Agreement. Consultant shall maintain such coverage continuously for a period of at least three years after the completion of the work under this Agreement. Consultant shall purchase a one (1) year extended reporting period A) if the retroactive date is advanced past the effective date of this Agreement; B) if the policy is cancelled or not renewed; or C) if the policy is replaced by another claims-made policy with a retroactive date subsequent to the effective date of this Agreement.

(iv) The foregoing requirements as to the types and limits of insurance coverage to be maintained by Consultant, and any approval of said insurance by WRCOG, is not intended to and shall not in any manner limit or qualify the liabilities and obligations otherwise assumed by the Consultant pursuant to this Agreement, including but not limited to, the provisions concerning indemnification.

(v) If at any time during the life of the Agreement, any policy of insurance required under this Agreement does not comply with these specifications or is canceled and not replaced, WRCOG has the right but not the duty to obtain the insurance it deems necessary, and any premium paid by WRCOG will be promptly reimbursed by Consultant or WRCOG will withhold amounts sufficient to pay premium from Consultant payments. In the alternative, WRCOG may cancel this Agreement. WRCOG may require the Consultant to provide complete copies of all insurance policies in effect for the duration of the Project.

(vi) Neither WRCOG nor any of its Directors, officials, officers, employees, volunteers or agents shall be personally responsible for any liability arising under or by virtue of this Agreement.

3.2.10.5 Separation of Insureds; No Special Limitations. All insurance required by this Section shall contain standard separation of insureds provisions. In addition, such insurance shall not contain any special limitations on the scope of protection afforded to WRCOG, its Directors, officials, officers, employees, agents, and volunteers.

3.2.10.6 Deductibles and Self-Insurance Retentions. Any deductibles or self-insured retentions must be declared to and approved by WRCOG. Consultant shall guarantee that, at the option of WRCOG, either: (1) the insurer shall reduce or eliminate

such deductibles or self-insured retentions as respects WRCOG, its Directors, officials, officers, employees, agents, and volunteers; or (2) the Consultant shall procure a bond guaranteeing payment of losses and related investigation costs, claims, and administrative and defense expenses.

3.2.10.7 Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, licensed to do business in California, and satisfactory to WRCOG.

3.2.10.8 Verification of Coverage. Consultant shall furnish WRCOG with original certificates of insurance and endorsements effecting coverage required by this Agreement on forms satisfactory to WRCOG. The certificates and endorsements for each insurance policy shall be signed by a person authorized by that insurer to bind coverage on its behalf and shall be on forms provided by WRCOG if requested. All certificates and endorsements must be received and approved by WRCOG before work commences. WRCOG reserves the right to require complete, certified copies of all required insurance policies, at any time.

3.2.10.9 Sub-consultant Insurance Requirements. Consultant shall not allow any sub-contractors or sub-consultants to commence work on any sub-contract until they have provided evidence satisfactory to WRCOG that they have secured all insurance required under this section. Policies of commercial general liability insurance provided by such sub-contractors or sub-consultants shall be endorsed to name WRCOG, SANBAG, and CVAG as additional insureds using ISO Form CG 20 38 04 13 or an endorsement providing the exact same coverage. If requested by Consultant, WRCOG may approve different scopes or minimum limits of insurance for particular sub-contractors or sub-consultants.

3.2.11 Safety. Consultant shall execute and maintain its work so as to avoid injury or damage to any person or property. In carrying out its Services, the Consultant shall at all times be in compliance with all applicable local, state, and federal laws, rules, and regulations, and shall exercise all necessary precautions for the safety of employees appropriate to the nature of the work and the conditions under which the work is to be performed. Safety precautions as applicable shall include, but shall not be limited to: (A) adequate life protection and life-saving equipment and procedures; (B) instructions in accident prevention for all employees and sub-contractors, such as safe walkways, scaffolds, fall protection ladders, bridges, gang planks, confined space procedures, trenching and shoring, equipment, and other safety devices, equipment and wearing apparel as are necessary or lawfully required to prevent accidents or injuries; and (C) adequate facilities for the proper inspection and maintenance of all safety measures.

3.3 Fees and Payments.

3.3.1 Compensation. Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Agreement at the rates set forth in Exhibit "C" attached hereto and incorporated herein by reference. The total compensation shall not exceed seven million five-hundred thousand dollars (\$7,500,000.00) plus I-REN's annual incentives without written approval of I-REN Executive Committee. Extra Work may be authorized, as described below, and, if authorized, said Extra Work will be compensated at the rates and manner set forth in this Agreement.

3.3.2 Payment of Compensation. Consultant shall submit to WRCOG a monthly itemized statement which indicates work completed and hours of Services rendered by Consultant. The statement shall contain the invoice number and date; remittance address;

Agreement number 2023-80-2080-001, and invoice total. The statement shall describe the amount of Services and supplies provided since the initial commencement date, or since the start of the subsequent billing periods, as appropriate, through the date of the statement. WRCOG shall, within 45 days of receiving such statement, review the statement and pay all approved charges thereon.

3.3.3 Reimbursement for Expenses. Consultant shall not be reimbursed for any expenses unless authorized in writing by WRCOG.

3.3.4 Extra Work. At any time during the term of this Agreement, WRCOG may request that Consultant perform Extra Work. As used herein, "Extra Work" means any work which is determined by WRCOG to be necessary for the proper completion of the Project, but which the Parties did not reasonably anticipate would be necessary at the execution of this Agreement. Consultant shall not perform, nor be compensated for, Extra Work without written authorization from WRCOG's Representative.

3.3.5 Prevailing Wages. Consultant is aware of the requirements of California Labor Code Sections 1720, et seq., and 1770, et seq., as well as California Code of Regulations, Title 8, Section 16000, et seq., ("Prevailing Wage Laws"), which require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects. If the Services are being performed as part of an applicable "public works" or "maintenance" project, as defined by the Prevailing Wage Laws, and if the total compensation is \$1,000 or more, Consultant agrees to fully comply with such Prevailing Wage Laws. WRCOG shall provide Consultant with a copy of the prevailing rates of per diem wages in effect at the commencement of this Agreement. Consultant shall make copies of the prevailing rates of per diem wages for each craft, classification, or type of worker needed to execute the Services available to interested parties upon request, and post copies at the Consultant's principal place of business and at the project site. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers, and agents free and harmless from any claims, liabilities, costs, penalties or interest arising out of any failure or alleged failure to comply with the Prevailing Wage Laws.

3.4 Accounting Records.

3.4.1 Maintenance and Inspection. Consultant shall maintain complete and accurate records with respect to all costs and expenses incurred under this Agreement. All such records shall be clearly identifiable. Consultant shall allow a representative of WRCOG during normal business hours to examine, audit, and make transcripts or copies of such records and any other documents created pursuant to this Agreement. Consultant shall allow inspection of all work, data, documents, proceedings, and activities related to the Agreement for a period of three (3) years from the date of final payment under this Agreement.

3.5 General Provisions.

3.5.1 Termination of Agreement.

3.5.1.1 Grounds for Termination. WRCOG may, by written notice to Consultant, terminate the whole or any part of this Agreement at any time and without cause by giving written notice to Consultant of such termination, and specifying the effective date thereof, at least seven (7) days before the effective date of such termination. Upon termination, Consultant shall be compensated only for those services which have been adequately rendered to WRCOG,

and Consultant shall be entitled to no further compensation. Consultant may not terminate this Agreement except for cause.

3.5.1.2 Effect of Termination. If this Agreement is terminated as provided herein, WRCOG may require Consultant to provide all finished or unfinished Documents and Data and other information of any kind prepared by Consultant in connection with the performance of Services under this Agreement. Consultant shall be required to provide such documents and other information within fifteen (15) days of the request.

3.5.1.3 Additional Services. In the event this Agreement is terminated in whole or in part as provided herein, WRCOG may procure, upon such terms and in such manner as it may determine appropriate, services similar to those terminated.

3.5.2 Delivery of Notices. All notices permitted or required under this Agreement shall be given to the respective Parties at the following address, or at such other address as the respective parties may provide in writing for this purpose:

Consultant: The Energy Coalition
525 Technology Drive Ste. 350
Irvine, CA 92618

WRCOG: Western Riverside Council of Governments
3390 University Avenue, Suite 200
Riverside, CA 92501
Attn: Casey Dailey

Such notice shall be deemed made when personally delivered or when mailed, forty-eight (48) hours after deposit in the U.S. Mail, first class postage prepaid and addressed to the Party at its applicable address. Actual notice shall be deemed adequate notice on the date actual notice occurred, regardless of the method of service.

3.5.3 Ownership of Materials and Confidentiality.

3.5.3.1 Documents & Data; Licensing of Intellectual Property. This Agreement creates a non-exclusive and perpetual license for WRCOG to copy, use, modify, reuse, or sub-license any and all copyrights, designs, and other intellectual property embodied in plans, specifications, studies, drawings, estimates, and other documents or works of authorship fixed in any tangible medium of expression, including but not limited to, physical drawings or data magnetically or otherwise recorded on computer diskettes, which are prepared or caused to be prepared by Consultant under this Agreement ("Documents & Data"). Consultant shall require all sub-contractors to agree in writing that WRCOG is granted a non-exclusive and perpetual license for any Documents & Data the sub-contractor prepares under this Agreement. Consultant represents and warrants that Consultant has the legal right to license any and all Documents & Data. Consultant makes no such representation and warranty in regard to Documents & Data which were prepared by design professionals other than Consultant or provided to Consultant by WRCOG. WRCOG shall not be limited in any way in its use of the Documents & Data at any time, provided that any such use not within the purposes intended by this Agreement shall be at WRCOG's sole risk.

3.5.3.2 Intellectual Property. In addition, WRCOG shall have and retain all right, title, and interest (including copyright, patent, trade secret, and other proprietary rights) in all plans, specifications, studies, drawings, estimates, materials, data, computer programs or

software and source code, enhancements, documents, and any and all works of authorship fixed in any tangible medium or expression, including but not limited to, physical drawings or other data magnetically or otherwise recorded on computer media ("Intellectual Property") prepared or developed by or on behalf of Consultant under this Agreement as well as any other such Intellectual Property prepared or developed by or on behalf of Consultant under this Agreement.

WRCOG shall have and retain all right, title and interest in Intellectual Property developed or modified under this Agreement whether or not paid for wholly or in part by WRCOG, whether or not developed in conjunction with Consultant, and whether or not developed by Consultant. Consultant will execute separate written assignments of any and all rights to the above referenced Intellectual Property upon request of WRCOG.

Consultant shall also be responsible to obtain in writing separate written assignments from any sub-contractors or agents of Consultant of any and all right to the above referenced Intellectual Property. Should Consultant, either during or following termination of this Agreement, desire to use any of the above-referenced Intellectual Property, it shall first obtain the written approval of the WRCOG.

All materials and documents which were developed or prepared by the Consultant for general use prior to the execution of this Agreement and which are not the copyright of any other party or publicly available and any other computer applications, shall continue to be the property of the Consultant. However, unless otherwise identified and stated prior to execution of this Agreement, Consultant represents and warrants that it has the right to grant the exclusive and perpetual license for all such Intellectual Property as provided herein.

WRCOG further is granted by Consultant a non-exclusive and perpetual license to copy, use, modify or sub-license any and all Intellectual Property otherwise owned by Consultant which is the basis or foundation for any derivative, collective, insurrectional, or supplemental work created under this Agreement.

3.5.3.3 Confidentiality. All ideas, memoranda, specifications, plans, procedures, drawings, descriptions, computer program data, input record data, written information, and other Documents & Data either created by or provided to Consultant in connection with the performance of this Agreement shall be held confidential by Consultant. Such materials shall not, without the prior written consent of WRCOG, be used by Consultant for any purposes other than the performance of the Services. Nor shall such materials be disclosed to any person or entity not connected with the performance of the Services or the Project. Nothing furnished to Consultant which is otherwise known to Consultant or is generally known, or has become known, to the related industry shall be deemed confidential. Consultant shall not use WRCOG's name or insignia, photographs of the Project, or any publicity pertaining to the Services or the Project in any magazine, trade paper, newspaper, television, or radio production or other similar medium without the prior written consent of WRCOG.

3.5.3.4 Infringement Indemnification. Consultant shall defend, indemnify, and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers, and agents free and harmless, pursuant to the indemnification provisions of this Agreement, for any alleged infringement of any patent, copyright, trade secret, trade name, trademark, or any other proprietary right of any person or entity in consequence of the use on the Project by WRCOG of the Documents & Data, including any method, process, product, or concept specified or depicted.

3.5.4 Cooperation; Further Acts. The Parties shall fully cooperate with one another and shall take any additional acts or sign any additional documents as may be necessary, appropriate, or convenient to attain the purposes of this Agreement.

3.5.5 Attorney's Fees. If either Party commences an action against the other Party, either legal, administrative, or otherwise, arising out of or in connection with this Agreement, the prevailing party in such litigation shall be entitled to have and recover from the losing party reasonable attorney's fees and all other costs of such action.

3.5.6 Indemnification. Consultant shall defend, indemnify, and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, consultants, employees, volunteers, and agents free and harmless from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury, in law or equity, to property or persons, including wrongful death, in any manner arising out of or incident to any alleged acts, omissions, or willful misconduct of Consultant, its officials, officers, employees, agents, consultants and contractors, arising out of or in connection with the performance of the Services, the Project or this Agreement, including without limitation the payment of all consequential damages and attorneys' fees and other related costs and expenses. Consultant shall defend, at Consultant's own cost, expense, and risk, any and all such aforesaid suits, actions, or other legal proceedings of every kind that may be brought or instituted against WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, consultants, employees, agents or volunteers. Consultant shall pay and satisfy any judgment, award, or decree that may be rendered against WRCOG, SANBAG, CVAG or their respective Directors, officials, officers, consultants, employees, agents, or volunteers, in any such suit, action or other legal proceeding. Consultant shall reimburse WRCOG, SANBAG, CVAG and their respective Directors, officials, officers, consultants, employees, agents, or volunteers, for any and all legal expenses and costs, including reasonable attorneys' fees, incurred by each of them in connection therewith or in enforcing the indemnity herein provided. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, consultants, employees, agents, or volunteers. This section shall survive any expiration or termination of this Agreement. Notwithstanding the foregoing, to the extent Consultant's Services are subject to Civil Code Section 2782.8, the above indemnity shall be limited, to the extent required by Civil Code Section 2782.8, to claims that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant.

3.5.7 Entire Agreement. This Agreement contains the entire Agreement of the Parties with respect to the subject matter hereof, and supersedes all prior negotiations, understandings or agreements. This Agreement may only be modified by a writing signed by both Parties.

3.5.8 Governing Law. This Agreement shall be governed by the laws of the State of California. Venue shall be in Riverside County.

3.5.9 Time of Essence. Time is of the essence for each and every provision of this Agreement.

3.5.10 WRCOG's Right to Employ Other Consultants. WRCOG reserves the right to employ other consultants in connection with this Project.

3.5.11 Successors and Assigns. This Agreement shall be binding on the successors and assigns of the Parties.

3.5.12 Assignment or Transfer. Consultant shall not assign, hypothecate, or transfer, either directly or by operation of law, this Agreement or any interest herein without the prior written consent of WRCOG. Any attempt to do so shall be null and void, and any assignees, hypothecates or transferees shall acquire no right or interest by reason of such attempted assignment, hypothecation or transfer.

3.5.13 Construction; References; Captions. Since the Parties or their agents have participated fully in the preparation of this Agreement, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any Party. Any term referencing time, days, or period for performance shall be deemed calendar days and not work days. All references to Consultant include all personnel, employees, agents, and sub-contractors of Consultant, except as otherwise specified in this Agreement. All references to WRCOG include its Directors, officials, officers, employees, agents, and volunteers except as otherwise specified in this Agreement. The captions of the various articles and paragraphs are for convenience and ease of reference only, and do not define, limit, augment, or describe the scope, content, or intent of this Agreement.

3.5.14 Amendment; Modification. No supplement, modification, or amendment of this Agreement shall be binding unless executed in writing and signed by both Parties.

3.5.15 Waiver. No waiver of any default shall constitute a waiver of any other default or breach, whether of the same or other covenant or condition. No waiver, benefit, privilege, or service voluntarily given or performed by a Party shall give the other Party any contractual rights by custom, estoppel, or otherwise.

3.5.16 No Third-Party Beneficiaries. There are no intended third-party beneficiaries of any right or obligation assumed by the Parties.

3.5.17 Invalidity; Severability. If any portion of this Agreement is declared invalid, illegal, or otherwise unenforceable by a court of competent jurisdiction, the remaining provisions shall continue in full force and effect.

3.5.18 Prohibited Interests. Consultant maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement. Further, Consultant warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, brokerage fee, gift, or other consideration contingent upon or resulting from the award or making of this Agreement. For breach or violation of this warranty, WRCOG shall have the right to rescind this Agreement without liability. For the term of this Agreement, no member, Director, officer, official, agent volunteer, or employee of WRCOG, during the term of his or her service with WRCOG, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

3.5.19 Equal Opportunity Employment. Consultant represents that it is an equal opportunity employer, and it shall not discriminate against any sub-contractor, employee, or applicant for employment because of race, religion, color, national origin, handicap, ancestry, sex, or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff, or termination. Consultant shall also comply with all relevant provisions of any of WRCOG's Minority Business Enterprise Program, Affirmative Action Plan, or other related programs or guidelines currently in effect or hereinafter enacted, including but not limited to California Public Utilities

Commission General Order 156 to the extent applicable to WRCOG.

3.5.20 Labor Certification. By its signature hereunder, Consultant certifies that it is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Workers' Compensation, or to undertake self-insurance in accordance with the provisions of that Code and agrees to comply with such provisions before commencing the performance of the Services.

3.5.21 Authority to Enter Agreement. Consultant has all requisite power and authority to conduct its business and to execute, deliver, and perform the Agreement. Each Party warrants that the individuals who have signed this Agreement have the legal power, right, and authority to make this Agreement and bind each respective Party.

3.5.22 Counterparts. This Agreement may be signed in counterparts, each of which shall constitute an original.

3.6 Subcontracting.

3.6.1 Prior Approval Required. Consultant shall not subcontract any portion of the work required by this Agreement, except as expressly stated herein, without prior written approval of WRCOG. Subcontracts, if any, shall contain a provision making them subject to all provisions stipulated in this Agreement.

[SIGNATURES ON FOLLOWING PAGE]

SIGNATURE PAGE TO
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
PROFESSIONAL SERVICES AGREEMENT

IN WITNESS WHEREOF, the Parties hereby have made and executed this Agreement as of the date first written above.

WESTERN RIVERSIDE COUNCIL
OF GOVERNMENTS

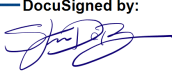
THE ENERGY COALITION

By: _____
Kurt Wilson
Title: Executive Director

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By: _____
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Craig Perkins
Title: President / Executive Director

APPROVED AS TO FORM:

DocuSigned by:

By: _____
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Steven DeBaun
General Counsel
Best Best & Krieger LLP

*A corporation requires the signatures of two corporate officers.

One signature shall be that of the Chairman of Board, the President or any Vice President, and the second signature (on the attest line) shall be that of the Secretary, any Assistant Secretary, the Chief Financial Officer or any Assistant Treasurer of such corporation.

If the above persons are not the intended signators, evidence of signature authority shall be provided to WRCOG.

EXHIBIT “A”

SCOPE OF SERVICES

The requested SOWs are listed here and detailed in the sections following the public sector background information below and inclusive of the proposal submitted by TEC.

1. Public Sector Technical Assistance and Strategic Energy Planning Program Implementation.
2. Public Buildings Normalized Metered Energy Consumption (NMEC) Incentive Program Implementation.
3. Public Sector Financing Services.

I-REN's Public Sector energy efficiency programs (Scopes 1 and 2) and financing services (Scope 3) will be developed and implemented in close coordination with each other and with other I-REN programs and REN-wide activities, regardless of the number of consultants hired.

Programs and activities proposed for these scopes of work must be aligned with I-REN's Energy Efficiency Business Plan (I-REN BP),¹ CPUC Decision 21-11-013 approving the I-REN BP,² and all other applicable requirements for REN energy efficiency programs.

I-REN Public Sector Background

I-REN's public sector offerings will serve the members of the three Councils of Government (COGs) represented in I-REN, including the Coachella Valley Association of Governments (CVAG), San Bernardino Council of Governments (SANBAG), Western Riverside Council of Governments (WRCOG), and the cities, school districts, water districts, special districts, and tribal communities they represent. These regional programs will target, but not be limited to, upgrades to existing public buildings and facilities with high energy use and older equipment. While the offerings will consider all public building types, there will be a focus on community-serving buildings such as community centers, libraries, senior centers, schools, and fire and police buildings. Through energy efficiency projects in these facilities, I-REN can provide benefits that will flow to hard-to-reach, disadvantaged, low income, and other vulnerable communities. The I-REN programs will be multi-beneficial in nature, layering energy efficiency strategies with financing services, greenhouse gas reductions, community resilience and climate adaptation measures.

Local governments in the I-REN service territory have limited capacity to complete energy upgrades and are challenged to maintain and upgrade these facilities due to lack of funding for capital improvements, a lack of awareness related to energy efficiency and other energy efficiency program opportunities, limited time and staff resources, along with conflicting priorities. Further, State mandates such as building energy benchmarking (AB 802) requirements, energy code compliance, and climate adaptation planning are additional unfunded regulations and requirements on local governments and are difficult to meet given competing priorities. These challenges have been exacerbated in recent years due to the COVID-19 pandemic, the associated economic downturn and increased pressure on local

¹ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for

Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

² D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

government agencies to respond to a variety of issues.

To address these challenges, I-REN will leverage its existing public sector partnerships and networks across the region to offer technical assistance, implement incentive program options, and improve access to financing, as indicated in the scopes of work in this agreement. Implementing these initiatives will further I-REN's goals of encouraging resilience and continuous capacity building for local governments, thereby strengthening their ability to serve their community through energy efficiency projects in their own facilities, while also saving on building operations costs and contributing to local and statewide goals for energy savings, climate resilience, and greenhouse gas emissions reduction.

I-REN's Public Sector Program Objectives

- Local governments have the support and resources to develop and implement their strategic energy plans and energy efficiency projects.
- Help local governments afford and finance a range of energy efficiency upgrades through innovative financing options.

Scope 1: Public Sector Technical Assistance and Strategic Energy Planning Program Implementation

This scope of work in this agreement and in the proposal submitted by TEC includes professional services for the tasks and deliverables described below, for implementation of I-REN's Public Sector Technical Assistance and Strategic Energy Planning Program (TA Program). This program is a non-resource, equity segment energy efficiency program that will work with a consultant to establish a regional Building Upgrade Concierge (BUC) for local governments, special districts, and tribal communities (collectively, "public sector customers") with technical guidance and tools to inform and enable priority energy improvements.

Insufficient staff time and resources is one of the major barriers to implementing energy efficiency retrofits in public sector buildings. I-REN's TA Program for the public sector will provide concierge-style support to help fill gaps in staff capacity and resources at these local government jurisdictions. I-REN can also provide additional staffing support through its energy efficiency fellowship interns workforce education & training (WE&T) initiative, which will be coordinated with its public sector energy efficiency activities. I-REN's TA Program will build local government's capacity to tackle complex public sector facility energy improvement projects, from helping with benchmarking to navigating options and approaches for maximizing their investments and energy savings.

Local governments, special districts, and tribal jurisdictions vary widely in their current situation with regard to energy efficiency project implementation. I-REN seeks a consultant who will meet these departments and facilities staff where they are, assess their current situation and resources, and offer personalized support and resources to move their projects forward. To implement the program, the consultant will provide person-to-person technical assistance to local governments to support public sector energy efficiency projects. The consultant will assist local governments with strategic energy planning and benchmarking to connect local government goals related to climate, resilience, and economic development to energy efficiency programs and adoption.

In addition to staff capacity constraints, other common barriers facing the public sector include complex program requirements to receive funding, risk aversion to new or unproven technology,

a lack of data to support their decision-making process, or limited technical expertise and knowledge of energy projects. To overcome these barriers, the consultant will develop tools and resources to increase public sector awareness of and participation in energy efficiency programs such as the I-REN Public Buildings NMEC Incentive Program included in this SOW (Scope 2) as well as other federal, state, and local energy efficiency and distributed energy resource programs. This work will be conducted in close coordination with the parallel development of the BUC software solution and will allow I-REN to serve as a clearinghouse for public sector energy efficiency and distributed energy resource program information.

Task 1.1: Program Design

The consultant will provide leadership for program design activities in collaboration with the I-REN team. The program's design must be aligned with the I-REN BP,³ D.21-11-013,⁴ and all other applicable requirements for REN energy efficiency programs. The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN team within 2 weeks of final contract execution.
- Develop a concierge-style program delivery model that supports I-REN's goals for the TA Program, overcomes public sector participation barriers, and prioritizes service to vulnerable communities.
- Support I-REN in engaging with local and regional stakeholders to ensure the program design fits the needs of local governments in the region.
- Define program eligibility guidelines and program team roles; document program processes and procedures and develop participant forms and other collateral.
- Establish coordination process with other I-REN energy efficiency programs, staff, Energy-Efficiency Fellows, services, and implementers, e.g., the Public Buildings NMEC Program and Public Sector Financing Services included in this SOW, to maximize program participation and benefits to customers.
- Identify other public sector energy efficiency programs and related offerings in the region and establish coordination process with program administrators to identify eligibility requirements and participation processes, to inform resources and assistance provided to I-REN public sector customers.
- Develop regionally-focused tools and resources to increase energy efficiency and distributed energy resource program participation in the public sector and allow I-REN to serve as a clearinghouse for relevant information.
- Coordinate with BUC software provider to inform solution design and ongoing enhancements.

Deliverables:

- Kick-off meeting agenda and notes.
- Program Manual.
- Implementation Plan content, e.g., program process flow, diagram, logic model.
- Participant forms and other collateral.
- Coordination process documentation.

³ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for

Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

⁴ D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

- Regionally-focused tools and resources to increase awareness of and participation in energy efficiency and distributed energy resource program participation in the public sector.

Task 1.2: Outreach & Engagement

Program-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable. The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials.
- Recommend and develop marketing and outreach collateral in various formats targeted to public sector customer audiences.
- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier.
- Identify and implement strategies for outreach to local jurisdictions and agencies to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.
- Collaborate with local governments, tribes, and special districts to design and deliver messaging to the community to promote local leadership in energy efficiency by highlighting success stories from local strategic energy plans and projects.
- Set targets and milestones for outreach and engagement and report on progress.

Deliverables:

- Outreach plan with targets and milestone schedule.
- Content for an e-newsletter targeted to local government audiences.
- Comprehensive website content including a listing of events, resources and tools for local governments.
- Content and strategy for targeted use of social media, and other channels to promote public sector resources.
- Case studies highlighting local project success stories.
- Other outreach materials as recommended by consultant.

Task 1.3: Program Implementation

The consultant will lead all program implementation activities in coordination with the I-REN team, with responsibility for each activity listed below:

- Establish and actively manage communication with local governments, special districts, and tribal communities; identify energy efficiency champions, department decisionmakers, and facility staff and build relationships with them.
- Provide concierge-style person-to-person support via phone, email, and in person for public sector customers to assess jurisdictions' needs and get higher levels of assistance and support for their energy efficiency projects.
- Assist participants through multiple stages of engagement: strategic energy planning and benchmarking, project opportunity scoping, incentive program identification and participation, contracting and procurement, installation, and ongoing operations and commissioning.
- Develop or enhance strategic energy plans to connect local government goals related to climate, resilience, and economic development to energy efficiency programs and

adoption.

- Coordinate with Energy-Efficiency Fellows for public sector work where appropriate, in collaboration with I-REN workforce education & training (WE&T) initiatives.
- Deliver resources for the public sector to tap into energy efficiency and distributed energy resources programs offered by I-REN and other program administrators.
- Maintain communication to monitor status and encourage progress; follow up on completed projects to ensure efficient operations and ongoing maintenance, and address facility staff turnover and retraining needs.
- Document and report on program implementation activities and participant interactions.
- Conduct regular (e.g., weekly or biweekly) meeting with I-REN to provide status updates.

Deliverables:

- Documentation of participant interactions.
- Monthly and quarterly status reports.
- Meeting agendas and status updates.

Task 1.4: Other Services

The consultant will also be responsible for the activities listed below:

- Provide program-specific content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum (JCM), Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Collect program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Contribute to program performance analysis and evaluation, measurement and verification (EM&V) activities for tracking program achievements and informing continuous improvement.

Deliverables:

- Program-specific content and edits or updates to content for I-REN regulatory filings.
- Program data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements.
- Analysis of program performance and recommendations for future program improvements.

Scope 2: Public Buildings NMEC Incentive Program Implementation

This agreement seeks professional services for the tasks and deliverables described below, to support I-REN's Public Buildings NMEC Incentive Program (NMEC Program). The I-REN Public Sector NMEC program is an equity segment energy efficiency resource program intended to provide incentives for meter-based energy savings achieved over three to five years.

Incentivized measures could include any measure that reduces energy usage, e.g., HVAC tune ups and retrofits, exterior and interior lighting and smart controls, operations and maintenance, etc. The program would be open to all public sector facilities including those operated by county and city government, school districts, special districts, and tribes.

Program outreach will focus initially on public gathering spaces such as community and neighborhood centers, health and recreation centers, senior centers, teen centers, and libraries. Implementing energy efficiency projects at these locations will serve multiple goals, including

but not limited to those described here:

- Upgrades and retrofits to HVAC and lighting equipment both interior and exterior will improve comfort and safety at facilities that benefit vulnerable populations such as children, elders, and low income, disadvantaged, and underserved communities.
- Higher efficiency equipment, appliances and controls such as cooling-dominated HVAC loads as well as improvements to operations and maintenance will lower energy bills for local governments, reducing overhead and freeing up funds for other projects.
- Completion of projects at these high-visibility locations will support achieving local and statewide energy efficiency and greenhouse gas reduction goals while also positioning local governments as energy efficiency leaders within their communities.

The program will use an NMEC approach to calculate savings and demonstrate persistence of savings. By using NMEC to calculate savings, the program will help protect against unrealized savings. Combined with technical assistance and reinforcement of operations and management best practices, public sector customers will experience maximized savings.

Task 2.1: Program Design

The consultant will provide leadership for program design activities in collaboration with the I-REN team. The program's design must be aligned with the I-REN BP,⁵ D.21-11-013,⁶ and all other applicable requirements for REN energy efficiency programs. The program must also comply with any and all applicable CPUC guidance regarding NMEC, such as the current version of the NMEC Rulebook. The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN team within 2 weeks of final contract.
- Develop an NMEC program delivery model that supports I-REN's goals for the program, overcomes public sector participation barriers, and prioritizes service to vulnerable communities.
- Support I-REN in engaging with local and regional stakeholders to ensure the program design fits the needs of local governments in the region.
- Define and document program eligibility guidelines and verification process; program team roles; and other relevant program processes and procedures.
- Design NMEC incentive structure and payment process.
- Document NMEC savings calculation methodology and develop measurement and verification (M&V) plan in compliance with all relevant CPUC guidance and requirements.
- Establish close coordination processes with the other I-REN Public Sector offerings included in this RFP:
 - Coordinate with the I-REN Public Sector TA program to develop a seamless participation pathway for customers from the TA program into the NMEC program.
 - Coordinate with the Public Sector Financing Services to provide concierge-style services to customers for layering financing with their NMEC projects.
- Develop participant forms, agreements, and other program collateral.
- Coordinate with BUC software provider to inform solution design and ongoing enhancements.

⁵ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for

Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

⁶ D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

Deliverables:

- Kick-off meeting agenda and notes.
- Eligibility guidelines and verification process.
- NMEC incentive structure and payment process.
- Documentation of NMEC savings calculation methodology.
- Program Manual.
- Implementation Plan content, e.g., program process flow, diagram, logic model, NMEC M&V plan.
- Documentation of coordination process with the TA program and Public Sector Financing Services.
- Participant forms, agreements, and other collateral.

Task 2.2: Outreach & Engagement

Program-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant with support from and in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable.

The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials.
- Recommend and develop marketing and outreach collateral in various formats targeted to public sector customer audiences, in close coordination with I-REN marketing consultant and TA program implementer as applicable.
- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier.
- Coordinate with I-REN's TA program implementer and financing services provider as applicable to identify and implement strategies for outreach to local jurisdictions and agencies to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.
- Coordinate with I-REN's TA program implementer and financing services provider as applicable to collaborate with local governments, tribes, and special districts to design and deliver messaging to the community to promote local leadership in energy efficiency by highlighting success stories from local projects.
- Set targets and milestones for outreach and engagement and report on progress.

Deliverables:

- Outreach plan with targets and milestone schedule.
- Content for an e-newsletter targeted to local government audiences.
- Comprehensive website content describing program.
- Content and strategy for targeted use of social media, and other channels to promote public sector incentives.
- Content for case studies highlighting local project success stories.
- Other outreach materials as recommended by consultant.

Task 2.3: Program Implementation

The consultant will lead all program implementation activities in coordination with the I-REN team, with responsibility for each activity listed below:

- Coordinate closely with the TA program to guide customers seamlessly from technical assistance into NMEC program participation.
- Also, in coordination with the TA program, establish and actively manage communication with local governments, special districts, and tribal communities; identify energy efficiency champions and build relationships with them.
- Provide concierge-style person-to-person support for public sector customers entering the NMEC program.
- Assist participants through multiple stages of engagement: project opportunity scoping, contracting and procurement, installation, M&V, and incentive payment.
- Document and report on program implementation activities, e.g., participant interactions, project pipeline, active project statuses, risk mitigation, etc.
- Conduct regular (e.g., weekly or biweekly) meeting with I-REN to provide status updates.

Deliverables:

- Documentation of program implementation activities.
- Monthly and quarterly status reports.
- Meeting agendas and status updates.

Task 2.4: Other Services

The consultant will also be responsible for the activities listed below:

- Develop and perform quality assurance and quality control (QAQC) processes to ensure participant eligibility, avoid double-dipping with other ratepayer-funded programs, prevent program “gaming,” etc.
- Request and collect data from IOU program administrators sufficient to support baseline and savings calculation methodology, as applicable.
- Collect and provide I-REN program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Provide program-specific content and/or review of content as needed for I-REN regulatory documents and filings, e.g., JCM, Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Contribute to program performance analysis and EM&V activities for tracking program achievements and informing continuous improvement.

Deliverables:

- Documentation of QAQC processes.
- Program-specific content and edits or updates to content for I-REN regulatory filings.
- Program data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements.
- Analysis of program performance and recommendations for future program improvements.

Scope 3: Public Sector Financing Services

This agreement seeks professional services for the tasks and deliverables described below, to support I-REN’s Public Sector programs and activities through the provision of financing services to participants in the programs listed in SOWs 1 and 2. The financing services solicited in this scope of work would layer with technical assistance services provided through I-REN’s Public Sector Technical Assistance and Strategic Energy Planning Program, and/or with incentives provided through the Public Buildings NMEC Incentive Program, to provide additional

benefit to public sector customers.

A wide variety of financing mechanisms are available for energy efficiency projects, from traditional loans and financing from banking institutions to specialized products designed specifically for energy efficiency. However, the public sector is challenged by many barriers in trying to take advantage of these options. Staff time and resources are constrained, the array of options is confusing, and it can be unclear how local governments, special districts, and tribes would participate, given their unique position as publicly funded agencies.

I-REN can bridge this gap by identifying financing mechanisms and creative funding sources, evaluating their appropriateness for various public sector jurisdictions and facility types in the I-REN service territory, and then assembling a tailored set of options to present to local governments, special districts, and tribes. I-REN can support local jurisdiction staff and decision-makers in navigating through the complexities of financing options, choosing a pathway and applying for funds, and then serve as a technical assistance resource for project implementation and reporting.

For its initial focus, I-REN proposes to target HVAC upgrades in community buildings including but not limited to recreation centers, libraries, senior centers, and the like. HVAC replacement at a large facility is costly, and the intervention of financing through I-REN's Public Sector initiative could mean the difference between replacing a system with baseline equipment and moving up to a more efficient system that will deliver better performance and bill savings, as well as supporting energy savings and climate action goals.

This scope of work seeks a professional consultant to lead the services described above, through the delivery of the following tasks.

Task 3.1: Financing Services Design

The consultant will be responsible for developing a financing offering consisting of one or more financing mechanisms that can be layered with the TA and NMEC public sector programs, to overcome upfront-cost financial barriers for public sector jurisdictions pursuing energy efficiency and climate resiliency projects. Financing services proposed must be aligned with the I-REN BP,⁷ D.21-11-013,⁸ and all other applicable requirements for REN energy efficiency and financing programs.

- Conduct a kick-off meeting with the I-REN team within 2 weeks of final contract.
- Develop financing offering and delivery model that layers with I-REN's TA and NMEC programs, overcomes public sector participation barriers, and prioritizes service to vulnerable communities.
- Support I-REN in engaging with local and regional stakeholders to ensure the financing offering fits the needs of local governments in the region.
- Define eligibility guidelines, terms and conditions, and other processes and procedures for participation in financing services.
- Establish coordination process with I-REN's TA and NMEC programs to ensure a seamless experience for customers in layering financing with the projects they pursue in other programs.

⁷ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for

Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

⁸ D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

- Develop participant forms, agreements, and other collateral.
- Provide financing-related content for inclusion in other I-REN program manuals, IPs, etc.
- Coordinate with BUC software provider to inform solution design and ongoing enhancements.

Deliverables:

- Kick-off meeting agenda and notes.
- Financing offering documentation and procedures.
- Participant forms, terms and conditions, and other collateral.
- Program manual and IP content.

Task 3.2: Marketing & Outreach

Financing-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant with support from and in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable. Messaging regarding financing services should be incorporated in I-REN's TA and NMEC program outreach collateral wherever applicable.

The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials.
- Develop financing marketing and outreach plan, set targets and milestones, and report on progress.
- Recommend and develop standalone collateral and/or content to add to other I-REN program collateral for marketing and outreach targeted to public sector customer audiences.
- Collaborate with TA and NMEC program implementers as applicable to include financing content in outreach to local jurisdictions and agencies to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.

Deliverables:

- Outreach plan with targets and milestone schedule.
- Standalone and/or added content for various outreach formats, e.g., e-newsletter, website, social media, and other channels.
- Content for case studies highlighting local project success stories; other outreach materials as recommended by consultant.

Task 3.3: Financing Implementation

The consultant will lead all financing implementation activities in close coordination with the TA and NMEC programs and I-REN team, with responsibility for each activity listed below:

- Coordinate closely with the TA and NMEC programs to guide customers in layering financing with their projects in the other programs.
- In coordination with I-REN staff, Energy-Efficiency Fellows, and the TA and NMEC programs, establish and actively manage communication with local governments, special districts, and tribal communities; identify energy efficiency champions and build relationships with them.
- Provide concierge-style person-to-person support for public sector customers to assist in

them through multiple stages of engagement: navigating the financing options available to them, the decision process, and the follow-through to implement the financing mechanisms selected for projects.

- Document and report on financing implementation activities, e.g., participant interactions, financed projects and statuses, risk mitigation, etc.
- Conduct regular (e.g., weekly or biweekly) meeting with I-REN to provide status updates.

Deliverables:

- Documentation of financing implementation activities.
- Monthly and quarterly status reports.
- Meeting agendas and status updates.

Task 3.4: Other Services

The consultant will also be responsible for the activities listed below:

- Provide financing-related content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum, Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Collect financing-related data as applicable to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Contribute to financing-related performance analysis and evaluation, measurement and verification (EM&V) activities for tracking I-REN public sector portfolio achievements and informing continuous improvement.

Deliverables:

- Financing-specific content and edits or updates to content for I-REN regulatory filings.
- Financing-related data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements.
- Analysis of financing-related performance and recommendations for future improvements.

EXHIBIT “B”

SCHEDULE OF SERVICES

Please see Exhibit “C” for Schedule of Services and Timeline

EXHIBIT “C”**COMPENSATION
BILLING RATES****Budget for tasks 1.1 - 1.4**

Public Sector Technical Assistance Program and Strategic Energy Planning			
Task	Total Cost	Estimated TEC Labor Hours	Timeline
Task 1.1: Program Design	\$61,455	420	<0-60 days from NTP
Task 1.2: Outreach & Engagement	\$120,580	882	<60-120 days from NTP; ongoing
Task 1.3: Program Implementation	\$4,698,218	28,327	>45 days from NTP, starting with a soft launch
Task 1.4: Other Services	\$71,740	379	Ongoing
TOTALS	\$4,951,993	30,008	

Budget for tasks 2.1 - 2.4

Public Buildings Normalized Metered Energy Consumption			
Task	Total Cost	Estimated TEC Labor Hours	Timeline
Incentives	\$4,500,000	n/a	-
Task 2.1: Program Design	\$61,390	397	<0-60 days from NTP
Task 2.2: Outreach & Engagement	\$53,710	385	<60-120 days from NTP; ongoing
Task 2.3: Program Implementation	\$1,774,925	8,850	>60 days from NTP
Task 2.4: Other Services	\$56,925	319	Ongoing
TOTALS	\$6,446,950	9,951	-

Budget for Tasks 3.1 - 3.4

Public Sector Financing			
Task	Total Cost	Estimated TEC Labor Hours	Timeline
Task 3.1: Financing Services Design	\$32,020	209	<0-30 days from NTP
Task 3.2: Marketing & Outreach	\$34,480	251	<30-90 days from NTP; ongoing
Task 3.3: Financing Implementation	\$503,020	3,758	>30 days from NTP

Exhibit “C”

Task 3.4: Other Services	\$30,090	174	Ongoing
TOTALS	\$599,610	4,392	

EXHIBIT “D”

THE ENERGY COALITION’S PROPOSAL

Approach and Understanding of Scope of Work Plan

Introduction

The energy landscape is changing dramatically and rapidly. TEC believes the future of energy is local. Regional Energy Networks, and specifically I-REN, are poised to play a significant leadership role in our transition to a low carbon, decentralized, resilient and localized clean energy future.

Building on the foundation of trust and energy interest fostered by the LGPs implemented by the three I-REN COGs and the WRCOG’s Resilient IE initiative, the TEC team offers a proven strategy to improve public agencies’ energy performance and advance their position as energy leaders within their communities. The program designs meet the requirements of REN EE^[1] programs and will deliver on the goals of the I-REN public sector programs, Business Plan and relevant state goals. This team, with TEC as the lead, will collaborate closely with I-REN stakeholders, including other implementers, to ensure I-REN’s unique value is front and center in service delivery and that disadvantaged, low-income, and other vulnerable communities receive the support needed to implement their strategic energy plans and EE projects. With the I-REN’s support services, these communities will be more resilient and prepared to withstand extreme heat and other impacts of climate change in the region.

Through TEC’s proposed approach as the lead implementer for all three public sector programs, participants will benefit from a streamlined and straightforward experience. A single point of contact—a TEC project manager (PM)—will deliver wrap-around services across all public sector programs. The PM will act as participating agencies’ concierge, bringing appropriate resources and expertise when needed. In order to properly address the barriers and challenges faced by the public agencies in the Inland Empire, TEC will tailor services to meet each agency and projects’ needs and priorities. This approach offers multiple benefits, layering energy efficiency planning and strategies with financing services, greenhouse gas reductions, community resilience, and climate adaptation.

TEC acknowledges the need for high quality products to be delivered on time. We have internal protocols to ensure program deliverables meet rigorous standards and are completed within established timelines. All deliverables will be quality checked for accuracy and reasonableness. TEC uses internal checklists and develops schedules to ensure quality before delivering products to agencies.

TEC assiduously develops and evaluates program strategies to control costs and ensure efficient project and service delivery. TEC also continuously monitors its overall program budget and will take appropriate action to deliver on program goals within budget. Additionally, TEC drives continuous improvement through feedback and lessons learned from staff, subconsultants, agency participants, and stakeholders to ensure that the program is operating as cost effectively as possible.

Task 1: Public Sector Technical Assistance and Strategic Energy Planning Program Implementation

Public agencies face substantial barriers to completing comprehensive energy projects, including constrained staff time and resources, a lack of capital, and insufficient data to support their decision-making processes. TEC's proposed program focuses on assisting public agencies, with an emphasis on underserved communities, to overcome these barriers. Our proposed program offers customized and objective project management, financial and engineering services through a concierge-style approach that helps agencies meet their climate, energy, and resiliency goals. Each participating agency will be assigned a dedicated project manager (PM) for streamlined, end-to-end service delivery that provides high touch customer service from EE project identification through completion. The PM serves as the point of contact for the project team supporting each agency, including a TEC program manager, TEC project coordinator, and assigned engineering or financing consultant depending on the scope of the activities. The PM works side by side with agencies to develop or update strategic energy action plans and/or identify strategies to implement their existing plans. The PM will introduce public agencies to I-REN's public sector portfolio of programs and other energy programs for a seamless experience that avoids customer confusion.

Task 1.1: Program Design

Program Kick-Off

Within two weeks of the contract being signed, TEC's contract manager will initiate a kick off meeting with the I-REN team to review the program scope and milestones. In coordination with I-REN, TEC will also schedule introductory meetings with awarded implementers for the Building Upgrade Concierge (BUC) and other public sector scopes to lay the groundwork for streamlined coordination. During the introductory meeting, each public sector implementer will present overviews of their program offerings so all parties have a strong understanding of coordination opportunities. TEC will distribute meeting agendas and detailed meeting notes to ensure alignment on strategies and next steps.

Initial Design and Ramp Up

During the program design phase, TEC will incorporate insight from the program kick-off discussions and previous public sector program implementation experience into an Implementation Plan (following the EE IP template) and an initial Program Manual. These resources will outline the program delivery model and articulate how services will support I-REN's regional resilience goals, capacity building goals, and local and statewide climate goals. The resources will include: program eligibility guidelines, program team roles, program processes and procedures, barriers and mitigation strategies, and coordination protocols within the I-REN programs. TEC can help I-REN deliver a public webinar to review and collect feedback on the IP before the final version is posted on the California Energy Data and Reporting System (CEDARS).

Soft Launch

In parallel to the initial design and ramp up phase, TEC will prepare a soft program launch prior to the end of 2022, and immediately following the posting of the IP to build excitement and interest in the new I-REN programs. TEC will coordinate with I-REN to develop an initial list of target agencies based on regional priorities. Customers who enroll in I-REN's Public Sector Technical

Assistance and Strategic Energy Planning Program (TA Program) during the soft launch will receive assistance with benchmarking activities such as building out or updating their portfolios in Energy Star Portfolio Manager (ESPM) or compliance support for California's Building Energy Benchmarking Program (also known as AB 802). This soft launch will allow I-REN to engage key agencies as soon as possible and offer targeted support to demonstrate early success.

As part of the program's soft launch, TEC will develop an enrollment form and other collateral to engage with customers and inform them of program benefits. Collateral will be finalized in coordination with the I-REN team.

Stakeholder Coordination

Throughout the program design phase, TEC will engage with local and regional stakeholders including Coachella Valley Association of Governments (CVAG), SANBAG, and WRCOG. Engagement with these associations helps ensure that program services and messaging will fulfill the unique needs of the I-REN communities. Initial engagement activities with the councils of government (COGs) will include workshops and surveys to collect feedback, glean insights, and identify best practices for the program's design and strategies.

TEC will also identify other EE programs and offerings in the region to establish coordination processes and protocols. TEC will review the existing I-REN Joint Cooperation Memo (JCM) to identify programs with complementary offerings. TEC will leverage its public sector IOU and third party program expertise to inform coordination efforts. TEC will initiate meetings with I-REN and other program administrators and implementers to share details about the TA Program's offerings and confirm other programs' eligibility requirements, participation processes, targeted customers, measures supported, and other details that will inform the TA Program's resources and assistance for overlapping customers. Before these meetings, TEC will align with I-REN on coordination strategies that will most benefit I-REN and its public sector participants. These coordination meetings will culminate in coordination protocols that all parties can reference when supporting public sector customers.

Throughout program design and implementation, TEC will engage with regional stakeholders including the Inland Southern California Climate Collaborative (ISC3) and the local IOUs as appropriate.

Regionally-focused Tools and Resources

Based on stakeholder feedback and TEC's assessment of regional needs, TEC will coordinate closely with the BUC program lead to support the development of regionally-focused tools and resources to increase EE and DER program participation, as follows:

- EE and DER incentive program resource hub listing all active programs that serve public agencies in the I-REN territory. The hub will house a matrix outlining program participant eligibility requirements, EE measure opportunities, incentive rates, and other key information like vendor lists for midstream EE programs.
- Interactive map of regional energy projects where I-REN agencies can learn about their peer achievements and identify go-to references for project questions. The map will be developed based on research conducted by TEC, information collected from stakeholders, agency participants, and through projects completed by the TA Program.

During the design phase, TEC will continually assess opportunities for additional tools and resources to inform the BUC software provider, support BUC enhancements, and help I-REN

serve as a clearinghouse for relevant information.

Updates to Design and Coordination With Other I-REN Programs and Stakeholders

TEC will incorporate stakeholder feedback and any modifications identified during the soft launch into the Implementation Plan and Program Manual as appropriate. TEC will develop additional supporting tools and templates if necessary for the launch of the program. TEC will design external-facing templates that can be customized to each agency and region as needed to ensure deliverables reflect each agency's unique priorities.

Task 1.2: Outreach and Engagement

TEC proposes coordinated outreach and engagement among all I-REN public sector programs and services with the **I-REN TA Program serving as the entry point for agency participation in public sector programs and services**. Agency outreach will focus on the comprehensive suite of end-to-end EE services available across the I-REN public sector program portfolio. This will minimize customer confusion by reducing the number of I-REN implementer touch points and simplifying information on public sector offerings. This will also ensure all outreach and marketing efforts are cohesive and align with the vision, branding and marketing strategies set by the I-REN and I-REN's marketing consultant. After enrollment, the PM will facilitate introductions and services from the other public sector programs.

TEC will implement a multi-pronged outreach and engagement strategy to encourage agency enrollment. During the program design phase, TEC's engagement team, led by TEC's Engagement Program Manager, in coordination with the I-REN marketing consultant, will develop a marketing and outreach plan with a documented process to engage with agencies in the eligible service area. This approach will include coordinated outreach and engagement where the TA Program serves as the entry point to the I-REN NMEC and Financing Programs. Key strategies that will be identified and implemented according to an aligned upon schedule are described in more detail below.

Agency Targeting

Given the broad range of agency types and limited resources, TEC will create a targeted outreach and engagement plan based on multiple factors including: 1) I-REN priority communities such as tribal, low-income, DACs and other vulnerable communities; and 2) a market opportunity study, which will provide a high-level assessment of energy-savings potential within the region. Details on these factors are below.

- **I-REN priority communities:** During the program kick-off meeting, TEC will work with the I-REN team to confirm priority hard to reach communities, as identified in the RFP. TEC will then develop a list of target agencies for enrollment, leveraging existing data sources such as CalEPA's CalEnviroScreen 4.0 and the California Department of Housing and Community Development.
- **Market opportunity study:** TEC will pull information from various data sources, including information from the I-REN COGs, to assess long-term energy savings opportunities in the region. First, TEC will collect information on agency size, facility counts, and facility square footage. Second, if available, TEC will incorporate agency energy use and tariff analysis to more directly analyze energy savings potential. Third, TEC will incorporate additional indicators agency by agency, where available (e.g. wastewater treatment plant operational capacity, K-12 school district population), as a proxy for energy consumption.

TEC's enrollment target list for the program will include I-REN priority agencies and agencies with high energy savings potential.

Initial Engagement and Enrollment

TEC will leverage insight from the workshops and surveys conducted as part of Task 1.1. to identify new and existing outreach channels that will resonate within the region. The strategies will include channels with proven success for public sector customers based on TEC's experience enrolling 200+ agencies in SoCalREN. TEC recognizes that there is not a one-size-fits-all approach to regional outreach, and therefore will leverage multiple strategies to engage with traditionally hard-to-reach communities, including:

- Direct introductions through I-REN COGs or partners
- Speaking opportunities hosted by I-REN or partners such as workshops, webinars, conferences, and events
- Virtual channels such as the I-REN website, social media, and press releases
- Development and distribution of project case studies to demonstrate agency success through the program
- "Refer a friend" campaigns to encourage enrolled agencies to recommend enrollment to peer agencies.

TEC will adapt the activities outlined above based on feedback and results to achieve continued engagement by existing and potential program participants.

Ongoing Engagement

Celebrating success. TEC recognizes that celebrating agency energy and resilience accomplishments encourages continued participant engagement, helps agencies demonstrate leadership within their communities, increases enrollment, and appeals to the competitive nature of neighboring public agencies. TEC will collaborate with local governments, tribes, and special districts to celebrate success by highlighting project achievements through the following channels:

- **Project impact report:** This report is delivered after construction is completed and agencies receive any applicable funding and financing. It highlights the life cycle energy savings, cost savings, and greenhouse gas (GHG) reduction benefits of the EE project. This deliverable can be shared among agency staff and with the general public to promote EE's community benefits and position the agency as a regional energy leader.
- **Legislative body and/or community check presentations:** TEC will facilitate check presentations to governing boards, councils, or other community recognized avenues. The check presentation will spotlight the financial resources secured by the agency, in partnership with I-REN, to advance the agency's energy and resilience goals.
- **Social media posts:** TEC will develop content highlighting agency achievements for the I-REN team to post on I-REN social media platforms, such as LinkedIn, Twitter, and Instagram.

Capacity building. The capacity building service will offer practical and essential training for agency staff on topics ranging from funding and financing to critical facility resilience to operations and maintenance best practices. This service will empower public agencies to make improvements to their facilities and infrastructure to ensure that energy and resilience strategies persist over time. Depending on the topic and the target agency staff, the capacity building series can be conducted via webinars, in-person workshops, or other formats.

Peer-to-peer networking. One of the most beneficial services a REN can offer is the connection

to peer agencies working on similar initiatives. TEC will assess the existing peer-to-peer working groups offered throughout the region and complement these groups by offering a space for agency staff to share and learn best practices for energy projects and plans.

Virtual engagement. TEC will work with I-REN and CivicPlus to produce and distribute content through the website and social channels showcasing TA Program highlights, educational content, and BUC resources for public agencies. E-newsletter content will be developed for local government audiences. This content can be used to reach new audiences and to provide continuous engagement and education for existing enrolled agencies.

Reporting and Continued Innovation

TEC will identify milestones and targets for evaluation at the outset of coordination activities and will work with I-REN to create an appropriate avenue and schedule for reporting on progress toward goals. TEC anticipates continued fine-tuning of the outreach and engagement process as the I-REN enrollment, project process, and coordination between program implementers is solidified. As this process evolves, reporting tools and strategies will be adjusted accordingly to ensure effective performance and continued innovation.

Task 1.3: Program Implementation

TEC's proposed program design aligns with I-REN's vision to connect local governments to EE resources to increase energy savings and equitable access throughout San Bernardino and Riverside Counties. Recognizing that each agency is unique, the program will offer a customizable and comprehensive suite of services including strategic energy planning, benchmarking, and turnkey EE project support. Program services will be available for all public building types, with a focus on community buildings such as community centers, libraries, senior centers, schools, and fire and police buildings that are located in DACs, low-income, and other hard to reach areas.

Enrollment/Agency Kick-Off

Agency enrollment begins with a kick-off meeting where we present program offerings and engage in open dialogue to get to know the agency and their needs. TEC will also share next steps for program participation, including execution of a non-binding enrollment form, required prior to allocation of all I-REN public sector services. The form will indicate a main point of contact, the "Energy Ambassador", for the agency's program participation. An agency is considered enrolled once they sign the form to confirm acknowledgement of program participation, responsibilities, and services. TEC will invite the COGs to enrollment meetings, where applicable, to increase agency trust in the program. Once enrolled, each agency is assigned a dedicated PM, supported by the project team, who will act as a concierge to all public sector program offerings, including NMEC, Financing Services, and the BUC.

Concierge Service Delivery

TEC's goal is that agencies see the PM as a trusted and unbiased third party advisor and "go-to" resource when making energy decisions. The PM will offer customized support through the Energy Ambassador's preferred communication channels and engage with the agency staff to build a trusted relationship. During project development, the PM will engage with additional agency staff, such as facility managers, who can identify existing facility equipment conditions and pain points.

Energy Resiliency Roadmap Development

After the enrollment meeting, the PM will engage with the Energy Ambassador to take a deeper dive into agency goals and conduct an iterative feedback process to develop a customized strategic energy plan, or “Energy Resiliency Roadmap”. The Roadmap will outline a phased course of action to meet the agency’s needs and priorities. Alternatively, agencies with existing energy plans will be offered support to update those plans.

During the initial phase of Roadmap development, TEC will:

- Collect agency asset energy data, building square footage information, critical facility and infrastructure lists, cooling centers, and other available facility data
 - Assist agencies in requesting energy data from their utility representatives as needed
- Review existing Climate Action Plans, Energy Action Plans, vulnerability assessments, and hazard mitigation plans such as assessments and strategies developed through Resilient IE
- Request information on energy (renewable and EE) projects completed within the last five years at agency facilities (this can be completed in coordination with the COGs based on previous LGP efforts where applicable)
- Take inventory of existing ESPM building portfolios
- Assess grid reliability and public safety power shutoff (PSPS) events applicable to the portfolio.

Data will be processed and analyzed through two platforms: TEC’s portfolio energy analysis tool and ESPM. If needed, TEC will help agencies update or create building portfolios in ESPM. With insights from these two powerful tools, TEC will develop an energy assessment that offers agencies a holistic picture of their portfolio-wide energy consumption and how their buildings compare to similar facilities across the nation. Non-energy data such as CalEnviroScreen 4.0 will be reviewed to assess progress toward energy, climate, and resiliency goals.

TEC will then present the portfolio energy analysis section of the Energy Resiliency Roadmap to the agency and, based on the agency’s long term goals, discuss site prioritization for program services. TEC will guide the agency to focus on critical facilities/infrastructure and cooling centers that will offer long-term resiliency benefits to the community, particularly where there are existing grid vulnerabilities.

Based on feedback and discussions with the agency, TEC will finalize and present the full Energy Resiliency Roadmap that outlines a comprehensive plan to unlock the benefits of EE. I-REN stakeholders such as the regional COGs will be invited to participate in these meetings with the agencies. The Roadmap also will include an assessment on community climate and energy vulnerabilities (climate, social and economic) and identifies resilience opportunities to address those threats. I-REN technical services and resources will also be outlined in the Roadmap. Other external energy programs and funding options, such as statewide or IOU third party programs that fill gaps and help agencies overcome barriers where program services are not available, will be described at a high level.

Roadmap Implementation Services

Each Roadmap will include a custom mix of I-REN EE services depending on each agency’s priorities and unique needs. If an agency has a time-sensitive project, the PM can work with the

Energy Ambassador to evaluate it upon enrollment and the Roadmap can be completed in parallel. The TA Program services offered to help agencies implement their roadmaps include building benchmarking compliance and EE project implementation, described in depth below.

California Building Energy Benchmarking Compliance (AB 802)

California Assembly Bill (AB) 802 requires energy benchmarking for all commercial buildings 50,000 square feet or larger. Building information in ESPM is submitted to the California Energy Commission to comply with these regulations. TEC has supported over 150 public sector buildings with benchmarking compliance and can offer this support to I-REN agencies.

EE Project Implementation

The Energy Resiliency Roadmap may prioritize up to three sites for immediate EE project implementation. Additional sites for mid and long term project support will be addressed based on the timelines outlined in the Roadmap. Project implementation follows the below steps outlined below.

Desktop Review: The first step during project implementation is conducting a desktop review of facility site plans and equipment data. These building plans and datasets are shared with an assigned engineering consultant (TRC or AESC) for review to ensure the subsequent site visit is cost effective and efficient. The same engineering consultant will support the entire project to streamline the agency experience. During this phase, the PM will coordinate with the BUC to collect relevant site information, including a list of opportunities identified in their customer facing portal to consider for further investigation.

Audit Kick Off, Site Visit and Audit: After the desktop review, the PM will schedule an audit kick-off meeting with the Energy Ambassador and other key agency staff. During this meeting, the project engineer will ask site-specific questions to guide the site visit and audit and to ensure resources are invested wisely and focused on equipment in need of upgrades. After walking the site, the engineer will develop a preliminary list of EE retrofit measures or operational and maintenance improvements for further detailed analysis. Any information required to support resilience opportunity identification, such as DERs, will also be collected at this time. At this stage, TEC and its engineering consultant will leverage the BUC, NMEC, and Financing Services team to identify applicable additional energy program resources, available incentive offerings, and financing opportunities.

The preliminary measures list will include high-level energy savings, cost estimates, and estimated utility incentive amounts based on applicable energy incentive programs. The agency will then confirm with the PM which measures they wish to implement and select an incentive program pathway.

If an agency opts to pursue I-REN's NMEC incentive program, the engineering consultant will complete the audit calculations, detailed to the level of rigor required to submit an incentive application.^[2] This two-phased approach (from the preliminary measure list preparation to the comprehensive audit calculations) ensures resources are allocated to the implementation of viable measures and that agency decision-makers are supportive of the preliminary measures list before the program invests in full engineering calculations. TEC has learned through experience working with public agencies that full ASHRAE level II audits are typically not necessary to obtain public agency buy-in. So, this resource-intensive deliverable will only be provided when required to advance a project.

Project Summary, Funding and Financing Services: After agency buy-in on measures, the

PM will consult with I-REN financing services staff and BUC team to confirm available funding and financing pathways for the project. Next, the PM will schedule a meeting to review the findings of the energy audit and financial analysis with the project engineer, the Energy Ambassador and key agency staff. Additional stakeholders will be offered an invitation, including the representative regional COG. The project summary will be developed through a combination of the engineer's audit calculations and a financing calculator tool.

The project summary's purpose is to provide the Energy Ambassador with a comprehensive document to build project buy-in. The summary outlines the EE measures identified during the site visit and a financial analysis with project benefits such as estimated energy savings, GHG emission reductions, cost savings, water savings, and incentive amounts. These metrics will all be tied into the agency's relevant energy, resiliency, and climate goals. The project summary also includes a funding and/or financing plan through the summary of financial metrics and cash flow analysis for funding options identified by the I-REN Public Sector Financing Services team such as cash, utility On-bill Financing (OBF), CEC Energy Conservation Act Assistance (ECAA) low and no-interest loans, and ESCO financing. Finally, the project summary outlines the project timeline to ensure program and agency alignment on implementation expectations.

Energy Resiliency Opportunity Report

Based on the recommendations outlined in the Energy Roadmap, an Energy Resiliency Opportunity Report will be delivered in tandem with the project summary. This report will provide agencies with a high level analysis and identification of resources for DER and resilience strategy next steps. The analysis will assess facilities identified for resiliency opportunities (e.g. DERs) based on existing infrastructure, energy needs and back-up requirements, as well as community benefit to vulnerable populations. TEC will coordinate with the BUC team to ensure that all information and resources about DERs and resilience are included. The Energy Resiliency Opportunity Report is intended to help an agency identify prime candidates for future DER and resilience capital investment projects; however, given the limitations of California's EE ratepayer funding, in depth DER technical assistance will not be offered through the I-REN TA Program.

Once the agency has appropriate staff approval to move forward with EE project implementation, TEC will assist with applicable incentive applications. If the project is channeling to the I-REN Public Buildings Normalized Metered Energy Consumption Incentive Program (NMEC Program), the project team will develop a Project Feasibility Study to demonstrate program influence and submit the application to the public sector NMEC Program for review and approval. If the project is not eligible for the I-REN NMEC Program, it will be channeled to alternative incentive programs such as SCE or SoCalGas core and third party programs or other EE administrator programs. If the agency elects to leverage financing for the project, the project team will support financing applications through I-REN financing services as outlined in Task 3.

Design and Procurement Support: TEC has helped public agencies design and procure over 600 energy projects and has a strong understanding of the barriers public agencies face when it comes to procurement. Agency staff often do not have the time or technical expertise to develop measure performance specifications to use when they are seeking to procure contracting. TEC provides customized assistance to agencies tailored to their preferred procurement method and requirements. Agencies may choose to self-perform the work, manage their own competitive bid solicitation, or select another approach such as leveraging ESCOs or cooperative procurement contracts. The project manager can also assist agencies with council or board approvals by packaging materials, developing presentations, and more depending on the agency's needs.

Construction Support: Once an agency authorizes construction, the PM will ensure the project scope is implemented as designed so expected EE savings are realized and incentives and financing are secured. Given that the public agency will be the “project owner of record”, they will be responsible for all construction contracts and costs and designating a construction manager. The TEC team will play a supporting role by reviewing contractor submittals for EE measures to verify work is performed according to design specifications and applicable incentive program requirements.

Project Closeout: Once construction is completed, the PM and engineering consultant will support the agency with any training necessary to operate and maintain the new equipment so all expected project benefits are delivered. The project engineer will also be available to ensure that equipment is properly operating and commissioned. TEC will support any post-project incentive requirements, such as the development and submission of an Installation Report for the NMEC Program. During project closeout, TEC will share details about installed measures and savings with the I-REN marketing team to help the agency celebrate success and the BUC program to display achievements in their portal. TEC will annually use ESPM reports to share energy consumption insights and building performance improvements to help the agency track and ensure persistence of energy savings. During these touch points, TEC will determine if additional agency support or training new facility staff is required to overcome maintenance and staff turnover challenges.

Workforce Capacity Building

TEC has a long history of supporting workforce development through its 10+ years of experience implementing workforce, education and training programs across the state. We recognize the critical role these activities play in training the workforce to meet California’s growing demand for energy professionals. In coordination with I-REN, TEC will develop an I-REN’s EE Fellowship for new professionals to gain real world experience and support I-REN public sector programs’ success. TEC envisions that fellows can support building benchmarking activities. Depending on the term of the fellowship, Fellows may also be tapped to support other program services like incentive application development, site equipment inventories, or resiliency-related research for the Energy Resiliency Opportunity Report.

Risk Mitigation Strategies

Public agencies face a multitude of barriers to implementing EE projects. Key risks and solutions are outlined below:

- **Public agency staff turnover:** TEC recognizes that public agencies experience high staff turnover rates; COVID-19 and the “great resignation” have only exacerbated these issues. When an Energy Ambassador changes roles or leaves their agency, TEC will coordinate with the agency to identify a new project contact. If this is not feasible and TEC loses contact, or if agencies become unresponsive, TEC will work closely with the regional COGs to identify a new staff person at the agency to continue delivering services.
- **Agency staff juggle numerous priorities:** Public agency staff often have many responsibilities beyond energy projects. TEC’s goal is to minimize burdens on the public agency staff and simplify their decision making process. TEC will accomplish this by developing a strong relationship with the agency to understand their needs and how to best serve them.
- **Customer inability to fund projects:** Through TEC’s experience in the public sector, we acknowledge that project financing is consistently identified as a top barrier to project implementation. Many agencies are not willing to take on loans to finance projects,

particularly those with interest rates. To overcome this challenge, TEC will support additional funding and/or financing opportunities in coordination with I-REN Financing Services. TEC will also coordinate closely with agency staff to help their projects get budgeted in Capital Improvement Plans where possible.

- **Market impacts:** Inflation and supply chain disruptions can threaten project completion. TEC has experience working through these barriers. We include project cost buffers and disclaimers to account for inflation impacts to project cost between project identification and equipment purchase. TEC builds in anticipated supply chain delays into project timelines and collects and shares information about industry lead times from and with agencies with similar projects throughout the region.

Program Reporting

TEC will work closely with I-REN to document program implementation activities and participant interactions. TEC has developed a customized Customer Relationship Management platform on Salesforce for energy project tracking and customer information. The list below includes a few examples of data that will be collected and reported on:

- Participant information: name, address, Energy Ambassador contact details
- Project details: energy savings identified and completed (kWh, kW, therms), project milestones, bill savings, program services provided
- Incentive program information: milestones, program pathway, energy savings
- Financing leveraged: financing product used, dollar amount
- Facility information: site address, site use, ESPM building type
- EE measures installed and respective energy savings
- Events with participants: enrollment kick off, Energy Resiliency Roadmap meetings, audit kick off, project summary presentations etc.

Based on I-REN's desired frequency, TEC will share program status updates through a dashboard that will include engagement, enrollment, project successes and other information to ensure the program is on track to meet its goals and to keep stakeholders informed of program operations and outcomes.

Task 1.4: Other Services

TEC will leverage its extensive experience and expertise to support all aspects of regulatory reporting, including filings, data collection, and EM&V.

Regulatory Reporting

As requested by I-REN, TEC will provide program-specific content and/or will review I-REN JCMs, annual reports, Advice Letters and data requests. Requests will be fielded by the TEC contract manager and assigned to TEC staff with time for internal review before submitting to I-REN for feedback. TEC will also proactively consider any potential program-specific edits or content for I-REN regulatory filings and alert I-REN as appropriate.

Data Collection, Reporting and Analysis

Proper data collection and reporting is the foundation of communicating program success. Data collection protocols and systems for the public sector programs will be established during the program design period in coordination with I-REN and the BUC team to ensure successful reporting of metrics and indicators. The data will be collected, reported, and maintained throughout program implementation by TEC PMs and TEC project coordinators working directly with agencies. Program managers will perform general quality control and coordinate with the

contract manager on any trends or issues to be discussed with I-REN. TEC’s project analyst will support program performance analysis as requested and the contract manager will support any EM&V requests from I-REN as needed. Any improvements identified will be coordinated and implemented through the TEC contract manager.

TEC pursues continuous improvement for all programs. Beyond EM&V studies, and as an ongoing practice, TEC will look for opportunities to improve program performance and share recommendations with I-REN. At a minimum, TEC will perform an annual performance analysis and present recommendations for short-term and long-term planning.

Task 2: Public Buildings Normalized Metered Energy Consumption (NMEC) Incentive Program Implementation

California has an ambitious goal of doubling EE savings by 2030. For public agencies to contribute to statewide EE goals and improve their aging infrastructure, they need resources. This is especially true for hard-to-reach, disadvantaged, and low-income communities that serve vulnerable populations. Most existing EE programs require bringing facilities above Title 24 standards, which can deter public agencies from acting due to financial constraints—leaving below-code facilities with the largest EE opportunities “stranded.” I-REN’s NMEC Program will offer a way to access “stranded” savings with comprehensive project delivery support. The NMEC Program will use a normalized metered energy consumption approach to measure energy savings at the meter, incentivizing savings that have historically been excluded from traditional EE programs or are considered to be industry standard practice (ISP). The program will focus on underserved communities by offering enhanced incentives to hard-to-reach, disadvantaged, and low-income communities.

The program’s intent is to support public agencies, with a focus on public gathering spaces, to reduce energy and costs in their facilities and infrastructure. The NMEC Program will contribute to this effort by achieving the following objectives:

- Support comprehensive lighting and HVAC projects to improve the comfort and safety of vulnerable populations
- Deliver deep energy savings to public agencies at high visibility locations to position local governments as EE leaders within their communities and to meet local and state EE and GHG goals
- Provide technical expertise and appropriate training to facility personnel to maximize persistence of energy and bill savings.

Task 2.1: Program Design

Public agencies face substantial barriers, exacerbated by the COVID-19 pandemic, to completing comprehensive energy projects. TEC’s proposed program focuses on assisting public agencies to overcome these barriers through incentives for holistic building energy projects that create safe and healthy hubs for community members and better buildings for public sector workers. The following table shows common barriers and TEC’s approach to overcome them.

Table 1: Strategies to overcome barriers

Public Agency Barriers	TEC’s Strategies to Overcome Barriers

Limited staff time and resources	Public agency staff juggle many priorities and often have responsibilities beyond EE. Through close coordination with the I-REN TA Program, the NMEC Program will alleviate staff time necessary to make their energy projects a reality.
Lack of public agency capital	By offering incentives to program participants, and enhanced incentives to underserved communities, the capital costs of each project will be reduced, requiring less out of pocket funding from each public agency.
Limited access to actionable data for informed decision making	TEC provides pertinent EE project data and metrics tailored to enable an agency to make informed decisions throughout a project's lifecycle and post-installation for persistence in savings.
Buildings in need of repair that are below code	TEC utilizes a NMEC approach that captures energy savings that are below code and encourages more comprehensive projects that are not limited to above-code measures.
Lack of staff training to assure persistence in savings	TEC supports facility staff training led by the contractor as well as developing facility maintenance plans for staff use and transitions. Additionally, TEC provides ongoing energy performance reports to facility staff 3-years post installation.

The NMEC Program will integrate seamlessly with the I-REN TA and Financing Services Programs to provide public agencies with a turnkey solution and frictionless experience. The program entry and participation process will typically follow these steps:

- Enrollment, project identification, and audit in the TA Program
- EE measures identified as viable NMEC candidates through the TA Program
- Agency selects to pursue NMEC incentives
- TA Program supports NMEC incentive application Project Feasibility Study (PFS)
- NMEC Program performs application technical review, M&V plan development, and approves project for incentives
- Financing Services Program supports with additional financing applications to layer with NMEC incentives
- TA Program supports project implementation
- NMEC Program supports incentive closeout, M&V, persistence of savings activities (including applicable training), and incentive payments

Throughout the design phase, TEC will coordinate with the BUC software provider to integrate NMEC opportunities and information into their platform.

Program Kick-Off

Within two weeks of the contract being signed, TEC's contract manager will initiate a kick off meeting with the I-REN team to review the program scope and milestones. In coordination with I-REN, TEC will also initiate introductory meetings with implementers for the BUC and other public sector scopes to lay the groundwork for coordination that ensures a seamless I-REN program participant experience. During the initial introductory meeting, each public sector implementer will present overviews of their program offerings so all parties have a strong understanding of coordination opportunities and how to ensure streamlined customer experiences across the portfolio. Agendas for these meetings, along with detailed meeting notes, will be distributed to the I-REN team to ensure alignment on strategies and next steps. As a follow-up to the meeting, TEC will work with the other public sector program implementers to outline a program coordination

process so all stakeholders have a clear idea of synergies and avoid duplication.

Initial Design and Ramp Up

Implementation Plan

During the design phase, TEC's program manager will incorporate insight from the program kick-off discussions and expertise delivering an NMEC incentive program for SoCalREN to develop an Implementation Plan and Program Manual following the CPUC EE IP template. The IP will include details on program processes and procedures, a logic model, incentive structure and payment process, target market, and tactics to overcome regional public sector participation barriers. The IP will also include the NMEC savings calculation methodology and M&V plan in compliance with all relevant CPUC guidance and requirements. The Program Manual, which is a required attachment to the IP, will include details on program coordination across I-REN's public sector program portfolio and customer eligibility requirements, among other required elements per the CPUC template. Additionally, TEC can help I-REN deliver a public webinar to review and collect feedback on the IP before the final version is posted on CEDARS.

Program Stakeholder Coordination

Throughout program design and implementation, TEC's contract manager and team will engage with local and regional stakeholders to ensure NMEC Program services are responsive to regional needs and energy resilience priorities. Stakeholders include, but are not limited to, WRCOG, SANBAG, CVAG, the Inland Southern California Climate Collaborative (ISC3), and the local IOUs. These stakeholders will help TEC ensure that program design and messaging resonates with the I-REN territory's unique needs. Initial engagement activities with COGs will include workshops and surveys to collect feedback on the program's design.

Program Eligibility and Incentive Structure

The NMEC Program is available to all agencies enrolled in the I-REN TA Program. The program will be open to all public sector facilities with an initial focus on public gathering spaces such as community and recreation centers, senior and teen centers, and libraries. The program will incentivize any measure that reduces energy consumption at the site. To be eligible for the program, projects must be estimated to realize a minimum of 10% savings from the existing baseline, have access to interval data, and the building cannot be scheduled or designated for major redesign or re-use. The customer must agree to post-installation M&V and must notify the program of any non-routine events (NREs) for data reconciliation to confirm actual energy savings. NREs are permanent or semi-permanent changes in the building equipment or use that may have an impact on energy usage. As part of the eligibility verification process, TEC will also complete an NMEC predictability analysis.

As an equity program, TEC proposes offering public agency facilities that support vulnerable populations a higher incentive rate. A pay-for-performance payment process will pay out a portion of project incentives at project completion and the remainder following the completion of the EM&V period. The program manager will perform an analysis of existing program incentive structures options for public agencies before finalizing the payment process for I-REN. Eligibility guidelines, the verification process, incentive structure and payment process will be clearly documented and vetted with I-REN.

Program Forms and Collateral

Throughout the design phase, TEC will develop forms, materials, and collateral for program launch. Marketing materials will be developed with support from the I-REN marketing team to

provide education and awareness about the program (discussed in more detail in Task 2.2). The NMEC program manager will oversee the development of the NMEC Program PFS, which will adhere to CPUC guidelines. The PFS serves as the customer agreement to pursue incentives through the program. Additional forms to be developed include the quarterly savings report, the M&V plan, final M&V report, and predictability analysis which are described in more detail in Task 2.2 below.

Task 2.2: Outreach and Engagement

TEC will coordinate outreach and engagement with the I-REN TA Program and financing services to encourage public agency participation in the Program and maintain a seamless I-REN experience. The I-REN NMEC Program will bring EE funding to regions that have been historically underserved by traditional EE programs. TEC recognizes that the wide array of EE funding and financing programs available on the market brings with it increased risk of customer confusion. TEC's marketing and outreach approach will prioritize 1) reaching underserved agencies and 2) reducing customer confusion through inclusive and comprehensive design.

Marketing and Outreach Collateral Development

TEC's marketing and outreach strategy will target agencies through workshops, webinars, conferences, fact sheets, case studies, website content, and other engagement opportunities to build agency awareness of program resources, capacity, and expertise. TEC will begin outreach and marketing efforts by reviewing existing I-REN collateral to ensure branding and messaging alignment and to identify where NMEC Program engagement may be infused into existing and planned I-REN marketing channels, including the TA and Financing Services programs.

TEC will facilitate a series of NMEC Program workshops, webinars, and localized outreach events within I-REN territory to promote the program and recruit participants. TEC will also coordinate with the other I-REN public sector program implementers to complement and support their outreach efforts.

Upon contract execution, TEC will design a comprehensive communications and outreach plan, informed by existing I-REN engagement efforts, and will share the plan with I-REN for review. The communications and outreach plan will set targets and milestones for engagement activities and will outline a methodology for reporting on program engagement. Upon I-REN approval, TEC will implement the communications and outreach plan.

Marketing and outreach collateral may include:

- NMEC Program launch workshop (in-person and webinar options) within 60 days of contract execution
- NMEC Program fact sheet
- Regular content for e-newsletters targeted to local government audiences
- NMEC Program slide deck for standalone presentations or to fold into I-REN public sector presentations
- Case studies showcasing the health, safety, financial, and resilience benefits of holistic facility upgrades through the NMEC Program

Culturally Specific Marketing Strategies

TEC recognizes that there is not a one-size-fits-all approach to EE program design and outreach. We will call upon regional stakeholders for insights into engaging communities where cultural

factors such as language, socioeconomic status and other challenges have led to participation barriers. Additionally, TEC will leverage the following marketing and outreach design components to reach communities that have faced historical barriers to leveraging EE programs:

- In-person program outreach in public gathering spaces such as community and recreation centers, senior and teen centers, and libraries
- Dedicated program support email address and phone number for increased program accessibility and ongoing receipt of program questions and feedback
- Region-specific marketing and outreach materials, in regionally appropriate language(s) with simple jargon-free language, where needed.

Marketing and Outreach Coordination with I-REN TA Program and Financing Services

TEC proposes coordinated outreach between all I-REN public sector programs, with the I-REN TA Program as the entry point for agency participation in I-REN services. A dedicated PM will be assigned to each agency upon enrollment in the TA Program, and the same PM will guide the agency through the NMEC Program and financing services for qualifying projects. This singular point of contact will build agency trust and reduce confusion across programs. TEC will engage key agency decision makers, such as public works staff, financing department staff, facility managers, and elected officials during initial program outreach and during key milestones of EE projects.

Agency outreach will focus on the comprehensive suite of end-to-end EE services available across the I-REN public sector portfolio. To ensure effective outreach and reduce agency confusion, TEC will design NMEC Program collateral to seamlessly integrate into TA Program and financing services collateral.

Celebration of Success

Celebrating the success of agency energy projects encourages more enrollments, repeat program engagement, demonstrates agency leadership within agency's communities, and appeals to the competitive nature of neighboring public agencies. In addition to introductory slide decks, fact sheets, and case studies, TEC will develop the following outreach materials to celebrate local EE leadership and project success stories:

- **Project Impact Report.** The Project Impact Report will highlight the lifecycle energy savings, cost savings, and GHG reduction benefits of completed EE projects. This deliverable can be shared among agency staff and with the general public to promote the community benefits of EE and position the agency as a regional energy leader.
- **Legislative Body and/or Community Check Presentations.** TEC will promote local EE success by facilitating check presentations to governing boards, councils, or other community-recognized avenues. The check presentation will spotlight the financial resources secured by the agency, in partnership with I-REN, to advance the agency's energy goals.
- **Social Media Posts.** TEC will develop social media content spotlighting agency achievements for the I-REN team to post on I-REN social media platforms.

Marketing and Outreach Coordination with Regional Stakeholders

TEC recognizes the value of working alongside COGs and other regional stakeholders to guide localized messaging, implement customized outreach, and build agency trust. Leveraging lessons learned from TEC's successful SoCalREN regional partner model, TEC will work with regional stakeholders to develop unique outreach strategies to increase program participation and equitable distribution of program resources across local governments, tribes, school districts, and

special districts. Strategies may include regional EE working groups, competitions, or other innovative initiatives that respond to local energy priorities. TEC will partner with the COGs to develop an annual forum for celebrating agencies that are saving energy through the I-REN NMEC Program. These events will bring positive publicity to agencies already implementing energy retrofits, encouraging future projects, while building interest from other public agencies that may not yet be enrolled in the I-REN public sector programs, or who have not yet taken action to save energy. Key public agency stakeholders, including elected officials, will be invited to attend to increase program visibility. These events will bolster I-REN's role as a facilitator of local energy action while showcasing the value of the I-REN public sector programs to Inland Empire public agencies.

Task 2.3: Program Implementation

TEC's proposed program design aligns with I-REN's vision to connect local governments to a wide range of EE resources to increase energy savings and equitable access throughout San Bernardino and Riverside Counties. The program offers a pathway for agencies to maximize energy and cost savings through technical assistance, persistence of savings reports, and reinforcement of operations and management best practices. The PM assigned through the TA Program will also act as the agency's advisor for the NMEC Program, acting as a single point of contact "concierge" for the agency. Below reflects the key steps and flow of an NMEC project, starting with project identification, which is supported by the TA Program. Once a project is identified as a viable candidate, subsequent activities are handled by the NMEC Program team.

Project Eligibility and Savings Risk Assessment

The public buildings NMEC incentive program will be available to all agencies enrolled in the public TA Program. The PM will assess if an agency's project meets the minimum criteria to participate in the NMEC Program. The PM will work closely with the NMEC Program manager to ensure the project meets all eligibility requirements. TEC will screen for site-level projects that have pre-installation savings estimates greater than or equal to 10% of annual consumption.

Upon initial eligibility verification, the public agency will sign a participation agreement acknowledging an understanding of program requirements, a commitment to install measures as proposed, and the risks of not doing so. The NMEC Program manager will stay connected with the agency through the PM to reduce risk and ensure the pre-installation savings calculations are conservative. In the event that the project site savings turn out to be less than 10% of annual consumption, potential reasons for the shortfall will be investigated. The two main causes for projects falling below the 10% threshold after implementation include:

1. One or more measures not installed or not installed as planned
2. An unidentified NRE affecting energy usage.

Project Application

Once initial project eligibility and program requirements are confirmed, the PM will work closely with the agency and NMEC Program manager to gather all interval data^[4] required for the NMEC technical partner, Alternative Energy Systems Consulting, Inc. (AESC), to conduct detailed analysis and confirm that the project is a good candidate for an NMEC approach. Once confirmed, the NMEC Program manager will work with AESC and the PM to prepare the NMEC incentive application for agency approval and signature. Both the NMEC application and M&V plan will follow the industry-standard International Performance Measurement & Verification Protocol (IPMVP) Option C approach and comply with the CPUC requirements for site-based NMEC Programs per the latest version of the NMEC Rulebook. The goals of the M&V Plan are to:

- Verify the energy savings identified during the audit and design phase

- Ensure that the project savings are at least 10% of the facility's annual consumption
- Monitor data for NREs and unusual trends to identify potential system issues.

Application Review and Approval

Once the application is submitted, the NMEC Program manager will coordinate with a technical reviewer from AESC or TRC to review and approve the incentive application. The technical reviewer will perform a thorough review of the project application to verify project calculation methodology and project costs, the M&V plan, project influence, and ensure the project meets all applicable CPUC requirements. If questions arise or additional information is requested by the technical review team, the NMEC Program manager will coordinate with the PM to facilitate responses. Throughout this process, the PM will provide the agency with frequent status updates. Applications will be uploaded to the CPUC Custom Measure and Project Archive (CMPA).

Once approved, the NMEC Program manager will send an approval letter to the agency and PM with anticipated project savings and incentive amounts. As an equity segment program, incentives rates for underserved agencies will be twice the standard rate to prioritize projects at facilities that benefit vulnerable populations. The PM will work closely with the agency through project design, procurement, and construction under the TA Program scope to ensure energy savings are delivered as anticipated.

Installation Verification

Upon EE measure installation and commissioning, the PM will notify the NMEC Program manager that the project is completed. The NMEC Program manager will coordinate with the technical review team to conduct a post-installation inspection to verify all measures were installed as specified in the project application. If planned measures were not implemented or were installed differently than specified, the PM will work with the project development engineer to update savings and incentive metrics.

Project Completion Incentive

Based on TEC's experience implementing and participating in pay-for-performance NMEC Programs with public agencies, we recommend that the program provide an initial partial incentive payment upon project completion to help subsidize project costs. The remaining incentive will be paid out after the M&V reporting period when persistent savings achievements have been verified.

Operations and Maintenance (O&M) Plan and Training

TEC will collaborate with the agency and project contractor to update the Operations and Maintenance (O&M) manual at the facility for the measures installed, or to create one if none exists, to maximize energy savings. The O&M manual includes a description of the implemented measures, including setpoints, sequences of operation, and system diagrams, and O&M requirements to maintain these measures. The O&M requirements typically include a checklist of maintenance tasks and a schedule for performing them. Checklists are kept for each piece of equipment and updated after maintenance tasks are performed. The O&M manual will include a schedule of regular review and updating of occupancy or operational changes to ensure changes do not impact the measures installed. TEC can also provide training for facility personnel on the use of the O&M manual. The PM will offer a quarterly check-in with facility staff for 2-3 years after installation to answer questions and provide additional training, if required.

Persistence of Savings

After project completion, the project enters the post-installation M&V reporting period. During this 12-month period, agencies will be able to monitor their energy consumption through quarterly savings reports and via access to Praxis by AESC, a data-secure, web-based software platform that enables users to perform population or site-based NMEC M&V of payable savings for completed projects. Praxis was developed in compliance with CalTRACK methods and follows ASHRAE Guideline 14, International Performance Measurement and Verification Protocol (IPVMP), and other industry best practices. Praxis tracks all pertinent statistical criteria and other parameters to ensure the energy model's accuracy and predictive power. Praxis conducts ongoing measure monitoring during the performance period through data visualization, tracking, and reporting features. Access to this software will provide direct feedback to facility personnel that may not have access to utility bills and will empower staff to manage and track their energy usage. The PM and NMEC Program manager will present these reports to the facility staff so they understand how the information was collected and analyzed, and also to identify any potential NREs.

Quantifying Metered Savings

Modeling

TEC utilizes baseline and post-installation modeling algorithms to quantify project energy savings. Modeling may be based on change-point models originally developed under ASHRAE Research Project 1050. Change-point models are a series of dependent piecewise linear relationships between energy use and ambient temperature. The change-point models are named by the number of parameters in the model and whether they apply to heating or cooling energy use. After each model is developed, the change-points and coefficients of the slopes of each line segment will have been determined, along with their goodness-of-fit metrics.¹⁵ Other algorithm models may also be explored and used based on the project and facility type and any applicable CPUC NMEC rulings.

To develop energy models, the data may be grouped into different bins based on building operating periods. Such bins may include occupied or unoccupied periods, weekdays, weekends, or holidays, or in-session versus out of session periods, as are common in schools and universities. Thus, different models may be developed in the baseline period according to these unique operation periods, as they will have different responses to ambient temperature. After acceptable models are developed for each period, they may be combined using an indicator variable. This approach applies to both baseline and post-installation period data.

At the end of the post-installation period, both baseline and post-installation models are normalized using the nearest Typical Meteorological Year (TMY) weather conditions for the building's climate zone. Both baseline and post-installation models are normalized to TMY conditions. The difference between the total normalized baseline energy use and the total normalized post-installation energy use defines the total normalized savings. The normalized savings are claimed as the savings for the measures installed in each participating building.

Non-Routine Events

NREs are events unrelated to weather, normal operation, and EE measures that impact energy use. NREs include changes in building occupancy, equipment shut-downs, major renovations such as changes in facility size, or a steady increase in building loads due to factors such as the addition of personal heaters, new electric vehicle charging capabilities, and/or the addition of on-

site renewable energy generation. The potential for NREs occurring during a metered savings project is not insignificant and continuous customer contact, ongoing monitoring of the building, and frequent comparison to the predicted building performance are necessary to detect them. When NREs occur, it is necessary to determine whether they add load (reduce savings) or decrease load (increase savings), how significant they are, and how to properly quantify them.

The agency or facility staff will be responsible for notifying the PM and program of any NREs via a detailed narrative describing the changes that have occurred and the duration of the NRE. Depending on their significance, NRE impacts on building energy use are quantified using engineering calculations supported by audit information and/or measured energy use data, or directly from the building's metered energy use data. Each NRE is described and the methodology for quantifying their impacts, data, and analysis, are provided with the final M&V report.

Savings Persistence Incentive and Marketing

Once the metered savings are quantified and weather normalized, the agency is eligible to receive the savings persistence incentive for the remaining balance of "trued-up" incentives based on the project's realized savings. TEC will provide incentive check presentations to the agency's legislative body and/or at community events to spotlight the financial resources secured by the agency, in partnership with I-REN, to advance the agency's energy goals. The agency will also receive a project impact report to show the life cycle benefits of the project as well as a project case study that can be shared with agency management and council/board members. Sharing the project success will position local governments as EE leaders in their communities and inspire further energy-saving actions.

Continued Persistence of Savings

After the 12-month post-installation reporting period and savings persistence incentive payout, the agency will continue to monitor their energy consumption through ongoing quarterly savings reports for up to three years after project completion. The reports will be accessible through the same proprietary software and will provide continued feedback to facility personnel to manage and track the facility's energy usage. The agency staff will also have periodic check-ins with the PM and NMEC Program manager throughout years 2 and 3 to answer questions and ensure the project's energy and cost savings are maximized.

Program Progress Updates

TEC will conduct recurring meetings with the I-REN team to provide program updates. Meetings will include status reports on active and potential projects, project pipeline growth, risk mitigation strategies, participant interactions, and progress towards goals. TEC will also provide program updates and coordinate with the BUC software provider to inform solution design and ongoing enhancements.

Task 2.4: Other Services

Activities

Quality Assurance and Quality Control

To verify project quality through the NMEC Program and ensure ratepayer funds are being properly utilized, TEC will incorporate a number of quality assurance guidelines and procedures, as outlined below.

1. TEC will perform a preliminary project review for each facility (or site) that an agency is

interested in upgrading after the project engineer recommends potential NMEC project eligibility. This will ensure the project is a good candidate for the NMEC Program and that appropriate resources are offered. The review will consist of the following:

- Reviewing 12 months of site energy consumption for weather normalized goodness-of-fit and non-routine events
 - Confirming data collection capabilities at facility(ies) or site(s) and the completeness and quality of datasets
 - Checking that any solar, storage or EV charging systems at the facility are separately metered
 - Reviewing history of past energy-related projects to determine if a 10% reduction in annual energy consumption is feasible
 - Obtaining information from participants regarding potential changes to end use including electric vehicles, installation of solar panels, building operation or application, and occupancy during the course of the project (next 3 years).
2. TEC will mitigate “double dipping” by coordinating with the local and statewide IOUs and/or third party program implementers. In coordination with I-REN, TEC will develop a process to inform either the IOUs or third party implementers about I-REN supported NMEC projects. Through this process, I-REN will avoid situations where equipment for a project is purchased from a vendor participating in a statewide program (e.g. Illuminate California), and that vendor also claiming EE program savings for the sale/installation of the equipment.
 3. The NMEC Program will diligently manage “gaming” or “free ridership” by only offering services to agencies who truly would not have installed a project without the benefit of incentives. TEC is very familiar with the CPUC’s rigorous custom project influence requirements and recognizes the importance of ensuring that customers who do not need incentives are taking resources from those who do.

Regulatory Reporting

TEC will leverage its extensive experience and expertise to support all aspects of regulatory reporting, including filings, data collection, and EM&V. As requested by I-REN, TEC will provide program-specific content and/or will review I-REN JCMs, annual reports, Advice Letters and data requests. Requests will be fielded by the TEC contract manager and assigned to TEC staff with time for internal review before submitting to I-REN for feedback. TEC will also proactively consider any potential program-specific edits or content for I-REN regulatory filings and alert I-REN as appropriate.

Data Collection, Reporting, and Analysis

Proper data collection and reporting is the foundation of tracking and communicating program success. Data collection protocols and systems for the public sector programs will be established during the program design period in coordination with I-REN, the IOU program administrators and the BUC team to ensure successful CPUC reporting of metrics, indicators and other measures of program performance. As an equity segment program, TEC PMs and coordinators will collect, report, and maintain equity segment metrics throughout program implementation. Program managers will perform general quality control and coordinate with the contract manager on trends or issues to be discussed with I-REN. TEC’s assigned project analyst will support program performance analysis as requested and the contract manager will support any EM&V requests from I-REN as requested. Any improvements identified will be implemented through the TEC contract manager.

TEC pursues continuous improvement for all programs. Beyond EM&V studies, and as an

ongoing practice, TEC will look for opportunities to improve program performance and share recommendations with I-REN. At a minimum, TEC, led by the contract manager, will perform an annual analysis of performance and present recommendations for short-term and long-term planning.

Task 3: Public Sector Financing Services

Project financing is often cited as the number one barrier to EE project implementation. Staff and capital resource constraints, the COVID-19 pandemic, supply chain delays, and increasing labor and equipment costs are squeezing already constrained public agencies. Public agencies also have varying internal funding and financing requirements and may lack the resources and expertise to navigate the options available to them. It can be challenging for public agencies to dedicate resources to the rigorous application and reporting requirements for many funding opportunities. These challenges are even more pronounced in DAC, low-income, and other hard to reach communities.

The I-REN Public Sector Financing Services Program will help agencies overcome financing barriers by helping them navigate the complexities of project financing and developing tailored recommendations to address each agency's specific financing needs and priorities. TEC will design the program to help agencies use multiple incentive and financing resources in tandem with the I-REN TA and NMEC Programs. Through TEC's proposed approach as the lead implementer for all three public sector programs, participants will benefit from a streamlined and straightforward experience. Appropriate resources for each agency's needs will be delivered by the same point of contact, the TEC PM, across all public sector programs.

Task 3.1: Financing Services Design

Program Kick-Off

Within two weeks of the contract being signed, TEC's contract manager will initiate a kick off meeting with the I-REN team to review the scope of services and contract milestones. TEC will also meet with awarded implementers for the BUC and other public sector scopes to lay the groundwork for coordination that ensures all participating agencies benefit from a seamless I-REN experience. During the initial introductory meeting, each public sector implementer will present overviews of their program offerings so all parties have a strong understanding of coordination opportunities and how to ensure streamlined customer experiences across the portfolio. Agendas and detailed meeting notes will be distributed to the I-REN team to ensure alignment on strategies and next steps. As a follow-up to the meeting, TEC will work with the other public sector program implementers to outline a program coordination process so all stakeholders have a clear idea of synergies and avoid duplication.

Local and Regional Stakeholder Engagement

TEC recognizes the value of working alongside trusted regional experts to customize services and messaging to their communities. Engagement with these stakeholders will enhance the I-REN's Financing Services Program by using their local and regional knowledge, existing relationships with member agencies, and their professional relationships that extend beyond EE.

Throughout the program design phase, TEC's engagement program manager will engage with local and regional stakeholders in the territory including CVAG, SANBAG, WRCOG, and ISC3 to

design services for unique needs of agencies in the I-REN territory. TEC will conduct stakeholder engagement activities, including workshops and surveys to collect feedback on what financing mechanisms, resources, and messaging has worked well in this region. TEC will continue to collect feedback from stakeholders throughout program implementation to ensure services are adapted as new regional priorities and financing opportunities emerge.

Services Design and Ramp-Up

TEC's financing services program manager will incorporate insights from the program kick-off and stakeholder engagement to develop content for I-REN's TA and NMEC Program IPs and Program Manuals. This content will detail I-REN's financing services to alleviate financial barriers to public sector EE project implementation, while prioritizing vulnerable and underserved communities. Key components of TEC's proposed financing services model include the items detailed in the sections below.^[6]

Energy Financing Services Advising

Each agency will be assigned a dedicated TEC PM to serve as an EE project financing advisor. Should TEC serve as the lead implementer for all I-REN public sector scopes, each participating agency will be assigned one TEC PM to guide the agency through all I-REN public sector offerings, creating a seamless customer experience. The PM will share funding and financing opportunities available to the agency and will educate the agency on the most beneficial financing mechanisms options for any given project. TEC's subconsultant, PFMFA, will provide additional financial advisory services to help the agency point of contact, or "Energy Ambassador", explain financing options in detail to their financing department to build internal buy-in. Services may include review of energy savings performance contracts, third-party loan terms and conditions, and other similar requests. TEC and PFMFA's successful partnership to deliver public sector financing services is exemplified through assistance provided by the SoCalREN to the City of Palmdale. TEC and PFMFA helped Palmdale secure a private EE loan for \$990,250 and submit a Revolving Savings Fund application for over \$1M.

Financing Resource Library

To increase services reach across I-REN territory, TEC will develop a comprehensive EE financing resources library that will be available to all I-REN enrolled public agencies via the program website.

Green Revolving Fund Set Up Support

TEC's PM, in coordination with PFMFA, can also support agencies with the set up of internal green revolving funds, like we did for WRCOG's Sustainability and Efficiency Revolving Fund (SERF) or Temecula's Energy Temecula Energy Efficiency Asset Management (TEAM) Fund. A Green Revolving Fund (GRF) is an internal capital pool that is dedicated to funding energy efficiency, renewable energy, and/or sustainability projects that generate cost savings. A portion of those savings are then used to replenish the fund (i.e. revolve), allowing for reinvestment in future projects. This establishes an ongoing funding vehicle that drives energy efficiency and sustainability while generating cost savings and ensuring capital is available for important projects.^[7]

Financing Resources and Application Assistance

Many EE programs offer incentives or financing on a reimbursement basis after successful project completion. However, public agencies often lack the up-front capital to invest in EE retrofits. TEC PMs will educate participating agencies on bridge financing programs, energy performance

financing, and other low-or-no up-front financing options to expedite EE projects in the absence of up-front capital. The PM will also help participating agencies apply for long-term EE financing. Example project financing pathways are listed in the table 2 below.

Table 2: Project Financing Pathways

Project Financing Pathways	
Energy Services Company (ESCO) Performance Contracting	ESCOs offer tailored EE project financing (both on- and off-balance sheet) to agencies to deliver low-to-no up-front cost EE projects. TEC will educate agencies on the processes and key considerations for working with ESCOs. TEC will also offer unbiased third-party reviews of an ESCO's cash flow pro forma for identified projects. TEC will also advise agencies on Government Code 4217, an expedited alternative procurement pathway enabling agencies to pursue an ESCO option.
SoCalREN Revolving Savings Fund	TEC will coordinate with SoCalREN to understand the viability of this pathway for I-REN program participants. Underserved agencies may be able to access SoCalREN's 0% interest loans. Through the I-REN Financing Services Program, TEC will offer agencies support in applying for these loans.
SCE and SCG 0% On-Bill Financing (OBF)	OBF allows customers to repay the costs of EE upgrades through energy cost savings directly on their utility bills. SCE and SCG allow customers to use OBF and EE incentives. The TEC PM will assist the agency with applying for utility OBF and EE incentives through the I-REN NMEC Program or other incentive programs. TEC has supported OBF applications for nearly 1,200 service accounts, securing over \$19 million for public agency customer EE retrofits.
CEC Energy Conservation Assistance Act Loans	The CEC offers 0% interest loans to school districts and 1% interest loans to other public agencies to finance EE and energy generation projects. TEC will support agencies through the application process to secure loans for the energy projects.
IBank California Lending for Energy and Environmental Needs Statewide EE Program (SWEEP) Loans	SWEEP Loans can finance a wide array of EE measure types including HVAC, lighting, and energy management systems. The TEC PM will offer agencies necessary support to complete loan applications.

TEC monitors for emerging grants and financing opportunities for public agencies and anticipates that new financing programs will emerge in the coming months from the Bipartisan Infrastructure Law and the Inflation Reduction Act. TEC can work with single or multiple agencies, including regional stakeholders, to develop innovative grant applications to take advantage of available funding. Given the extensive resources required to apply for grant funding, these program services will be offered on a limited basis and only to I-REN's most vulnerable communities including DACs, low-income, and other hard to reach populations.

TEC will also consider innovative partnerships with private financing companies like [BlocPower](#) to connect agencies to new financing mechanisms to fill additional gaps. TEC's I-REN financing services model will adapt to new market offerings.

Services Eligibility and Coordination with I-REN TA and NMEC Programs

All public agencies in I-REN territory are eligible for financing services, with priority offered to the

territory's vulnerable communities. In alignment with the TA Program's concierge-style approach, public agencies will access I-REN's Financing Program offerings by first enrolling in the TA Program. Coordination between I-REN's TA, NMEC, and financing services will be seamless. While TEC is proposing to lead implementation of all public sector programs, we are committed to successful coordination with other implementers as applicable. TEC will deliver streamlined coordination through the following program elements:

- **Integrating financing services content into I-REN Program Manuals and IPs.**
- **A singular PM for wrap-around I-REN TA, NMEC, and financing services.** The PM will provide EE project development support via benchmarking, EE audits, and financial analyses and will connect the participating agency to I-REN financing services and assist with applicable financing applications.
- **Including financing services in TA Program project identification and financial analysis.** TEC will integrate educational information on I-REN financing services and project financing pathways into each TA Program project summary.
- **Integrated financing support with I-REN NMEC incentives.** TEC will assist public agencies with applying for financing opportunities in tandem with NMEC EE incentives. The PM will collect all necessary documentation from the I-REN NMEC Program or other incentive program to submit financing applications on behalf of the agency.

TEC's program manager and communications team will develop collateral and forms to educate agencies about financing options and to mitigate the risk of agencies discontinuing projects, ensuring responsible use of ratepayer funds. Collateral and forms developed will include:

- **Matrix of project financing opportunities:** TEC will guide program participants to the financing opportunities that will best meet their needs. However, TEC will also create a matrix of financing opportunities for agency review and consideration. Table 2 above illustrates sample opportunities that will be included.
- **Financing Services Form:** A non-binding participation form will outline I-REN's no-cost financing services and the requirements from the agency to progress the project. Agency signature ensures continued willingness to work with I-REN to secure financing and move the project into implementation.

Program Coordination with I-REN BUC Software

TEC is committed to integrating I-REN financing services into BUC software to create a program design and user interface that works for public agency staff. TEC will also provide feedback for ongoing enhancements to the BUC software to ensure seamless coordination between BUC and I-REN financing services.

Task 3.2: Marketing and Outreach

TEC's engagement program manager will implement a coordinated outreach and engagement strategy with the other I-REN public sector programs as outlined in Tasks 1.2 and 2.2. TEC's financing services program manager will develop messaging about the program's financing services to be incorporated in the TA and NMEC Programs' outreach to local agencies. TEC will also leverage the market opportunity study and I-REN priority communities identified in task 1.2 to inform financing services outreach. While the TA Program will serve as the primary entry point for public agency I-REN EE program participation, TEC will coordinate across public sector scopes to ensure the agency experience across programs is clear and streamlined.

Marketing and Outreach Collateral Development

Within 60 days of contract execution, TEC's program manager will coordinate with the communications manager to develop a marketing and outreach plan, outreach targets, and milestones. Key marketing and outreach strategies to be implemented include:

- Financing services launch workshop (in-person and webinar options)
- Financing services fact sheet
- Financing services slide deck for standalone presentations or to fold into I-REN public sector-wide presentations alongside TA and NMEC Program services
- Case studies showcasing the benefits of EE funding and financing
- Content creation for newsletter features
- Legislative body and/or community check presentations
- Program achievements and information highlighted on social media platforms, including LinkedIn, Twitter, and Instagram.

In addition to the marketing and outreach plan, TEC will continue to collect feedback from local public agencies on financing questions, concerns, and requests for information on new funding opportunities. TEC will deliver bi-annual financing workshops to address hot topics and keep public agencies engaged in the financing services offerings. TEC will also support the TA and NMEC Program implementers at public agency meetings with key decision makers to ensure project financing questions can be answered directly.

All marketing and outreach strategies will be finalized in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN implementers as applicable. TEC will also collect stakeholder feedback on marketing collateral to ensure it resonates with local communities. Before distributing or sharing any collateral, TEC will confirm that it adheres to I-REN branding, templates, and other relevant guidelines. Lastly, TEC will provide I-REN with progress updates on marketing and outreach efforts at requested intervals.

Task 3.3: Financing Implementation

TEC's proposed program design aligns with I-REN's vision to connect local governments to a wide range of EE resources to increase energy savings and equitable access throughout San Bernardino and Riverside Counties. TEC recognizes that the numerous EE funding and financing programs bring a risk of customer confusion, which may dissuade already resource-constrained agencies from taking advantage of available programs. TEC will minimize customer confusion through a concierge-style approach that allows for seamlessly combining TA, NMEC, and financing services resources. TEC's implementation strategy will initially target HVAC EE upgrades in recreation centers, libraries, senior centers, and other community centers in vulnerable communities in alignment with I-REN's Financing Services objectives.

Financing Services Participant Experience

The TEC team will work closely with I-REN staff, energy efficiency fellows, and other public sector implementers to foster relationships with public agencies and their designated Energy Ambassadors. TEC's financing services approach will include the program design elements outlined in task 3.1, will be closely coordinated with the TA and NMEC Programs, and will include the following activities:

1. During EE project development, the TEC PM will review current financing resources and hold discussions with the agency to identify agency-specific financial barriers, limitations

- and priorities. PFMFA may join these meetings if needed.
2. After the TA Program delivers an EE audit, TEC will develop a tailored **financial analysis** (leveraging a specialized EE financing calculator tool) to review all funding and financing mechanisms available and generate a recommendation that maximizes the project's financial benefit to the agency and addresses the agency's financial barriers.
 3. In coordination with the TA and NMEC Programs, TEC will develop and deliver a **project summary** that highlights the most financially beneficial funding/financing pathway for the agency. The proposal will include key financial metrics like simple payback (SPP), return on investment (ROI), net present value (NPV), and a year-over-year cash flow analysis.
 4. Once a program financing pathway is selected, the PM will provide application assistance, objective third-party advising, and other supportive services to assist the agency with pursuing their selected financing program(s).
 5. Public agencies may also receive support to implement a green revolving fund that can provide a continuous funding stream for EE projects.

Financing Services Implementation Documentation and Reporting

TEC will document key program implementation activities and participant interactions. When TEC leads any agency or I-REN meetings, we will share meeting agendas and minutes to set expectations for all parties. TEC has developed a customized Customer Relationship Management platform on Salesforce for energy project tracking, event tracking, and customer information that includes the following data: agency information, financing services provided, financing leveraged, facility information, EE measures installed, and events with participants.

TEC will document and share program status updates based on I-REN's desired frequency (e.g. weekly, bi-weekly). On a monthly and quarterly basis, TEC will share a dashboard to highlight key metrics of success.

Task 3.4: Other Services

TEC will leverage its extensive experience and expertise to support all aspects of regulatory reporting, including filings, data collection, and EM&V.

Regulatory reporting

As requested by I-REN, TEC's contract manager will provide program-specific content and/or will review I-REN JCMs, annual reports, Advice Letters and data requests. Requests will be fielded by the TEC contract manager and assigned to TEC staff with time for internal review before submitting to I-REN for feedback. TEC will also proactively consider any potential program-specific edits or content for I-REN regulatory filings and alert I-REN as appropriate.

Data Collection, Reporting, and Analysis

Data collection protocols and systems will be established during program design in coordination with I-REN and the BUC team to ensure successful reporting of financing-related data for CPUC reporting, program metrics, targets, indicators and other measures of performance. The data will be collected, reported, and maintained throughout program implementation by TEC PMs and project coordinators. TEC's financing services program manager will perform quality control and coordinate with the contract manager on any trends or issues to be discussed with I-REN. TEC's project analyst will support program performance analysis as requested and the contract manager will support any EM&V requests. The TEC contract manager will coordinate any improvements identified via reporting and analysis.

TEC pursues continuous improvement for all programs. Beyond EM&V studies, and as an ongoing practice, TEC will look for opportunities to improve program performance and share recommendations with I-REN. At a minimum, TEC will perform an annual analysis of performance and present recommendations for short-term and long-term planning.

^[1] As defined in D.21-11-013

^[2] During the program design phase, TEC will align with I-REN on preferred approaches for coordination and level of continued project support for participants who choose to pursue incentive program opportunities through other program administrators (PA). There may be significant opportunities to manage I-REN TA Program Resources through coordinated approaches with other PAs.

^[4] In TEC's experience, collecting energy data from the utility providers can be time consuming; utility company delays can persist for 1-4 months. To overcome this challenge, TEC identified an alternative energy data collection platform, Utility API, that will streamline data collection by allowing the agency to provide a one time authorization for continued data collection.

^[5] See ASHRAE RP-1050 for change-point modeling details and ASHRAE Guideline 14-2014 for metrics on modeling goodness-of-fit.

^[6] Additional services may be identified through stakeholder discussions.

^[7] US DOE Better Buildings Solution Center, Green Revolving Funds.

<https://betterbuildingssolutioncenter.energy.gov/toolkits/green-revolving-funds> Accessed September 9th, 2022.

Attachment 2a

IREN BUC Software RFP 22-08

REQUEST FOR PROPOSAL NUMBER 22-08

Inland Regional Energy Network (I-REN)
Building Upgrade Concierge (BUC) Software
Services for Public Sector Energy Efficiency

August 9, 2022



Western Riverside Council of
Governments 3390 University
Avenue, Suite 200
Riverside, CA 92501
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1. SUMMARY

In 2012, the California Public Utilities Commission (CPUC) authorized a new model for administering energy efficiency programs outside the traditional Investor-Owned Utility (IOU) administered paradigm. These new models are known as Regional Energy Networks (RENs).

The CPUC sought for the RENs to address the following three operational areas:

- 1) Undertake programs that the IOUs cannot or do not intend to do.
- 2) Target hard to reach areas and disadvantaged communities.
- 3) Design programs that have the potential to be scaled to larger geographic areas.

In addition to these directions provided by the CPUC, RENs were also directed to address Workforce Education & Training (WE&T), Technology development, and programs within the field of Water / Energy Nexus. The goal of a REN is to implement and administer energy efficiency programs the current IOUs cannot or do not have the available resources to implement within their service territory. In addition to this goal, RENs look to fill the economic and geographical gaps of distant, hard to reach, and disadvantaged communities that IOUs cannot access, or have a difficult time accessing, to promote energy efficiency opportunities.

For the past two years, the Western Riverside Council of Governments (WRCOG), as the lead contracting agency, has partnered with and has been strategizing with the Coachella Valley Association of Governments (CVAG) and the San Bernardino Associated Governments (SANBAG) on development of a REN to service the inland counties of Riverside and San Bernardino. This tri-COG group, hereby collectively referred to as the Inland REN ("I-REN" or "I-REN Team") for the purposes of this program, has submitted a Business Plan to the CPUC, and has been approved to become a REN Program Administrator (PA), with the desire to address CPUC goals and objectives described in rulemaking 13-11-005 concerning Energy Efficiency Rolling Portfolios, Policies, Programs, Evaluation, and Related Issues. The I-REN Business Plan addresses three sectors – the Public Sector, the Codes & Standards Sector, and the Workforce, Education, & Training Sector. Throughout these sectors there will be a strong focus on hard-to-reach communities and disadvantaged communities within the I-REN territory.

The I-REN Business Plan was approved by the CPUC on November 18, 2021, with a budget of \$65 million to be funded through program years 2022 to 2027. The I-REN Team is seeking competitive bids for a lead software consultant to assist the I-REN Team with professional services for a software solution to support I-REN's Public Sector energy efficiency programs targeting local governments, special districts, and tribal communities (collectively, "public sector customers"). The requested software will support I-REN staff and implementer(s) in providing technical guidance and tools to inform and enable priority energy improvements. The solution should also enable I-REN to serve as a clearinghouse for energy efficiency and distributed energy resource program information in general, for I-REN programs as well as programs offered by other program administrators, and other tasks described in the Scope of Work.

WRCOG is a joint powers authority whose purpose is to unify Western Riverside County so that it can speak with a collective voice on important issues that affect its members. Representatives from eighteen (18) cities in Western Riverside County, the Riverside County Board of Supervisors, and the Eastern and Western Municipal Water Districts have seats on the WRCOG Executive Committee, the policy setting Board for the Agency. The Riverside County Superintendent of Schools is an ex-officio member of the Executive Committee. As a Joint Powers Authority, WRCOG examines a range of regional matters critical to Western Riverside County's future.

SANBAG is a joint powers authority representing its member agencies on regional issues in San Bernardino County. SANBAG member agencies include 23 cities and San Bernardino County.

CVAG is also a joint powers authority and is the regional planning agency coordinating government services within the Coachella Valley and Eastern Riverside County. CVAG's member agencies include 10 cities, Riverside County, the Agua Caliente Band of Cahuilla Indians, the Cabazon Band of Mission Indians, the Torres Martinez Desert Cahuilla Indians, and the Twenty-Nine Palms Band of Mission Indians.

For more information about WRCOG please visit www.wrcog.us.

For more information about SANBAG please visit <http://gosbcta.com>.

For more information about CVAG please visit www.cvag.org.

2. SUBMISSIONS

All Proposal must be submitted via PlanetBids by **the Proposal Due Date listed in Section 6, Schedule of Events, no later than 5:00 p.m. Pacific Standard Time (PST)** at <https://pbsystem.planetbids.com/portal/36405/portal-home>.

Proposals shall include a Table of Contents listing all sections, disclosures, etc., and their corresponding page numbers. **Please review Section 12 for additional details.** It shall be the responsibility of the Proposer to submit the Proposal and all other required items specified in this RFP via [PlanetBids](#) at or before 5:00 p.m. PST on the Proposal Due Date listed in Section 6, Schedule of Events. WRCOG will not accept any Proposal received after the Proposal submission time and date.

3. QUESTIONS AND ANSWERS REGARDING THIS RFP

Any questions concerning technical specifications or Scope of Work requirements must be submitted in [PlanetBids](#) by 5:00 p.m. on **the date listed in Section 6, Schedule of Events**.

4. PRE-PROPOSAL MEETING

WRCOG will be hosting a pre-Proposal meeting on the date listed in Section 6, Schedule of Events, to discuss this RFP. The meeting will convene via Zoom at:

<https://us02web.zoom.us/j/81202939285?pwd=Z3RGM3dRcWZ3TFpiNEI4a3dCQ1ITQT09>

Participation is encouraged but not mandatory.

5. BUDGET PARAMETERS

I-REN's budget was established by the CPUC when the I-REN Business Plan was approved on November 18, 2021. I-REN's approved budget is further broken down by sector and though there is limited flexibility to shift funds within a sector, we cannot exceed the annual approved amounts without a formal CPUC filing. The not-to-exceed amount for this RFP is as follows:

Public Sector Building Upgrade Concierge (BUC) software: \$250,000.00 per year. Part of the annual \$250,000 not-to-exceed amount will be used to purchase up to 55 kiosks, one for each of I-REN's member agencies and used to host the BUC software, estimated at a cost of \$10,000 each.

Proposer understands that Proposer is not entitled to the full not-to-exceed amounts outlined in this section. The not-to-exceed amount merely represents the maximum funding available within the applicable budget sectors for these particular services. Pursuant to Section 11 of this RFP, the overall cost of Proposer's Proposal will be a primary consideration in the evaluation and selection of the award of the agreement. It is also possible that these not-to-exceed amounts may be altered based on budget needs and WRCOG reserves the right to alter the not-to-exceed amounts in light of budget considerations.

The contract term for this RFP shall be three years from the date of execution with the option of two one-

year extensions.

6. SCHEDULE OF EVENTS

Event	Date
1. RFP Distribution	8/09/22
2. Pre-Proposal Meeting via Zoom	8/22/22 at 2:00 p.m. PST
3. Questions from vendors about scope or approach due	8/23/22 at 5:00 p.m. PST
4. Answers to questions from vendors about scope or approach posted to the PlanetBids portal	8/30/22
5. Proposal Due Date	9/16/22 at 5:00 p.m. PST
6. Review of Proposals	9/19/22 – 9/30/22
7. Potential Interviews	10/03/22 – 10/07/22
8. Anticipated decision and selection of vendor(s)	10/10/22 – 10/21/22
9. Anticipated commencement date of work	11/05/22 - 11/15/22

The interview schedule may be staggered, depending on the number of Proposals received, and could span multiple weeks.

7. WRCOG RIGHTS

Award of a contract resulting from this RFP will be based upon the most responsive Proposal or Proposals which will be most advantageous to WRCOG in terms of cost, functionality, and effectiveness in meeting goals and objectives, and other factors as specified in this RFP.

A. WRCOG reserves the right to:

- Disqualify any and all Proposals that are not submitted in accordance with the required format described in this RFP.
- Reject any and all Proposals submitted.
- Request additional information.
- Issue Addenda to this RFP.
- Award all or part of the work contemplated in this RFP.
- Remedy errors in the RFP.
- Cancel the entire RFP.
- Issue a subsequent RFP.
- Approve or reject the use of a particular subcontractor / supplier.
- Negotiate with any, all, or none of the Proposers. If WRCOG is unable to negotiate final contract Terms and Conditions that are acceptable to WRCOG, WRCOG reserves the right to award the contract to another Proposer(s).
- Accept other than the lowest priced Proposal.
- Award a contract without interviews, discussions, or negotiations.
- Award a contract to one or more Proposers.

- B. WRCOG may, at its discretion, and without explanation to prospective Proposer(s), at any time, choose to discontinue this RFP without obligation to such prospective Proposer(s).
- C. All Proposers should be aware of the insurance requirements for Contract Award. The Certificate of Insurance must be provided by the successful Proposer(s) prior to Contract Award. A contract may not be awarded if insurance requirements are not met.
- D. WRCOG does not reimburse for the cost of Proposal preparation, even in the event of RFP cancellation.
- E. Communication between the Proposer(s) and any member of the Proposal Review Committee during the selection process is prohibited, except in the manner expressly authorized in this RFP. Violation of this restriction is grounds for disqualification of the communicating Proposer(s)' Proposal.
- F. Every Proposal submitted is considered a firm offer that must be valid for a minimum of ninety (90) calendar days.
- G. For software-related services, contractors must determine in advance whether WRCOG already has, or is willing to procure, appropriate licenses for any proprietary and/or third-party software that would be required. Contractors must also provide the impacts of any enhancements and upgrades. WRCOG will require delivery of documentation and source code for all electronic intellectual property developed under a WRCOG contract prior to releasing final payment to the contractor/consultant.

8. ADDENDA

WRCOG reserves the right to revise the RFP documents. Any WRCOG changes to the requirements will be made by written addenda to this RFP. Any written addenda issued pertaining to this RFP shall be incorporated into the terms and conditions of any contract resulting from this RFP. Addenda will be posted on PlanetBids. It is the responsibility of the Proposer(s) to check PlanetBids to determine if any addenda have been issued. WRCOG will not be bound to any modifications to or deviations from the requirements set forth in this RFP as the result of oral instructions. Proposers shall acknowledge receipt of addenda in their Proposal. Failure to acknowledge receipt of all addenda may cause the Proposal to be deemed non-responsive to this RFP and be rejected without further evaluation.

9. NOTIFICATION OF RIGHT TO PROTEST CONTRACT AWARD

Proposer(s) have the right to protest the contract award. A written protest must be filed with WRCOG's Energy & Environmental Director within five (5) working days after the decision of award is made. WRCOG will not accept any verbal protests. The protest must be a detailed, written statement of the protest grounds and reference the RFP Number and name of the designated Contracts Administrator. Grounds for a protest are that WRCOG failed to follow the selection procedures and adhere to requirements specified in this RFP or any addenda or amendments, there has been a violation of conflict of interest as provided by California Government Code Section 87100 et seq., or violation of State or Federal law. WRCOG will only consider those specific issues addressed in the written protest. The protest must be submitted to WRCOG via 1) certified mail and 2) e-mail using the contact information provided below.

Name	Casey Dailey, Director of Energy & Environmental Programs
Address	3390 University Avenue, Suite 200, Riverside, CA 92501
Phone	(951) 405-6720
Email	cdailey@wrcog.us

A written response from WRCOG will be directed to the protesting Proposer(s) within fourteen (14) calendar days of receipt of the protest, advising of the decision with regard to the protest and the

basis of the decision.

10. CONFLICTS OF INTEREST

All Proposers responding to this RFP must avoid organizational conflicts of interest which would restrict full and open competition in this procurement. An organizational conflict of interest means that due to other activities, relationships, or contracts, a Proposer is unable, or potentially unable, to render impartial assistance or advice to WRCOG; a Proposer's objectivity in performing the work identified in the Scope of Work is or might be otherwise impaired; or a Proposer has an unfair competitive advantage. In addition to the above requirements, all Proposers shall disclose any financial, business, or other relationship with WRCOG, WRCOG's member agencies, their respective elected decision-makers, and/or their respective staff that may have an impact upon the outcome of the procurement process and/or the proposed agreement, including but not limited to, past communications with any of the parties listed in this Section 10 that relate to the subject of this RFP.

11. CRITERIA

Any award to be made pursuant to this RFP will be based upon the Proposal with appropriate consideration given to operational, technical, cost, and management requirements. Evaluation of offers will be based upon each Proposer's responsiveness to the RFP and the total price quoted for all items covered by the RFP.

The following elements will be the primary considerations in evaluating all submitted Proposals and in the selection of a Proposer(s):

- A. Completion of all required responses in the correct format.
- B. Qualifications and experience with similar projects and clients.
- C. Key staff that will actually be working on the proposed tasks.
- D. The extent to which Proposer's proposed solution fulfills WRCOG-stated requirements as set forth in this RFP.
- E. An assessment of the Proposer's ability to deliver the indicated services in accordance with the specifications set out in this RFP.
- F. The Proposer's stability, experience, and record of past performance in delivering relevant services.
- G. Availability of sufficient high-quality personnel with the required skills and experience for the specific approach proposed.
- H. Overall cost of Proposer's Proposal.

12. PROPOSAL INFORMATION, ORGANIZATION, AND CONTENT

Proposer's submittal in response to this RFP will be incorporated into a final agreement between WRCOG and the selected Proposer(s). All Proposals shall contain, at a minimum, the following information:

- A. Title Page
- B. Table of Contents
- C. Cover Letter
- D. Firm Capabilities
- E. Approach and Understanding of the Scope of Work Plan
- F. Appendix A: References

G. Appendix B: Project Team Staffing

H. Appendix C: Company Overview

The page limit for Items A - F is **30 total pages**. There is no page limit on appendices.

Title Page

The following must be provided on the title page:

- RFP number
- Title of the project
- Name and address of proposing firms and/or individuals
- Phone and Fax of Proposer
- Primary contact person
- Email address of the primary contact person
- Signature of the individual authorized / obligated to commit the Proposer to this project.

Table of Contents

A clear identification of the materials by section and page numbers are to be included in the Table of Contents.

Cover Letter

The cover letter should be brief (two pages maximum) and outline the Proposer's general approach, qualifications, and experience. In order to address the needs of this procurement, WRCOG will accept teams to propose in which proposing firms work cooperatively in presenting integrated solutions. Proposer's(s') team arrangements may be desirable in that they will enable the companies involved to complement each other's unique capabilities, while offering the best combination of performance, cost, and delivery for financial assistance being provided under this RFP. WRCOG will recognize the integrity and validity of Proposer's(s') team arrangements provided that:

- The arrangements are clearly identified and relationships are fully disclosed; **and**
- A primary (lead) individual is designated who will be fully responsible for all contract performance.

Firm Capabilities

All Proposals must provide a comprehensive, yet concise description of the Proposer's(s') individuals' capabilities including the following:

- A. A track record of providing successful assistance on similar disciplines and tasks highlighted in the "Request for Detailed Scope of Work and Budget" section.
- B. A track record of providing successful services to similar governmental entities.
- C. Descriptions of the key staff that will actually be working on the proposed tasks and their experience working on similar issues.
- D. If responding as a firm, the ownership, size, and location of the office responsible for providing services to WRCOG.
- E. If responding as a firm, its legal organization (e.g., corporation, partnership) and year of incorporation.
- F. If responding as a firm, a description of the firm's equal employment opportunity and non-

discrimination policies.

- G. If responding as firm, a summary of the firm's minority and female recruitment efforts and the percentage of minority and female officers, partners, or the equivalent.
- H. A statement, in one page or less, of any other relevant factors that should be considered by WRCOG in evaluating the Proposal.

Proposals will be evaluated by a Proposal Review Committee on the basis of the Proposer's(s') skills and experience, proposed cost, presentation and completeness of Proposal, and the ability and willingness to work with WRCOG, its management, and references.

Proposers to this RFP should be mindful that WRCOG's selection process prioritizes experience, knowledge, and abilities of key individuals more so than experience associated with a particular firm. WRCOG has found that successful completion of a project is heavily reliant on the key staff that will be working with WRCOG on a regular basis.

Approach and Understanding of the Scope of Work Plan

Proposers are encouraged to propose enhancements or procedural or technical innovations to the Scope of Work that do not materially deviate from the objectives or required content of the project. **WRCOG is requesting that the response to this portion of the RFP be limited to 30 total pages.** There is no page limit on appendices.

Proposer(s) shall:

- A. Provide a narrative, which addresses the Scope of Work, and shows understanding of WRCOG's needs and requirements.
- B. Describe the approach to completing the tasks specified in the Scope of Work. The work plan shall be of such detail to demonstrate the Consultant's ability to accomplish the project objectives.
- C. Sequentially outline the activities that would be undertaken to complete the tasks and specify who would perform the tasks.
- D. Include a timeline for the proposed work. Note that I-REN is interested in having a "soft launch" of one or more of its programs by the end of 2022, with full deployment for 2023.
- E. Furnish detailed and itemized pricing for the proposed work, including an estimate of hours required to complete the specified tasks along with a total anticipated budget.
- F. Identify methods that consultant will use to ensure quality control as well as budget and schedule control for the project.
- G. Identify any special issues, problems, or risks that are likely to be encountered in this project and how the Proposer would propose to address them.
- H. Describe ability for proposed solution to accommodate other I-REN programs and activities in the future if desired

Also, please provide hourly billing rates for staff you are proposing to include on this RFP for services not directly identified in the Scope of Work.

Appendix A: References

Please provide three (3) references, including names and contact information. References should not include any WRCOG staff or WRCOG Committee members.

Appendix B: Project Team Staffing

Please include biographies and relevant experience of key staff who would be assigned to the project. Please describe coverage levels of employees who would be assigned to this project. Affirm that no employees working on the engagement have ever been convicted of a felony.

Appendix C: Company Overview

Please provide the following for your company:

- Official registered name (Corporate, D.B.A., Partnership, etc.), Dun & Bradstreet Number, Primary and secondary SEC numbers, address, main telephone number, toll-free number(s), and fax number(s).
- Primary key contact name, title, address (if different from above address), direct telephone, and fax number(s).
- Person authorized to contractually bind the organization for any Proposal against this RFP.

Appendix D: Information Technology & Data Security

Please provide an overview of your firm's approach to each of the following:

- Data security policies and practices, including access control and treatment of personally identifiable information (PII)
- Disaster response and business continuity
- Change management
- Any other relevant information to indicate adherence to industry-standard IT and data security best practices

13. REQUEST FOR DETAILED SCOPE OF WORK AND BUDGET

I-REN is a new Regional Energy Network serving the Counties of Riverside and San Bernardino. I-REN's Energy Efficiency Business Plan¹ addresses three market sectors – the Public Sector, the Codes & Standards, and Workforce, Education, & Training. I-REN is currently soliciting proposals from program implementers and marketing consultants, while engaging in REN development activities to prepare for initial program launches later in 2022 and full program deployment in 2023. Note that programmatic and marketing RFPs are also available through PlanetBids.

This RFP seeks professional services for software to support I-REN's Public Sector energy efficiency programs targeting local governments, special districts, and tribal communities (collectively, "public sector customers").

I-REN's Public Sector portfolio includes the following programs and activities.

1. Public Sector Technical Assistance and Strategic Energy Planning Program Implementation
2. Public Buildings Normalized Metered Energy Consumption (NMEC) Incentive Program Implementation
3. Public Sector Financing Services

The sections below present a brief overview of I-REN's requested solution and its public sector offerings. The tasks for the software scope of work are shown in the sections that follow. Tasks listed within each scope are provided as guidelines. Proposers may recommend supplemental tasks but

¹ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

must explain their rationale. All tasks and deliverables must be identified as distinct line items with accompanying narrative and costs in bidder proposals.

Requested Software Services and Solution

This RFP is for software services to support I-REN staff and implementer(s) in providing technical guidance and tools to inform and enable priority energy improvements through the programs and activities summarized above and detailed further below. The solution should also enable I-REN to serve as a clearinghouse for energy efficiency and distributed energy resource program information in general, for I-REN programs as well as programs offered by other program administrators.

As a new Regional Energy Network, I-REN has not yet hired program implementers and so the final program design details for its Public Sector offerings will be determined after implementer contracts are finalized. The software consultant will coordinate closely with I-REN member agency staff and interns, program implementers, and other consultants to conduct a thorough requirements gathering process to identify business needs for the solution.

Broadly, I-REN anticipates needing an information technology solution and services with elements that may include but are not necessarily limited to the following:

- Database of information and documents including:
 - o Energy efficiency, distributed energy resource, and other relevant programs and financing opportunities
 - o Other informational resources and collateral related to energy efficiency, distributed energy resources, and other relevant topics
- Customer-facing portal with capabilities including:
 - o Gather enrollment information from interested parties and evaluate enrollees based on eligibility criteria
 - o Display a tailored list of opportunities to the interested party based on the enrollment information they input
 - o Provide other informational resources relevant to the interested party
 - o Connect the interested party to I-REN program staff to begin person-to-person next steps
- Back-end portal for I-REN administrative staff, program staff, I-REN energy efficiency fellowship interns (“RENterns”), program implementers, and other consultant teams, with capabilities including:
 - o Customer relationship management system to collect data, record interactions with participants, and automate communications and tasks
 - o Customizable dashboard for tracking relevant statistics and performance metrics
 - o Reporting capabilities to support I-REN organizational and administrative needs, as well as compliance with CPUC requirements
- Flexibility to expand beyond public sector offerings to accommodate tracking of other I-REN activities, relationships, metrics, and other information and resources as necessary.

I-REN Public Sector Background

I-REN's public sector offerings will serve the members of the three Councils of Government (COGs) represented in I-REN, including CVAG, SANBAG, WRCOG, and the cities, school districts, water districts, special districts, and tribal communities they represent. These regional programs will target, but not be limited to, upgrades to existing public buildings and facilities with high energy use and older equipment. While the offerings will consider all public building types, there will be a focus on community-serving buildings such as community centers, libraries, senior centers, schools, and fire and police buildings. Through energy efficiency projects in these facilities, I-REN can provide benefits that will flow to hard-to-reach, disadvantaged, low income, and other vulnerable communities. The I-REN programs will be multi-beneficial in nature, layering energy efficiency strategies with greenhouse gas reductions, community resilience and climate adaptation measures.

Local governments in the I-REN service territory have limited capacity to complete energy upgrades and are challenged to maintain and upgrade these facilities due to lack of funding for capital improvements, a lack of awareness related to energy efficiency and other energy efficiency program opportunities, limited time and staff resources, along with conflicting priorities. Further, State mandates such as building energy benchmarking (AB 802) requirements, energy code compliance, and climate adaptation planning are additional unfunded regulations and requirements on local governments and are difficult to meet given competing priorities. These challenges have been exacerbated in recent years due to the COVID-19 pandemic, the associated economic downturn, and increased pressure on local government agencies to respond to a variety of issues.

To address these challenges, I-REN will leverage its existing public sector partnerships and networks across the region to offer technical assistance, implement incentive program options, and improve access to financing, as indicated in the Scope of Work in this RFP. Implementing these initiatives will further I-REN's goals of encouraging resilience and continuous capacity building for local governments, thereby strengthening their ability to serve their community through energy efficiency projects in their own facilities, while also saving on building operations costs and contributing to local and statewide goals for energy savings, climate resilience, and greenhouse gas emissions reduction.

I-REN's Public Sector Program Objectives

- a. Local governments have the support and resources to develop and implement their strategic energy plans and energy efficiency projects.
- b. Help local governments afford and finance a range of energy efficiency upgrades through innovative financing options.

Scope of Work

Task 1: Requirements Gathering

The consultant will be responsible for each activity listed below:

1. Conduct a kick-off meeting with the I-REN team within one month of final contract.
2. Review I-REN's energy efficiency portfolio, in particular the Public Sector programs and activities, and current information technology (IT) assets that relate to energy efficiency program delivery, e.g., the website, reporting templates, etc.
3. Guide potential software users, including I-REN member agency staff and interns, program implementers, and other consultants (collectively, the "I-REN software user group"), through the process of discovering business requirements for the proposed solution.
4. Document business requirements and I-REN software user group needs and priorities.
5. Assess the software options with applicability to I-REN's business requirements and present those options to I-REN with a recommendation for the proposed solution.

Anticipated deliverables:

6. Kick-off meeting agenda and notes.
7. Documentation of business requirements and I-REN software user group needs and priorities.
8. Assessment of software options and detailed recommendation for proposed solution including pricing, I-REN staff time commitment, software consultant time required to configure, ongoing enhancements and maintenance, terms and conditions, data security considerations, IT infrastructure needs, and any other relevant information to guide I-REN team decision-making.

Task 2: Solution Development & Deployment

The consultant will be responsible for each activity listed below:

1. Depending on the type of solution to be pursued:
 - o Lead the process of procuring licenses for an out-of-the-box software solution, or
 - o Lead the development of custom software solution.
2. Lead the development and implementation of plans for software configuration, in coordination with I-REN software user group.
3. Provide opportunities for testing and input from the user group as the solution is developed and/or configured.
4. Conduct end-to-end testing and coordinate user acceptance testing.
5. Deploy solution and provide any necessary training to the user group.

Anticipated deliverables:

6. Software configuration plans
7. Coordination and documentation of user input
8. User acceptance testing scripts
9. User guides and training materials/other documentation

Task 3: Ongoing Maintenance & Enhancements

The consultant will be responsible for each activity listed below:

1. Ensure ongoing maintenance is performed as needed to maintain solution at the appropriate levels for industry standards e.g., user interface, accessibility, data security, etc.
2. Implement a ticketing process and specify the expected service level for handling requests for bug fixes, enhancements, and other changes to the system.

Anticipated deliverables:

3. Documentation regarding ongoing maintenance
4. Ticketing procedures and service level availability for responding to tickets

Task 4: Other Services

The consultant will be responsible for each activity listed below:

1. Coordinate with I-REN team and consultants to ensure software solution is able to track and report on I-REN program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance as applicable.
2. Provide software-related content and/or review of content as needed for I-REN regulatory documents and filings, e.g., JCM, Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
3. As appropriate, contribute to I-REN program portfolio performance analysis and evaluation,

measurement, and verification activities for tracking program achievements and informing continuous improvement.

Anticipated deliverables:

4. Software-related content and edits or updates to content for I-REN regulatory filings
5. Data tracking and reporting in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements
6. Analysis of software-related performance and recommendations for future improvements

14. CONTACT AND REQUESTS FOR CLARIFICATION

The principal contact for WRCOG will be Benjamin Druyon, Program Manager, (951) 405-6727, bdruyon@wrcog.us, or a designated representative, who will coordinate the assistance to be provided by WRCOG to the Proposer. Throughout the RFP Process, Proposer may not contact the following parties regarding this procurement: (1) any other members of WRCOG's staff; (2) members of WRCOG's legislative body; (3) and/or representatives of WRCOG's member agencies that may vote on or influence the proposed agreement. Any and all inquiries and comments regarding this RFP must be communicated pursuant to the process described in this Section 14. WRCOG may, in its sole discretion, disqualify any Proposer who engages in any prohibited communications.

All questions, requests for interpretations or clarifications, either administrative or technical must be submitted via the [WRCOG PlanetBids portal](#). All questions, requests for interpretations or clarifications, if answered, will be answered in writing, conveyed to all interested firms, and posted on the WRCOG PlanetBids portal. To ensure a response, questions must be received via the WRCOG PlanetBids portal by the date and time listed in Section 6 – Schedule of Events. Any communications submitted past this deadline will not be answered.

15. TERMS AND CONDITIONS

Any Proposer or person submitting a Proposal shall state their willingness to agree to the following terms and conditions:

- A. The awardee must be fully committed to the mission of I-REN.
- B. Termination - A termination agreement is to be negotiated between the parties that includes provisions on termination for cause and termination for convenience.
- C. Oral Presentations - Any individual or firm who submits a Proposal in response to this RFP must be willing to make oral presentations related to contract-related activities at the request of the I-REN Team or management.
- D. Compensation - The total value of this contract is undefined and contains the option of renewal at the discretion of WRCOG. The schedule of compensation will be mutually negotiated. The compensation plan will include payment based upon an assessment of the vendor's attainment of specific, measurable outcomes or "performance benchmarks," which will be mutually developed between WRCOG and the selected Proposer(s).

16. WRCOG STANDARD PROFESSIONAL SERVICES AGREEMENT

The successful Proposer(s) will be required to sign WRCOG's standard Professional Services Agreement (PSA) in order to receive the contract award. Proposer(s) must identify in their Proposal any concerns or objections they would have with any of the PSA terms and conditions if selected for contract award. Proposer(s) shall propose alternative language for consideration in their Proposal. If WRCOG is unable to negotiate final contract Terms and Conditions that are acceptable to WRCOG, WRCOG reserves the right to award the contract to another Proposer. The agreement is available in PlanetBids in the Documents tab as part of this RFP.

17. DIVERSE BUSINESS ENTERPRISES (DBE)

Consistent with the California Public Utilities Code and California Public Utilities Commission (CPUC) policy objectives as set out in CPUC General Order 156, Proposers that execute a contract with WRCOG for I-REN work will be required to complete a Supplier Diversity Questionnaire after the contract has been executed. WRCOG asks that all Proposers refrain from directly or indirectly providing this information when responding to this RFP.

WRCOG encourages all eligible Proposers to get certified with the CPUC as a diverse business enterprise.

For overview information on the CPUC Supplier Diversity Program, please visit the program homepage (<https://www.cpuc.ca.gov/supplierdiversity/>). For information on the certification process and requirements, please visit the Certifications page (<https://www.cpuc.ca.gov/Certifications/>).

Attachment A: Scoring Criteria

Inland Regional Energy Network (I-REN) Building Upgrade Concierge (BUC) Software Services for Public Sector Energy Efficiency

Evaluation Criteria	Max. Possible Points
<u>TECHNICAL APPROACH</u> • Tasks & approach clearly described • Creative/innovative approach • Project intent has been met	30
<u>CONSULTANT FIRMS</u> <u>Prime Consultant</u> • Familiar with regional and local issues • Experience with similar projects of the same size and scope <u>Sub-Consultants (if any)</u> • Each sub provides unique service(s) to the team • Subs are fully capable of performing their tasks	30
<u>PROJECT MANAGEMENT</u> • Qualifications of key individuals • Time commitment of key individuals	15
<u>PROJECT COSTS</u> • Realistic cost for services to be performed	20
<u>REFERENCES</u> • Similar projects completed on time and within budget	5
TOTAL	100

Attachment 2b

AESC BUC Software Services Proposal

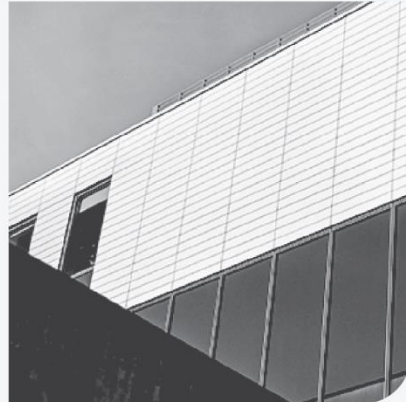
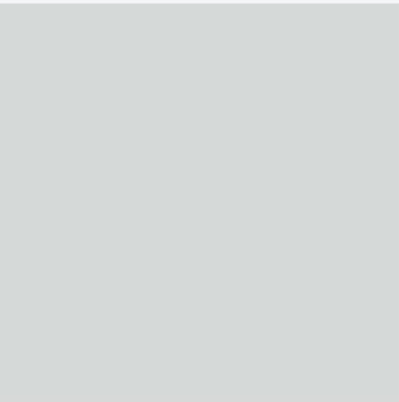
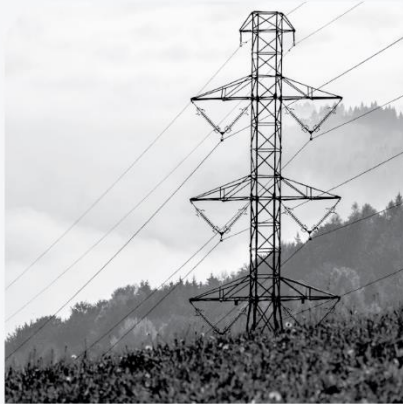


aesc

Response to RFP Number 22-08

Inland Regional Energy Network

BUC SOFTWARE SERVICES FOR PUBLIC SECTOR ENERGY EFFICIENCY



September 2022

SUBMITTED BY

Antonio Corradini, CEO/Principal Engineer
Alternative Energy Systems Consulting, Inc.
2445 Impala Drive, Carlsbad, CA 92010
760.931.2641
acorradini@aesc-inc.com

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1.0 Cover Letter

September 16, 2022

Casey Dailey, Director of Energy & Environmental Programs
Western Riverside Council of Governments (WRCOG)

Dear Casey,

Alternative Energy Systems Consulting, Inc. (AESC) is pleased to submit this proposal to provide Building Upgrade Concierge (BUC) software services for Public Sector energy efficiency within the Inland Regional Energy Network (I-REN). AESC has been providing high-quality engineering and software services for 26 years to municipalities, utilities and individual customers in the Inland Empire and broader Southern California region. We will leverage our extensive experience in the industry and the region to deploy a software solution that supports I-REN staff and implementer(s) in providing technical guidance and tools to inform and enable priority energy improvements within Public Sector energy efficiency programs.

AESC's software practice began in 1996 to develop custom tools and incentive calculators for the first California statewide Standard Performance Contract on behalf of SCE, PG&E and SDG&E. Since then, we have optimized these tools and expanded our capabilities to offer robust software and web-based solutions, such as with **Praxis by AESC**, which we are proposing here. Praxis is a secure, web-based software platform developed to help utilities and project developers accelerate and streamline each phase of the energy project development lifecycle. It is also the same software being proposed for NMEC services within The Energy Coalition's proposal for Public Sector implementation services. The robust capabilities of AESC's Praxis software will deliver all the functionality I-REN has identified in the RFP, as shown in Table 1.

Table 1. How AESC Will Deliver I-REN's Requested Functionality

Requested Functionality	How AESC will Deliver
Database of information and documents	Across most of the utility programs AESC manages, we provide informational resources such as user manuals, training videos, and other relevant program and financing opportunities. For example, AESC provides all online portal content (in addition to managing the application process) for Southern California Edison's Charge Ready and Charge Ready Transport programs. This includes a variety of tools and resources to help customers understand the program and how to apply. For more information, please visit https://www.sce.com/evbusiness/chargeready
Customer-facing portal	Praxis offers a customer-facing portal for program implementer staff and participating trade allies to: • Gather enrollment information and evaluate eligibility • Create custom building and project portfolios

Requested Functionality	How AESC will Deliver
	- Analyze building energy usage - Scope projects and estimate savings - Perform whole-building energy modeling and thermal modeling - Generate customer reports, proposals, and applications with a tailored list of opportunities - Connect public sector interested parties to I-REN staff for next steps
Back-end portal	I-REN staff and certain program implementation staff will have access to Praxis to perform administrative functions, such as: - Manage users - Assign roles - Assign customer leads - Communicate with trade allies and customers - Document interactions - View comprehensive program-level reports - Generate regulatory-focused reports
Expansion capabilities	Praxis is a highly flexible and expandable platform, offering vast opportunities for new tools and functions beyond the scope of I-REN's public sector offerings. System development is guided by our software team's specialized energy engineering knowledge, utility experience and regulatory understanding to create a user experience that meets our clients' business needs and today's consumer software standards.

AESC understands I-REN's desire to provide a central location for users to access incentive information for their energy efficiency project(s). While Praxis is a cloud-hosted software platform and can be accessed by any device from any location, AESC proposes installing up to 55 iPad-style kiosks (as opposed to computer-style kiosks) in targeted community and aggregation centers. This approach meets I-REN's desire for centrally located access while reducing the installation costs within your budget.

Praxis is a standard platform solution that will require only minor customization. AESC can meet I-REN's anticipated deployment timeline of late 2022/beginning 2023. AESC will coordinate closely with I-REN's chosen Public Sector Energy Efficiency program implementer(s) to configure the software and enable a timely launch. Some of the significant cost savings of installing iPad-style kiosks can be reallocated to program and incentive information updates within the system throughout its three-year evolution.

We look forward to the opportunity to share more about Praxis through a demonstration for WRCOG and the proposal evaluation team. Please let me know if we can answer any questions.

Sincerely,



Antonio Corradini, AESC, CEO/Principal Engineer

2.0 Firm Capabilities

Founded in 1994 as a private corporation, AESC is an energy consultancy that delivers solutions in energy efficiency, renewable energy, distributed energy resources, and software for utilities, regulators, public entities, and private enterprises throughout the United States. AESC combines technical excellence, Integrated Demand Side Management experience, and a broad skillset to provide a complete suite of engineering and management services. AESC's 55+ person team includes experts in energy efficiency program implementation, engineering, water and wastewater system optimization, distributed energy resources (DERs), measurement and verification (M&V) and Normalized Metered Energy Consumption (NMEC), tool/software development, codes and standards, and demand response.

With four offices in California (including Carlsbad and Pasadena), our roots and primary clients are in the Southern California region, specifically within, and adjacent to, WRCOG, CVAG, and SANBAG territories. Through our engineering and program management work, we understand local energy politics and, in some cases, helped form regional policy, such as advisory roles to the CPUC and SoCalREN. Relatedly, through SoCalREN, AESC has provided management support and energy engineering services to stimulate the identification and implementation of public sector energy retrofits, for approximately 30 agencies. Our key utility and municipal clients in this region include Southern California Edison, PG&E, SDG&E, Southern California Gas Company, SCPPA, CVAG, Coachella Valley Water District, Moreno Valley, Colton, West Covina, San Dimas, Vernon, Pasadena Water & Power, City of Los Angeles, LADWP, San Diego County, and the City of Carlsbad.

AESC's software practice was initiated in 1996 to develop custom tools and incentive calculators for the first California statewide Standard Performance Contract on behalf of SCE, PG&E and SDG&E. Since that time, AESC has created, maintained, and updated tools and calculators for measures in HVAC, motors, air compressors, VSDs, boilers, oxidizers, lighting, controls, cold storage doors, injection molding, tank insulation, wastewater, drip tape, pump off controllers, solar and storage. The team has pioneered the development of Intelligent Agent technologies under CEC PIER and US Department of Energy grants, created and maintained an automated online application tool for SCE, and developed customized calculation tools and online audit tools for several large, multi-state utilities across the country. Over time, in order to optimize these tools for use by a multitude of stakeholders, AESC's software team has refined interfaces and evolved them from spreadsheet-based tools to more robust software and web-based solutions, such as with Praxis by AESC proposed here.

The enduring strategy for AESC's software practice is based on bringing together our deep and specialized knowledge of energy engineering, utility and regulatory issues with a dedicated in-house software development team that understands the user experience and can meet today's consumer software standards, data security requirements, and systems integration and accessibility needs. AESC

excels at tailoring software solutions to fit specific user and utility needs and is skillful at quickly and accurately developing and modifying software products to meet changing policy, regulatory and technical requirements.

2.1 Key Staff Experience

Software services for this project will be provided by the following key staff. We summarize their experience below and provide additional details of their qualifications in **Section 5.0 – Appendix B: Project Team Staffing**.

Kevin Tock, Director of Software, will provide strategic direction on the deployment of all aspects of the software solution. Kevin has over 30 years of experience in the development and application of industrial software products. He has significant senior management experience in engineering, product management, product development and program management. Noteworthy accomplishments include:

- Board Member, Long Beach Green Business Council
- Board Member, Project Haystack
- Led the portfolio implementation of Energy Efficiency & Demand Response for Irvine Company
- Led the portfolio implementation of Energy Efficiency for Macerich
- Implemented the US DOE funded “Development and Demonstration of a New-Generation High Efficiency 10-kW Stationary Fuel Cell System”
- Led the Multi-site implementation of a Fuel Cell-based Back-up Power System for Telecom sites
- Responsible for an Energy Efficiency and Demand Response software product that has been a leading participant in the Southern California Edison Demand Response program
- Responsible for a suite of cloud-based Praxis software solutions covering Scoping, Modeling and Measurement & Verification
- Responsible for multiple cloud-based custom software solutions for electric utility customers such as: Southern California Edison, San Diego Gas & Electric, Pacific Gas & Electric and Duke Energy

Donald Pratt, Principal Software Engineer, will serve as the lead software developer and provide tactical direction to the implementation. Don has over 25 years of experience in software development, primarily in the utility industry. Project experience highlights include:

- Designed and developed the Self-Generation Incentive Program / California Solar Initiative (SGIP/CSI) trigger point tracking website (www.csi-trigger.com) using ASP.NET with a SQLServer back-end.
- Developed the databases used by the Center for Sustainable Energy (CSE) for tracking applications to the CSI and SGIP programs.

- Developed the CSI EPBB incentive calculator website (www.csi-epbb.com) using ASP.NET. This website also provides a web service that allows third parties to integrate the calculator into their own website. The web service is used by the PowerClerk CSI Application Portal and several PV vendors.
- Leads the development team working on the Customized Calculation Tool (CCT) (formerly, Standard Performance Contracting) energy savings estimation software. Led the initial effort to port this software from Excel spreadsheets to a Windows-based desktop application. A later port migrated the software to a web-based application utilizing ASP.NET with a SQLServer back-end. Led subsequent efforts to add support for express, demand response, and retrocommissioning solutions and revised the site to be friendlier to average non-residential users. Led further update efforts to integrate with SCE's customer relationship management system.
- Led the development of distributed energy resource planning and control software system comprised of a number of independent and cooperating intelligent software agents, utilizing a Java front-end and MS Access database backend.
- Developed a software bridge to allow intelligent software agents to interact with Excel spreadsheets.

Mayda Bandy, Senior Manager, will provide strategic oversight for the delivery of AESC's software solution. Mayda has nearly 17 years of experience in energy and water resources management, specializing in operations, policy development, and regulatory compliance. Project experience highlights include:

- Oversees the delivery of energy management audits to over three dozen agencies in Southern California working with the SoCalREN.
- Successfully Delivered a Water-Energy Nexus Pilot Program in Partnership with San Diego County Water Authority and SDG&E.
- Completed 2 Impact Evaluations for Programs funded by United States Department of Interior, Bureau of Reclamation and California Department of Water Resources.
- Served as a Water Resource Management Subject Matter Expert for San Diego County Water Authority from 2006-2011-Print, TV and Online.
- Launched a Trailblazing Water Budget Calculator leveraging GIS and Infrared Imagery in 2009 to San Diego County Retail Water Agencies.
- Served as the Rule 20-Conversions Subject Matter Expert for SDG&E on the Rule 20 Proceeding led by the CPUC.
- Improved Service Levels by >25% for the Two Largest Customer Programs offered by SDG&E Resulting in Improved Customer Satisfaction.

- Raised Employee Engagement Scores from 60% to 80% While Undergoing a Large Organizational Transformation Designed to Improve Project Controls and Management.

Eliseo Sandoval – Senior Software Engineer, will be a key implementer on the software development team. Eliseo has over 20 years of programming experience in the development and management of computer software information systems. Project experience highlights include:

- Member of software development team for Duke's Custom-to-Go Tool Suite, which is a set of calculation tools for estimating savings and incentives for the installation of a variety of energy savings measures. Roles included sole developer of the Lighting and Compressed Air tools and contributing developer (improvements, new features) on the main application.
- Sole developer of AESC's Audit Report Tool (ART) software, which estimates energy savings associated with recommended upgrades to a facility's equipment and systems.
- Sole developer of AESC's Facility Inspection Tool (FIT) software, an audit data collection tool designed for tablets and mobile devices.
- Software developer for CEC PIER's "Intelligent Software Agents for Integration of Renewables and Storage", which demonstrates that applying agent technology can expand the potential delivery of renewable energy and use of existing transmission facilities for the benefit of the consumers in California. Addressed delivery of wind generation resources located in the Tehachapi wind resource area in California.

Robert Cobb – Senior Software Engineer

Robert has over 18 years of experience in software development and design, with experience in Windows and Web development. Project experience highlights include:

- Member of software development team for Duke's Custom-to-Go Tool Suite, which is a set of calculation tools for estimating savings and incentives for the installation of a variety of energy savings measures. Roles included sole developer of the HVAC and Process Pump and Fan VFD tools.
- Member of software development team working on the Customized Calculation Tool (CCT) (formerly, Standard Performance Contracting) energy savings estimation software. Worked on a web-based version utilizing ASP.NET with a SQLServer back-end.
- Developed the iEAR database for SCE which is used for energy audit assessments by providing a regulatory compliant, cost-effective means to identify customers with IDSM energy and demand savings potential. Converted the tool from Excel into a centralized and portable Access database. Updated SCE's Online Application Tool user guides and manuals to meet Web Content Accessibility Guidelines (WCAG 2.0).

- Sole developer of an automated process for reporting project management metrics and KPI's and creating billable invoices. Worked with project managers and accounting on defining requirements. Developed a SQL database with ETL packages and reports that pulled 3rd party timekeeping records from the cloud to a local server and auto-generated reports and invoices.
- Active member of AESC IT Committee. Assist in performing system administration and technical support between AESC and 3rd party IT managed services. Oversee IT infrastructure and recommend improvements to operations and security.

Keith Valenzuela, PE – Engineer Technical Lead

Keith has over 13 years of experience in engineering support and design. Project experience highlights include:

- Extensive experience reviewing and verifying complex energy savings calculations, performing pre- and post-installation site inspections and confirming program requirements are met for SCE's and PG&E's Customized Solutions incentive programs.
- Provides technical review for large and complex energy retrofit projects through the Duke Energy Smart \$aver incentive program.
- Performed quality control on over 150 Customized Solutions incentive program technical reviews within the last year.
- Performed over 15 energy audits for various building types including commercial and industrial buildings. Energy audits included analysis and recommendation of renewables such as photovoltaic systems when appropriate.

2.2 Equal Employment Opportunity and Non-Discrimination Policies

AESC is committed to the principles of equal employment. We are committed to complying with all federal, state, and local laws providing equal employment opportunities, and all other employment laws and regulations. It is our intent to maintain a work environment that is free of harassment, discrimination, or retaliation based on an individual's race (including, but not limited to, hair texture and protective hairstyles such as braids, locks, and twists), color, religion, religious creed (including religious dress and grooming practices), national origin, ancestry, citizenship, physical or mental disability, medical condition (including cancer and genetic characteristics), genetic information, marital status, sex (including pregnancy, childbirth, breastfeeding, or related medical conditions), gender (including gender identity and gender expression), age (40 years and over), sexual orientation, veteran and/or military status, protected medical leaves (requesting or approved for leave under the Family and Medical Leave Act or the California Family Rights Act), domestic violence victim status, political affiliation, or any other status protected by federal, state, or local laws. The Company is dedicated to the fulfillment of this policy in regard to all aspects of employment, including but not limited to recruiting, hiring, placement,

transfer, training, promotion, rates of pay, and other compensation, termination, and all other terms, conditions, and privileges of employment. The Company will conduct a confidential, prompt, and thorough investigation of all allegations of discrimination, harassment, or retaliation, or any violation of the Equal Employment Opportunity Policy. The Company will take appropriate corrective and remedial action, if and where warranted. The Company prohibits retaliation against any employees who provide information about, complain about, or assist in the investigation of any complaint of discrimination or violation of the Equal Employment Opportunity Policy. We are all responsible for upholding this policy. You may discuss questions regarding equal employment opportunity with your Supervisor or any other designated member of management.

2.3 Diverse Representation

AESC is laser-focused on hiring, retaining, and advancing minority and marginalized groups. We are proud of the diversity across our company, especially of our ability to hire and promote women into management positions in the male-dominated industry of energy engineering. Six of AESC's 13-person management team identify as women. We have developed our DEI recruitment strategy significantly over the past few years to increase the pool of candidates from historically underrepresented groups. For example, we deliberately target local BIPOC spaces when advertising job openings. Approximately 63% of employees hired since mid-2020 are considered diverse candidates.

In addition, AESC aims to bring intentional inclusivity to our culture so that all employees feel welcome and included and have equitable opportunities to deliver impact. We have an internal technical training series called AESC Academy, planned by the operations team but delivered by staff at all levels. We have specifically enabled early-career engineers of various backgrounds to develop and deliver the training material to their peers and seniors. Each session entails nearly 100% attendance by our technical staff and is also recorded for later use and reference by all employees. Additionally, AESC allocates a training budget each year to our personnel – approximately 40 hours are reserved and reinforced by individual managers.

AESC has a dedicated Diversity, Equity and Inclusion (DEI) lead whose role is to track and maintain progress on AESC's internal DEI initiatives and activities through the following:

- Advise on recruitment and staffing to attract talent across all sectors of society
- Work with an attorney in matters pertaining to employee rights, benefits, etc.
- Stay apprised of industry developments in DEI and establish best practices

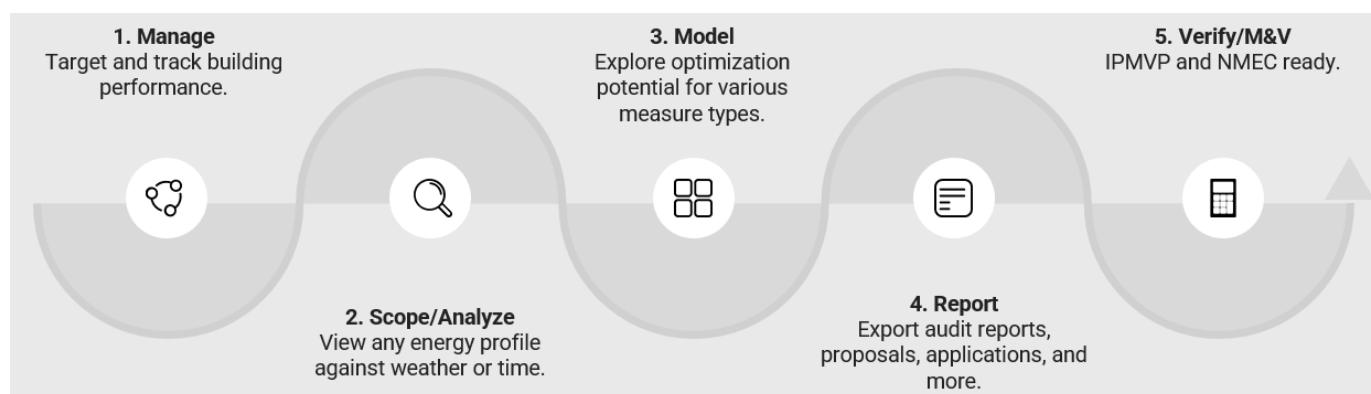
In addition, AESC has a DEI working group consisting of engaged volunteers who are focused on continuing to develop the DEI policy including developing goals and metrics and updating them over time.

3.0 Approach and Understanding of the Scope of Work Plan

3.1 Understanding and Solution Overview

AESC understands I-REN is seeking a software solution that will support I-REN staff and implementer(s) in providing technical guidance and tools to inform and enable priority energy improvements for Public Sector offerings. We propose **Praxis by AESC** to meet these objectives. Praxis is a secure, web-based software platform developed to help utilities and project developers accelerate and streamline each phase of the energy project development lifecycle – from facility scoping, to project calculation and modeling, to incentive application processing, and ultimately to measurement and verification. Praxis is comprised of tools and features organized into functional modules which can be used in their current form or configured for I-REN’s needs.

Figure 1. Key Functional Modules of Praxis by AESC



Praxis is cloud hosted and designed for mobile devices, which enable easy customization and expansion to fit specific program or customer requirements. Whether you are a utility designing a customized energy calculation tool, a facility or trade ally preparing an energy audit, or an efficiency program in need of application management software, Praxis has an application that can propel you into the next phase of the project.

Praxis offers a user-friendly interface to access powerful functions and analytics driven by full thermal models, 8760 weather data, regional climate zones and actual utility tariffs. Key Praxis features include the ability to create, benchmark and track energy performance of a portfolio of buildings, analyze detailed site energy usage, scope and model energy measures, generate reports with energy savings and incentive estimates, and perform M&V and settlement on actualized energy impacts through multiple IPMVP methods. This includes Key Parameter Measurement, Normalized meter-based savings that account for independent variables and non-routine events (CalTrack compliant), and calibrated simulation. Table 2 highlights these and other key capabilities of the platform.

Table 2. Praxis Key Features and Capabilities

Facility Scoping	• Energy Audits and Reporting • Project Scoping • Strategic Energy Management Treasure Hunts and Assessments • Rate Tools and Benchmarking
Energy Modeling	• Whole-Building Energy Modeling • Comprehensive, multi-measure modules for HVAC upgrades and controls, lighting retrofits, fan optimization, VFDs, among others • Transparent, accurate and defensible savings estimations based on decades of energy engineering, supported by a published methodology document • Whole building thermal modeling driven by 8760 weather data and regional climate zones • Selectable energy code baselines (CA Title 24, ASHRAE 90.1, etc.)
Customer Engagement	• Customer Branded, Intuitive Interface • Incentive Program Management • CRM Integration • Automatic report generation for immediate results and seamless application submittal • User Manuals & Training Videos • Intelligent and streamlined data inputs • Wizard-style approach guides user and makes input suggestions • Interactive estimation of savings and incentive as selections change • Auto-lookup and autocomplete function for lighting products qualified by ENERGY STAR and DLC • Auto-selection of prescriptive or custom program eligibility for lighting projects
Measurement and Verification	• IPMVP and ASHRAE Guideline 14 compliant • Normalized Metered Energy Consumption (NMEC CalTRACK compliant) • Energy Intensity Modeling for SEM • Key Parameter Measurement • Data disaggregation • Measure and Track Energy Savings • Generate Energy Savings Reports

Praxis provides program participants a clear, user-friendly platform to enter project information and generate accurate and uniform energy savings estimates and documentation for application submittals. The user interface includes both semi-custom fields, where the user can select from a list of predefined values via drop-down menus, and custom fields, that allow the user to define custom values. When no selection is made in certain fields, the tool will default towards common practice values. Enhancing the user experience is the ability to perform multiple scenario analysis and identify superior alternatives to include in the project submittal

The calculation engine behind Praxis is driven by decades of energy engineering expertise, a comprehensive understanding of building systems, and calculation tool development. Praxis is compliant

with industry standard requirements for full building thermal model using 8760 weather data and selectable baselines (CA Title 24, ASHRAE 90.1, etc.). The results are consistent, reliable and transparent with the imbedded assumptions and algorithms explained in methodology documentation. The tool leverages this technical intelligence to reduce engineering review time, program costs, and ultimately increases participation.

Each deployment of Praxis is customized to each utility program to accommodate different measure mixes, code baselines, and branding guidelines.

The following pages provide additional details of the features and capabilities available with Praxis to meet the needs of I-REN and program implementers. AESC is available to demonstrate software functionality, share short videos demonstrating key Praxis features, or discuss follow-up questions at I-REN's request.

Figure 2. Manage a Portfolio of Buildings

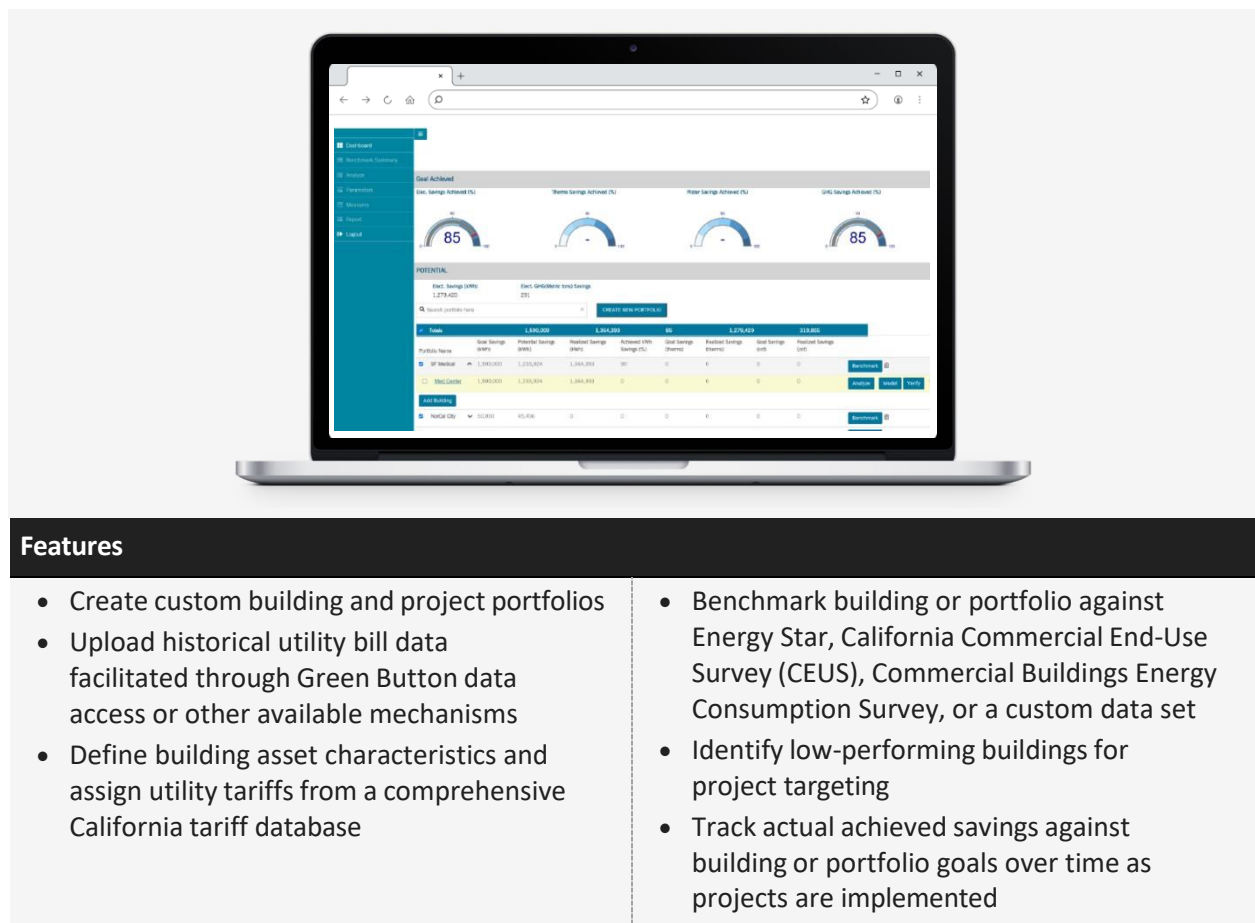
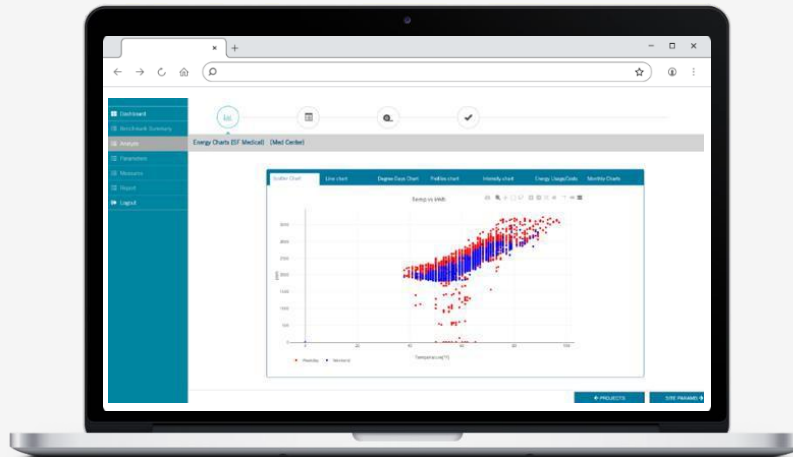


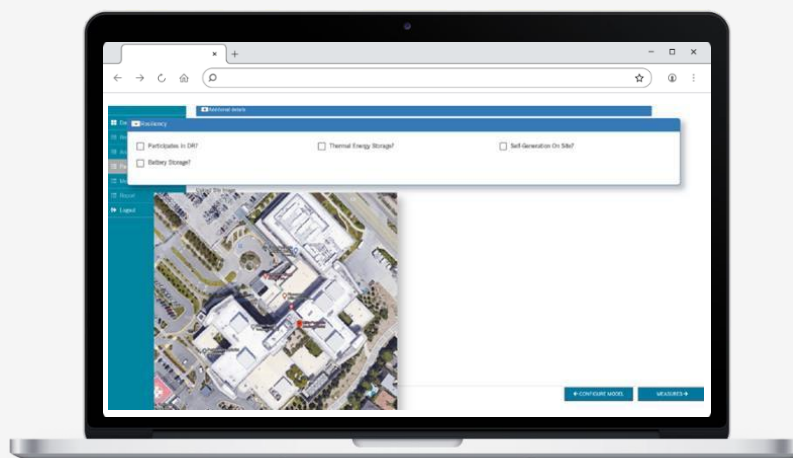
Figure 3. Utility Bill Analysis



Features

- View any energy profile against weather or time to identify potential optimization opportunities
- Analyze usage by season, month, hour, weekend/weekday

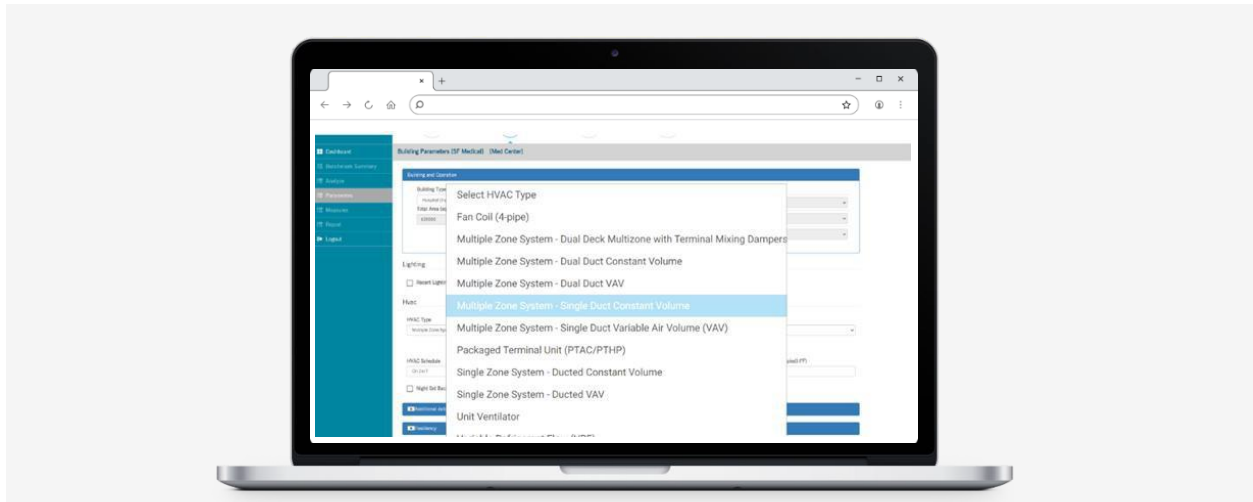
Figure 4. Facility and Project Scoping



Features

- Scope projects and estimate savings and incentives based on preliminary building data
- Leverage energy audit and reporting tools for data collection and to refine information on building baseline

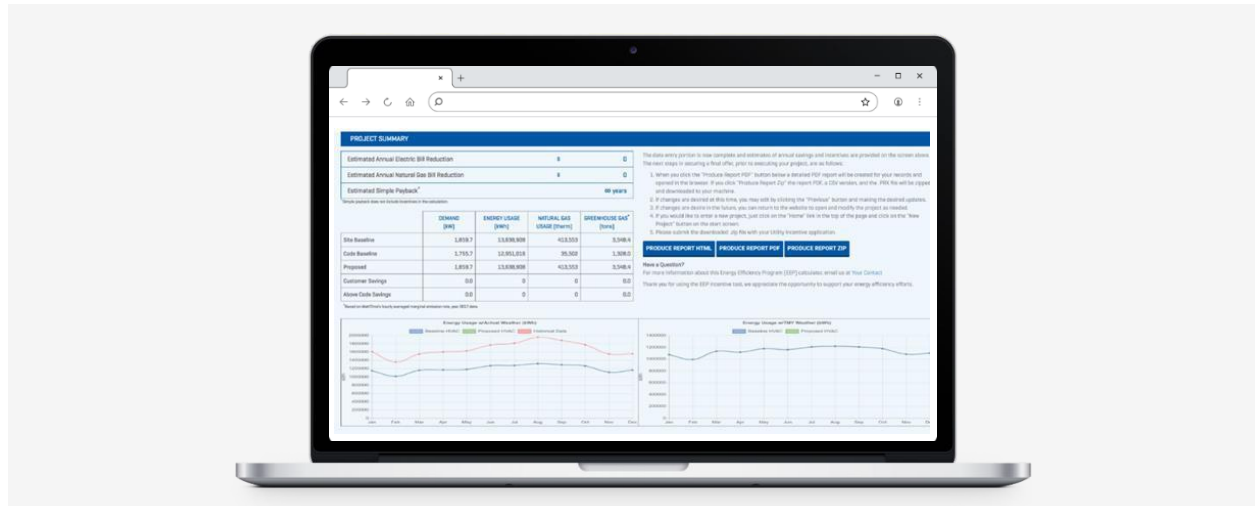
Figure 5. Measure Modeling



Features

- Perform whole-building energy modeling and whole building thermal modeling driven by 8760 weather data and regional climate zones
- Leverage comprehensive, multi-measure modules for HVAC upgrades and controls, lighting retrofits, fan optimization, VFDs, and more
- Select savings baselines including CA Title 24, ASHRAE 90.1, and existing building
- Auto-lookup and autocomplete function for lighting products qualified by ENERGY STAR and DLC
- Auto-selection of prescriptive or custom program eligibility for lighting projects
- Generate accurate and defensible savings estimations based on decades of energy engineering, supported by a published methodology document

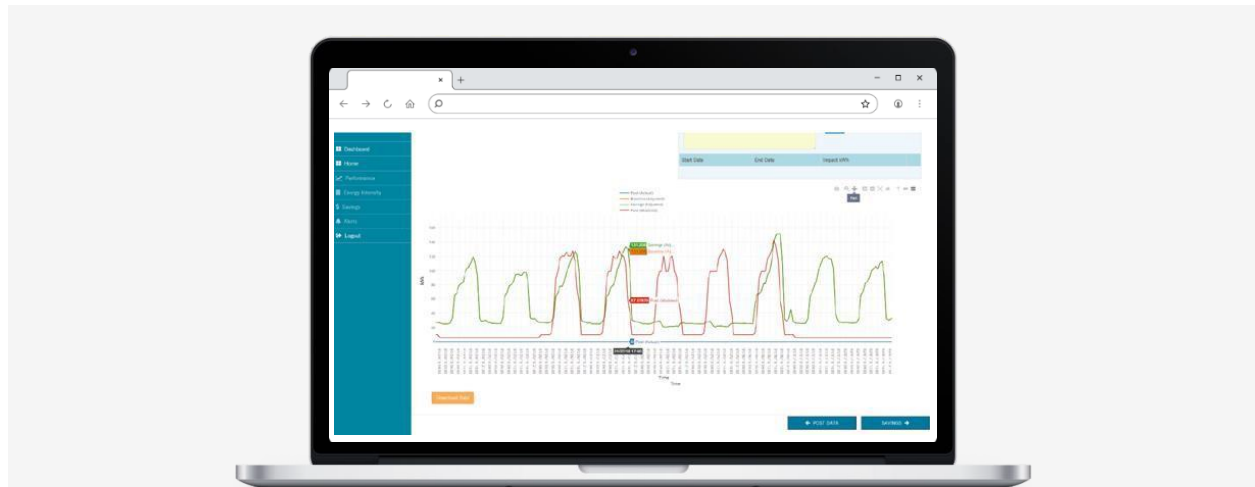
Figure 6. Customer Engagement and Reporting



Features

- Generate customer reports, proposals and applications that estimate or finalize savings and incentives.
- Create custom reports, e.g., by portfolio, project developer, etc.
- Outputs can be customized and branded.

Figure 7. Measurement and Verification (M&V)



Features

- Measure and Track Energy Savings
- Generate Energy Savings Reports
- IPMVP and ASHRAE Guideline 14 compliant
- Data disaggregation
- Energy Intensity Modeling for SEM
- Key Parameter Measurement
- Normalized Metered Energy Consumption (NMEC)

3.2 Approach to Scope of Work Tasks

The mission of AESC's software team is to deliver high-quality, intuitive and cost-effective software to our customers. To achieve this, it is essential that an agile, structured and documented process be followed throughout the product's life. AESC adheres to the Software Development Life Cycle (SDLC) methodology to guide the development process to ensure a timely release of quality software products.

AESC uses industry best practice software development methods and processes to build our software products. Development progress meetings will be held at least once a week. Each team member will identify the work completed over the last period, work planned over the next period, any issues or barriers that have surfaced in their work, any obstacles the team member will be imposing on others and any external issues. AESC uses Microsoft Visual Studio Team Services (MS VSTS) to manage the source code version control, bug and work item tracking and reporting components of the Application Lifecycle Management (ALM) process. The MS VSTS version control software is used to maintain source code versions, migrate source code through the development process to the production environment, maintain a history of code changes to support rollback capabilities and track changes to developers. The MS VSTS ticketing system is used to document reported issues and the associated change requests with their resolutions. Development and testing are performed in an environment that is logically separated from the production environment.

We summarize our approach to completing each of the tasks specified in the Scope of Work, including the sequential activities we will perform, who will perform them, and the deliverables we will provide.

3.2.1 Task 1: Requirements Gathering

Task 1 Resources

- D.Pratt, K.Valenzuela & K.Tock

Task 1 Deliverables

- Kick-off meeting agenda and notes
 - SOW detailing proposed solution and pricing
 - Project Plan to implement the SOW
 - Documentation of Functional Specifications
-

AESC will kick off software implementation with a kick-off meeting scheduled within one month of contract execution. We will meet with I-REN internal stakeholders to gather, assess, and document business requirements from discovery sessions with I-REN internal stakeholders. We will review I-REN's

energy efficiency portfolio, specifically the Public Sector programs and activities, and current relevant IT assets, and integrate any existing documented business requirements into this process. AESC assumes this task will require one to two conference call meetings with I-REN personnel.

This task includes the following efforts:

- Requirements
 - Establish a close strategic relationship with I-REN internal stakeholders
 - Develop a Statement of Work (SOW) detailing AESC’s proposed solution and pricing
- Planning
 - Prioritize the project tasks
 - Establish the budget and schedule
 - Establish project risks
 - Establish the priorities
 - Identify internal resources and assign tasks and responsibilities to them
- Specification
 - Develop detailed Project Plan to implement the SOW
 - Develop a Functional Specification that identifies the intended development approach, to respond specifically to each item in the SOW
 - Review the Functional Specification contents with the customer in a Scope Review meeting

3.2.2 Task 2: Solution Development & Deployment

Task 2 Resources

- R,Cobb, E.Sandoval & D.Pratt

Task 2 Deliverables

- Software configuration plans
 - Coordination and documentation of user input
 - User acceptance test plans
 - Written acceptance of all form development completion and full functionality
 - User Manuals
-

AESC will develop all aspects of the BUC software through the following efforts:

- Development
 - Develop a fully functional product that complies with the Functional Specification
 - Develop the necessary user Manuals to support the solution
- Testing
 - Verify with internal testing via test plans and reports that the product meets the Functional Specification
 - Identify and verify the acceptance criteria with the customer (Beta/User Acceptance Test), to ensure that the solution meets the Functional Specification
 - Verify that the final solution has met the necessary Support Requirements
 - Ensure problem resolution
 - Capture lessons learned
- Deployment
 - Deploy and test deployment to the target environment
 - Verify with customer testing that the Go Live deployment meets the customer requirements

3.2.3 Task 3: Ongoing Maintenance & Enhancements

Task 3 Resources

- R,Cobb, E.Sandoval & D.Pratt

Task 3 Deliverables

- Documentation of on-going maintenance
 - Documentation of ticketing procedures and Service Level Agreements for responding to tickets
-

This task includes the monthly activities necessary for seamless system execution including version control and update, monitoring of website activities, and technical support (phone and email). AESC will:

- Ensure the product is utilized reliably and cost-effectively
- Problem resolution via Action Register management
- Gather and analyze operating data to meet the customer objectives
- Improve delivery
- Set up an evaluation to highlight project success and/or learn from project history

AESC will also ensure on-going consistent site quality and user experience for all front and backend components, including:

Table 3. Software Validation, Quality Assurance Testing and Fixes

Design	Testing	Tracking	Maintenance
• Implement Responsive Design • Forms • Images	• User • Performance • Responsive • Documentation	• Issue • Implement Google Analytics Tracking code based on I-REN Marketing requirements	• Software Support • Software Maintenance

Change control is accomplished via the establishment of Change Requests in the Action Register for any bug, enhancement request or other required activity. Each Change Request will move through several pre-defined "states", to ensure that the change is properly conducted. All Change Requests will be evaluated to assure that the changes are properly reviewed, implemented and approved.

3.2.4 Task 4: Other Services

AESC will ensure Praxis data capture and reporting capabilities adhere to the needs of I-REN staff and program implementers. Example monthly progress reporting may include:

- Forecasted Gross and Net Energy Savings (kW, kWh, Therms)
- Actual year-to-date Gross and Net Energy Savings (kW, kWh, Therms)
- Forecasted Financial Commitments
- Actual year-to-date financial expenditures
- List of Committed and Installed Projects with the estimated completion date
- Depth of interventions (energy savings as a fraction of total site consumption)
- Greenhouse gas emissions savings (metric ton of CO2 reduction)
- Total program savings (kWh) by COGS as well as total for the Program
- Total budget reserved (from enrolled projects) by COGS as well as total for the Program

As requested by I-REN, AESC will provide software-related content and/or review of content as needed for I-REN regulatory documents and filings. We will support EM&V activities and comply with all regulatory reporting requirements by providing I-REN with all requested data in a format suitable for submission to the program evaluator or regulating body.

3.3 Timeline

AESC expects to complete and deliver the work detailed within this proposal in the timeline noted below, provided that I-REN and the program implementer provide timely feedback and approvals on their deliverables. We will finalize this schedule with I-REN during the project kick-off meeting following contract execution.

Table 4. Estimated Project Timeline

Sprint	Activity	Date <i>*Weeks from Contract Execution</i>
1	Kick-off Meeting	2 weeks
2	Functional Specification Approval	6 weeks
3	Preliminary Review	10 weeks
4	Beta Release	14 weeks
5	Go Live	18 weeks

3.4 Pricing

AESC proposes the following pricing mechanisms:

- A \$10,000 fee that includes AESC launching, hosting, maintaining and customizing the software to perform the functionalities mentioned in this proposal
- \$1,000 per iPad installed at the suggested locations
- An up to \$80,000 per year T&M budget to perform any additional customization and reporting requested as part of Task 4 (if beyond the current capabilities of the software).

As a result, we estimate \$55,000 for the iPad kiosks; \$360,000 for software; and \$240,000 for special T&M tasks over the 3-year program for a total of \$655,000. This is less than the allowed \$750,000 for three years.

T&M will be charged per the table below; and the hourly rate will be hold for the three years 2023-2024-2025:

Table 5. Estimated Project Timeline

Labor Category	Hourly Rate
Director/Principal	\$273
Senior Program Manager	\$237
Program Manager/Engineer Section Lead	\$223
Senior Engineer	\$205

3.5 Implementation Methodology

AESC closely monitors Quality Assurance (QA) at every stage of the SDLC to ensure that our software is operating as intended and that controls are modified as conditions change. We perform monitoring activities to continuously assess the quality of internal control over time. Necessary corrective actions are taken as required to correct deviations from SDLC policies and procedures. QA is responsible for Issue Resolution, Change Control, and Customer Issue Communications.

AESC deploys a consistent Project Management methodology to ensure that project activities meet the project requirements. Project Management is responsible for internal and external communication, task execution and quality improvement procedures during the project. Throughout the project, the Project Manager will compare project status and progress to the actual plan and adjust schedules or institute/communicate any agreed-upon remediation plans as necessary if progress falls below pre-determined levels. At the close of a project after all the tasks have been completed and the customer has accepted the product. An evaluation is then necessary, in order to highlight project success and/or learn from project history.

3.6 Ability to Support Other I-REN Programs and Activities

Praxis is a highly flexible and expandable platform, offering vast opportunities for new tools and functions beyond the scope of I-REN's public sector offerings. System development is guided by our software team's specialized energy engineering knowledge, utility experience and regulatory understanding to create a user experience that meets our clients' business needs and today's consumer software standards.

AESC will coordinate with I-REN to accommodate other programs and activities identified as needing support. All such activities will be performed on a Time & Materials price basis, unless otherwise agreed-upon by I-REN and AESC. Please refer to the table in Section 3.4 for AESC's staff classifications and hourly labor rates.

4.0 Appendix A: References

Duke Energy

Shelly Elliott, Product & Services Manager

Shelley.Elliott@duke-energy.com

AESC delivers Duke Energy's Smart Saver Tools, which is built on the Praxis platform, across their service territory since 2012 (NC, SC, IN, KY, OH, and 2015 in FL).

Southland/Enviser

Eric Nyenhuis, Project Development Director

enyenhuis@southlandind.com

Southland/Enviser is an MEP building systems expert offering full lifecycle solutions, from design through building maintenance. Southland/Enviser staff and engineers use Praxis to deliver services for their customers across the country. <https://southlandind.com/>

Pacific Gas & Electric

Alison Erlenbach, Expert Program Manager

alison.erlenbach@pge.com

AESC is a lead implementer for PG&E's Market Access Program (MAP). Praxis is used to provide the necessary analytic tools to bridge the flow of information between PG&E, aggregators, and evaluators: project scoping and analysis, tracking building performance, generating program documents and performing M&V.

5.0 Appendix B: Project Team Staffing

Kevin Tock, Director of Software, will provide strategic direction on the deployment of all aspects of the software solution. Kevin has over 30 years of experience in the development and application of industrial software products. He has significant senior management experience in engineering, product management, product development and program management.

As Director of Software at AESC, Kevin is responsible for software projects, Program Management, Product Development and contributing to Business Development for utilities, regulators, public entities and private enterprise. The AESC software team has developed and maintains numerous Application and Calculator software solutions and has extensive experience in the use of energy industry, energy-related information that is essential to both utility companies and their customers.

Kevin previously served as Vice President of Product Development and Support at Enerliance, Inc. In this role, he was responsible for the development and support of the LOBOS software product, which provides energy efficiency, demand response and fault detection and diagnostics HVAC optimization. Responsible for product development, program management, product management, verification and validation testing, quality assurance and technical support. Kevin also held leadership roles at Intelligence Energy, Inc., Invensys PLC, and Honeywell, Inc.

Other noteworthy accomplishments include:

- Board Member, Long Beach Green Business Council
- Board Member, Project Haystack
- Led the portfolio implementation of Energy Efficiency & Demand Response for Irvine Company
- Led the portfolio implementation of Energy Efficiency for Macerich
- Implemented the US DOE funded “Development and Demonstration of a New-Generation High Efficiency 10-kW Stationary Fuel Cell System”
- Led the Multi-site implementation of a Fuel Cell-based Back-up Power System for Telecom sites
- Responsible for an Energy Efficiency and Demand Response software product that has been a leading participant in the Southern California Edison Demand Response program
- Responsible for a suite of cloud-based Praxis software solutions covering Scoping, Modeling and Measurement & Verification
- Responsible for multiple cloud-based custom software solutions for electric utility customers such as: Southern California Edison, SDG&E, PG&E and Duke Energy

Education and Certifications:

- BSEE (Bachelor of Science; Electrical Engineering) Valparaiso University

Donald Pratt, Principal Software Engineer, will serve as the lead software developer and provide tactical direction to the implementation. Don has over 25 years of experience in software development, primarily in the utility industry. To meet the needs of utilities and their customers, he employs various technologies such as C#, VB.NET, HTML, JavaScript, SQL, C++, ASP.NET, VBScript, Java, and Excel spreadsheets running against backend databases such as Microsoft (MS) Access, and SQLServer.

As Principal Software Engineer at AESC, Don provides software engineering support to many of AESC's projects on behalf of utility programs such as Self-Generation Incentive Program / California Solar Initiative (SGIP/CSI) incentive calculator, Southern California Edison's Online Application Tool, Duke Energy's SmartSaver Custom-To-Go Calculator, California IOUs Customized Calculation Tool, California Center for Sustainable Energy SGIP application tracking database, and AESC's internal tools, Praxis and Audit Report Tool (ART). He continues to actively support most of these tools and oversees modifications as tools needs change based on regulatory requirements, user feedback and utility needs.

Project experience highlights include:

- Designed and developed the (SGIP/CSI) trigger point tracking website (www.csi-trigger.com) using ASP.NET with a SQLServer back-end.
- Developed the databases used by the Center for Sustainable Energy (CSE) for tracking applications to the CSI and SGIP programs.
- Developed the CSI EPBB incentive calculator website (www.csi-epbb.com) using ASP.NET. This website also provides a web service that allows third parties to integrate the calculator into their own website. It is used by the PowerClerk CSI Application Portal and several PV vendors.
- Leads the development team working on the Customized Calculation Tool (CCT) energy savings estimation software. Led the initial effort to port this software from Excel spreadsheets to a Windows-based desktop application. A later port migrated the software to a web-based application utilizing ASP.NET with a SQLServer back-end. Led subsequent efforts to add support for express, demand response, and retrocommissioning solutions and revised the site to be friendlier to average non-residential users. Led further update efforts to integrate with SCE's customer relationship management system.
- Led the development of distributed energy resource planning and control software system comprised of several independent and cooperating intelligent software agents, utilizing a Java front-end and MS Access database backend.
- Developed a software bridge to allow intelligent software agents to interact with Excel spreadsheets.

Education and Certifications:

- BS (Bachelor of Science; Cognitive Science) University of California, San Diego
- MS (Master of Science; Computer Science) San Diego State University

Mayda Bandy, Senior Manager, will provide strategic oversight for the delivery of AESC's software solution. Mayda has nearly 17 years of experience in energy and water resources management, specializing in operations, policy development, and regulatory compliance. She has managed large multi-disciplinary teams and delivered impactful customer programs and projects for energy and water utilities.

As Senior Manager at AESC, Mayda oversees the delivery of energy management audits to over three dozen agencies in Southern California working with the SoCalREN. She also oversees the Water Practice for AESC consisting of Program Managers, Engineers, and Process Specialists. Mayda's team focuses on reducing resource demands and achieving energy neutrality through the optimization of water/wastewater facilities at a system level. Leveraging her nearly two decades of experience in energy and water resources management, Mayda develops innovative programs and interventions with a keen eye on optimization and compliance within the regulatory framework.

Project experience highlights include:

- Successfully Delivered a Water-Energy Nexus Pilot Program in Partnership with San Diego County Water Authority and SDG&E.
- Completed 2 Impact Evaluations for Programs funded by United States Department of Interior, Bureau of Reclamation and California Department of Water Resources.
- Served as a Water Resource Management Subject Matter Expert for San Diego County Water Authority from 2006-2011-Print, TV and Online.
- Launched a Trailblazing Water Budget Calculator leveraging GIS and Infrared Imagery in 2009 to San Diego County Retail Water Agencies.
- Served as the Rule 20-Conversions Subject Matter Expert for SDG&E on the Rule 20 Proceeding led by the CPUC.
- Improved Service Levels by >25% for the Two Largest Customer Programs offered by SDG&E Resulting in Improved Customer Satisfaction.
- Raised Employee Engagement Scores from 60% to 80% While Undergoing a Large Organizational Transformation Designed to Improve Project Controls and Management.

Education and Certifications:

- MPP (Master of Public Policy) Georgetown University
- BA (Bachelor of Arts; History) University of California, Los Angeles
- Lean Six Sigma, Green Belt

Eliseo Sandoval – Senior Software Engineer, will be a key implementer on the software development team. Eliseo has over 20 years of programming experience in the development and management of computer software information systems. He is an expert in C#, Java, C, C++, and Visual Basic, and is proficient in Windows, Unix and Linux environments.

As Senior Software Engineer at AESC, Eliseo provides software development for utility customers and for internal needs. Software developed and/or currently maintained include: Duke Custom-to-Go desktop application, Southern California Edison's Online Application Tool (OAT) software, Pacific Gas and Electric and San Diego Gas and Electric Excel-based application and review forms, AESC's Audit Report Tool (ART) software and Field Inspection Tool (FIT) software, California Energy Commission PIER research and development project "Intelligent Software Agents for Integration of Renewables and Storage" and AESC's Smart*DER project.

Project experience highlights include:

- Member of software development team for Duke's Custom-to-Go Tool Suite, which is a set of calculation tools for estimating savings and incentives for the installation of a variety of energy savings measures. Roles included sole developer of the Lighting and Compressed Air tools and contributing developer (improvements, new features) on the main application.
- Sole developer of AESC's Audit Report Tool (ART) software, which estimates energy savings associated with recommended upgrades to a facility's equipment and systems.
- Sole developer of AESC's Facility Inspection Tool (FIT) software, an audit data collection tool designed for tablets and mobile devices.
- Software developer for CEC PIER's "Intelligent Software Agents for Integration of Renewables and Storage", which demonstrates that applying agent technology can expand the potential delivery of renewable energy and use of existing transmission facilities for the benefit of the consumers in California. Addressed delivery of wind generation resources located in the Tehachapi wind resource area in California.
- Software developer for Smart*DER software, which employs intelligent agent technology at the local site level to automatically maximize the benefits of distributed energy resource (DER) asset operation. Intelligent agent technology is a distributed decision-making approach in contrast to the centralized decision and control approach typically used in the energy industry.

Education and Certifications:

- BS (Bachelor of Science; Computer Science) San Diego State University

Robert Cobb, Senior Software Engineer, will be a key implementer on the software development team. Robert has over 18 years of experience in software development and design, with experience in Windows and Web development using VB.net, ASP.net, C#, HTML, XAML, WPF, and MVC. He also has experience in relational database design and reporting using Access, SQL, SSIS, SSAS, and SSRS.

As Senior Software Engineer at AESC, Robert develops, maintains, and provides support for tools that calculate estimated energy savings and automate the incentive program application process for software used by utilities and their customers. He works closely with engineers, software team members, and external customers to define requirements to implement and support new energy measures for software. He develops and delivers software installation and update packages, including enhancement of Graphical User Interface (GUI) design, implementation of new measures, report writing, HTML page modification, and revision to underlying MS Access and SQL databases.

Project experience highlights include:

- Member of software development team for Duke's Custom-to-Go Tool Suite, which is a set of calculation tools for estimating savings and incentives for the installation of a variety of energy savings measures. Roles included sole developer of the HVAC and Process Pump and Fan VFD tools.
- Member of software development team working on the Customized Calculation Tool (CCT) (formerly, Standard Performance Contracting) energy savings estimation software. Worked on a web-based version utilizing ASP.NET with a SQLServer back-end.
- Developed the iEAR database for SCE which is used for energy audit assessments by providing a regulatory compliant, cost-effective means to identify customers with IDSM energy and demand savings potential. Converted the tool from Excel into a centralized and portable Access database. Updated SCE's Online Application Tool user guides and manuals to meet Web Content Accessibility Guidelines (WCAG 2.0).
- Sole developer of an automated process for reporting project management metrics and KPI's and creating billable invoices. Worked with project managers and accounting on defining requirements. Developed a SQL database with ETL packages and reports that pulled 3rd party timekeeping records from the cloud to a local server and auto-generated reports and invoices.
- Active member of AESC IT Committee. Assist in performing system administration and technical support between AESC and 3rd party IT managed services. Oversee IT infrastructure and recommend improvements to operations and security.

Education and Certifications:

- BS (Bachelor of Science; Computer Information Systems) DeVry University
- MS (Masters of Information System Management) Keller Graduate School of Management, DeVry University

Keith Valenzuela, PE, Engineer Technical Lead, will provide technical leadership, internal and external QC, as well as perform energy calculations, energy modeling, and report writing. Keith has over 13 years of experience in engineering support and design. He is familiar with and regularly uses of many calculation tools including eQUEST, Engage, EnergyPro, Customized Calculation Tool Software and AirMaster+.

As Engineer Technical Lead at AESC, Keith manages and mentors the engineering staff in Southern California. He has extensive experience reviewing and verifying complex energy savings calculations, performing pre- and post-installation site inspections and confirming program requirements are met for SCE's and PG&E's Customized Solutions incentive programs. He provides technical review for large and complex energy retrofit projects through the Duke Energy Smart \$aver incentive program.

Project experience highlights include:

- For several months, provided onsite support directly to SDG&E working with the deemed engineering team. Among other tasks, he served as the technical advisor for the commercial HVAC program manager, providing technical advice, updated program CET input files and adopted workpapers for new program measures.
- Performed quality control on over 150 Customized Solutions incentive program technical reviews within the last year.
- Performed over 15 energy audits for various building types including commercial and industrial buildings. Energy audits included analysis and recommendation of renewables such as photovoltaic systems when appropriate.

Education and Certifications:

- BSME (Bachelor of Science; Mechanical Engineering) California State University, Long Beach
- MEM (Masters of Engineering Management) Ohio University
- PE (California Professional Engineer)
- CEA (Certified Energy Auditor) Association of Energy Engineers
- BESA (Building Energy Simulation Analyst) Association of Energy Engineers

6.0 Appendix C: Company Overview

Table 6. Business Information

Official Registered Name (Corporate, D.B.A., Partnership, etc.)	Alternative Energy Systems Consulting, Inc.
Dun & Bradstreet Number	84-870-3955
Primary and Secondary SEC Numbers	N/A – AESC is a private corporation
Address	2445 Impala Drive, Carlsbad, CA 92010
Main Telephone Number	760.931.2641
Toll-Free Number	N/A
Fax Number	N/A

Table 7. Contact Information

Contact Name	Antonio Corradini
Title	CEO/Principal Engineer
Address	2445 Impala Drive, Carlsbad, CA 92010
Direct Telephone Number	760.931.2641
Fax Number	N/A

Table 8. Authorization

Person authorized to contractually bind the organization for any Proposal against this RFP	Antonio Corradini, CEO/Principal Engineer

7.0 Appendix D: Information Technology & Data Security

7.1 Data Security Policies and Practices

Praxis by AESC is a cloud-based solution. AESC manages hosting responsibilities covering configuration and maintenance as follows:

- Microsoft Azure Cloud hosting environment consisting of the following service types:
 - Web Application Server (Virtual Machine)
 - SQL Database
 - Virtual Network
 - Backup
 - Data Transfers
 - IP Addresses
 - Azure DNS
 - Security Center
 - Key Vault
 - Application Gateway
 - Support
- Security – Network access to the servers will be managed using Microsoft Azure network security groups. A network security group contains a set of security rules that allow or deny inbound and outbound traffic based on protocol, source IP address range, source port range, destination IP address range, and destination port range.
- Data Integrity – Web traffic will be protected using industry-standard SSL encryption.
- Availability – Microsoft Azure datacenters operate 24x7x365 and employ various measures to help protect operations from power failure, physical intrusion, and network outages.
- Performance – System latency and response will be monitored.
- Scalability – Performance will be monitored using Application Insights and will be scaled up/down as needed

Through our work supporting utility programs, we handle many thousands of transactions annually containing personal and utility-based confidential data. With this role comes the responsibility of ensuring the integrity and security of the data is maintained. For this reason, AESC has upheld a Service Organization Control (SOC 2 Type 2) credential since 2016. The SOC 2 Type 2 examination demonstrates that an independent accounting and auditing firm has reviewed and examined an organization's control objectives and activities, specifically regarding information security, and tested those controls to ensure that they are operating effectively.

AESC also has a formal Information Security Policy (ISP) which covers how we handle security related to our software platform, data retention, and specific client requirements that would supersede our own policy. Specific sections of the ISP are outlined below, but generally, the ISP is used to achieve the following:

- Provide policy guidance to protect the integrity, availability, and confidentiality of data and safeguard information assets and resources.
- Identify processes and techniques that promote secure communications and the appropriate protection of information within AESC and with external entities that interact with AESC.
- Establish a common information security program framework and format consistent with AESC's business processes and client requirements.

The scope of these policies includes all information in all its forms – written, spoken, recorded electronically or printed – that exists within AESC owned or leased facilities, contained in AESC owned or leased equipment, entrusted to AESC employees, vendors, contractors or subcontractors, and software whether obtained from outside sources or generated internally.

7.2 Disaster Response and Business Continuity

AESC maintains a comprehensive Business Continuity Plan (BCP) documenting the procedures for coordination of critical business functions in managing and supporting the business recovery in the event of a facilities (office building) disruption or disaster. The BCP is focused on localized disasters such as fires, floods, and other localized natural or man-made disasters. It does not cover major regional or national disasters such as regional earthquakes, war, or nuclear holocaust. However, it can provide some guidance in the event of such a large-scale disaster.

Following is a summary of the AESC's BCP:

Business Continuity Strategy. The strategy is to recover critical AESC business functions at the alternate site location(s). Information Systems will recover IT functions based on the critical departmental business functions and defined strategies. In the event of a disaster or disruption to the office facilities, the strategy is to recover operations by relocating to an alternate site. Acceptable short-term location strategies (for disruptions lasting two weeks or less) include the employee's home, a public location if reasonable privacy and security can be established, or a location or space rented or leased by AESC for its employees. The long-term strategies will be to acquire/lease and equip new office space in another building in the same metropolitan area. If relocation is necessary, AESC employees are permitted to utilize external alternative internet services to access Confidential Information. All AESC Information Security Policies apply including but not limited to storage and transport encryption standards.

Recovery Plan Phases. The activities necessary to recover from an AESC facilities disaster or disruption are divided into four phases:

1. **Disaster Occurrence** - This phase begins with the occurrence of the disaster event and continues until a decision is made to activate the recovery plans. The major activities that take place in this phase include emergency response measures, notification of management, damage assessment activities, and declaration of the disaster.
2. **Plan Activation** - In this phase, the BCP is put into effect. This phase continues until the alternate sites are occupied, critical business functions reestablished, and computer system service restored. The major activities in this phase include notification and assembly of the recovery teams, implementation of interim procedures, relocation to the alternate sites and re-establishment of data communications.
3. **Alternate Site Operations** - This phase begins after the alternate site's operations are established and continues until the primary facility is restored. The primary recovery activities during this phase are backlog reduction and alternate facility processing procedures.
4. **Transition to Primary Site** - This phase consists of any and all activities necessary to make the transition back to a primary facility location.

Vital Records Backup. All vital records for each AESC function or program that would be affected by a facilities disruption are maintained and controlled by either the assigned Data Manager or ISO. Some of these files are periodically backed up and stored at an offsite location as part of normal operations.

Restoration of Hardcopy Files, Forms, and Supplies. In the event of a facilities disruption, critical records located in AESC facilities may be destroyed or inaccessible. In this case, the last backup of critical records in the secure warehouse would be made available to alternate sites on an as-needed basis following AESC Information Security Policies.

Online Access to AESC. In the event of a facilities disruption, the strategy is to assist in re-establishing connectivity to AESC data and to establish remote communications to any alternate business site location. Services covered would include phones, cellular phones, pagers, communications, and all other services required for restoring limited emergency service to the organization. If deemed necessary, data communications may be rerouted from the data processing hot or cold site to the respective alternate business site locations.

7.3 Change Management

AESC Change Management approach enables a smooth, efficient implementation of the new Cogsdale solution. It is focused on creating an environment where employees are confident in their abilities to perform job duties at the go-live date and beyond.

Our team is guided by PDCA (Plan-Do-Check-Act), which is an iterative, four-stage approach for continually improving processes, products or services, and for resolving problems. It involves systematically testing possible solutions, assessing the results, and implementing the ones that have shown to work. It is based on the scientific method of problem-solving and was popularized by Dr W. Edwards Deming, who is considered by many to be the father of modern quality control.

The PDCA Cycle provides a simple and effective approach for solving problems and managing change. It enables businesses to develop hypotheses about what needs to change, test these hypotheses in a continuous feedback loop, and gain valuable learning and knowledge. It promotes testing improvements on a small scale before updating company-wide procedures and work methods. The PDCA cycle consists of four components:

1. **Plan** – Identify the problem, collect relevant data, and understand the problem's root cause, develop hypotheses about what the issues may be, and decide which one to test.
2. **Do** – Develop and implement a solution; decide upon a measurement to gauge its effectiveness, test the potential solution, and measure the results.
3. **Check** – Confirm the results through before-and-after data comparison. Study the result, measure effectiveness, and decide whether the hypothesis is supported or not.
4. **Act** – Document the results, inform others about process changes, and make recommendations for the future PDCA cycles. If the solution was successful, implement it. If not, tackle the next problem and repeat the PDCA cycle again.

Attachment 2c

WRCOG - IREN - Professional
Services Agreement - AESC-BUC

**WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
PROFESSIONAL SERVICES AGREEMENT 2023-80-2080-002**

1. PARTIES AND DATE.

This Agreement is made and entered into this 17th day of January 2023, by and between the Western Riverside Council of Governments, a California public agency ("WRCOG"), and Alternative Energy Systems Consulting, Inc., a California corporation ("Consultant"). WRCOG and Consultant are sometimes individually referred to as "Party" and collectively as "Parties."

2. RECITALS.

2.1 Inland Regional Energy Network

The Inland Regional Energy Network ("I-REN") is a consortium of WRCOG, San Bernardino Associated Governments ("SANBAG") and the Coachella Valley Association of Governments ("CVAG") for the purpose of establishing and operating a locally administered, designed, and delivered energy efficiency program. WRCOG is the administrative lead of I-REN and is responsible for entering into contracts on behalf of I-REN.

2.2 Consultant.

Consultant desires to perform and assume responsibility for the provision of certain professional services required by WRCOG on the terms and conditions set forth in this Agreement. Consultant represents that it is experienced in providing engineering and software development services that meet the needs of the I-REN program as described in the Scope of Services, is licensed in the State of California, and is familiar with the plans of WRCOG.

2.3 Project.

WRCOG desires to engage Consultant to render such professional services for the **Building Upgrade Concierge (BUC) software development services** ("Project") as set forth in this Agreement.

3. TERMS.

3.1 Scope of Services and Term.

3.1.1 General Scope of Services. Consultant promises and agrees to furnish to WRCOG all labor, materials, tools, equipment, services, and incidental and customary work necessary to fully and adequately supply the software development and services to support I-REN's Public Sector energy efficiency programs targeting local governments, special districts, and tribal communities necessary for the Project ("Services"). The Services are more particularly described in Exhibit "A" attached hereto and incorporated herein by reference, and which are stated in the proposal to WRCOG and approved by I-REN's Executive Committee. All Services shall be subject to, and performed in accordance with, this Agreement, the exhibits attached hereto and incorporated herein by reference, and all applicable local, state and federal laws, rules and regulations.

3.1.2 Term. The term of this Agreement shall be from **January 17, 2023** to

December 31, 2025, with no more than two options to renew or amend unless earlier terminated as provided herein. Consultant shall complete the Services within the term of this Agreement and shall meet any other established schedules and deadlines.

3.2 Responsibilities of Consultant.

3.2.1 Control and Payment of Subordinates; Independent Contractor. The Services shall be performed by Consultant or under its supervision. Consultant will determine the means, methods, and details of performing the Services subject to the requirements of this Agreement. WRCOG retains Consultant on an independent contractor basis and not as an employee. Consultant retains the right to perform similar or different services for others during the term of this Agreement. Any additional personnel performing the Services under this Agreement on behalf of Consultant shall also not be employees of WRCOG and shall at all times be under Consultant's exclusive direction and control. Consultant shall pay all wages, salaries, and other amounts due such personnel in connection with their performance of Services under this Agreement and as required by law. Consultant shall be responsible for all reports and obligations respecting such additional personnel, including, but not limited to, social security taxes, income tax withholding, unemployment insurance, disability insurance, and workers' compensation insurance.

3.2.2 Schedule of Services. Consultant shall perform the Services expeditiously, within the term of this Agreement, and in accordance with the Schedule of Services set forth in Exhibit "B" attached hereto and incorporated herein by reference. Consultant represents that it has the professional and technical personnel required to perform the Services in conformance with such conditions. In order to facilitate Consultant's conformance with the Schedule, WRCOG shall respond to Consultant's submittals in a timely manner. Upon request of WRCOG, Consultant shall provide a more detailed schedule of anticipated performance to meet the Schedule of Services.

3.2.3 Conformance to Applicable Requirements. All work prepared by Consultant shall be subject to the approval of WRCOG.

3.2.4 Substitution of Key Personnel. Consultant has represented to WRCOG that certain key personnel will perform and coordinate the Services under this Agreement. Should one or more of such personnel become unavailable, Consultant may substitute other personnel of at least equal competence upon written approval of WRCOG. In the event that WRCOG and Consultant cannot agree as to the substitution of key personnel, WRCOG shall be entitled to terminate this Agreement for cause. As discussed below, any personnel who fail or refuse to perform the Services in a manner acceptable to WRCOG, or who are determined by the WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, or a threat to the safety of persons or property, shall be promptly removed from the Project by the Consultant at the request of the WRCOG. The key personnel for performance of this Agreement are as follows:

Antonio Corradini, CEO/Principal Engineer

3.2.5 WRCOG's Representative. WRCOG hereby designates the Executive Director, or his or her designee, to act as its representative for the performance of this Agreement ("WRCOG's Representative"). WRCOG's Representative shall have the power to act on behalf of WRCOG for all purposes under this Contract. Consultant shall not accept direction or orders

from any person other than WRCOG's Representative or his or her designee.

3.2.6 Consultant's Representative. Consultant hereby designates Antonio Corradini, CEO/Principal Engineer, or his or her designee, to act as its Representative for the performance of this Agreement ("Consultant's Representative"). Consultant's Representative shall have full authority to represent and act on behalf of the Consultant for all purposes under this Agreement. The Consultant's Representative shall supervise and direct the Services, using his best skill and attention, and shall be responsible for all means, methods, techniques, sequences, and procedures, and for the satisfactory coordination of all portions of the Services under this Agreement.

3.2.7 Coordination of Services. Consultant agrees to work closely with WRCOG staff in the performance of Services and shall be available to WRCOG's staff, consultants, and other staff at all reasonable times.

3.2.8 Standard of Care; Performance of Employees. Consultant shall perform all Services under this Agreement in a skillful and competent manner, consistent with the standards generally recognized as being employed by professionals in the same discipline in the State of California. Consultant represents and maintains that it is skilled in the professional calling necessary to perform the Services. Consultant warrants that all employees and sub- contractors shall have sufficient skill and experience to perform the Services assigned to them. Finally, Consultant represents that it, its employees and sub-contractors have all licenses, permits, qualifications, and approvals of whatever nature that are legally required to perform the Services, and that such licenses and approvals shall be maintained throughout the term of this Agreement. As provided for in the indemnification provisions of this Agreement, Consultant shall perform, at its own cost and expense, and without reimbursement from WRCOG, SANBAG, and/or CVAG for any services necessary to correct errors or omissions which are caused by the Consultant's failure to comply with the standard of care provided for herein. Any employee of the Consultant or its sub-consultants who is determined by WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, a threat to the safety of persons or property, or any employee who fails or refuses to perform the Services in a manner acceptable to WRCOG, shall be promptly removed from the Project by the Consultant and shall not be re-employed to perform any of the Services or to work on the Project.

3.2.9 Laws and Regulations. Consultant shall keep itself fully informed of and in compliance with all local, state and federal laws, rules and regulations in any manner affecting the performance of the Project or the Services, including all Cal OSHA requirements, and shall give all notices required by law. Consultant shall be liable for all violations of such laws and regulations in connection with Services. If the Consultant performs any work knowing it to be contrary to such laws, rules, and/or regulations, and without giving written notice to WRCOG, Consultant shall be solely responsible for all costs arising therefrom. Consultant shall defend, indemnify, and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers and agents free and harmless, pursuant to the indemnification provisions of this Agreement, from any claim or liability arising out of any failure or alleged failure to comply with such laws, rules or regulations.

3.2.10 Insurance.

3.2.10.1 Time for Compliance. Consultant shall not commence the Services under this Agreement until it has provided evidence satisfactory to WRCOG that it has secured all insurance required under this section, in a form and with insurance companies

acceptable to WRCOG. In addition, Consultant shall not allow any sub-contractor to commence work on any subcontract until it has provided evidence satisfactory to WRCOG that the sub-contractor has secured all insurance required under this section.

3.2.10.2 Minimum Requirements. Consultant shall, at its expense, procure and maintain for the duration of the Agreement, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Agreement by the Consultant, its agents, representatives, employees or sub-contractors. Consultant shall also require all of its sub-contractors to procure and maintain the same insurance for the duration of the Agreement. Such insurance shall meet at least the following minimum levels of coverage:

(A) Minimum Scope of Insurance. Coverage shall be at least as broad as the latest version of the following: (1) *General Liability*: Insurance Services Office Commercial General Liability coverage (occurrence form CG 0001 or exact equivalent); (2) *Automobile Liability*: Insurance Services Office Business Auto Coverage (form CA 0001, or exact equivalent); and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

(B) Minimum Limits of Insurance. Consultant shall maintain limits no less than: (1) *General Liability*: \$1,000,000 per occurrence for bodily injury, personal injury, and property damage. If Commercial General Liability Insurance or other form with general aggregate limit is used, either the general aggregate limit shall apply separately to this Agreement / location or the general aggregate limit shall be twice the required occurrence limit; (2) *Automobile Liability*: \$1,000,000 per accident for bodily injury and property damage; and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation limits as required by the Labor Code of the State of California. Employer's Liability limits of \$1,000,000 per accident for bodily injury or disease.

3.2.10.3 Professional Liability. Consultant shall procure and maintain, and require its sub-consultants to procure and maintain, for a period of five (5) years following completion of the Services, errors, and omissions liability insurance appropriate to their profession. Such insurance shall be in an amount not less than \$2,000,000 per claim. This insurance shall be endorsed to include contractual liability applicable to this Agreement and shall be written on a policy form coverage specifically designed to protect against acts, errors, or omissions of the Consultant. "Covered Professional Services" as designated in the policy must specifically include work performed under this Agreement. The policy must "pay on behalf of" the insured and must include a provision establishing the insurer's duty to defend.

3.2.10.4 Insurance Endorsements. The insurance policies shall contain the following provisions, or Consultant shall provide endorsements on forms supplied or approved by WRCOG to add the following provisions to the insurance policies:

(A) General Liability.

(i) Commercial General Liability Insurance must include coverage for (1) Bodily Injury and Property Damage; (2) Personal Injury / Advertising Injury; (3) Premises / Operations Liability; (4) Products / Completed Operations Liability; (5) Aggregate Limits that Apply per Project; (6) Contractual Liability with respect to this Agreement; (7) Broad Form Property Damage; and (8) Independent Consultants Coverage.

(ii) The policy shall contain no endorsements or

provisions limiting coverage for (1) contractual liability; (2) cross liability exclusion for claims or suits by one insured against another; or (3) contain any other exclusion contrary to the Agreement.

(iii) The policy shall give WRCOG, its Directors, officials, officers, employees, volunteers, and agents insured status using ISO endorsement forms 20 10 10 01 and 20 37 10 01, or endorsements providing the exact same coverage.

(iv) The additional insured coverage under the policy shall be "primary and non-contributory" and will not seek contribution from WRCOG's, SANBAG's, or CVAG's insurance or self-insurance and shall be at least as broad as CG 20 01 04 13, or endorsements providing the exact same coverage.

(B) Automobile Liability.

(i) The automobile liability policy shall be endorsed to state that: (1) WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents and volunteers shall be covered as additional insureds with respect to the ownership, operation, maintenance, use, loading or unloading of any auto owned, leased, hired, or borrowed by the Consultant or for which the Consultant is responsible; and (2) the insurance coverage shall be primary insurance as respects WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents, and volunteers, or if excess, shall stand in an unbroken chain of coverage excess of the Consultant's scheduled underlying coverage. Any insurance or self-insurance maintained by WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents, and volunteers shall be in excess of the Consultant's insurance and shall not be called upon to contribute with it in any way.

(C) Workers' Compensation and Employers Liability Coverage.

(i) Consultant certifies that he/she is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and he/she will comply with such provisions before commencing work under this Agreement.

(ii) The insurer shall agree to waive all rights of subrogation against WRCOG, its Directors, officials, officers, employees, agents, and volunteers for losses paid under the terms of the insurance policy which arise from work performed by the Consultant.

(D) All Coverages. Defense costs shall be payable in addition to the limits set forth hereunder. Requirements of specific coverage or limits contained in this section are not intended as a limitation on coverage, limits, or other requirement, or a waiver of any coverage normally provided by any insurance. It shall be a requirement under this Agreement that any available insurance proceeds broader than or in excess of the specified minimum insurance coverage requirements and/or limits set forth herein shall be available to WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers, and agents as additional insureds under said policies. Furthermore, the requirements for coverage and limits shall be (1) the minimum coverage and limits specified in this Agreement; or (2) the broader coverage and maximum limits of coverage of any Insurance policy or proceeds available to the named insured; whichever is greater.

(i) The limits of insurance required in this Agreement may be satisfied by a combination of primary and umbrella or excess insurance. Any umbrella or excess insurance shall contain or be endorsed to contain a provision that such coverage shall also apply on a primary and non-contributory basis for the benefit of WRCOG (if agreed to in a written contract or agreement) before WRCOG's own insurance or self-insurance shall be called upon to protect it as a named insured. The umbrella / excess policy shall be provided on a "following form" basis with coverage at least as broad as provided on the underlying policy(ies).

(ii) Consultant shall provide WRCOG at least thirty (30) days prior written notice of cancellation of any policy required by this Agreement, except that the Consultant shall provide at least ten (10) days prior written notice of cancellation of any such policy due to non-payment of premium. If any of the required coverage is cancelled or expires during the term of this Agreement, the Consultant shall deliver renewal certificate(s) including the General Liability Additional Insured Endorsement to WRCOG at least ten (10) days prior to the effective date of cancellation or expiration.

(iii) The retroactive date (if any) of each policy is to be no later than the effective date of this Agreement. Consultant shall maintain such coverage continuously for a period of at least three years after the completion of the work under this Agreement. Consultant shall purchase a one (1) year extended reporting period A) if the retroactive date is advanced past the effective date of this Agreement; B) if the policy is cancelled or not renewed; or C) if the policy is replaced by another claims-made policy with a retroactive date subsequent to the effective date of this Agreement.

(iv) The foregoing requirements as to the types and limits of insurance coverage to be maintained by Consultant, and any approval of said insurance by WRCOG, is not intended to and shall not in any manner limit or qualify the liabilities and obligations otherwise assumed by the Consultant pursuant to this Agreement, including but not limited to, the provisions concerning indemnification.

(v) If at any time during the life of the Agreement, any policy of insurance required under this Agreement does not comply with these specifications or is canceled and not replaced, WRCOG has the right but not the duty to obtain the insurance it deems necessary, and any premium paid by WRCOG will be promptly reimbursed by Consultant or WRCOG will withhold amounts sufficient to pay premium from Consultant payments. In the alternative, WRCOG may cancel this Agreement. WRCOG may require the Consultant to provide complete copies of all insurance policies in effect for the duration of the Project.

(vi) Neither WRCOG nor any of its Directors, officials, officers, employees, volunteers, or agents shall be personally responsible for any liability arising under or by virtue of this Agreement.

3.2.10.5 Separation of Insureds; No Special Limitations. All insurance required by this Section shall contain standard separation of insureds provisions. In addition, such insurance shall not contain any special limitations on the scope of protection afforded to WRCOG, its Directors, officials, officers, employees, agents, and volunteers.

3.2.10.6 Deductibles and Self-Insurance Retentions. Any deductibles or self-insured retentions must be declared to and approved by WRCOG. Consultant shall guarantee that, at the option of WRCOG, either: (1) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects WRCOG, its Directors, officials, officers,

employees, agents, and volunteers; or (2) the Consultant shall procure a bond guaranteeing payment of losses and related investigation costs, claims, and administrative and defense expenses.

3.2.10.7 Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, licensed to do business in California, and satisfactory to WRCOG.

3.2.10.8 Verification of Coverage. Consultant shall furnish WRCOG with original certificates of insurance and endorsements effecting coverage required by this Agreement on forms satisfactory to WRCOG. The certificates and endorsements for each insurance policy shall be signed by a person authorized by that insurer to bind coverage on its behalf and shall be on forms provided by WRCOG if requested. All certificates and endorsements must be received and approved by WRCOG before work commences. WRCOG reserves the right to require complete, certified copies of all required insurance policies, at any time.

3.2.10.9 Sub-consultant Insurance Requirements. Consultant shall not allow any sub-contractors or sub-consultants to commence work on any sub-contract until they have provided evidence satisfactory to WRCOG that they have secured all insurance required under this section. Policies of commercial general liability insurance provided by such sub-contractors or sub-consultants shall be endorsed to name WRCOG, SANBAG, and CVAG as additional insureds using ISO Form CG 20 38 04 13 or an endorsement providing the exact same coverage. If requested by Consultant, WRCOG may approve different scopes or minimum limits of insurance for particular sub-contractors or sub-consultants.

3.2.11 Safety. Consultant shall execute and maintain its work so as to avoid injury or damage to any person or property. In carrying out its Services, the Consultant shall at all times be in compliance with all applicable local, state, and federal laws, rules, and regulations, and shall exercise all necessary precautions for the safety of employees appropriate to the nature of the work and the conditions under which the work is to be performed. Safety precautions as applicable shall include, but shall not be limited to: (A) adequate life protection and life-saving equipment and procedures; (B) instructions in accident prevention for all employees and sub-contractors, such as safe walkways, scaffolds, fall protection ladders, bridges, gang planks, confined space procedures, trenching and shoring, equipment, and other safety devices, equipment and wearing apparel as are necessary or lawfully required to prevent accidents or injuries; and (C) adequate facilities for the proper inspection and maintenance of all safety measures.

3.3 Fees and Payments.

3.3.1 Compensation. Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Agreement at the rates set forth in Exhibit "C" attached hereto and incorporated herein by reference. The total compensation shall not exceed six hundred fifty-five thousand dollars (\$655,000.00) without written approval of I-REN Executive Committee. Extra Work may be authorized, as described below, and, if authorized, said Extra Work will be compensated at the rates and manner set forth in this Agreement.

3.3.2 Payment of Compensation. Consultant shall submit to WRCOG a monthly itemized statement which indicates work completed and hours of Services rendered by Consultant. The statement shall contain the invoice number and date; remittance address; Agreement number 2023-80-2080-002, and invoice total. The statement shall describe the amount of Services and supplies provided since the initial commencement date, or since the start

of the subsequent billing periods, as appropriate, through the date of the statement. WRCOG shall, within 45 days of receiving such statement, review the statement and pay all approved charges thereon.

3.3.3 Reimbursement for Expenses. Consultant shall not be reimbursed for any expenses unless authorized in writing by WRCOG.

3.3.4 Extra Work. At any time during the term of this Agreement, WRCOG may request that Consultant perform Extra Work. As used herein, "Extra Work" means any work which is determined by WRCOG to be necessary for the proper completion of the Project, but which the Parties did not reasonably anticipate would be necessary at the execution of this Agreement. Consultant shall not perform, nor be compensated for, Extra Work without written authorization from WRCOG's Representative.

3.3.5 Prevailing Wages. Consultant is aware of the requirements of California Labor Code Sections 1720, et seq., and 1770, et seq., as well as California Code of Regulations, Title 8, Section 16000, et seq., ("Prevailing Wage Laws"), which require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects. If the Services are being performed as part of an applicable "public works" or "maintenance" project, as defined by the Prevailing Wage Laws, and if the total compensation is \$1,000 or more, Consultant agrees to fully comply with such Prevailing Wage Laws. WRCOG shall provide Consultant with a copy of the prevailing rates of per diem wages in effect at the commencement of this Agreement. Consultant shall make copies of the prevailing rates of per diem wages for each craft, classification, or type of worker needed to execute the Services available to interested parties upon request, and post copies at the Consultant's principal place of business and at the project site. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers, and agents free and harmless from any claims, liabilities, costs, penalties or interest arising out of any failure or alleged failure to comply with the Prevailing Wage Laws.

3.4 Accounting Records.

3.4.1 Maintenance and Inspection. Consultant shall maintain complete and accurate records with respect to all costs and expenses incurred under this Agreement. All such records shall be clearly identifiable. Consultant shall allow a representative of WRCOG during normal business hours to examine, audit, and make transcripts or copies of such records and any other documents created pursuant to this Agreement. Consultant shall allow inspection of all work, data, documents, proceedings, and activities related to the Agreement for a period of three (3) years from the date of final payment under this Agreement.

3.5 General Provisions.

3.5.1 Termination of Agreement.

3.5.1.1 Grounds for Termination. WRCOG may, by written notice to Consultant, terminate the whole or any part of this Agreement at any time and without cause by giving written notice to Consultant of such termination, and specifying the effective date thereof, at least seven (7) days before the effective date of such termination. Upon termination, Consultant shall be compensated only for those services which have been adequately rendered to WRCOG, and Consultant shall be entitled to no further compensation. Consultant may not terminate this Agreement except for cause.

3.5.1.2 Effect of Termination. If this Agreement is terminated as provided herein, WRCOG may require Consultant to provide all finished or unfinished Documents and Data and other information of any kind prepared by Consultant in connection with the performance of Services under this Agreement. Consultant shall be required to provide such documents and other information within fifteen (15) days of the request.

3.5.1.3 Additional Services. In the event this Agreement is terminated in whole or in part as provided herein, WRCOG may procure, upon such terms and in such manner as it may determine appropriate, services similar to those terminated.

3.5.2 Delivery of Notices. All notices permitted or required under this Agreement shall be given to the respective Parties at the following address, or at such other address as the respective parties may provide in writing for this purpose:

**Consultant: Alternative Energy Systems Consulting, Inc.
2445 Impala Drive
Carlsbad, CA 92010**

**WRCOG: Western Riverside Council of Governments
3390 University Avenue, Suite 200
Riverside, CA 92501
Attn: Casey Dailey**

Such notice shall be deemed made when personally delivered or when mailed, forty-eight (48) hours after deposit in the U.S. Mail, first class postage prepaid and addressed to the Party at its applicable address. Actual notice shall be deemed adequate notice on the date actual notice occurred, regardless of the method of service.

3.5.3 Ownership of Materials and Confidentiality.

3.5.3.1 Documents & Data; Licensing of Intellectual Property. This Agreement creates a non-exclusive and perpetual license for WRCOG to copy, use, modify, reuse, or sub-license any and all copyrights, designs, and other intellectual property embodied in plans, specifications, studies, drawings, estimates, and other documents or works of authorship fixed in any tangible medium of expression, including but not limited to, physical drawings or data magnetically or otherwise recorded on computer diskettes, which are prepared or caused to be prepared by Consultant under this Agreement ("Documents & Data"). Consultant shall require all sub-contractors to agree in writing that WRCOG is granted a non-exclusive and perpetual license for any Documents & Data the sub-contractor prepares under this Agreement. Consultant represents and warrants that Consultant has the legal right to license any and all Documents & Data. Consultant makes no such representation and warranty in regard to Documents & Data which were prepared by design professionals other than Consultant or provided to Consultant by WRCOG. WRCOG shall not be limited in any way in its use of the Documents & Data at any time, provided that any such use not within the purposes intended by this Agreement shall be at WRCOG's sole risk.

3.5.3.2 Intellectual Property. In addition, WRCOG shall have and retain all right, title, and interest (including copyright, patent, trade secret, and other proprietary rights) in all plans, specifications, studies, drawings, estimates, materials, data, computer programs or software and source code, enhancements, documents, and any and all works of authorship fixed

in any tangible medium or expression, including but not limited to, physical drawings or other data magnetically or otherwise recorded on computer media ("Intellectual Property") prepared or developed by or on behalf of Consultant under this Agreement as well as any other such Intellectual Property prepared or developed by or on behalf of Consultant under this Agreement.

WRCOG shall have and retain all right, title and interest in Intellectual Property developed or modified under this Agreement, whether or not developed in conjunction with Consultant, and whether or not developed by Consultant. Consultant will execute separate written assignments of any and all rights to the above referenced Intellectual Property upon request of WRCOG.

Consultant shall also be responsible to obtain in writing separate written assignments from any sub-contractors or agents of Consultant of any and all right to the above referenced Intellectual Property. Should Consultant, either during or following termination of this Agreement, desire to use any of the above-referenced Intellectual Property, it shall first obtain the written approval of the WRCOG.

All materials and documents which were developed or prepared by the Consultant for general use prior to the execution of this Agreement and which are not the copyright of any other party or publicly available and any other computer applications, shall continue to be the property of the Consultant. However, unless otherwise identified and stated prior to execution of this Agreement, Consultant represents and warrants that it has the right to grant the exclusive and perpetual license for all such Intellectual Property as provided herein.

WRCOG further is granted by Consultant a non-exclusive and perpetual license to copy, use, modify or sub-license any and all Intellectual Property otherwise owned by Consultant which is the basis or foundation for any derivative, collective, insurrectional, or supplemental work created under this Agreement.

3.5.3.3 Confidentiality. All ideas, memoranda, specifications, plans, procedures, drawings, descriptions, computer program data, input record data, written information, and other Documents & Data either created by or provided to Consultant in connection with the performance of this Agreement shall be held confidential by Consultant. Such materials shall not, without the prior written consent of WRCOG, be used by Consultant for any purposes other than the performance of the Services. Nor shall such materials be disclosed to any person or entity not connected with the performance of the Services or the Project. Nothing furnished to Consultant which is otherwise known to Consultant or is generally known, or has become known, to the related industry shall be deemed confidential. Consultant shall not use WRCOG's name or insignia, photographs of the Project, or any publicity pertaining to the Services or the Project in any magazine, trade paper, newspaper, television, or radio production or other similar medium without the prior written consent of WRCOG.

3.5.3.4 Infringement Indemnification. Consultant shall defend, indemnify, and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers, and agents free and harmless, pursuant to the indemnification provisions of this Agreement, for any alleged infringement of any patent, copyright, trade secret, trade name, trademark, or any other proprietary right of any person or entity in consequence of the use on the Project by WRCOG of the Documents & Data, including any method, process, product, or concept specified or depicted.

3.5.4 Cooperation; Further Acts. The Parties shall fully cooperate with one

another and shall take any additional acts or sign any additional documents as may be necessary, appropriate, or convenient to attain the purposes of this Agreement.

3.5.5 Attorney's Fees. If either Party commences an action against the other Party, either legal, administrative, or otherwise, arising out of or in connection with this Agreement, the prevailing party in such litigation shall be entitled to have and recover from the losing party reasonable attorney's fees and all other costs of such action.

3.5.6 Indemnification. Consultant shall defend, indemnify, and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, consultants, employees, volunteers, and agents free and harmless from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury, in law or equity, to property or persons, including wrongful death, in any manner arising out of or incident to any alleged acts, omissions, or willful misconduct of Consultant, its officials, officers, employees, agents, consultants and contractors, arising out of or in connection with the performance of the Services, the Project or this Agreement, including without limitation the payment of all consequential damages and attorneys' fees and other related costs and expenses. Consultant shall defend, at Consultant's own cost, expense, and risk, any and all such aforesaid suits, actions, or other legal proceedings of every kind that may be brought or instituted against WRCOG, SANBAG, CVAG, their respective i Directors, officials, officers, consultants, employees, agents, or volunteers. Consultant shall pay and satisfy any judgment, award, or decree that may be rendered against WRCOG, SANBAG, CVAG or their respective Directors, officials, officers, consultants, employees, agents, or volunteers, in any such suit, action or other legal proceeding. Consultant shall reimburse WRCOG, SANBAG, CVAG and their respective Directors, officials, officers, consultants, employees, agents, or volunteers, for any and all legal expenses and costs, including reasonable attorneys' fees, incurred by each of them in connection therewith or in enforcing the indemnity herein provided. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, consultants, employees, agents, or volunteers. This section shall survive any expiration or termination of this Agreement. Notwithstanding the foregoing, to the extent Consultant's Services are subject to Civil Code Section 2782.8, the above indemnity shall be limited, to the extent required by Civil Code Section 2782.8, to claims that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant.

3.5.7 Entire Agreement. This Agreement contains the entire Agreement of the Parties with respect to the subject matter hereof, and supersedes all prior negotiations, understandings, or agreements. This Agreement may only be modified by a writing signed by both Parties.

3.5.8 Governing Law. This Agreement shall be governed by the laws of the State of California. Venue shall be in Riverside County.

3.5.9 Time of Essence. Time is of the essence for each and every provision of this Agreement.

3.5.10 WRCOG's Right to Employ Other Consultants. WRCOG reserves the right to employ other consultants in connection with this Project.

3.5.11 Successors and Assigns. This Agreement shall be binding on the successors and assigns of the Parties.

3.5.12 Assignment or Transfer. Consultant shall not assign, hypothecate, or

transfer, either directly or by operation of law, this Agreement, or any interest herein without the prior written consent of WRCOG. Any attempt to do so shall be null and void, and any assignees, hypothecates or transferees shall acquire no right or interest by reason of such attempted assignment, hypothecation, or transfer.

3.5.13 Construction; References; Captions. Since the Parties or their agents have participated fully in the preparation of this Agreement, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any Party. Any term referencing time, days, or period for performance shall be deemed calendar days and not work days. All references to Consultant include all personnel, employees, agents, and sub-contractors of Consultant, except as otherwise specified in this Agreement. All references to WRCOG include its Directors, officials, officers, employees, agents, and volunteers except as otherwise specified in this Agreement. The captions of the various articles and paragraphs are for convenience and ease of reference only, and do not define, limit, augment, or describe the scope, content, or intent of this Agreement.

3.5.14 Amendment; Modification. No supplement, modification, or amendment of this Agreement shall be binding unless executed in writing and signed by both Parties.

3.5.15 Waiver. No waiver of any default shall constitute a waiver of any other default or breach, whether of the same or other covenant or condition. No waiver, benefit, privilege, or service voluntarily given or performed by a Party shall give the other Party any contractual rights by custom, estoppel, or otherwise.

3.5.16 No Third-Party Beneficiaries. There are no intended third-party beneficiaries of any right or obligation assumed by the Parties.

3.5.17 Invalidity; Severability. If any portion of this Agreement is declared invalid, illegal, or otherwise unenforceable by a court of competent jurisdiction, the remaining provisions shall continue in full force and effect.

3.5.18 Prohibited Interests. Consultant maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement. Further, Consultant warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, brokerage fee, gift, or other consideration contingent upon or resulting from the award or making of this Agreement. For breach or violation of this warranty, WRCOG shall have the right to rescind this Agreement without liability. For the term of this Agreement, no member, Director, officer, official, agent volunteer, or employee of WRCOG, during the term of his or her service with WRCOG, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

3.5.19 Equal Opportunity Employment. Consultant represents that it is an equal opportunity employer, and it shall not discriminate against any sub-contractor, employee, or applicant for employment because of race, religion, color, national origin, handicap, ancestry, sex, or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff, or termination. Consultant shall also comply with all relevant provisions of any of WRCOG's Minority Business Enterprise Program, Affirmative Action Plan, or other related programs or guidelines currently in effect or hereinafter enacted, including but not limited to California Public Utilities Commission General Order 156 to the extent applicable to WRCOG.

3.5.20 Labor Certification. By its signature hereunder, Consultant certifies that it is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Workers' Compensation, or to undertake self-insurance in accordance with the provisions of that Code, and agrees to comply with such provisions before commencing the performance of the Services.

3.5.21 Authority to Enter Agreement. Consultant has all requisite power and authority to conduct its business and to execute, deliver, and perform the Agreement. Each Party warrants that the individuals who have signed this Agreement have the legal power, right, and authority to make this Agreement and bind each respective Party.

3.5.22 Counterparts. This Agreement may be signed in counterparts, each of which shall constitute an original.

3.6 Subcontracting.

3.6.1 Prior Approval Required. Consultant shall not subcontract any portion of the work required by this Agreement, except as expressly stated herein, without prior written approval of WRCOG. Subcontracts, if any, shall contain a provision making them subject to all provisions stipulated in this Agreement.

[SIGNATURES ON FOLLOWING PAGE]

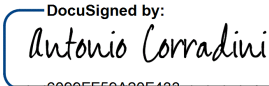
SIGNATURE PAGE TO
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
PROFESSIONAL SERVICES AGREEMENT

IN WITNESS WHEREOF, the Parties hereby have made and executed this Agreement as of the date first written above.

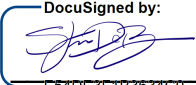
WESTERN RIVERSIDE COUNCIL
OF GOVERNMENTS

By: _____
Kurt Wilson
Title: Executive Director

ALTERNATIVE ENERGY SYSTEMS
CONSULTING, INC

By:  _____
Antonio Corradini
Title: CEO/Principal Engineer

APPROVED AS TO FORM:

By:  _____
Steven DeBaun
General Counsel
Best Best & Krieger LLP

ATTEST:

By: _____
Its: _____

*A corporation requires the signatures of two corporate officers.

One signature shall be that of the Chairman of Board, the President or any Vice President, and the second signature (on the attest line) shall be that of the Secretary, any Assistant Secretary, the Chief Financial Officer or any Assistant Treasurer of such corporation.

If the above persons are not the intended signators, evidence of signature authority shall be provided to WRCOG.

EXHIBIT “A”

SCOPE OF SERVICES

This agreement is for software services to support I-REN staff and implementer(s) in providing technical guidance and tools to inform and enable priority energy improvements through the programs and activities summarized above and detailed further below. The solution should also enable I-REN to serve as a clearinghouse for energy efficiency and distributed energy resource program information in general, for I-REN programs as well as programs offered by other program administrators.

The software consultant will coordinate closely with I-REN member agency staff and interns, program implementers, and other consultants to conduct a thorough requirements gathering process to identify business needs for the solution.

Broadly, I-REN anticipates needing an information technology solution and services with elements that may include but are not necessarily limited to the following:

- Database of information and documents including:
 - Energy efficiency, distributed energy resource, and other relevant programs and financing opportunities.
 - Other informational resources and collateral related to energy efficiency, distributed energy resources, and other relevant topics.
- Customer-facing portal with capabilities including:
 - Gather enrollment information from interested parties and evaluate enrollees based on eligibility criteria.
 - Display a tailored list of opportunities to the interested party based on the enrollment information they input.
 - Provide other informational resources relevant to the interested party.
 - Connect the interested party to I-REN program staff to begin person-to-person next steps.
- Back-end portal for I-REN administrative staff, program staff, I-REN energy efficiency fellowship interns (“I-REN Public Service Energy Fellowship”), program implementers, and other consultant teams, with capabilities including:
 - Customer relationship management system to collect data, record interactions with participants, and automate communications and tasks.
 - Customizable dashboard for tracking relevant statistics and performance metrics.
 - Reporting capabilities to support I-REN organizational and administrative needs, as well as compliance with CPUC requirements.
- Flexibility to expand beyond public sector offerings to accommodate tracking of other I-REN activities, relationships, metrics, and other information and resources as necessary.

I-REN Public Sector Background

I-REN’s public sector offerings will serve the members of the three Councils of Government (COGs) represented in I-REN, including CVAG, SANBAG, WRCOG, and the cities, school districts, water districts, special districts, and tribal communities they represent. These regional programs will target, but not be limited to, upgrades to existing public buildings and facilities with high energy use and older equipment. While the offerings will consider all public building types, there will be a focus on community-serving buildings such as community centers, libraries,

senior centers, schools, and fire and police buildings. Through energy efficiency projects in these facilities, I-REN can provide benefits that will flow to hard-to-reach, disadvantaged, low income, and other vulnerable communities. The I-REN programs will be multi-beneficial in nature, layering energy efficiency strategies with greenhouse gas reductions, community resilience and climate adaptation measures.

Local governments in the I-REN service territory have limited capacity to complete energy upgrades and are challenged to maintain and upgrade these facilities due to lack of funding for capital improvements, a lack of awareness related to energy efficiency and other energy efficiency program opportunities, limited time and staff resources, along with conflicting priorities. Further, State mandates such as building energy benchmarking (AB 802) requirements, energy code compliance, and climate adaptation planning are additional unfunded regulations and requirements on local governments and are difficult to meet given competing priorities. These challenges have been exacerbated in recent years due to the COVID-19 pandemic, the associated economic downturn, and increased pressure on local government agencies to respond to a variety of issues.

To address these challenges, I-REN will leverage its existing public sector partnerships and networks across the region to offer technical assistance, implement incentive program options, and improve access to financing, as indicated in the Scope of Work in this RFP. Implementing these initiatives will further I-REN's goals of encouraging resilience and continuous capacity building for local governments, thereby strengthening their ability to serve their community through energy efficiency projects in their own facilities, while also saving on building operations costs and contributing to local and statewide goals for energy savings, climate resilience, and greenhouse gas emissions reduction.

I-REN's Public Sector Program Objectives

- Local governments have the support and resources to develop and implement their strategic energy plans and energy efficiency projects.
- Help local governments afford and finance a range of energy efficiency upgrades through innovative financing options.

Scope of Work

Task 1: Requirements Gathering

The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN team within one month of final contract.
- Review I-REN's energy efficiency portfolio, in particular the Public Sector programs and activities, and current information technology (IT) assets that relate to energy efficiency program delivery, e.g., the website, reporting templates, etc.
- Guide potential software users, including I-REN member agency staff and interns, program implementers, and other consultants (collectively, the "I-REN software user group"), through the process of discovering business requirements for the proposed solution.
- Document business requirements and I-REN software user group needs and priorities.
- Assess the software options with applicability to I-REN's business requirements and present those options to I-REN with a recommendation for the proposed solution.

Deliverables:

- Kick-off meeting agenda and notes.
- Documentation of business requirements and I-REN software user group needs and priorities.
- SOW detailing proposed solution and pricing: Assessment of software options and detailed recommendation for proposed solution including pricing, I-REN staff time commitment, software consultant time required to configure, ongoing enhancements and maintenance, terms and conditions, data security considerations, IT infrastructure needs, and any other relevant information to guide I-REN team decision-making.
- Project Plan to implement the SOW
- Documentation of functional specifications

Task 2: Solution Development & Deployment

The consultant will be responsible for each activity listed below:

- Depending on the type of solution to be pursued:
 - Lead the process of procuring licenses for an out-of-the-box software solution, or
 - Lead the development of custom software solution
- Lead the development and implementation of plans for software configuration, in coordination with I-REN software user group.
- Provide opportunities for testing and input from the user group as the solution is developed and/or configured.
- Conduct end-to-end testing and coordinate user acceptance testing.
- Deploy solution and provide any necessary training to the user group.

Deliverables:

- Software configuration plans.
- Coordination and documentation of user input.
- User acceptance testing scripts.
- Written acceptance of all form development, completion, and full functionality
- User guides and training materials/other documentation.

Task 3: Ongoing Maintenance & Enhancements

The consultant will be responsible for each activity listed below:

- Ensure ongoing maintenance is performed as needed to maintain solution at the appropriate levels for industry standards e.g., user interface, accessibility, data security, etc.
- Implement a ticketing process and specify the expected service level for handling requests for bug fixes, enhancements, and other changes to the system.

Deliverables:

- Documentation regarding ongoing maintenance.
- Documentation of ticketing procedures and service level availability for responding to tickets.

Task 4: Other Services

The consultant will be responsible for each activity listed below:

- Coordinate with I-REN team and consultants to ensure software solution is able to track

and report on I-REN program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance as applicable.

- Provide software-related content and/or review of content as needed for I-REN regulatory documents and filings, e.g., JCM, Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- As appropriate, contribute to I-REN program portfolio performance analysis and evaluation, measurement, and verification activities for tracking program achievements and informing continuous improvement.

Anticipated deliverables:

- Software-related content and edits or updates to content for I-REN regulatory filings.
- Data tracking and reporting in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements. Example monthly progress reporting may include:
 - Forecasted Gross and Net Energy Savings (kW, kWh, Therms)
 - Actual year-to-date Gross and Net Energy Savings (kW, kWh, Therms)
 - Forecasted Financial Commitments • Actual year-to-date financial expenditures
 - List of Committed and Installed Projects with the estimated completion date
 - Depth of interventions (energy savings as a fraction of total site consumption)
 - Greenhouse gas emissions savings (metric ton of CO2 reduction)
 - Total program savings (kWh) by COGS as well as total for the Program
 - Total budget reserved (from enrolled projects) by COGS as well as total for the Program
- Analysis of software-related performance and recommendations for future improvements.

EXHIBIT “B”

SCHEDULE OF SERVICES

AESC expects to complete and deliver the work detailed within this proposal in the timeline noted below, provided that I-REN and the program implementer provide timely feedback and approvals on their deliverables. We will finalize this schedule with I-REN during the project kick-off meeting following contract execution.

TIMELINE

1	Kick-off Meeting	2 weeks
2	Functional Specification Approval	6 weeks
3	Preliminary Review	10 weeks
4	Beta Release	14 weeks
5	Go Live	18 weeks

EXHIBIT “C”

COMPENSATION
BILLING RATES

Pricing

AESC proposes the following pricing mechanisms:

- A \$10,000 per month fee that includes AESC launching, hosting, maintaining, and customizing the software to perform the functionalities mentioned in this proposal
- \$1,000 per iPad installed at the suggested locations
- An up to \$80,000 per year T&M budget to perform any additional customization and reporting requested as part of Task 4 (if beyond the current capabilities of the software).

As a result, we estimate \$55,000 for the iPad kiosks; \$360,000 for software; and \$240,000 for special T&M tasks over the 3-year program for a total of \$655,000.

T&M will be charged per the table below; and the hourly rate will be hold for the three years 2023-2024-2025:

Director/Principal	\$273
Senior Program Manager	\$237
Program Manager/Engineer Section Lead	\$223
Senior Engineer	\$205

Attachment 3a

IREN Codes & Standards RFP 22-09

REQUEST FOR PROPOSAL NUMBER 22-09

Inland Regional Energy Network (I-REN)
Codes & Standards Sector

August 9, 2022



Western Riverside Council of
Governments 3390 University
Avenue, Suite 200
Riverside, CA 92501
(951) 405-6700
wrcog.us

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1. SUMMARY

In 2012, the California Public Utilities Commission (CPUC) authorized a new model for administering energy efficiency programs outside the traditional Investor-Owned Utility (IOU) administered paradigm. These new models are known as Regional Energy Networks (RENs).

The CPUC sought for the RENs to address the following three operational areas:

- 1) Undertake programs that the IOUs cannot or do not intend to do.
- 2) Target hard to reach areas and disadvantaged communities.
- 3) Design programs that have the potential to be scaled to larger geographic areas.

In addition to these directions provided by the CPUC, RENs were also directed to address Workforce Education & Training (WE&T); Technology development; and programs within the field of Water / Energy Nexus. The goal of a REN is to implement and administer energy efficiency programs the current IOUs cannot or do not have the available resources to implement within their service territory. In addition to this goal, RENs look to fill the economic and geographical gaps of distant, hard to reach, and disadvantaged communities that IOUs cannot access or have a difficult time accessing to promote energy efficiency opportunities.

For the past two years, the Western Riverside Council of Governments (WRCOG) as the lead contracting agency, has partnered with and has been strategizing with the Coachella Valley Association of Governments (CVAG) and San Bernardino Associated Governments (SANBAG) on development of a REN to service the Inland counties of Riverside and San Bernardino, with WRCOG acting as the lead agency. This tri-COG group hereby collectively referred to as the Inland REN ("I-REN" or "I-REN Team") for the purposes of this program, has submitted a Business Plan to the CPUC, and has been approved to become a REN Program Administrator (PA), with the desire to address CPUC goals and objectives described in rulemaking 13-11-005 concerning Energy Efficiency Rolling Portfolios, Policies, Programs, Evaluation, and Related Issues. The I-REN Business Plan addresses three sectors – the Public Sector, the Codes & Standards Sector, and the Workforce, Education, & Training Sector. Throughout these sectors there will be a strong focus on hard-to-reach communities and disadvantaged communities within the I-REN territory.

The I-REN Business Plan was approved by the CPUC on November 18, 2021, with a budget of \$65 million to be funded through program years 2022 to 2027. The I-REN Team is seeking competitive bids for one or more consultants to assist the I-REN Team with program design, outreach, implementation, and other tasks described in the Scope of Work for the following programs and services:

1. Codes & Standards Training & Education Program
2. Codes & Standards Technical Support Program

Proposers responding to this RFP may bid on one or more of the scopes of work listed above and detailed further in this document.

WRCOG is a joint powers authority whose purpose is to unify Western Riverside County so that it can speak with a collective voice on important issues that affect its members. Representatives from eighteen (18) cities in Western Riverside County, the Riverside County Board of Supervisors, and the Eastern and Western Municipal Water Districts have seats on the WRCOG Executive Committee, the policy setting Board for the Agency. The Riverside County Superintendent of Schools is an ex-officio member of the Executive Committee. As a Joint Powers Authority, WRCOG examines a range of regional matters critical to Western Riverside County's future.

WRCOG also administers the Riverside County Habitat Conservation Agency, managing more than

40,000 acres of ecosystem to protect the endangered Stephens' Kangaroo Rat.

SANBAG is a joint powers authority representing its member agencies on regional issues in San Bernardino County. SANBAG member agencies include 23 cities and San Bernardino County.

CVAG is also a joint powers authority and is the regional planning agency coordinating government services within the Coachella Valley and Eastern Riverside County. CVAG's member agencies include 10 cities, Riverside County, the Agua Caliente Band of Cahuilla Indians, the Cabazon Band of Mission Indians, the Torres Martinez Desert Cahuilla Indians, and the Twenty-Nine Palms Band of Mission Indians.

For more information about WRCOG please visit the website at www.wrcog.us.

For more information about SANBAG please visit the website at <http://gossbcta.com>.

For more information about CVAG please visit the website at www.cvag.org.

2. SUBMISSIONS

All Proposal must be submitted via PlanetBids by the Proposal Due Date listed in Section 6, Schedule of Events, **no later than 5:00 p.m. Pacific Standard Time (PST)** at <https://pbsystem.planetbids.com/portal/36405/portal-home>.

Proposals shall include a Table of Contents listing all sections, disclosures, etc., and their corresponding page numbers. **Please review Section 12 for additional details.** It shall be the responsibility of the Proposer to submit the Proposal and all other required items specified in this RFP via [PlanetBids](#) at or before 5:00 p.m. PST on the Proposal Due Date listed in Section 6, Schedule of Events. WRCOG will not accept any Proposal received after the Proposal submission time and date.

3. QUESTIONS AND ANSWERS REGARDING THIS RFP

Any questions concerning technical specifications or Scope of Work requirements must be submitted in [PlanetBids](#) on the date listed in the Schedule of Events.

4. PRE-PROPOSAL MEETING

WRCOG will be hosting a pre-Proposal meeting on the Pre-Proposal Meeting Date listed in Section 6, Schedule of Events, to discuss this RFP. The meeting will convene via Zoom at:

<https://us02web.zoom.us/j/81202939285?pwd=Z3RGM3dRcWZ3TFpiNEI4a3dCQ1ITQT09>

Participation is encouraged but not mandatory.

5. BUDGET PARAMETERS

I-REN's budget was established by the CPUC when the I-REN Business Plan was approved on November 18, 2021. I-REN's approved budget is further broken down by sector and though there is limited flexibility to shift funds within a sector, we cannot exceed the annual approved amounts without a formal CPUC filing. The not-to-exceed amounts for this RFP are as follows:

1. Codes & Standards Training & Education Program shall not exceed \$1,750,000, for the initial three-year term of the agreement.
2. Codes & Standards Technical Support Program shall not exceed \$875,000, for the initial three-year term of the agreement.

Proposer understands that Proposer is not entitled to the full not-to-exceed amounts outlined in this

section. The not-to-exceed amount merely represents the maximum funding available within the applicable budget sectors for these particular services. Pursuant to Section 11 of this RFP, the overall cost of Proposer's Proposal will be a primary consideration in the evaluation and selection of the award of the agreement. It is also possible that these not-to-exceed amounts may be altered based on budget needs and WRCOG reserves the right to alter the not-to-exceed amounts in light of budget considerations.

The contract term for this RFP shall be three years from the date of execution with the option of two one-year extensions.

6. SCHEDULE OF EVENTS

Event	Date
1. RFP Distribution	8/09/22
2. Pre-Proposal Meeting via Zoom	8/22/22 at 2:00 p.m. PST
3. Questions from vendors about scope or approach due	8/23/22 at 5:00 p.m. PST
5. Answers to questions from vendors about scope or approach posted to the PlanetBids portal	8/30/22
6. Proposal Due Date	9/16/22 at 5:00 p.m. PST
7. Review of Proposals	9/19/22 – 9/30/22
8. Potential Interviews	10/03/22 – 10/07/22
9. Anticipated decision and selection of vendor(s)	10/10/22 – 10/21/22
10. Anticipated commencement date of work	11/05/22 - 11/15/22

The interview schedule may be staggered, depending on the number of Proposals received, and could span multiple weeks.

7. WRCOG RIGHTS

Award of a contract resulting from this RFP will be based upon the most responsive Proposal or Proposals which will be most advantageous to WRCOG in terms of cost, functionality, and effectiveness in meeting goals and objectives, and other factors as specified in this RFP.

A. WRCOG reserves the right to:

- Disqualify any and all Proposals that are not submitted in accordance with the required format described in this RFP.
- Reject any and all Proposals submitted.
- Request additional information.
- Issue Addenda to this RFP.
- Award all or part of the work contemplated in this RFP.
- Remedy errors in the RFP.
- Cancel the entire RFP.
- Issue a subsequent RFP.
- Approve or reject the use of a particular subcontractor / supplier.

- Negotiate with any, all, or none of the Proposers. If WRCOG is unable to negotiate final contract Terms and Conditions that are acceptable to WRCOG, WRCOG reserves the right to award the contract to another Proposer(s).
 - Accept other than the lowest priced Proposal.
 - Award a contract without interviews, discussions, or negotiations.
 - Award a contract to one or more Proposers.
- B. WRCOG may, at its discretion, and without explanation to prospective Proposer(s), at any time, choose to discontinue this RFP without obligation to such prospective Proposer(s).
- C. All Proposers should be aware of the insurance requirements for Contract Award. The Certificate of Insurance must be provided by the successful Proposer(s) prior to Contract Award. A contract may not be awarded if insurance requirements are not met.
- D. WRCOG does not reimburse for the cost of Proposal preparation, even in the event of RFP cancellation.
- E. Communication between the Proposer(s) and any member of the Proposal Review Committee during the selection process is prohibited, except in the manner expressly authorized in this RFP. Violation of this restriction is grounds for disqualification of the communicating Proposer's(s') Proposal.
- F. Every Proposal submitted is considered a firm offer that must be valid for a minimum of ninety (90) calendar days.
- G. If applicable, WRCOG prefers that software developed under WRCOG's contract not incorporate proprietary and / or third-party software components. This does not preclude the development of deliverables, which interface with commonly-available, off-the-shelf software. However, contractors must determine in advance whether WRCOG already has, or is willing to procure, appropriate licenses for any proprietary and/or third-party software that would be required. Contractors must also provide the impacts of any enhancements and upgrades. WRCOG will require delivery of documentation and source code for all electronic intellectual property developed under a WRCOG contract prior to releasing final payment to the contractor/consultant.

8. ADDENDA

WRCOG reserves the right to revise the RFP documents. Any WRCOG changes to the requirements will be made by written addenda to this RFP. Any written addenda issued pertaining to this RFP shall be incorporated into the terms and conditions of any contract resulting from this RFP. Addenda will be posted on PlanetBids. It is the responsibility of the Proposer(s) to check PlanetBids to determine if any addenda have been issued. WRCOG will not be bound to any modifications to or deviations from the requirements set forth in this RFP as the result of oral instructions. Proposers shall acknowledge receipt of addenda in their Proposal. Failure to acknowledge receipt of all addenda may cause the Proposal to be deemed non-responsive to this RFP and be rejected without further evaluation.

9. NOTIFICATION OF RIGHT TO PROTEST CONTRACT AWARD

Proposer(s) have the right to protest the contract award. A written protest must be filed with WRCOG's Energy & Environmental Director within five (5) working days after the decision of award is made. WRCOG will not accept any verbal protests. The protest must be a detailed, written statement of the protest grounds and reference the RFP Number and name of the designated Contracts Administrator. Grounds for a protest are that WRCOG failed to follow the selection procedures and adhere to requirements specified in this RFP or any addenda or amendments, there has been a violation of conflict of interest as provided by California Government Code Section 87100 et seq., or violation of State or Federal law. WRCOG will only consider those specific issues addressed in the

written protest. The protest must be submitted to WRCOG via 1) certified mail and 2) e-mail using the contact information provided below.

Name	Casey Dailey, Director of Energy & Environmental Programs
Address	3390 University Avenue, Suite 200, Riverside, CA 92501
Phone	(951) 405-6720
Email	cdailey@wrcog.us

A written response from WRCOG will be directed to the protesting Proposer(s) within fourteen (14) calendar days of receipt of the protest, advising of the decision with regard to the protest and the basis of the decision.

10. CONFLICTS OF INTEREST

All Proposers responding to this RFP must avoid organizational conflicts of interest which would restrict full and open competition in this procurement. An organizational conflict of interest means that due to other activities, relationships, or contracts, a Proposer is unable, or potentially unable, to render impartial assistance or advice to WRCOG; a Proposer’s objectivity in performing the work identified in the Scope of Work is or might be otherwise impaired; or a Proposer has an unfair competitive advantage. In addition to the above requirements, all Proposers shall disclose any financial, business, or other relationship with WRCOG, WRCOG’s member agencies, their respective elected decision-makers, and/or their respective staff that may have an impact upon the outcome of the procurement process and/or the proposed agreement, including but not limited to, past communications with any of the parties listed in this Section 10 that relate to the subject of this RFP.

11. CRITERIA

Any award to be made pursuant to this RFP will be based upon the Proposal with appropriate consideration given to operational, technical, cost, and management requirements. Evaluation of offers will be based upon each Proposer’s responsiveness to the RFP and the total price quoted for all items covered by the RFP.

The following elements will be the primary considerations in evaluating all submitted Proposals and in the selection of a Proposer(s):

- A. Completion of all required responses in the correct format.
- B. Qualifications and experience with similar projects and clients.
- C. Key staff that will actually be working on the proposed tasks.
- D. The extent to which Proposer’s proposed solution fulfills WRCOG-stated requirements as set forth in this RFP.
- E. An assessment of the Proposer’s ability to deliver the indicated services in accordance with the specifications set out in this RFP.
- F. The Proposer’s stability, experience, and record of past performance in delivering relevant services.
- G. Availability of sufficient high-quality personnel with the required skills and experience for the specific approach proposed.
- H. Overall cost of Proposer’s Proposal.

12. PROPOSAL INFORMATION, ORGANIZATION, AND CONTENT

Proposer’s submittal in response to this RFP will be incorporated into a final agreement between WRCOG and the selected Proposer(s). All Proposals shall contain, at a minimum, the following

information:

- A. Title Page
- B. Table of Contents
- C. Cover Letter
- D. Firm Capabilities
- E. Approach and Understanding of the Scope of Work Plan
- F. Appendix A: References
- G. Appendix B: Project Team Staffing
- H. Appendix C: Company Overview

The page limit for Items A - F is **45 total pages**. There is no page limit on appendices.

Title Page

The following must be provided on the title page:

- RFP number
- Title of the project
- Name and address of proposing firms and/or individuals
- Phone and Fax of Proposer
- Primary contact person
- Email address of the primary contact person
- Signature of the individual authorized / obligated to commit the Proposer to this project.

Table of Contents

A clear identification of the materials by section and page numbers are to be included in the Table of Contents.

Cover Letter

The cover letter should be brief (two pages maximum) and outline the Proposer's general approach, qualifications, and experience. In order to address the needs of this procurement, WRCOG will accept teams to propose in which proposing firms work cooperatively in presenting integrated solutions. Proposer's(s') team arrangements may be desirable in that they will enable the companies involved to complement each other's unique capabilities, while offering the best combination of performance, cost, and delivery for financial assistance being provided under this RFP. WRCOG will recognize the integrity and validity of Proposer's(s') team arrangements provided that:

- The arrangements are clearly identified and relationships are fully disclosed; **and**
- A primary (lead) individual is designated who will be fully responsible for all contract performance.

Firm Capabilities

All Proposals must provide a comprehensive, yet concise description of the Proposer's(s') individuals' capabilities including the following:

- A. A track record of providing successful assistance on similar disciplines and tasks.

- B. A track record of providing successful services to similar governmental entities.
- C. Descriptions of the key staff that will actually be working on the proposed tasks and their experience working on similar issues.
- D. If responding as a firm, the ownership, size, and location of the office responsible for providing services to WRCOG.
- E. If responding as a firm, its legal organization (e.g., corporation, partnership) and year of incorporation.
- F. If responding as a firm, a description of the firm's equal employment opportunity and non-discrimination policies.
- G. If responding as firm, a summary of the firm's minority and female recruitment efforts and the percentage of minority and female officers, partners, or the equivalent.
- H. A statement, in one page or less, of any other relevant factors that should be considered by WRCOG in evaluating the Proposal.

Proposals will be evaluated by a Proposal Review Committee on the basis of the Proposer's(s') skills and experience, proposed cost, presentation and completeness of Proposal, and the ability and willingness to work with WRCOG, its management, and references.

Proposers to this RFP should be mindful that WRCOG's selection process prioritizes experience, knowledge, and abilities of key individuals more so than experience associated with a particular firm. WRCOG has found that successful completion of a project is heavily reliant on the key staff that will be working with WRCOG on a regular basis.

Approach and Understanding of the Scope of Work Plan

Proposers are encouraged to propose enhancements or procedural or technical innovations to the Scope of Work that do not materially deviate from the objectives or required content of the project.

WRCOG is requesting that the response to this portion of the RFP be limited to 30 total pages.

There is no page limit on appendices.

Proposer(s) shall:

- A. Provide a narrative, which addresses the Scope of Work, and shows understanding of WRCOG's needs and requirements.
- B. Describe the approach to completing the tasks specified in the Scope of Work. The work plan shall be of such detail to demonstrate the Consultant's ability to accomplish the project objectives.
- C. Sequentially outline the activities that would be undertaken to complete the tasks and specify who would perform the tasks.
- D. Include a timeline for the proposed work. Note that I-REN is interested in having a "soft launch" of one or more of its programs by the end of 2022, with full deployment for 2023.
- E. Furnish detailed and itemized pricing for the proposed work, including an estimate of hours required to complete the specified tasks along with a total anticipated budget.
- F. Identify methods that consultant will use to ensure quality control as well as budget and schedule control for the project.
- G. Identify any special issues, problems, or risks that are likely to be encountered in this project and how the Proposer would propose to address them.

Also, please provide hourly billing rates for staff you are proposing to include on this RFP for services not directly identified in the Scope of Work.

Appendix A: References

Please provide three (3) references, including names and contact information. References should not include any WRCOG staff or WRCOG Committee members.

Appendix B: Project Team Staffing

Please include biographies and relevant experience of key staff who would be assigned to the project. Please describe coverage levels of employees who would be assigned to this project. Affirm that no employees working on the engagement have ever been convicted of a felony.

Appendix C: Company Overview

Please provide the following for your company:

- Official registered name (Corporate, D.B.A., Partnership, etc.), Dun & Bradstreet Number, Primary and secondary SEC numbers, address, main telephone number, toll-free number(s), and fax number(s).
- Primary key contact name, title, address (if different from above address), direct telephone, and fax number(s).
- Person authorized to contractually bind the organization for any Proposal against this RFP.

13. DETAILED SCOPE OF WORK AND BUDGET

Bidders may submit Proposals for **one or both** the Scopes of Work (SOWs) included in this RFP. The requested SOWs are listed here and detailed in the sections following the Codes & Standards background information below.

1. Codes & Standards Training & Education Program
2. Codes & Standards Technical Support Program

I-REN's Codes & Standards programs will be developed and implemented in close coordination with each other and with other I-REN programs and REN-wide activities, regardless of the number of consultants hired through this RFP.

Tasks listed within each SOW are provided as guidelines. Proposers may recommend supplemental tasks but must explain their rationale. For SOW(s) included in Bidder's proposal, all tasks and deliverables must be identified as distinct line items with accompanying narrative and costs.

I-REN Codes & Standards Background

I-REN's Codes and Standards offerings will serve the members of the three Councils of Government (COGs) represented in I-REN, including the Coachella Valley Association of Governments (CVAG), San Bernardino Associated Governments (SANBAG), Western Riverside Council of Governments (WRCOG), and the cities, school districts, water districts, special districts, and tribal communities they represent.

Energy code enforcement has historically been difficult for local jurisdictions, particularly smaller communities with fewer resources. Conflicting priorities and a focus on life and safety codes relegates energy code to a secondary (or tertiary) position. I-REN's service territory includes many jurisdictions that face significant challenges in enforcing energy codes and standards with their current resources and capacity. These jurisdictions are small in population size, geographically dispersed, challenged by

extreme climate conditions, and disadvantaged by pollution and other factors. The same challenges also apply to development of local reach codes.

As an organization led by and dedicated to serving local governments, I-REN has a unique opportunity to provide flexible and adaptable solutions to help bridge the gap and assist these jurisdictions. I-REN's Codes & Standards initiatives will offer locally focused training, education, and tools to support codes and standards implementation, enforcement, and compliance activities, as well as development and implementation of reach codes and model ordinances. I-REN's familiarity with its communities will be important to inform and deliver regionally relevant program offerings that may not otherwise be available. I-REN brings existing relationships with important partners in the region, such as local councils, building department staff, building professionals, colleges, not-for-profit organizations, NGOs, CBOs, trade organizations, and regional entities. I-REN will also focus on serving hard-to reach, disadvantaged, underserved, tribal, and environmental and social justice communities.

I-REN's Codes & Standards Program Objectives

- a. Improve the understanding of energy efficiency codes and standards among local building departments and the building industry to increase implementation and compliance and enforcement.
- b. Make code compliance and enforcement a valuable element of the region's energy efficiency goal attainment with engagement regionwide.
- c. Deliver locally informed resources and tools that streamline code compliance and enforcement and increase permit closeout.
- d. Provide information to local governments on policy tools available at the local level, including reach codes.

SOW 1: Codes & Standards Training & Education Program

This SOW includes professional services for the tasks and deliverables described below, for implementation of I-REN's Codes & Standards Training & Education Program. This program is a non-resource program to establish and implement training and education for building department staff and the building industry to support, understand, and effectively implement energy efficiency codes and standards, including where gaps exist in the Statewide IOU Compliance Improvement program and enforcement activities. The program will also include outreach to engage, educate and involve regional construction firms, architects, industry experts, and building departments, and support compliance and enforcement within regional energy efficiency programs and customers.

To implement the program, the consultant will assist in developing a training curriculum to address gaps in compliance with current requirements and offer ongoing training on changes and trends in codes and standards. The consultant will promote training through I-REN governing agencies' existing marketing channels, through local government partnerships, and through building industry communication networks. The consultant will also collaborate with local governments to design and deliver effective messaging to building departments and private industry during code transitions. It is imperative that the consultant be knowledgeable of existing IOU programs and offerings when developing I-REN's programs to avoid duplication of efforts, which is a requirement of the CPUC.

Task 1.1: Program Design

The consultant will provide leadership for program design activities in collaboration with the I-REN team. The program's design must be aligned with I-REN's Energy Efficiency Business Plan (I-REN BP),¹ CPUC Decision 21-11-013 approving the I-REN BP,² and all other applicable requirements for REN

¹ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

² D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

energy efficiency programs. The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN Team within two weeks of final contract execution.
- Develop a program delivery model that supports I-REN's goals for the Training & Education Program, overcomes public and private sector participation barriers, and prioritizes service to vulnerable communities.
- Support I-REN in engaging with local and regional stakeholders to ensure the program design fits the needs of local governments and other stakeholders in the region.
- Define program eligibility guidelines and program team roles; document program processes and procedures.
- Establish coordination process with other I-REN energy efficiency programs, services, and implementers, e.g., the Codes & Standards Technical Support Program included in this RFP, to maximize program participation and benefits to customers.
- Identify administrators of other Codes & Standards programs and related offerings in the region and establish coordination process to assist I-REN public and private sector customers with enrolling and participating in those programs.
- Develop participant forms and other collateral.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.
- Assist I-REN in the facilitation of a regularly scheduled Codes & Standards Working Group meeting.
- Track and document quantifiable measures to be used to report the successes of the programs.
- Whenever possible, incorporate existing successful models and programs into the I-REN program portfolio.

Anticipated deliverables:

- Kick-off meeting agenda and notes.
- Develop a Program Manual.
- Provide Implementation Plan content, e.g., program process flow, diagram, logic model.
- Coordination process documentation.
- Develop participant forms and other collateral.
- Provide monthly and quarterly status reports.
- Provide meeting agendas and status updates.

Task 1.2: Outreach & Engagement

Program-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable. The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials and recommend needed changes.
- Recommend and assist in the development of marketing and outreach collateral in various formats targeted to Codes & Standards customer audiences.
- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier.
- Assist in the development of marketing content for e-communicators, social media, and other channels to promote the training sessions, online Code Hub and building professionals' regional forums.
- Support outreach to potential speakers and presenters.
- Identify and implement strategies for outreach to local jurisdictions and agencies and building professionals to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.
- Identify Codes & Standards champions and build relationships with them.

- Set targets and milestones for outreach and engagement (including hard-to-reach communities) and report on progress.
- Conduct regular (e.g., weekly, or biweekly) meetings with I-REN to provide status updates.

Anticipated deliverables:

- Develop outreach plan with targets and milestone schedule.
- Provide content for an e-newsletter targeted to local government audiences.
- Provide comprehensive website content including a listing of events, resources and tools for local governments and building professionals.
- Develop content and strategy for targeted use of social media, and other channels to promote Codes & Standards resources
- Develop case studies highlighting local success stories.
- Assist with other outreach materials as recommended by consultant.
- Provide monthly and quarterly status reports.
- Provide meeting agendas and status updates.

Task 1.3: Program Implementation

The consultant will lead all Training & Education Program implementation activities in coordination with the I-REN team. The consultant will develop a training curriculum to address gaps in compliance with current Codes & Standards requirements and changes and trends in Codes & Standards. The consultant will assist I-REN in supporting local governments and the building industry during transitions to new codes to deliver effective messaging and resources and increase timely compliance with updated requirements. The consultant will also foster the development of an online Code Hub community for sharing best practices amongst building departments and the building industry and assist with coordination of Regional Forums. The consultant will be responsible for each activity listed below:

- Deliver a minimum of four training sessions and one Regional Forum per year in each of I-REN's subregions.
- Collate information from attendee surveys following each training session.
- Perform updates of training module content and delivery mechanisms to ensure trainings are responsive to key target audience needs.
- Support participation in online training modules.
- Support coordination with International Code Council (ICC), and any required curriculum updates, to facilitate the ability of I-REN to award Continuing Education Units to attendees of I-REN trainings.
- Track and provide information on California and national codes, including updates to Title 24 Parts 6 (California Energy Code) and 11 (California Green Building Standards Code).
- Perform updates to training curriculums to reflect adopted changes to Title 24 Parts 6 and 11.
- Collect, report, and maintain metrics relative to training and education, including numbers of sessions, numbers of and contact information for attendees, and other relevant metrics as needed.
- Provide recommendations, based on analysis of metrics and knowledge of the field, for improvements to I-REN's training program and topics for potential new training sessions.
- Consistent with available budget and direction from I-REN, develop new training modules for in-person or online delivery.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.

Anticipated deliverables:

- Develop Training & Education Program Implementation Plan that includes timeframe/schedule, roles and responsibilities and proposed curriculum.
- Provide delivery of a minimum of 12 training sessions and three Regional Forums per year throughout the I-REN territory.

- Provide updates of training curriculum to improve the program and to reflect changes to Title 24 Parts 6 and 11.
- Provide assistance with event logistics and follow up activities.
- Provide documentation of participant interactions.
- Provide monthly and quarterly status reports.
- Provide meeting agendas and status updates.

Task 1.4: Other Services

The consultant will also be responsible for the activities listed below:

- Provide program-specific content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum (JCM), Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Collect program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Contribute to program performance analysis and evaluation, measurement, and verification (EM&V) activities for tracking program achievements and informing continuous improvement.

Anticipated deliverables:

- Develop program-specific content and edits or updates to content for I-REN regulatory filings.
- Provide program data in alignment with CPUC reporting templates.
- Document metrics, indicators, and other performance measurements.
- Provide analysis of program performance and recommendations for future program improvements.

SOW 2: Codes & Standards Technical Support Program

This SOW includes professional services for the tasks and deliverables described below, for implementation of I-REN's Codes & Standards Technical Support Program. This program is a non-resource program to develop technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes to support improved enforcement and compliance. I-REN will also develop regionally appropriate model ordinances, vet and refine them with participating local governments, provide ongoing technical assistance for adoption and implementation, and deliver model ordinance updates to reflect the triennial code cycle.

To implement the program, the consultant will assist in developing technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes. This includes suggesting strategy, conducting research, designing programs and services, and supporting implementation of programs and services to increase energy code compliance rates. The consultant will promote training through I-REN governing agencies' existing marketing channels, through local government partnerships, and through building industry communication networks. The consultant will also assist I-REN in improving consistency in code enforcement and compliance resources across the region by facilitating cooperation among local governments.

Task 1.1: Program Design

The consultant will provide leadership for program design activities in collaboration with the I-REN team. The program's design must be aligned with I-REN's Energy Efficiency Business Plan (I-REN BP),³

³ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

CPUC Decision 21-11-013 approving the I-REN BP,⁴ and all other applicable requirements for REN energy efficiency programs. The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN team within two weeks of final contract execution.
- Develop a program delivery model that supports I-REN's goals for the Technical Support Program, overcomes public and private sector participation barriers, and prioritizes service to vulnerable communities.
- Support I-REN in engaging with local and regional stakeholders to ensure the program design fits the needs of local governments and other stakeholders in the region.
- Define program eligibility guidelines and program team roles; document program processes and procedures.
- Establish coordination process with other I-REN energy efficiency programs, services, and implementers, e.g., the Codes & Standards Training & Education Program included in this RFP, to maximize program participation and benefits to customers.
- Identify administrators of other Codes & Standards programs and related offerings in the region and establish coordination process to assist I-REN public and private sector customers with enrolling and participating in those programs.
- Develop participant forms and other collateral.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.
- Assist I-REN in the facilitation of a regularly scheduled Codes & Standards Working Group meeting.
- Track and document quantifiable measures to be used to report the successes of the programs.
- Whenever possible, incorporate existing successful models and programs into the I-REN program portfolio.

Anticipated deliverables:

- Kick-off meeting agenda and notes.
- Develop a program Manual.
- Provide Implementation Plan content, e.g., program process flow, diagram, logic model.
- Coordination process documentation.
- Develop participant forms and other collateral.
- Provide monthly and quarterly status reports.
- Provide meeting agendas and status updates.

Task 1.2: Outreach & Engagement

Program-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable. The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials and recommend needed changes.
- Recommend and assist in the development of marketing and outreach collateral in various formats targeted to Codes & Standards customer audiences.
- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier.
- Assist in the development of marketing content for e-communicators, social media, and other channels to promote the Technical Support Program.
- Identify and implement strategies for outreach to local jurisdictions and agencies and building professionals to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.

⁴ D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

- Collaborate with local governments, tribes, and special districts and building professionals to design and deliver messaging to the community to promote local leadership in Codes & Standards compliance by highlighting local success stories.
- Set targets and milestones for outreach and engagement (including hard-to-reach communities) and report on progress.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.

Anticipated deliverables:

- Develop outreach plan with targets and milestone schedule.
- Provide content for an e-newsletter targeted to local government audiences.
- Provide comprehensive website content including a listing of events, resources and tools for local governments and building professionals.
- Provide content and strategy for targeted use of social media, and other channels to promote Codes & Standards resources
- Develop case studies highlighting local success stories.
- Provide assistance with other outreach materials as recommended by consultant.
- Provide monthly and quarterly status reports.
- Provide meeting agendas and status updates.

Task 1.3: Program Implementation

The consultant will lead all Technical Support Program implementation activities in coordination with the I-REN team. The consultant will help I-REN address the areas of greatest need for improved code compliance, in collaboration with local governments and the building industry. The consultant will also provide general support for reach code development and implementation. The consultant will be responsible for each activity listed below:

- Develop and deploy effective survey instruments to gather data and use that data to inform the design of resources to assist building departments and industry professionals.
- Work with local jurisdictions' permit systems and data.
- Work with local jurisdictions, CEC, CALBO, HERS providers, and other key stakeholders on Title 24 Parts 6 and 11 documentation.
- Promote web and mobile permitting tools (e.g., SolarAPP+, CodeCycle) in training sessions and outreach materials.
- Promote use of permit guides or other materials (e.g., checklists, frequently asked questions, e-newsletters) to improve regional best practices for compliance improvement, including:
 - a. Support distribution and placement of guides for public and staff use with local building departments;
 - b. Update guides as necessary based upon feedback from users and participating agencies and businesses;
 - c. Consistent with available budget and I-REN direction, create new guides or other materials for priority areas of compliance improvement.
- Develop training curriculum to address gaps in compliance with current Codes & Standards requirements, in coordination with the Codes & Standards Training & Education Program included in this RFP.
- Assist in developing model reach code ordinances for each Inland Empire climate zone; consistent with available budget and direction from I-REN, tailor ordinances for specific cities based on their building stock, calculate energy, cost and GHG reductions, document cost-effectiveness studies, and prepare adoption, outreach, and implementation materials, in each case using materials developed by the Statewide Codes & Standards Program where available.
- Track and provide information on California and national grant funding opportunities that support improved code compliance.

- Collaborate with local governments, tribes, and special districts and building professionals to design and deliver messaging to the community to promote local leadership in Codes & Standards compliance by highlighting local success stories.
- Collect and analyze metrics for all compliance improvement activities and use the results to suggest changes and improvements.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.

Anticipated deliverables:

- Develop survey instruments.
- Provide training programs in coordination with the Codes & Standards Training & Education Program included in this RFP.
- Develop permit guides.
- Assist with reach code adoption and implementation materials.
- Provide documentation of participant interactions.
- Provide bi-annual reports on compliance improvement efforts, including metrics and recommendations for program improvement.
- Provide monthly and quarterly status reports.
- Provide meeting agendas and status updates.

Task 1.4: Other Services

The consultant will also be responsible for the activities listed below:

- Provide program-specific content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum (JCM), Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Collect program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Contribute to program performance analysis and evaluation, measurement and verification (EM&V) activities for tracking program achievements and informing continuous improvement.

Anticipated deliverables:

- Provide program-specific content and edits or updates to content for I-REN regulatory filings.
- Provide program data in alignment with CPUC reporting templates.
- Document and provide metrics, indicators, and other performance measurements.
- Provide analysis of program performance and recommendations for future program improvements.

14. CONTACT AND REQUESTS FOR CLARIFICATION

The principal contact for WRCOG will be Benjamin Druyon, Program Manager, (951) 405-6727, bdruyon@wrcog.us, or a designated representative, who will coordinate the assistance to be provided by WRCOG to the Proposer. Throughout the RFP Process, Proposer may not contact the following parties regarding this procurement: (1) any other members of WRCOG's staff; (2) members of WRCOG's legislative body; (3) and/or representatives of WRCOG's member agencies that may vote on or influence the proposed agreement. Any and all inquiries and comments regarding this RFP must be communicated pursuant to the process described in this Section 14. WRCOG may, in its sole discretion, disqualify any Proposer who engages in any prohibited communications.

All questions, requests for interpretations or clarifications, either administrative or technical must be submitted via the [WRCOG PlanetBids portal](#). All questions, requests for interpretations or clarifications, if answered, will be answered in writing, conveyed to all interested firms, and posted on the WRCOG PlanetBids portal. To ensure a response, questions must be received via the WRCOG

PlanetBids portal by the date and time listed in Section 6 – Schedule of Events. Any communications submitted past this deadline will not be answered.

15. TERMS AND CONDITIONS

Any Proposer or person submitting a Proposal shall state their willingness to agree to the following terms and conditions:

- A. The awardee must be fully committed to the mission of I-REN.
- B. Termination - A termination agreement is to be negotiated between the parties that includes provisions on termination for cause and termination for convenience.
- C. Oral Presentations - Any individual or firm who submits a Proposal in response to this RFP must be willing to make oral presentations related to contract-related activities at the request of the I-REN Team or management.
- D. Compensation - The total value of this contract is undefined and contains the option of renewal at the discretion of WRCOG. The schedule of compensation will be mutually negotiated. The compensation plan will include payment based upon an assessment of the vendor's attainment of specific, measurable outcomes or "performance benchmarks," which will be mutually developed between WRCOG and the selected Proposer(s).

16. WRCOG STANDARD PROFESSIONAL SERVICES AGREEMENT

The successful Proposer(s) will be required to sign WRCOG's standard Professional Services Agreement (PSA) in order to receive the contract award. Proposer(s) must identify in their Proposal any concerns or objections they would have with any of the PSA terms and conditions if selected for contract award. Proposer(s) shall propose alternative language for consideration in their Proposal. If WRCOG is unable to negotiate final contract Terms and Conditions that are acceptable to WRCOG, WRCOG reserves the right to award the contract to another Proposer. The agreement is available in PlanetBids in the Documents tab as part of this RFP.

17. DIVERSE BUSINESS ENTERPRISES (DBE)

Consistent with the California Public Utilities Code and California Public Utilities Commission (CPUC) policy objectives as set out in CPUC General Order 156, Proposers that execute a contract with WRCOG for I-REN work will be required to complete a Supplier Diversity Questionnaire after the contract has been executed. WRCOG asks that all Proposers refrain from directly or indirectly providing this information when responding to this RFP.

WRCOG encourages all eligible Proposers to get certified with the CPUC as a diverse business enterprise.

For overview information on the CPUC Supplier Diversity Program, please visit the program homepage (<https://www.cpuc.ca.gov/supplierdiversity/>). For information on the certification process and requirements, please visit the Certifications page (<https://www.cpuc.ca.gov/Certifications/>).

Attachment A: Scoring Criteria

Inland Regional Energy Network (I-REN) Codes & Standards Program Services

Evaluation Criteria	Max. Possible Points
<u>TECHNICAL APPROACH</u> • Tasks & approach clearly described • Creative/innovative approach • Project intent has been met	30
<u>CONSULTANT FIRMS</u> <u>Prime Consultant</u> • Familiar with regional and local issues • Experience with similar projects of the same size and scope <u>Sub-Consultants (if any)</u> • Each sub provides unique service(s) to the team • Subs are fully capable of performing their tasks	30
<u>PROJECT MANAGEMENT</u> • Qualifications of key individuals • Time commitment of key individuals	15
<u>PROJECT COSTS</u> • Realistic cost for services to be performed	20
<u>REFERENCES</u> • Similar projects completed on time and within budget	5
TOTAL	100

Attachment 3b

Frontier Energy Codes and Standards Proposal

A. TITLE PAGE

Inland Regional Energy Network (I-REN) Codes & Standards Sector

RFP No. 22-09

September 16, 2022

Prepared for:



Primary Contact: Nancy Barba, Director

nbarba@frontierenergy.com

213-213-1978

A handwritten signature in black ink that reads "Jean Krausse".

Authorized Signature:

Jean Krausse, Vice President



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C. COVER LETTER

September 16, 2022

Benjamin Druyon, Program Manager
Western Riverside Council of Governments
3390 University Avenue, Suite 200
Riverside, CA 92501

Dear Mr. Druyon,

Frontier Energy, Inc. (Frontier) welcomes the opportunity to submit this proposal for I-REN's Codes and Standards (C&S) Programs – Training and Education *and* Technical Support. To fully address the scopes of work for the two programs, Frontier is teaming with local organizations with extensive contacts and experience in outreach and engagement to disadvantaged and hard-to-reach communities.

Frontier Energy has been in the forefront of C&S work in California for many years, with experience that spans:

- Prime consultant for BayREN C&S program, since 2013.
- Support for 3C-REN in the design and implementation of their Energy Codes Connect and Building Performance Training program
- Over 20 years of support for updates to the California Building Energy Efficiency Standards (Title 24, Part 6). Prime consultant for the Statewide Title 24 Codes and Standards Team on single family standard enhancement activities for 2019, 2022, and 2025 cycles.
- Statewide Reach Code Program Lead for residential single and multifamily, 2019 and 2022 cycles.

Frontier has been privileged to support the I-REN's journey to become an energy efficiency program provider. We are proposing staff who have demonstrated their dedication to I-REN's mission and who will guide a team that is well-positioned to quickly launch and grow the C&S programs in the years ahead.

If you have any questions, please contact Frontier Energy's Primary Contact and Team lead, Nancy Barba at 213-213-1978 and nbarba@frontierenergy.com or myself.

A handwritten signature in black ink, appearing to read "Jean Krausse".

Jean Krausse, Vice President
737-236-0279
jkrausse@frontierenergy.com

D. FIRM CAPABILITIES

Frontier Energy, Inc. (Frontier) and the Making Hope Happen Foundation (Making Hope Happen) are proposing for both the Codes and Standards Training and Education Program and the Codes and Standards Technical Support Program. The Making Hope Happen Foundation will be a subcontractor to Frontier.

About Frontier Energy

Established in 1981, Frontier Energy is an engineering and consulting firm with a strong record of delivering energy efficiency solutions for commercial, industrial, and residential sectors. Frontier's expertise encompasses demand-side management, software development, building research and consulting, commercial foodservice efficiency, and transportation and power. With a staff of over 140, working from offices in California, Illinois, Minnesota, Texas, New York, and remotely, Frontier provides the highest caliber of energy efficiency and engineering services, applying in-depth knowledge of emerging and established technologies to create exceptional solutions, customized to clients' needs and local conditions.

About Our Partners

Frontier Energy is partnering with three local organizations to increase the range and depth of outreach and engagement to assist in achieving I-REN's goal of developing "culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier." The leads for the three organizations listed below have a history of working together. They bring extensive local connections and experience in community outreach and engagement in the I-REN territory. Frontier Energy will serve as the Prime contractor with the organizations as Subcontractors.



Making Hope Happen Foundation

The Making Hope Happen Foundation is a nonprofit organization that grew out of the San Bernardino Community and School Alliance (CASA). The Foundation, along with other community-based organizations, residents, community leaders, and students, works to build and align systems to advance a more equitable San Bernardino. Making Hope Happen is currently using a grant from the California Air Resources Board to help remove barriers to electric vehicle (EV) adoption and charging in disadvantaged neighborhoods and has a workforce development project to gauge interest in the EV industry among young people. Making Hope Happen has a network of other organizations within the Inland Region that it can leverage to support outreach and engagement to disadvantaged and hard-to-reach communities beyond the City of San Bernardino.



Inland Equity Community Land Trust (ECLT)

The Inland Equity Community Land Trust, formerly known as the Inland Equity Partnership, is a nonprofit whose mission is to develop and steward affordable housing in Riverside and San Bernardino counties. The ECLT maintains a commitment to affordability, diversity, high-quality architecture, and energy conservation. Its staff bring experience in outreach and education. They meet with county boards, agency heads, and community organizations to help navigate and improve safety net programs in local communities.



Inland SoCal Housing Collective

The Inland SoCal Housing Collective is a broad-based community initiative of over 40 organizations focused on affordable housing in the San Bernardino and Riverside counties. The collective works to: address homelessness by connecting the housing development sector with the homeless continuum of care; highlight innovation trends in housing construction technologies and typologies; promote the protection of affordable home retention resources for rental and homeownership; and advance equitable, affordable homeownership.

Task 1.1 Program Design Experience (SOWs 1 and 2)

The team of Frontier Energy and subconsultants will be led by Nancy Barba, whose experience designing California energy efficiency programs dates to the ARRA-funded Energy Upgrade California. Her leadership and the capabilities of the proposed team will translate into smooth and efficient startup and operations of I-REN's Codes & Standards programs. The team's experience spans all components and activities needed to successfully design, launch, and manage programs including selecting market segments, identifying barriers, creating implementation and marketing plans, schedules, budgeting, performance tracking and reporting tools, and performing iterative design interventions, as needed.

The Frontier team has a record of creating program refinements that satisfy regulatory requirements while simplifying program engagement, resulting in improved participation rates. The team works to establish strong trade ally and stakeholder relationships and identify potential design improvements based on their feedback. Frontier also has experience working to mitigate the need for design changes. The team has worked extensively in regulated programs to improve communications and participant familiarity, reducing the need for extensive program redesigns.

Examples of Frontier's program design services are provided below.

BayREN

Frontier Energy has supported BayREN in designing multiple programs for energy codes and standards implementation, technology commercialization, residential and commercial building retrofits, and building professional education and engagement. Frontier staff have worked with building departments, training providers, and building professionals to implement an effective approach to developing and offering training and for developing and vetting model reach codes. The Frontier team ensures that training and reach codes are appropriate for local jurisdictions based on the energy-efficiency needs of their residents, businesses, and building sector. This involves working with partners, such as local government staff members and Community Choice Aggregators (CCAs), to clearly identify objectives and establish a framework. The team attends CPUC Reporting PCG and relevant sub-groups, to remain informed on regulatory reporting requirements and determine reporting solutions that best serve each program. The team coordinates with CPUC staff and relevant consultants to address any outstanding questions put forward by BayREN.

The Frontier team ensures that training and reach codes are appropriate for local jurisdictions based on the energy-efficiency needs of their residents, businesses, and building sector.

The team works with BayREN programs to develop a coordinated infrastructure for portfolio-wide reporting and compliance, consultant and contractor protocols, process and procedure documentation, work paper development and documentation, and other technical documents that will receive scrutiny under CPUC EM&V. The team has created program implementation plans, program manuals, program logic models, enrollment and application forms, tracking and reporting processes, and desktop quality assurance and field quality control protocols. The team ensures programs evolve through collaboration with embedded/internal and third-party EM&V activities, from technical assistance to trainings to IT solutions.

3C-REN

Frontier Energy supported 3C-REN in program design and continues to support implementation of their Energy Codes Connect program, Building Performance Training program, and Multifamily program. Details for Energy Codes Connect are provided under our Task 1.2 and Task 1.3 experience for SOW 1.

For the 3C-REN multifamily program, initial work included developing a multifamily market characterization assessment to inform 3C-REN's multifamily program RFP requirements and program design.¹ The report included an overview of existing multifamily programs and practices, potential electrification technologies, possible implementation approaches, EM&V approaches, and final recommendations. The Frontier team further assists with the development of program manuals, forms, and tools; developing the measures list and associated rebate amounts and calculation methodologies; defining program requirements for the Salesforce platform; and developing ME&O strategy and materials, among other activities.

Frontier also provides technical and regulatory consulting for 3C-REN, which includes support for the 3C-REN approved Business Plan and 2019 filings and, most recently, completion of the 2024-2031 Strategic Business Plan. Work encompassed support for program design, metrics filings, the joint cooperation memo, and the 2019 annual budget advice letter filing.

PATHS Initiative

Frontier Energy was awarded funding from the U.S. Department of Energy for the Career Pathways to Advance the Trades in HVAC Services (PATHS) initiative. PATHS is structuring workforce education and training to target the entire HVAC career pathway from recruitment to trade schools, through classroom training, career preparation, workforce recruitment, on the job training, and formal workforce training. The goal is to achieve a workforce with the necessary skills to design, install, and maintain HVAC systems for optimum performance.

Trainings for students from the California Community Colleges in the Inland Empire region of California, as well as local contractors, will serve to pilot the program's new curriculum, developed under the guidance of a technical advisory council of education providers, contractors, manufacturers, and industry influencers serving the supply and demand side of the HVAC industry. The committee will identify barriers, needs, best practices, and existing

¹ 3C-REN Multifamily Program Market Research & Analysis, September 2020. Prepared by Frontier Energy. Available online: [3C-REN_MultifamilyResearch_Sept2020.pdf \(pcdn.co\)](https://pcdn.co/3C-REN_MultifamilyResearch_Sept2020.pdf)

programs that can be leveraged to develop curriculum for PATHS. The curriculum will provide training on the proper use of tools to take readings of operational parameters, assess whether the measurements were taken correctly, interpret the results, identify a set of options to improve performance, and communicate options to a homeowner.

While PATHS is currently a localized pilot in the Inland Empire, the initiative is being designed for replicability and sustainability to potentially scale PATHS nationwide. A long-term initiative model plan will be developed to provide guidance on dues structures that will sustain activities or linkages with trade associations, manufacturers, utility programs, state or federal conservation programs.

TECH Clean California Initiative's Streamlining Installation and Permit Pilot

As part of the TECH Initiative, Frontier Energy seeks to address infrastructure and permitting barriers to support single-day installations for heat pump water heaters. Frontier Energy developed a pilot implementation plan that established key activities and timeline for design and launch of pilot incentives, streamlined the permit process, and permit office training with the selected partner agency's program team. The team also identified partners for content collaboration and implementation coordination, including appropriate and feasible engagement with code-making and or code enforcement bodies to achieve pilot goals. The team developed stakeholder and working groups comprised of representatives from IOUs, RENs, municipal utilities, and CCAs to identify existing and in-development resources for permitting and code compliance as related to heat pump conversion projects, and gaps in these trainings that TECH partners have identified as barriers to streamlined permitting for these projects.

The team is developing a streamlined permit process to collaborate with the partner agency's Permit Office training program, local/regional building departments, and building code industry organizations such as chapters of the International Code Council and Sustainable Energy Action Committee to develop a streamlined permit process for projects involving heat pump installations.

The team works with BayREN to develop and offer Permit Office Trainings to help overcome code compliance barriers by developing Permit Office Training focused on reducing permitting time for electrification projects. Frontier Energy and partners will assess content with both 2019 and final 2022 Title 24 code requirements. The team established learning objectives and knowledge transfer goals for training and methods (surveys or other tools) for assessing knowledge gain for training participants.

Based on existing training resources and associated gaps identified in the implementation plan, Frontier works with partner agencies, their training instructors, and the Implementer team to develop and vet either new training curriculums or modified curriculums for existing trainings.

PG&E Midstream Heat Pump Water Heater Study

Frontier Energy, under contract to Energy Solutions, has supported the PG&E Midstream Heat Pump Water Heater (HPWH) Study project since July 2021. The project is focused on gaining a greater understanding of HPWH installation barriers from various stakeholder perspectives. Frontier was brought into the project to lead stakeholder outreach to local building departments and single-family contractors, leveraging our team's network of existing relationships and experience with codes and standards programs and contractor engagement.

The Frontier team interviewed staff in various roles at local building departments and single

family contractor firms within the study's geographic regions. Interviews with local government building department staff focused on reviewing current water heating permitting and inspection requirements related to HPWH installations. Single-family contractors were interviewed to understand current practices for replacing gas water heaters and any insights on the impact of transitioning to HPWH installations.

Based on analysis of the barriers identified through the stakeholder engagement process, Frontier designed implementation strategies and inducement structures aimed at influencing the market to favor HPWHs for replacements under all use cases, including emergency circumstances. The outcomes of this task are:

1. Implementation strategies to overcome the three major barriers were identified including a description, rationale, resources needed, education required, an explanation of how and why strategies vary in each region, key metrics, and key indicators of success.
2. Financial inducement structures were created to overcome the most impactful barrier for each stakeholder category.

Following the preparation of the midstream study report, Frontier Energy is now engaged in identifying study learnings to add value to other codes and standards initiatives such as the BayREN Codes & Standards trainings and TECH Clean California Streamlining Permitting Pilot. As with the stakeholder engagement part of the project, this effort also capitalizes on Frontier Energy's established presence and expertise in the C&S space.

Sonoma Clean Power

Frontier provides ongoing support to Sonoma Clean Power's (SCP) energy programs, including SCP's Lead Locally program. This work includes the development and implementation of mid-stream incentive program designs, outreach and engagement to contractors to participate in programs, on-bill financing options for energy efficiency and decarbonization technologies, technical assistance, and field services for residential and commercial energy efficiency projects. Frontier works with industry professionals to identify and accelerate adoption of heat pump technologies as well as supports efforts to accelerate the adoption of all-electric space and water heating technologies, radiant panels and hydronic fan coils w/ air-to-water heat pumps, ducted mini-split heat pump; and grid-interactive heat pump water heaters.

Frontier assessed market barriers to large-scale retrofits and organized and supported the SCP's Advanced Energy Center, a community hub for information, inspiration, and education to accelerate deployment of energy saving and decarbonization technologies.

Task 1.2 Outreach and Engagement Experience (SOWs 1 and 2)

The Frontier team has extensive experience in developing and implementing outreach strategies and developing and maintaining websites and materials. Frontier will leverage its experience and skillsets derived from successfully developing and managing websites for the California Fuel Cell Partnership, the Energy Network (SoCalREN), and Food Service Technology Center, including comprehensive content for e-newsletters and the websites.

Frontier has also managed contractor communications and programs across residential,

multifamily, commercial, and non-commercial sectors. Frontier has been developing contractor marketing and engagement plans for over two decades. Most recently, we have developed and implemented the plan that has facilitated exceeding goals for TECH Clean California contractor recruitment.

BayREN

The Frontier team assists BayREN with (1) outreach and engagement with building departments' and building professionals' ability to identify support needed to understand code requirements or projects that commonly trigger energy code compliance; (2) quarterly forums to highlight regional compliance barriers and facilitate sharing of best-practices between local staffs; (3) in-person and online trainings on energy code and Zero Net Energy issues, best practices, and tools that can assist in building department business processes; and (4) a robust on-line library of tools and resources for planning and building departments. Program services and tools typically focus on new construction and building retrofits and alterations within the residential, commercial, and municipal sectors.

To amplify the impacts of the C&S Program, the team ensures meaningful and regular communication and networking to increase feedback loops and maximize use of program resources. The team created a central hub that provides easy access to relevant information for BayREN staff and partners. This hub facilitates their ability to leverage work in other communities to accelerate impact, avoid redundant efforts, and reduce administrative time. The hub includes information on regional and statewide C&S efforts, program metrics, committee minutes, internal resources, contact lists, and opportunities to connect with local building departments and building professionals (e.g., local ICC Chapter Meetings).

The Frontier team leverages its experience in event planning, logistics, and a historical knowledge and in-depth understanding of strategies to produce successful forums on behalf of BayREN. Frontier supported the BayREN C&S Program with coordination of 26 Regional Forums resulting in nearly 1,700 attendees. Frontier's network of local government staff and industry experts are used to connect MTC/ABAG and C&S county representatives with potential speakers, presenters, and potential target audiences for upcoming Regional Forums. The team also has a dedicated marketing and outreach consultant that provides support in producing and delivering email content and e-flyers.

The Team partners with experienced Title 24, Part 6 trainers to deliver a minimum of 30 training courses per year to building department staff, contractors, architects, and other building professionals throughout the Bay Area. Frontier Energy's marketing and outreach consultant works with each trainer to:

- Developing and delivering marketing materials and text to promote training.
- Track registrations for training to determine additional marketing activities if necessary.
- Refine content or format to better serve participant needs, which may differ depending on type of building professional, climate zone, size of the jurisdiction, and local politics.
- Help training participants sign in and complete pre- and post-event evaluations.
- Capture questions from participants during and after class to share with trainers or other Title 24, Part 6 experts.
- Identify gaps and opportunities for new training through feedback from current participants.
- Review training evaluations for improvements and iterations.
- Evaluate opportunities for training in-person and for online delivery.

3C-REN

Frontier Energy supports 3C-REN with outreach and engagement for multiple programs including Building Performance Training (BPT) and Multifamily Home Energy Savings (MHES).

For the BPT program, Frontier Energy has assisted 3C-REN in coordinating and scheduling meetings with potential partners to explore opportunities that align with the BPT program's goals. Frontier Energy conducts outreach to targeted stakeholders by assessing 3C-REN's current and potential partners and capture their contact information. The team also evaluates local and regional partnership opportunities to cross-promote training offerings. The team has experience in assisting the BPT team in developing their outreach strategy for engaging contractors. The team also works with the BPT team on selecting and prioritizing training courses offered by 3C-REN BPT team for copromotion in the TECH Clean California contractor newsletter. The team has developed promotional collateral such as informational postcards for events includes design and program information copy. The team also supports 3C-REN in creating copy and layout of BPT event and program highlights for e-blasts. The team is currently assisting 3C-REN in the launch of a new Spanish translated modules offered through BPT. Our efforts include developing a marketing plan, research in key partners and stakeholders, developing outreach emails, and assisting in developing an outreach schedule.

For the MHES program, Frontier support for outreach and engagement began with developing a marketing and outreach plan, strategies, and goals. Activities to implement the marketing plan have included event support, such as setting up email messages and layouts and developing lists and campaigns in Salesforce for program webinars. Follow-up outreach after events has included monitoring email performance metrics, answering questions about the event, and gathering recipient feedback. Assistance for other MHES events has included combinations of list development, event reminders, and post event recaps.

Our team's current outreach and engagement work for MHES includes promotion of rebate increases. This includes developing promotional collateral for newsletters, emails, and social media platforms.

TECH Clean California Initiative's Streamlining Installation and Permit Pilot

As part of the TECH Clean California's Streamlining Installation and Permit Pilot, described under Task 1.1, Frontier Energy supports outreach to Bay Area building departments, building professionals, CCAs, and interested parties to raise awareness of pilot offerings. The team developed a listserv targeted at prospective working group members. Recruitment fell into three separate tracks: building department staff, local government staff, and general building professionals.

Targeted communications to building departments were used to gage the interest of potential participants in the Working Group. Outreach to building department staff involved emails and calls using contacts in the listserv. One-on-one meetings were held with building department staff to solicit partner jurisdictions to implement the single-day permit process.

Stipends and other appropriate tokens of appreciation were provided to building department staff who participate in the working group. The pilot covered administrative costs as required for

partner jurisdictions to implement and operationalize a single-day permit process, such as installing new software and IT infrastructure.

Similar tactics were used to develop communications to local government staff (other than building department members) and to general building professionals, who were directed to the stakeholder group to provide input into the permit process and proposed materials. The following materials were developed to solicit interest in the stakeholder group: pilot flyer, HPWH permit supplement template, electrical load estimator, and 2019 HPWH building code assistance sheet.

The list of local government agencies includes:

- Community Choice Aggregators (CCAs)
- IOUs
- POU's
- CPUC
- CEC
- Local PUC
- Sustainability Departments
- Environmental Departments
- Planning Departments

A list of target building professionals includes:

- Contractors
- Energy analysts
- Engineers
- Architects
- Designers
- HPWH Manufacturers
- Technical Sales

Task 1.3 Program Implementation: Codes & Standards Training and Education Experience (SOW 1)

BayREN Codes & Standards Program

Since co-authoring BayREN's original Program Implementation Plan to secure program funding in 2012, Frontier has coordinated program efforts between ABAG, the BayREN counties, CPUC, and the California Energy Commission to improve regional compliance with California's Building Standards for Energy Efficiency and Green Building and advance local and state energy efficiency and Zero Net Energy goals. The program helps local market actors overcome barriers to compliance and provide resources for cities and counties to achieve the energy savings and greenhouse gas reductions promised by building code and local ordinances.

Frontier has designed and implemented program activities that have supported over 91 Bay Area jurisdictions. The team has implemented policy development and best-practices sharing through hundreds of forums and trainings with thousands of attendees.

The Frontier team assists BayREN with:

- Analysis and technical assistance to increase building departments' and building professionals' ability to understand and navigate code requirements or projects that commonly trigger energy code compliance
- Quarterly forums to highlight regional compliance barriers and facilitate sharing of best-practices between local staffs
- In-person and online trainings on energy code and Zero Net Energy issues, best practices, and tools that can assist in building department business processes
- A robust on-line library of tools and resources for planning and building departments. Program services and tools typically focus on new construction and building retrofits and alterations within the residential, commercial, and municipal sectors.

3C-REN

For 3C-REN's Energy Codes Connect and Building Performance Training programs, Frontier developed a strategic plan and conducted a market needs assessment. For both efforts, the team worked with employers, agencies, community colleges, labor, designers, architects, contractors, and other organizations most involved in the building professional industry to develop a program that can:

- Conduct targeted outreach and engagement to key audiences, including English as a Second Language groups
- Provide training on Residential building performance basics and Title 24 Code Cycle changes
- Establish connections and coordinate co-hosted trainings with statewide Energy Code Ace
- Perform outreach and engage with public sector audience through agency building departments
- Perform outreach and engage with private sector audience through trade and professional organizations

Frontier helps implement the Energy Code Connect program by conducting market assessments on workforce needs and opportunities and assessing existing best practices studies, recommendations and energy compliance resources to inform future iterations of the program's design. Frontier Energy provides technical and consulting support based upon identified and ongoing needs, including:

- Codes Coach scope of work review
- Procurement of Code Coach implementer
- Training topic recommendations
- Online tools and resources portal

Frontier Energy provides a range of support to the Building Performance Training program, such as:

- Support creation of pre and post training surveys
- Support quarterly update of program metrics, statistics and feedback
- Support analysis of survey findings and use to further develop
- Support WE&T marketing, education, and outreach
- Support presentation development
- Support outreach and training calendar
- Support outreach materials development

Frontier provided support to 3C-REN's efforts to engage disadvantaged communities by building and reinforcing relationships with organizations that provide trainings and workforce development services to create dialogue on available trainings and identify barriers to participation. Partners received an inventory of current training providers in the region and an assessment of identified gaps between education and workforce needs. These gaps and barriers were documented and informed program development and expansion about training topic priorities. As a result, 3C-REN now offers Spanish-translated modules and training cohorts for entry-level workers.

Frontier Energy provides implementation support for 3C-REN's Multifamily Home Energy Savings (MHES) Program under contract to the Association for Energy Affordability (AEA). These activities include performing screening calls with potential participants to provide an overview of the program requirements, rebates, and participation process. Frontier engages with potential participants about their goals for energy efficiency and needs for improvements to their properties. After assessing if the potential participant meets eligibility criteria and whether the program is a good fit for them, Frontier converts the lead to a project to begin technical assistance with AEA.

In addition to participant intake, Frontier also performs validation of property accounts to ensure projects are performed for customers of the relevant IOUs in 3C-REN territory, and to identify and avoid any potential "double-dipping" for measures previously incentivized through IOU or REN programs. This involves close coordination with IOU program management and leverages Frontier Energy's expertise with the California Electronic Technical Reference Manual

and regulatory guidance. Frontier is also responsible for third-party quality assurance/quality control (QAQC) on project eligibility and documentation at crucial checkpoints prior to rebate reservation, and again after installation before rebates can be paid.

Task 1.3 Implementation: Codes & Standards Technical Support Experience (SOW 2)

Reach Code Development

Under contract to PG&E, Frontier Energy has served as the Residential Lead for the Statewide Reach Code Program for the 2019 and 2022 code cycles, providing technical support to local governments on adopting ordinances intended to support meeting local and/or statewide energy and greenhouse gas reduction goals. In this role Frontier provides technical support to the program with cost-effectiveness studies that evaluate packages of measures for gas/electric, all-electric energy efficiency, PV, and zero net energy (ZNE) applied to single family and low-rise multifamily buildings. Over 50 California jurisdictions have adopted reach codes under the 2019 code cycle. Frontier also provided analysis support to PG&E for the 2016 code cycle.

Jurisdictions/utilities Frontier has supported or currently supports under the statewide program are listed below. Much of this work involves developing a custom analysis using local municipal/CCA utility rates in place of the IOU rates that are used in the statewide analysis. In some cases, the Frontier team has tailored the analysis to reflect other local conditions or building stock, e.g., evaluating different building prototypes.

- City of Alameda
- City of Palo Alto
- City of Glendale
- City of Healdsburg
- Los Angeles Department of Water and Power
- Sacramento Municipal Utility District
- City of Menlo Park
- City of Palm Springs
- City of Piedmont
- City of San Jose
- City of Santa Monica
- City of Truckee
- Marin Clean Energy (MCE)
- City of Riverside
- City of Burbank
- Central Coast Community Energy (CCCE)
- City of Davis

California Statewide Building Energy Efficiency Codes & Standards Development

Under contract to PG&E, Frontier has served as the lead single family residential contractor for the Statewide Building Energy Efficiency Standards Codes and Standards Enhancement (CASE) team over the 2019, 2022, and 2025 code cycles. Frontier Energy has developed strong working relationships with California Energy Commission staff and the Statewide CASE Team, including IOU representatives and the other prime implementers for the 2022 and 2025 cycles. This has proven valuable in collaboratively working through issues and resolving problems during the code development and rulemaking processes.

Frontier has served as the lead single family residential contractor for Codes and Standards Enhancement team over the 2019, 2022, and 2025 code cycles.

For the 2019 code cycle, Frontier successfully supported development, stakeholder vetting, and project documentation activities for seven CASE topics that were ultimately adopted by the Energy Commission. For the 2022 code cycle, Frontier led efforts on four proposals, including grid integration technologies, cost-effective existing home retrofits, air-to-water heat pumps, and variable capacity heat pumps.

M&V Experience for Code Development

The Frontier team also brings extensive experience with measurement and verification of existing and emerging technologies to inform opportunities for new code measures. Examples include:

- Managing the Central Valley Residential Home (CVRH) project, which provides data for updating future Title 24 standards for technologies such as mini-split heat pumps and radiant heating and cooling systems.
- Measurement and evaluation of the performance of occupied ZNE homes through the [ZNE Production Builder Demonstration program](#).
- An electrification cost-effectiveness study for SCE, SMUD, and LADWP. Headed up by E3, Frontier uses EnergyPlus modeling of single family and low-rise multifamily to evaluate new construction and retrofit electrification strategies and cost-effectiveness.
- A decade of work in DOE's Building America program resulted in innovative technologies, integrated design practices, and ZNE demonstration projects leading to 21 peer reviewed reports available through the [Building America Solution Center website](#). Team member Alea German contributed to these reports, which include: Implementing a Zero Energy Ready Home Multifamily Project; High Performance Walls in Hot-Dry Climates; Measure Guideline: Evaporative Condensers; Sonoma House: Monitoring of the First U.S. Passive House Retrofit; Strategy Guideline: and Proper Water Heater Selection.

Task 1.4 Program Tracking, Reporting, and Evaluation Experience (SOWs 1 and 2)

Frontier Energy's program tracking, reporting, and evaluation expertise is directly related to and enhanced by our team's technical and regulatory expertise. This is seen in examples from our experience with BayREN and 3C-REN, where we have provided both types of services in parallel. As I-REN's technical and regulatory consultant, Frontier Energy is well-positioned to provide program tracking, reporting, and evaluation-related services for the two Codes and Standards programs.

From our work with BayREN and 3C-REN, as well as our ongoing work with I-REN, our team is well-versed in the type of program-specific content needed for regulatory documents and filings such as the Joint Cooperation Memorandum (JCM), Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters. Frontier Energy drafted and coordinated I-REN's JCM and will have responsibility for supporting I-REN's Annual Report, Portfolio True-Up, and Mid-Cycle Review Advice Letters in the future. From our work with 3C-REN and BayREN our team is experienced in developing content and ensuring compliance for these types of filings. As programs are launched, we can work seamlessly among the Frontier team to meet regulatory requirements and integrate program-specific content.

Responding to evaluator and intervenor data requests is a highly important component of both implementation and regulatory work in ratepayer-funded energy efficiency programs. Our team is very

familiar with this process and attuned to the challenges of interpreting these requests, briefing clients and program implementation staff, coordinating multiple parties' input, and preparing a comprehensive response, often on an extremely short timeline. For both BayREN and 3C-REN we have experience responding to data requests with programmatic information to fulfill our program implementer responsibilities, while also coordinating programmatic responses from other implementers and contributing from a regulatory consulting perspective. Our team's technical and regulatory expertise strengthens our ability to provide complete and timely responses to data requests and we have received praise from evaluators for our team's performance in this regard.

Collection of program data for CPUC reporting, program metrics, targets, indicators, and other measures of program performance is a natural fit for Frontier Energy given our complementary role in reporting and metrics support for I-REN. For 3C-REN and BayREN we have experience performing both roles in parallel and through this arrangement have identified efficiencies and best practices for both the programmatic and regulatory sides of this work, ensuring we provide program data in alignment with CPUC reporting templates.

The Frontier team brings experience in developing program-specific metrics and performance indicators needed for regulatory filings and can support program database design and administration to capture datapoints/metrics aligned to reporting requirements and templates. See below for an in-depth example from our work with 3C-REN. Our regulatory work with I-REN gives us a head start, having recently completed I-REN's first metrics advice letter which was accepted by Energy Division in August.² We've also been working closely with Energy Division and its technology providers for months to navigate the complexities of setting up I-REN as a new Program Administrator for CPUC Reporting in CEDARS. Our team members attend CPUC Reporting Coordination Group calls and apply the insights from these calls to our regulatory and programmatic reporting work.

Frontier Energy also has experience contributing to program performance analysis and evaluation, measurement, and verification (EM&V) activities for tracking program achievements and informing continuous improvement. Over the years, Frontier has supported BayREN in a variety of EM&V strategy and prioritization exercises. One example includes developing potential areas of focus for BayREN Codes & Standards EM&V studies and research activities, which included providing background, proposed timeline, potential research questions, and identifying key parties for involvement. We have also supported REN-funded EM&V activities for 3C-REN, where Frontier coordinated the process and planning for a broad scope of tasks including gap analysis; analyzing impacts of updates to savings potential and technical resources; and identifying next steps and potential partners for follow-on activities.

3C-REN

Frontier Energy brings value to our work related to 3C-REN program, segment, and portfolio performance metrics due to our complementary roles in program tracking as an implementer

² Western Riverside Council Of Governments ELC (Corp ID 246) Advice Letter 2E/2G: 2022 Metrics and Segmentation Filing of I-REN, Pursuant to Decision (D.) 18-05-041, D.21-11-013, D.21-05-031. Accepted as of August 12, 2022. Effective date: July 31, 2022.

and regulatory consulting. In our capacity as technical and regulatory consultants we worked with 3C-REN to identify the appropriate metrics to track 3C-REN programs, proposed those metrics as part of their portfolio application filing, and are now actively working with 3C-REN leadership and program teams to develop and implement methodologies for capturing the relevant data. This has recently included an ongoing effort to develop database capabilities to track and report on program segment metrics proposed last year by the California Energy Efficiency Coordinating Committee (CAEECC) Equity and Market Support Segment Working Groups.

In our parallel capacities supporting implementation of 3C-REN's programs, whether contracted through AEA or directly with 3C-REN, our technical and regulatory team works closely with program implementer staff at Frontier and other implementer organizations to operationalize those metrics tracking methodologies through database structures, reports, dashboards, and program practices. 3C-REN uses a Salesforce database for customer and partner relationship management, program tracking, and regulatory reporting. Frontier provides administrative functions related to database development and maintenance, including ongoing enhancements to expand tracking capabilities. This is another activity that leverages Frontier's technical and regulatory expertise in conjunction with program implementation, tracking and reporting.

Key staff that will actually be working on the proposed tasks and their experience working on similar issues.

Name, Title	Qualifications
Nancy Barba, Director	Nancy joined Frontier in 2010. As Director of the Demand Side Management Group, she works closely with utilities, community choice aggregators, and regional energy networks, including I-REN, BayREN, and 3C-REN, leading regulatory support, program design, implementation, marketing and outreach, financing, and tracking and reporting. Nancy provides oversight of Frontier-delivered programs including BayREN's Codes and Standards Program, and Frontier's technical and regulatory consulting work for I-REN.
Margaret Marchant, Program Manager	Margaret brings 14 years of experience in the energy efficiency industry. She is the project lead for Frontier Energy's technical and regulatory consulting work with I-REN, and previously provided leadership for I-REN's business plan drafting and advocacy throughout the regulatory process leading to I-REN's approval in 2021. Margaret also supports energy efficiency program development and implementation for clients such as 3C-REN. She has oversight for Frontier's contributions to the PG&E Heat Pump Water Heater Midstream Study, including stakeholder engagement with local building departments and contractors. In the past she also contributed to the BayREN Codes and Standards Program, providing analysis to support decisions about permit guide updates, and revisions to ePermit tools.
Mikela Topey, Sr. Program Consultant	Mikela Topey is an environmental and economic justice advocate working to ensure energy-efficient and decarbonizing technologies are accessible to all. She currently serves as the project manager for the following programs and pilots: TECH Clean California's Streamlined Permitting Pilot, 3C-REN's

Name, Title	Qualifications
	Building Performance Training program, 3C-REN's Energy Code Connect program, BayREN's Training and Education program, BayREN's ZNE/ZNC Technical Assistance program, I-REN's Codes and Standards program, and I-REN's Workforce, Education, and Training program. Mikela also works with her clients to facilitate and coordinate partnership opportunities with the California Energy Commission and community-based organizations.
Tiare Ordanza, Sr. Program Consultant	Tiare has over 10 years of experience in energy efficiency working with residential, commercial, and institutional clients. She brings a strong background in project management, business development, sales, site audits, outreach and education to her work at Frontier Energy, where she supports the BayREN Codes and Standards and Home Energy Score Programs and the TECH Clean California Initiative.
Khain Lun So, Sr. Program Consultant	Since 2013, Lun has designed and produced materials for websites, outreach campaigns, social media campaigns, and videos for diverse clean energy technologies and programs. Lun provides support for BayREN's Codes and Standards Program elements including energy code trainings outreach, ICC credit certification, resources/survey coordination, quarterly regional forum promotion design/public outreach with Bay Area jurisdictions, live event technical support, audience tracking, video editing, Annual Program Report/Municipal Resources Guide design.
Adam Reese, Program Consultant	Adam has worked in energy efficiency for over 8 years on programs spanning residential, commercial new construction, and codes & standards. He specializes on contractor outreach and engagement, but has assisted in developing inducement strategies for PG&E. He is currently working supporting the TECH Clean California Initiative permitting pilot for Heat Pump Hot Water Heaters in the Bay Area.
Alea German, P.E.,	Alea has provided Reach Code Technical Support since 2016. She conducts technical analysis to assist PG&E and local governments in evaluating cost-effectiveness of initiatives to support meeting local and/or statewide energy and greenhouse gas reduction goals. Studies have covered efficiency, PV and battery measures, new construction and existing homes, and options that support all-electric designs. Alea also leads statewide technical code change proposals that that identify cost-effective enhancements to the California Energy Code. This process involves robust stakeholder outreach, market analysis, estimating statewide energy and cost savings, and code language development.
Engineering Manager	Alea has provided Reach Code Technical Support since 2016. She conducts technical analysis to assist PG&E and local governments in evaluating cost-effectiveness of initiatives to support meeting local and/or statewide energy and greenhouse gas reduction goals. Studies have covered efficiency, PV and battery measures, new construction and existing homes, and options that support all-electric designs. Alea also leads statewide technical code change proposals that that identify cost-effective enhancements to the California Energy Code. This process involves robust stakeholder outreach, market analysis, estimating statewide energy and cost savings, and code language development.
Ada Liu, Engineer	Since joining Frontier in 2019, Ada provides technical analysis and energy modeling for the Title 24 energy code and field and lab research projects. She has analyzed

Name, Title	Qualifications
	energy efficiency compliance options for Title 24 and retrofit package cost and savings for the 2019 and 2022 code cycle. Ada automated the development of CBECC-res and CBECC-com models with Python and Excel to evaluate energy efficiency measure and packages to include in reach codes and code development.
Subconsultant – Making Hope Happen	
Karen Suarez, Director	Karen is the Director of Uplift San Bernardino, a collective impact program of the Making Hope Happen Foundation. For over a decade, she has worked in roles to support and advocate for students, women, community and education. She has worked as a Congressional Field Representative for the 43rd Congressional District, Business Development Director for the Go Red for Women campaign for the Inland Empire American Heart Association, the Executive Director for The Dominguez Dream, and more recently the Assistant Vice President, Community Development Officer for Wells Fargo & Company serving Riverside and San Bernardino Counties, focused on housing affordability, small business growth, workforce development, and financial health.
Subconsultant – Inland Equity Community Land Trust	
Mirabel Nunez, Director	Mirabel leads projects that engage underrepresented people in the political process. Her workshops acquaint people with relevant political issues and equip them with effective advocacy strategies. In 2011, she was part of the team working with the League of United Latin American Citizens to get the Congressional, State, and local school Redistricting done in Western Riverside County. To date, the project has registered nearly 6,000 students. In 2019, Mirabel co-founded the Inland Equity Community Land Trust to develop and steward permanent affordable housing in Riverside and San Bernardino counties.
Subconsultant – Inland SoCal Housing Collective	
Melanie Steele, Director	Melanie has a background in community organization for sustainable housing. Prior to joining the Inland SoCal Housing Collective, she spent 9 years at Neighborhood Housing Services of the Inland Empire as the Director of Homeownership and Neighborhood Strategies/Interim CEO. She oversaw the housing and counseling team, down payment assistance programs, neighborhood initiatives, and data & reporting for the organization. At the Inland SoCal Housing Collective, Melanie supports the work of the local housing initiative and impact models across the region and statewide to share best practices and attract resources for the San Bernardino and Riverside counties.

Frontier Energy’s ownership, size, and location of the office responsible for providing services to WRCOG.

Frontier Energy, Inc. is a wholly-owned subsidiary of GTI International Inc. Frontier has 142 employees. The Los Angeles-led demand side management team will provide leadership and “boots on the ground” presence. We have eight staff members based in the greater Southern

California region with leadership and support from employees across the nation with deep, multidisciplinary expertise in providing services to Regional Energy Networks and local governments.

Frontier’s legal organization (e.g., corporation, partnership) and year of incorporation.

Frontier Energy, Inc. is a C Corporation that was incorporated in 1981.

Frontier’s equal employment opportunity and non-discrimination policies.

The following statement outlines Frontier Energy’s EEO Policy:

“Frontier Energy is an equal opportunity employer and makes employment decisions on the basis of merit. We want to have the best available persons in every job. Company policy prohibits harassment based on sex (including pregnancy, childbirth, breastfeeding, or related medical conditions), race, religion (including religious dress and grooming practices), color, gender (including gender identity and gender expression), national origin, ancestry, physical or mental disability, medical condition, genetic information, marital status, registered domestic partner status, age, sexual orientation, military and veteran status or any other basis protected by federal, state, or local law or ordinance or regulation. It also prohibits harassment based on the perception that anyone has any of those characteristics or is associated with a person who has or is perceived as having any of those characteristics. Discrimination can also include failing to reasonably accommodate religious practices or qualified individuals with disabilities where the accommodation does not pose an undue hardship.

The Company is committed to compliance with all applicable laws providing equal employment opportunities. This commitment applies to all persons involved in Company operations. The Company prohibits discrimination against any job applicant, employee, or unpaid intern by any employee of the Company, including managers and coworkers.”

Frontier Energy has a reasonable accommodation policy and reporting and investigation procedures for employees’ protection, which are included in its Employee Handbook.

Summary of the firm’s minority and female recruitment efforts and the percentage of minority and female officers, partners, or the equivalent.

Diversity, equity, and inclusion (DE&I) is a commitment at every level of Frontier Energy and a clearly communicated expectation with our employees, partners, and customers. Our diverse staff from many countries and backgrounds bring together a variety of perspectives crucial to delivering innovative solutions to complex challenges. As of 2021, 36% of Frontier’s employees self-identified as women and 32% as minority, and 25% of company officials are female.

Frontier and its parent company GTI have embarked on a three-year plan (2021-23) to assess and strengthen DE&I awareness and processes, including management and employee training and employee recruiting and compensation equity across both organizations. As part of this effort, diversity and inclusion training is now part of Frontier’s compliance training to educate all employees on how to become more aware of unconscious bias and other barriers to DE&I. Frontier managers receive additional training on how to implement diversity initiatives and encourage inclusiveness when conducting meetings and making decisions.

A statement, in one page or less, of any other relevant factors that should be considered by WRCOG in evaluating the Proposal.

The Frontier team is led by staff who have supported WRCOG's vision for the I-REN and for RENs in general. The team's history and ties to BayREN and 3C-REN will help coordinate shared interests to increase the effectiveness of RENs and their programs.

The team believes in building strong relationships with program administrators and stakeholders for long-term, ongoing transformation and growth. This, in turn, allows us to deepen our understanding of client and stakeholder needs and provide customized services and solutions.

Our team, including subcontractors, has local presence in and knowledge of I-REN's service territory. The team also brings a thorough understanding of the benefits and issues involved in C&S development, the importance of convening and communicating with stakeholders, the need to offer training and support to local jurisdictions based on their needs and to develop and maintain tools that support these stakeholders.

E. APPROACH AND UNDERSTANDING OF THE SCOPE OF WORK

SOW 1: Codes & Standards Training & Education Program

SOW 1 Narrative

Building on I-REN's goal to engage local governments, contractors, and other stakeholders, C&S success relies on informed and engaged local government staff to promote and implement tools and services, whether it's the number of trainings delivered, ordinances adopted, or jurisdictions participating in the I-REN Program. The Frontier Energy team will work hand-in-hand with I-REN staff to build partnerships with community stakeholders, and this approach will provide resources to smaller jurisdictions that do not have a local energy efficiency champion.

To ensure building professionals and the local governments and communities they serve are informed about policies and compliance, we will provide three pillars of support:

1. Strategy development – sound recommendations, guidance for program design, and implementation in coordination with CCAs, RENs, IOUs, CEC, and CPUC.
2. Streamlined communication – utilizing extensive experience working on marketing, engagement, and outreach campaigns across multiple programs in California to help review and collaborate and assist the needs of this program for reaching the market and key stakeholders.
3. Networking – connections with program administrators and code experts that can be leveraged for coordination, program support, and for recruiting speakers for forums, trainings, and workshops.

STRATEGY DEVELOPMENT

The Frontier team provides I-REN with deep expertise in energy program strategy development and technical assistance to help local governments achieve their energy goals. We will draw on recent team perspectives and experience with 3C-REN and the BayREN Codes & Standards program to help I-REN refine existing or design new strategies using the four steps discussed below to maximize the Program's impact.

Research. We will leverage the team's expertise and informational channels, based on decades of Codes and Standards development and local government, utility, and industry relationships, to provide I-REN with cutting edge and technically sound analysis, market characterization, and performance data on advanced energy programs and technologies. This research will encompass major issues at the center of current T24 and local reach code implementation, such as: heat pumps, renewable generation, and storage technologies; zero emission vehicles; grid integration and demand management strategies; contractor and workforce development; and incentive and financing options. This body of research provides I-REN with an accurate foundational understanding of the market and barriers and opportunities for code compliance and energy policies, on which it can build successful program models.

Design and Refine. The Frontier team can support any type of C&S Program initiative I-REN may elect to pursue. We have designed multiple programs for energy codes and standards implementation, technology commercialization, residential and commercial building retrofits, and building professional education and engagement. We have created program implementation plans, program manuals, program logic models, enrollment and application forms, tracking and reporting processes, and desktop quality assurance and field quality control protocols. We evolve programs through collaboration with

embedded/internal and third-party EM&V activities, from technical assistance to trainings to IT solutions.

Implement. Our staff have earned the confidence of our local government partners. We can either lead or provide support to ensure I-REN representatives are fully able to implement program activities. We have in-house resources for technical analysis; events, workshops, and trainings; marketing and outreach; electronic and traditional communications; IT and web development, and data systems and data security. We also understand how and when to support the I-REN representatives based on our work with I-REN since its inception and decades of experience serving similar initiatives in the Bay Area and other local governments.

Measure and Evaluate. The Frontier team understands the importance of defining EM&V activities early during program design. Clearly documenting program goals, objectives, performance targets, and processes not only makes for successful EM&V but for successful programs. We are experienced with systems and tools used by other programs including Salesforce and energyOrbit. We can continue to assist Program development and refinement, drawing on our experience with past successful EM&V collaborations and our deep knowledge of the CPUC Technical and Regulatory process.

COMMUNICATION AND NETWORKING

The Frontier team will further amplify the opportunities and impacts of the C&S Program by ensuring meaningful and regular communication and networking opportunities to increase feedback loops and maximize the impact of program resources. We propose the following efforts to strengthen communication between staff and with other local governments and increase the spread and reach of those communications, both in outgoing channels from I-REN to its stakeholders and in input and feedback loops from those stakeholders to I-REN. We will:

Create a Central Hub. Easy access to current, complete and relevant information will allow I-REN staff the ability to leverage work in other communities to accelerate impact, avoid redundant efforts, and reduce administrative time. We will develop a C&S Intranet that I-REN representatives can use to easily access up-to-date information about regional and statewide C&S efforts, program metrics, committee minutes, internal resources, contact lists, and opportunities to connect with local building departments and building professionals (e.g., local ICC Chapter Meetings). This central location will help C&S county representatives get the latest information and reduce the amount of time they spend opening multiple windows (Google folders, emails, calendars). A public calendar could be added for internal and external events.

Strengthen Communication. Consistent communication platforms and strategies enhance regular communication and access to information. We will use Adobe Connect to create a C&S “Virtual Meeting Room” to increase collaboration and gather more insight during C&S Committee meetings, and external meetings. Unlike Google Docs, Adobe Connect offers tools to encourage engagement and easily share content.

Make Connections. Access to expertise and information about relevant experiences from other regions and/or sectors create shared learning opportunities and support more action and impact. We will leverage Frontier Energy’s and Make Hope Happen’s network of local government staff, and industry experts to connect C&S county representatives with potential contacts for presentations at Regional Forums or to committees/ groups.

WHY THIS APPROACH

Past C&S efforts have delivered substantial benefits, and we envision continuing and refining these activities to maximize added value. Moving forward, this vision for the I-REN C&S Program encompasses:

Building a strong foundation for this program. Collaborating with the I-REN team on strategy development to address the most relevant building codes with significant potential savings in the Inland Empire. Prioritizing areas and topics that are of interest to code setting bodies and the authority having jurisdiction (AHJ) will help ensure savings opportunities are realized. I-REN is best positioned continue compliance improvement efforts “on the ground,” including targeted compliance efforts and development of electronic compliance infrastructures, to ensure potential savings from advocacy are realized.

Supporting multifaceted objectives. California’s diverse energy and climate-related policy goals include energy efficiency, demand reduction, renewable energy, onsite generation, grid connectivity, automated demand response, energy storage capacity, ZNE buildings, water efficiency, public health, zero emission vehicle infrastructure, sustainability, and equity. I-REN is uniquely positioned to accelerate progress toward these goals, with a C&S Program that is designed and implemented to drive and potentially unite these multifaceted objectives at the local level. We believe I-REN and the C&S Program can recognize and pursue activities that have both indirect energy impacts and non-energy benefits while maintaining energy efficiency as a foundational goal, as we have seen first-hand how this can be accomplished.

Work Plan

The Frontier team proposes the following Work Plan for the requested Scope of Work. We are fully staffed and well-resourced to deliver these services immediately upon contract execution. As appropriate by task, we will use approaches for strategy development, technical assistance, communication, and network development to further I-REN’s goals of serving local communities and building department staff.

Task 1.1 Program Design

Working in collaboration with the I-REN team, Frontier Energy will take the lead on program design to set up a Kickoff Meeting, engage with stakeholders, and develop key documents for the Codes & Standards Training & Education Program. This will include a program manual, an implementation plan, and specified participant forms and collateral. The Frontier Team will also provide monthly and quarterly status reports, meeting agendas and status updates.

The Team includes a bench of expert program and Technical Leads with demonstrated experience working with CPUC, CEC, PG&E, local CCAs, local governments, and the many other market actors involved in energy codes and standards. The Team will be available to attend weekly or bi-weekly meetings with the I-REN C&S Team, provide monthly and quarterly status reporting, as well as responding to ad hoc inquiries and needs as mentioned in the tasks below. A strong Implementation team at Frontier will facilitate activities across the project, with attention to quality work, innovation, and operational efficiency.

Coverage will be provided by the following Leads, who include:

- Nancy Barba: Program strategist for 3C-REN C&S and WE&T Program since inception; broad experience in energy efficiency programs.
- Margaret Marchant: Technical and regulatory expert supporting I-REN, 3C-REN, and BayREN program portfolios.

- Mikela Topey: Lead consultant support for 3C-REN and BayREN C&S programs, including market assessment and ramp up.
- The team's subcontractor leads Karen Suarez from the Making Hope Happen Foundation, Melanie Steele from the Inland SoCal House Collective, and Maribel Nunez from the Inland Equity Community Land Trust will support this task.

Deliverables:

- Develop a kick-off meeting agenda and notes and execute the meeting with the assistance of the I-REN team.
- Work with I-REN staff to develop key program documents which are crucial to getting the program on the right track from the start. The Frontier team will develop a Program Manual and Implementation Plan content in compliance with regulatory requirements. This will also include a definition of program eligibility guidelines, Program team roles and responsibilities, a program process flow diagram, and a logic model. When possible, Frontier will identify existing successful models of other programs and incorporate those practices into the I-REN program portfolio.
- Construct a program delivery model focused on the goals of the program, which includes overcoming public and private sector barriers for participation and puts a strong emphasis on service to vulnerable and disadvantaged communities. This will include supporting I-REN in engaging with local and regional stakeholders to ensure that the program design is fitting their needs. Their feedback will be critical in identifying those barriers and finding the best path forward.
- Utilizing our experience with similar programs, the Frontier team will assist the I-REN team in developing streamlined participant forms and other collateral which make involvement in the program as user-friendly as possible. This includes identifying administrators and processes of other Codes & Standards programs and related offerings in the region, so that we can assist public and private sector customers with any questions they might have about enrollment or participation in those programs.
- Critical to improving the program and molding the future of Codes & Standards in the region, the Frontier Team will provide monthly and quarterly status reports with all quantifiable measures to report the successes and areas of improvement of the programs. This will also include weekly meeting agendas and status updates, and any other ad hoc requests from the I-REN team.

Task 1.2: Outreach & Engagement

The Frontier team will take the lead on program-specific marketing, outreach, and stakeholder engagement by reviewing existing materials and outreach and recommending and assisting in the development of new collateral and strategies. This will include developing strategies to address barriers to engaging with culturally specific communities, e-campaigns to expand the reach of this program, and identifying Codes & Standards Champions, speakers, and presenters.

Coverage will be provided by the Marketing and Outreach Leads, who include:

- Mikela Topey: Outreach and engagement strategist for California energy programs
- Khain Lun So: 9 years of experience designing and producing materials for websites, outreach campaigns, social media campaigns, e-newsletters, and technical handouts

- Subcontractors
- The team's subcontractor leads Karen Suarez from the Making Hope Happen Foundation, Melanie Steele from the Inland SoCal House Collective, and Maribel Nunez from the Inland Equity Community Land Trust will support this task.

Deliverables:

- Upon contract execution, the Frontier team will review existing I-REN branding, marketing strategies, templates, and other relevant materials to determine which areas need to be prioritized for updating. The Frontier team will then make recommendations and assist in developing the necessary marketing and outreach collateral that is designed to target the customer audiences identified for Codes & Standards. This will include strategies to educate local jurisdictions, agencies, and building professionals to ensure they're up-to-date on program offerings. Frontier is experienced in collaborating with marketing firms to ensure program-specific materials align with overall REN communications and branding.
- The Frontier team puts a high priority on developing and successfully executing a strategy to engage and involve communities where language, socio-economic status, race, ethnicity, and gender have been a barrier. Frontier will engage with local Non-Government Organizations and regional stakeholders to identify these barriers from the people who are experiencing them and collaborate with the I-REN team to roll out a plan to reach those communities and involve them in shaping Codes & Standards.
- Our team will also prioritize identifying and involving key success stories and allies, such as Codes & Standards Champions, potential speakers and presenters, and case studies that highlight local wins we can use to create buy-in with the community. This will include an emphasis on finding such champions and success stories within the disadvantaged communities.
- Pulling from our team of experienced content creators, Frontier will develop an outreach plan to engage with local and regional stakeholders. This plan will utilize e-newsletters, social media, and other channels to promote Codes & Standards resources, but will also heavily emphasize a Code Hub where industry professionals can share best practices and collaborate. The Code Hub will also have a listing of events, resources, and tools for local governments and building professionals.
- The Frontier team will provide monthly and quarterly status reports with all quantifiable measures to report the successes and areas of improvement of the programs. This will also include weekly meeting agendas and status updates, and any other ad hoc requests from the I-REN team.

Task 1.3: Program Implementation

For implementation of the Training & Education Program the Frontier team will leverage best practices from our experience with BayREN Codes and Standards as well as learnings from our stakeholder engagement work related to Heat Pump Water heater permitting through the PG&E HPWH Midstream Study and TECH Clean California for the development of strategies for increased awareness, participation, and inducement of Codes & Standards. This experience includes work done on in-person events, online stakeholder forums, and promoting training events and modules for building industry professionals.

The Frontier team will work with I-REN to support local governments and the building industry, developing training curriculum for contractors and building departments, and fostering the development

of an online Code Hub community for sharing best practices. The Frontier Team will assist with the coordination of regional forums and training sessions. Mikela Topey will serve as the programmatic lead for implementing the Training and Education program. Frontier Energy will develop a Bureau of Instructors to offer training, education, and mentorship to building professionals based in the Inland Empire.

Deliverables:

- The Frontier team will develop a Training & Education Program Implementation Plan that includes timeframe/schedule, roles and responsibilities and proposed curriculum. This plan will also include a strategy to promote online training modules for local jurisdictions and building professionals and updates to the training modules and delivery mechanisms to ensure that the trainings are responsive to key target audience needs. Consistent with available budget and direction from I-REN, Frontier will develop new training modules for in-person or online delivery.
- Part of developing accurate training modules will be coordinating with the International Code Council and ensuring that any required curriculum updates are included to ensure the ability of I-REN to offer Continuing Education Units to attendees of I-REN trainings. Frontier will track and provide information on California and national codes, including updates to Title 24 Parts 6 and 11, which will be included in any updates to the training curriculum.
- Drawing from our experience at IHACI and coordinating online forums for contractors and building departments and jurisdictions, Frontier will deliver a minimum of 12 training sessions and three Regional Forums per year throughout the I-REN territory. This will include assistance with event logistics, and follow-up activities, documentation of participant interaction, and our team will collate information from the attendees following each event.
- Frontier will collect, report, and maintain metrics relative to training and education, including numbers of sessions, numbers of and contact information for attendees, and other relevant metrics as needed. Based on this data, Frontier will provide recommendations for improvements to I-REN's training program and topics for potential new training sessions.
- The Frontier team will provide monthly and quarterly status reports with all quantifiable measures to report the successes and areas of improvement of the programs. This will also include weekly meeting agendas and status updates, and any other ad hoc requests from the I-REN team.

Task 1.4: Other Services

In addition to program design, outreach, and implementation, the Frontier team will also assist with other services such as program-specific content and edits or updates for I-REN regulatory filings, provide program data in CPUC templates, and document performance measurements, and provide analysis of program performance and recommendations for future program improvements. As detailed in Section D. Firm Capabilities, Frontier has significant expertise in this area due to our complementary role as technical and regulatory consultant to I-REN and our team's years of experience providing similar services to other RENs. Coverage will be provided by Margaret Marchant, as she is Frontier Energy's technical and regulatory expert supporting I-REN, 3C-REN, and BayREN program portfolios.

Deliverables:

- Develop program-specific content and edits or updates to content for I-REN regulatory filings.
- Provide program data in alignment with CPUC reporting templates.
- Document metrics, indicators, and other performance measurements.
- Provide analysis of program performance and recommendations for future program improvements.

Timeline for SOW 1

Include a timeline for the proposed work. Note that I-REN is interested in having a “soft launch” of one or more of its programs by the end of 2022, with full deployment for 2023.

	2022	2023				2024				2025			
	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4
Contract Execution													
Task 1.1 Program Design													
Program Implementation Manual													
Program Manual													
1 st Stakeholder & Organizational Meetings													
Program Delivery Model													
Monthly and Quarterly status reports													
Task 1.2 Outreach & Engagement													
Review existing branding & marketing strategies													
Recommendations and assist in developing new materials													
Develop Outreach Plan													
Develop and implement plan to involve non-English speaking and DACs													
Engage with non-English speaking & DACs to gather barriers and feedback.													
Identify success stories, champions, speakers/presenters, and local wins.													
Monthly and quarterly status reports													
Task 1.3 Program Implementation													
T&E Program Implementation Plan													
Plan and Implement Trainings and forums.													
Collect and provide report on metrics relative to T&E.													
Provide monthly and quarterly status reports.													
Task 1.4 Other Services													
Develop content for I-REN regulatory filings.													
Provide program data for CPUC reporting templates.													
Document performance measurements.													
Provide analysis of program performance													

Budget for SOW 1

Furnish detailed and itemized pricing for the proposed work, including an estimate of hours required to complete the specified tasks along with a total anticipated budget.

	Estimated Hours by Year				Estimated Labor Cost by Year				Estimated Direct Cost by Year				Total Estimated Cost by Year			
	2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025
Task 1.1: Program Design	220	346	326	272	\$33,350	\$54,082	\$51,624	\$39,928	\$3,000	\$2,000	\$ 2,000	\$ -	\$36,350	\$56,082	\$53,624	\$39,928
Task 1.2: Outreach & Engagement	158	372	372	368	\$21,740	\$53,388	\$54,456	\$54,352	\$10,000	\$80,790	\$80,790	\$55,790	\$31,740	\$134,178	\$135,246	\$110,142
Task 1.3: Program Implementation	70	1080	1080	840	\$10,900	\$152,904	\$155,928	\$128,352	\$22,855	\$80,000	\$80,000	\$80,000	\$33,755	\$232,904	\$235,928	\$208,352
Task 1.4: Other Services	30	732	732	492	\$5,500	\$97,764	\$99,708	\$71,052	\$ -	\$ -	\$ -	\$ -	\$5,500	\$97,764	\$99,708	\$71,052
Subtotals	478	2,530	2,510	1,972	\$71,490	\$358,138	\$361,716	\$293,684	\$35,855	\$162,790	\$162,790	\$135,790	\$107,345	\$520,928	\$524,506	\$429,474
Total Estimated Cost (Labor and Direct Cost)													\$1,582,253			

Estimated direct cost include but are not limited to:

- Travel, mileage, airfare, hotel
- Technology and communications platforms
- Materials production and collateral
- Marketing and outreach subcontractors
- Subcontractors: Making Hope Happen Foundation, Inland Equity Community Land Trust (ECLT), Inland SoCal Housing Collective
- Venue rental and logistics
- Training event hosting services including catering
- Instructor and training subcontractors

Methods to Ensure Quality Control and Budget and Schedule control

The Frontier team will use several strategies to anticipate, mitigate, and otherwise resolve problems and obstacles that may arise while implementing this scope of work. These strategies are based on lessons learned from decades of program implementation across California, as well as specific understanding Frontier team members hold for how Codes & Standards activities are coordinated between I-REN, local governments, CEC, the Statewide IOU C&S team, and other C&S stakeholders.

- Clear and consistent communications and engagement with CPUC. There is not currently a C&S subject matter expert (SME) at CPUC, and the Program's contact there has changed multiple times since the Program's inception. The Frontier team can support the C&S Program Manager with historical accounting of all CPUC/I-REN related C&S communications to date. We can also develop any information resources to help onboard the C&S SME on I-REN activities.
- Budget alignment for volume-based activities. Demands for trainings, forum support, and other activities are specifically volume based. We have a firm understanding of the level of effort required for these activities as currently scoped and will work with the I-REN C&S Program Manager to ensure this level of effort continues to be calibrated against the available budget.

Issues, Problems, or Risks that Frontier Can Help Address

In Frontier's experience, many of the potential obstacles encountered during C&S implementation involve external pressures. These can include understanding, working with, but not being slowed by C&S stakeholders. Many critical actors throughout the C&S compliance chain have a vested interest in the code compliance process. Developing and implementing services for these actors requires I-REN to understand and collaborate with them without getting impeded by the details of how all these actors work, or don't work, together.

The Frontier team can help provide I-REN and the C&S Program Manager with sound and creative guidance to ensure input and feedback is solicited at the right time for the benefit of program activities.

SOW 2: Codes & Standards Technical Support Program

Sequentially outline the activities that would be undertaken to complete the tasks and specify who would perform the tasks.

SOW 2 Narrative

The goal of the Technical Support program is to support local jurisdictions in hard-to-reach, disadvantaged, underserved, and environmental and social justice communities by delivering locally informed resources and tools that streamline code compliance and enforcement and increase permit closeout. This program will coordinate with local and statewide programs in providing technical assistance and layer efforts to maximize the benefits attainable in the region.

The Team will design a set of technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes to support improved enforcement and compliance. In consultation with I-REN and their partners, the Team will conduct program assessments to understand the value of, and barriers to implementing compliance

improvement activities together with findings and recommended changes and improvements; and strategic action plans that will be informed by market trends and local or statewide policies, to increase energy code compliance rates and align with I-REN direction, the C&S Implementation Plan, and I-REN Business Plan. The consultant will promote training through I-REN governing agencies' existing marketing channels, through local government partnerships, and through building industry communication networks. The team will leverage existing resources, such as permitting guides, permitting e-tools, load calculators, reference sheets, permitting checklists, and will be customized to fit the needs of the jurisdiction.

The Team's proposes to engage jurisdictions interested in advancing their activities related to climate change through targeted and tailored energy efficiency approaches defined in one of the following plans or documents: climate action plans, community development plans, local and regional resiliency plans, local building stocks and climate conditions, and local workforce capabilities and needs. The team will work with Making Hope Happen Foundation, Inland SoCal Housing Collective, and Inland Equity Partnership to provide boots-on-the ground engagement with jurisdictions.

Stakeholder input and discussion of technical, policy, and operational processes will be vital to the successful adoption and implementation of ordinances and energy code that advance local climate goals. The Team has been successful with a three-prong stakeholder engagement strategy deployed during phases of model reach code development and energy code updates that ensures stakeholders understand project opportunities and concerns.

- Identification of key stakeholders. The Team, in coordination with I-REN and its partners, will leverage existing contacts to identify key stakeholders. The Team will work with I-REN to define timeline, specific objectives for engaging individual groups, and general desired outcomes. This process will be completed in a meeting with I-REN and/or local jurisdictions.
- Conduct outreach and engagement. The Team, along with Making Hope Happen Foundation, Inland SoCal Housing Collective, and Inland Equity Partnership, will support I-REN to solicit stakeholders to engage in proposed meetings, charrettes, trainings. To ensure that a broad range of people attend these events, the Team will use client recommendations, social media channels, and their own contacts with industry associations to drive attendance to events and share content. This effort underpins having the right stakeholders present and engaged in the process to build support.
- Share information and obtain feedback. The Team will support I-REN to engage diverse groups that can contribute to or will be affected by new ordinances or energy code changes to provide balanced input in code development and enforcement. Based on experience, important constituents for this process include code councils, developers, energy experts, community-based organizations, apartment associations, and economic and community development organizations. The Team will collaborate with I-REN to identify other organizations and constituent groups. The Team will work with I-REN and its partners to evaluate approaches for balancing the level of engagement from stakeholder groups during project phases, including:
 - Larger public meetings focused on in-person information sharing but with a remote option.
 - Small meetings with key organizations to build greater support for the process and approach.
 - Small internal meetings with jurisdiction and appropriate councils.
 - Electronic distribution of materials (potentially with the inclusion for electronic comment).

The Team will support meeting facilitation to elicit feedback, document comments and questions, and provide notes and summaries of findings from stakeholder outreach. This three-pronged approach will be applied to each specific activity, as discussed below.

Lead Development of Model Reach Codes

Engage stakeholders to gain broad support and understand concerns to inform a draft of model reach codes. While this process will not capture the nuances of each jurisdiction, it will capture consistent and important conditions for implementation within the region. The Team will:

- Support initial stakeholder engagement, draft stakeholder interview questions, and attend initial stakeholder meeting and up to six organizational meetings of specific groups.
- Support stakeholder feedback process on draft model codes and attend charrettes and final stakeholder meeting.

Identify Tools and Processes for Adoption and Implementation

The Team will engage jurisdictions' stakeholders who will be involved in local adoption and implementation processes to obtain feedback on development and drafts of tools and templates. To streamline this process, a select number of jurisdictions will be targeted collaboratively with I-REN.

Develop Cost-Benefit Analysis

Test assumptions in the cost-benefit analysis with a target group of stakeholders to support a productive charrette and stakeholder engagement process for reach code development. Considerations that could be vetted may include, but are not limited to, costs for new construction or costs for remodel scope.

Provide Technical Assistance for Municipalities for Code Adoption

Conduct internal engagement from specified personnel at interested jurisdictions and a public stakeholder process to understand the specific code application for the jurisdiction and determine the ordinance requirements, triggers, and target for the local ordinance. The Team will coordinate with I-REN to identify jurisdictions and work with jurisdictional leads to identify local stakeholders. The Team will coordinate with jurisdictional staff to refine the ordinance to account for local processes and provide information for council/board and public meetings. The Team will support presentations about the specific ordinance structure, answer technical questions, and create a framework to obtain feedback for implementation. The Team will work with the jurisdiction to respond to meeting comments and incorporate feedback into a revised ordinance as needed.

Provide Technical Assistance for Municipalities for Code Implementation

Stakeholder engagement will focus on clear communication and accessible implementation for internal and external stakeholders who will be impacted by implementation and compliance with the ordinance. The Team will coordinate with jurisdictional staff to define the stakeholder groups and deliver trainings that will focus on the specific impacted building types and address the topics proposed, including:

- Overview and Technical Requirements. The audience for this training will be key stakeholders, public professionals, and city staff who will benefit from understanding of ordinance and energy code (i.e., zoning, customer service staff, building department staff, sustainability department staff, etc.). The training will also provide general education to broader internal stakeholders and public stakeholders to support increased compliance and awareness. Training content may include but not be limited to:
 - Overview and key components of ordinance and/or energy code.
 - Communication of ordinance requirements to stakeholders.
 - General education of benefits.
 - Technical review of ordinance requirement and standards.
- Operational and Implementation Training. The audience for this training will be plan checkers, building inspectors, and other building department staff who will implement the ordinance and/or energy code. The training will support implementation staff as they learn compliance processes and work with permit applicants to ensure consistent application and a high level of compliance. Training content may include, but not be limited to:
 - Required compliance at appropriate stages in permit application (planning/zoning, building, etc.).
 - Review of compliance elements for plan check and field inspections.
 - Tools and processes required for implementation, including tracking process, permit triggers, compliance, and compliance documentation.
 - Process and documentation for enforcement of ordinance and energy code.

SOW 2 Work Plan

Task 1.1 Program Design

Working in collaboration with the I-REN team, Frontier Energy will take the lead on program design to set up a Kickoff Meeting, engage with stakeholders, and develop key documents for the Codes & Standards Technical Support Program. This will include a program manual, an implementation plan, and specified participant forms and collateral. The Frontier Team will also provide monthly and quarterly status reports, meeting agendas and status updates. The Team includes a bench of expert program and Technical Leads with demonstrated experience working with CPUC, CEC, PG&E, local CCAs, local governments, and the many other market actors involved in energy codes and standards.

Coverage will be provided by the following Leads, who include:

- Nancy Barba: Program strategist for 3C-REN C&S and WE&T Program since inception; broad experience in energy efficiency programs.
- Alea German: Technical expert for statewide C&S development and reach codes.
- Margaret Marchant: Technical and regulatory expert supporting I-REN, 3C-REN, and BayREN program portfolios.
- Mikela Topey: Lead consultant support for 3C-REN and BayREN C&S programs, including market assessment and ramp up.

The Team will be available to attend weekly or bi-weekly meetings with the I-REN C&S Team, provide monthly and quarterly status reporting, as well as responding to ad hoc inquiries and

needs as mentioned in the tasks below. A strong Implementation team at Frontier will facilitate activities across the project, with attention to quality work, innovation, and operational efficiency.

Deliverables:

- Develop a kick-off meeting agenda and notes and execute the meeting with the assistance of the I-REN team.
- Work with I-REN staff to develop key program documents which are crucial to getting the program on the right track from the start. The Frontier team will develop a Program Manual and Implementation Plan content. This will also include a definition of program eligibility guidelines, Program team roles and responsibilities, a program process flow diagram, and a logic model. When possible, Frontier will identify existing successful models of other programs and incorporate those practices into the I-REN program portfolio.
- Construct a program delivery model focused on the goals of the program, which includes overcoming public and private sector barriers for participation and puts a strong emphasis on service to vulnerable and disadvantaged communities. This will include supporting I-REN in engaging with local and regional stakeholders to ensure that the program design is fitting their needs. Their feedback will be critical in identifying those barriers and finding the best path forward.
- Utilizing our experience with similar programs, the Frontier team will assist the I-REN team in developing streamlined participant forms and other collateral which make involvement in the program as user-friendly as possible. This includes identifying administrators and processes of other Codes & Standards programs and related offerings in the region, so that we can assist public and private sector customers with any questions they might have about enrollment or participation in those programs.
- Critical to improving the program and molding the future of Codes & Standards in the region, the Frontier Team will provide monthly and quarterly status reports with all quantifiable measures to report the successes and areas of improvement of the programs. This will also include weekly meeting agendas and status updates, and any other ad hoc requests from the I-REN team.

Task 1.2: Outreach & Engagement

The Frontier team will take the lead on program-specific marketing, outreach, and stakeholder engagement by reviewing existing materials and outreach and recommending and assisting in the development of new collateral and strategies. This will include developing strategies to address the barrier of engaging with culturally specific communities, e-campaigns to expand the reach of this program, and identifying Codes & Standards Champions, local governments, tribes, and special districts and building professionals to promote local leadership engagement in Codes & Standards compliance.

Coverage will be provided by the Marketing and Outreach Leads, who include:

- Mikela Topey: Outreach and engagement strategist for California energy programs
- Khain Lun So: 9 years of experience designing and producing materials for websites, outreach campaigns, social media campaigns, e-newsletters, and technical handouts
- The team's subcontractor leads Karen Suarez from the Making Hope Happen Foundation, Melanie Steele from the Inland SoCal House Collective, and Maribel Nunez from the Inland Equity Community Land Trust will support this task.

Deliverables:

- Upon contract execution, the Frontier team will review existing I-REN branding, marketing strategies, templates, and other relevant materials to determine which areas need to be prioritized for updating. The Frontier team will then make recommendations and assist in developing the necessary marketing and outreach collateral that is designed to target the customer audiences identified for Codes & Standards. This will include strategies to educate local jurisdictions, agencies, and building professionals to ensure they're up-to-date on program offerings.
- The Frontier team puts a high priority on developing and successfully executing a strategy to engage and involve communities where language, socio-economic status, race, ethnicity, and gender have been a barrier. Frontier will engage with local Non-Government Organizations and regional stakeholders to identify these barriers from the people who are experiencing them and collaborate with the I-REN team to roll out a plan to reach those communities and involve them in shaping Codes & Standards. The team will set key performance metrics to ensure accountability for engaging hard-to-reach communities.
- Our team will also prioritize identifying and involving key success stories and allies, such as Codes & Standards Champions, and case studies that highlight local wins we can use to create buy-in with the community. This will include an emphasis on finding such champions and success stories within the disadvantaged communities.
- Pulling from our team of experienced content creators, Frontier will develop an outreach plan to engage with local and regional stakeholders. This plan will utilize e-newsletters, social media, and other channels to promote Codes & Standards resources, but will also heavily emphasize a Code Hub where industry professionals can share best practices and collaborate. The Code Hub will also have a listing of events, resources, and tools for local governments and building professionals.
- The Frontier team will provide monthly and quarterly status reports with all quantifiable measures to report the successes and areas of improvement of the programs. This will also include weekly meeting agendas and status updates, and any other ad hoc requests from the I-REN team.

Task 1.3: Program Implementation

Alea German will be the technical lead and Mikela Topey will be the program lead for the implementation of the Codes and Standards Technical Support Program. The team will lead the assessment of compliance improvement activities, such as, collecting and analyzing metrics, conducting research, and interviewing participants as required. Program activities may include, but are not limited to:

- Working with local jurisdictions' permit systems and data.
- Conducting periodic surveys to gauge over time contractors' and other stakeholders' assessment of the risks of non-compliance, and the reasons for opting to take the risk.
- Working with local jurisdictions, CEC, CALBO, HERS providers, and other key stakeholders to optimize process flows and business practices for Title 24 Part 6 compliance and documentation.
- Promote web and mobile permitting tools (e.g., SolarAPP+, CodeCycle) in training sessions and outreach materials.

The Team will develop customize permit guides at the request of local government staff by adding logo and contact information. Consistent with I-REN's direction and recommendations outlined in the bi-annual reports, new guides will be created for selected focus areas for compliance improvement. With

the intent of the permit guides to improve application submissions, the Team will work with local governments to understand and assess the impact of the permit guides on permit applications.

The Team will provide technical support to local jurisdictions on request. The Team will coordinate with I-REN and partners to understand the greatest needs of local governments and support outreach to engage them in reach code opportunities. Ordinances will be tailored based on specific cities' building stock, calculate energy, cost and GHG reductions, and cost-effectiveness. Based on our collective experience, jurisdictions desire and need help to evaluate opportunities and translate technical materials. We will leverage general templates and documents created under the IOU Statewide Team, customizing and modifying to meet local needs, requirements, and goals. The Team can provide (1) Support for adoption process, technical, and community engagement (2) Development of submittal materials leveraging statewide resources and (3) Development and identification of implementation tools. As needs arise for compliance with ordinances, these will be proposed as options for training topics. Through these efforts, the team will document best practices and local success stories for reach code implementation. In addition, the Team will gather information on the need for technical analysis and research to support local jurisdictions advancement of reach codes.

Deliverables:

- Develop survey instruments.
- Provide training programs in coordination with the Codes & Standards Training & Education Program included in this RFP.
- Develop permit guides.
- Assist with reach code adoption and implementation materials.
- Provide documentation of participant interactions.
- Provide bi-annual reports on compliance improvement efforts, including metrics and recommendations for program improvement.
- Provide monthly and quarterly status reports.
- Conduct regular biweekly meetings.
- Provide meeting agendas and status updates.
- Provide summaries on California and national grant funding opportunities.

Task 1.4: Other Services

In addition to program design, outreach, and implementation, the Frontier team will also assist with other services such as program-specific content and edits or updates for I-REN regulatory filings, provide program data in CPUC templates, and document performance measurements, and provide analysis of program performance and recommendations for future program improvements.

Coverage will be provided by Margaret Marchant, as she is Frontier Energy's technical and regulatory expert supporting I-REN, 3C-REN, and BayREN program portfolios.

Deliverables:

- Provide program-specific content and edits or updates to content for I-REN regulatory filings.
- Provide program data in alignment with CPUC reporting templates.

- Document metrics, indicators, and other performance measurements.
- Provide analysis of program performance and recommendations for future program improvements.

Timeline for SOW 2

Include a timeline for the proposed work. Note that I-REN is interested in having a “soft launch” of one or more of its programs by the end of 2022, with full deployment for 2023.

Because Frontier Energy has served as the current lead consultant for I-REN, the Team can implement work as proposed above immediately and without interruption. These newly proposed program can be implemented quickly with direction from the C&S Program Manager and input as necessary from I-REN partners. Major external dates of significance (i.e., the 2025 Title 24 update cycle) are noted.

The Team will work with I-REN and its partners during project scoping to define an appropriate and responsive schedule to meet sponsoring local jurisdictions’ needs. A proposed schedule is provided below based on general timelines for 2022 code adoption. Critical factors that will impact schedule refinement may include ability to leverage existing cost-effectiveness studies; need to coordinate with any program administrators for incentive-based codes; and feasibility of reaching various levels of stringency targeted by I-REN, its partners, or stakeholders

	2022	2023				2024				2025			
	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4
Contract Execution													
Task 1.1 Program Design													
Program Implementation Manual													
Program Manual													
1 st Stakeholder & Organizational Meetings													
Program Delivery Model													
Monthly and Quarterly status reports													
Task 1.2 Outreach & Engagement													
Review existing branding & marketing strategies													
Recommendations and assist in developing new materials													
Develop Outreach Plan													
Engage with non-English speaking & DACs to gather barriers and feedback.													
Develop and implement plan to involve non-English speaking & DACs													
Identify success stories, champions, speakers/presenters, and local wins.													
Monthly and Quarterly status reports													
Task 1.3 Program Implementation													
Assist jurisdictions with energy code compliance and enforcement													
Research Existing Codes													

	2022	2023				2024				2025			
	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4
1st Stakeholder & Organizational Meetings for code compliance and reach code adoption													
Establish Model Ordinance Framework													
Draft Model Codes													
Develop Survey Instruments													
Conduct Periodic Surveys													
Develop Permit Guides at the request of local jurisdictions.													
Leverage general templates customizing to meet local needs, requirements, and goals for implementation.													
Develop Cost Effectiveness Analysis													
Identify Reach Code Implementation Tools/Processes													
Assist in reach code adoption													
Provide documentation of participant interactions													
Provide bi-annual reports on compliance improvement efforts													
Charrettes & 2nd Stakeholder Meeting for model ordinance													
Final Draft Model Codes													
Local Stakeholder Engagement (as needed) for model ordinances													
Engage key stakeholders in readings for reach code approval													
CEC Model Ordinance Application/Approval													
File Model Ordinance with California Building Standards Commission													
Provide monthly and quarterly status reports. Conduct biweekly meetings, and summaries on grant funding opportunities.													
Task 1.4 Other Services													
Develop content for I-REN regulatory filings.													
Provide program data for CPUC reporting templates.													
Document performance measurements.													
Provide analysis of program performance													

Budget for SOW 2

Furnish detailed and itemized pricing for the proposed work, including an estimate of hours required to complete the specified tasks along with a total anticipated budget.

	Estimated Hours by Year				Estimated Labor Cost by Year				Estimated Direct Cost by Year				Total Estimated Cost by Year			
	2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025
Task 1.1 Program Design	125	246	246	198	\$18,775	\$39,962	\$40,754	\$35,426	\$ -	\$ -	\$ -	\$ -	\$18,775	\$39,962	\$40,754	\$35,426
Task 1.2: Outreach & Engagement	40	252	156	132	\$6,650	\$39,744	\$28,548	\$22,080	\$10,000	\$46,220	\$46,220	\$36,220	\$16,650	\$85,964	\$74,768	\$58,300
Task 1.3: Program Implementation	30	348	348	258	\$5,250	\$56,952	\$58,044	\$40,896	\$19,355	\$30,600	\$30,600	\$30,600	\$24,605	\$87,552	\$88,644	\$71,496
Task 1.4: Other Services	20	322	322	322	\$2,750	\$47,668	\$48,606	\$49,544	\$ -	\$ -	\$ -	\$ -	\$2,750	\$47,668	\$48,606	\$49,544
Subtotals	215	1,168	1,072	910	\$33,425	\$184,326	\$175,952	\$147,946	\$29,355	\$76,820	\$76,820	\$66,820	\$62,780	\$261,146	\$252,772	\$214,766
Total Estimated Cost (Labor and Direct Cost)																791,464

Estimated direct cost include but are not limited to:

- Travel, mileage, airfare, hotel
- Technology and communications platforms
- Materials production and collateral
- Marketing and outreach subcontractors
- Subcontractors: Making Hope Happen Foundation, Inland Equity Community Land Trust (ECLT), Inland SoCal Housing Collective
- Venue rental and logistics
- Training event hosting services including catering
- Instructor and training subcontractors

Methods to Ensure Quality Control and Budget and Schedule control

The Frontier team will use several strategies to anticipate, mitigate, and otherwise resolve problems and obstacles that may arise while implementing this scope of work. These strategies are based on lessons learned from decades of program implementation across California, as well as specific understanding Frontier team members hold for how Codes & Standards activities are coordinated between I-REN, local governments, CEC, the Statewide IOU C&S team, and other C&S stakeholders.

- Clear and consistent communications and engagement with CPUC. There is not currently a C&S subject matter expert (SME) at CPUC, and the Program's contact there has changed multiple times since the Program's inception. The Frontier Team can support the C&S Program Manager with historical accounting of all CPUC/I-REN related C&S communications to date. We can also develop any information resources to help onboard the C&S SME on I-REN activities.
- Scope and budget alignment for new initiatives. As the Program seeks to demonstrate new innovative C&S activities and initiatives, we recognize that even "smaller" projects have significant needs for planning, support, and implementation. For these types of activities, we can provide flexible, yet detailed program and project management supports. Tensions may arise as initial scoped activities evolve, but clear and timely communication between implementers, stakeholders, and the I-REN C&S Program Manager will work to alleviate tensions and promote understanding.

Issues, Problems, or Risks that Frontier Can Help Address

In Frontier's experience, many of the potential obstacles encountered within the space of C&S implementation involve external pressures. These can include:

- CEC budget limitations. Like many state government agencies, CEC's budget is a limiting factor for all of the code development and implementation supports that California's policy makers and C&S stakeholders typically request. This impacts which code proposals CEC can consider for any given code update cycle. Frontier Energy will coordinate with BayREN, 3C-REN, and I-REN to develop joint strategies and comments to submit code proposals that best serve each entity.
- Understanding, working with, but not being slowed by C&S stakeholders. Many critical actors throughout the C&S compliance chain have a vested interest in the code compliance process. Developing and implementing services for these actors requires I-REN to understand and collaborate with them without getting impeded by the details of how all these actors work, or don't work, together.

The Frontier Team can help provide I-REN and the C&S Program Manager with sound and creative guidance to ensure input and feedback is solicited at the right time for the benefit of program activities.

Hourly Billing Rates

Frontier Energy

Category	2022	2023	2024	2025
President	300	306	312	318
Vice President / Sr. Director	295	301	307	313
Director / Principal Consultant	275	281	287	293
Sr. Manager / Engineering Manager	245	250	255	260
Manager	218	222	226	231
Sr. Engineer / Sr. Program Manager	198	202	206	210
Engineer / Program Manager	165	168	171	174
Sr. Program Consultant / Sr. Analyst	150	153	156	159
Program Consultant / Analyst	130	133	136	139
Sr. Program Coordinator / Sr. Technician	110	112	114	116
Program Coordinator / Technician	95	97	99	101
Program Associate / Direct Install Technician	79	81	83	85
Administrative	75	75	75	75

Subcontractors

The following fully loaded rates are for a 36 month project period.

Category	Rate
Making Hope Happen	
Contract Manager, Karen Suarez	75
Project Coordinator, TBD	40
Inland Equity Partnership	
Community Outreach Coordinator, Maribel Nunez	50
Inland SoCal Housing Authority	
Project Manager, Melanie Steele	75

F. APPENDIX A: REFERENCES

Frontier Energy offers the following references for our Codes and Standards work.

3C-REN

Alejandra Tellez, Management Analyst

County Executive Office County of Ventura

800 S. Victoria Avenue, L#1940,

Ventura, CA 93009

Tel: 805-654-3835

Alejandra.Tellez@ventura.org

BayREN

Karen Kristiansson, Senior Program Coordination

Bay Area Metro Center

375 Beale Street, Suite 800

San Francisco, CA 94105

Tel: (415) 778-5260

kkristiansson@bayareametro.gov

PG&E

Kelly Cunningham, Codes and Standards Program Manager

P.O. Box 997300

Sacramento, CA 95899-7300

Tel: 530-574-8756

kavc@pge.com

G. APPENDIX B: PROJECT TEAM STAFFING

Coverage levels for proposed Frontier staff are provided in the table below, followed by biographies. Frontier confirms that no employees working on the engagement have ever been convicted of a felony.

Name, Title	Coverage Level ¹		
	Sow 1	Sow 2	Total
Frontier Energy			
Nancy Barba, Director	8%	3%	10%
Margaret Marchant, Program Manager	10%	10%	20%
Mikela Topey, Sr. Program Consultant	12%	4%	16%
Tiare Ordanza, Sr. Program Consultant	9%	3%	12%
Khain Lun So, Sr. Program Consultant	9%	3%	12%
Adam Reese, Program Consultant	32%	11%	43%
Alea German, P.E., Engineering Manager	1%	7%	8%
Ada Liu, Engineer	0.6%	4.8%	5.3%
Stephen Becker, Engineer	0.6%	4.8%	5.3%
Making Hope Happen Foundation			
Karen Suarez, Contract Manager	2%	1%	3%
TBD, Project Coordinator	9%	5%	14%
Inland SoCal Housing Collective			
Melanie Steele, Project Manager	9%	5%	14%
Inland Equity Community Land Trust			
Maribel Nunez, Community Outreach	17%	9%	26%

Biographies

Nancy Barba, Director

Nancy joined Frontier in 2010. Her effective communication skills and facility to manage diverse priorities contribute to her engaged, results-driven leadership, with experience that spans Energy Upgrade California programs to the current statewide TECH Clean California program. In her role as Director of Frontier’s West Demand Side Management Group, she works closely with regional energy networks, utilities, and multiple community choice aggregators, leading the design, launch, and implementation of portfolio and programs, marketing and outreach, stakeholder relations, financing, regulatory support, and tracking and reporting.

Nancy provides oversight for BayREN and 3C-REN’s Codes and Standards Programs, the technical and regulatory reporting for I-REN, BayREN, and 3C-REN. Her support for RENs (and CCAs) includes portfolio and program design and development activities, and associated budgets, metrics, energy savings, contracts, and reporting. She supports successful filings of annual budget advice letters, program implementation plans, joint cooperation memos, and other required regulatory documents for program administrators.

Nancy has demonstrated her commitment to I-REN from the beginning and continues to support and champion its mission to bring energy efficiency programs and services to all residents of the Inland Region.

Education/Certifications/Training

B.S., Business Administration, California State University, Long Beach

LEED AP O+M

Certified Green Building Professional

Certified GreenPoint Advisor

Margaret Marchant, Program Manager

Margaret brings 14 years of experience in the energy efficiency industry with expertise in program development and implementation, regulatory support, and strategic funding consulting. With diligent attention to detail and excellent communication skills, she excels in collaborating with clients on energy efficiency program development and regulatory filings.

Margaret supports energy efficiency program development and implementation for REN clients. This includes research and program ideation, leadership for developing program processes and materials, and supporting REN program staff with regulatory filings and data requests. Recently this has included the Tri-County Regional Energy Network Multifamily Home Energy Savings Program, for which Margaret serves as Frontier Energy project manager, as well as the preceding Multifamily Market Research & Analysis.

She has oversight for Frontier's contributions to the PG&E Heat Pump Water Heater Midstream Study, including stakeholder engagement with local building departments and contractors. In the past she also contributed to the BayREN Codes and Standards Program, providing analysis to support decisions about permit guide updates, and revisions to ePermit tools.

In addition to her program development and implementation work, Margaret provides technical and regulatory consulting support to multiple clients including I-REN, 3C-REN, and BayREN. She has successfully coordinated and authored funding applications and associated regulatory filings resulting in millions of dollars in ratepayer funding awarded for REN and CCA client programs, including I-REN's Business Plan filing.

For the I-REN Business Plan, Margaret and the project team took a data-driven approach involving extensive collaboration with I-REN and research into the challenges and opportunities in the region to develop a persuasive narrative and defend I-REN's position in subsequent regulatory filings. Ultimately, I-REN's Business Plan was approved and recognized for its alignment with CPUC goals for increasing equity in energy efficiency and serving populations considered hard-to-reach, underserved, Environmental and Social Justice communities, and disadvantaged communities.

Education/Certifications/Training

B.A., Liberal Arts Honors Program, the University of Texas at Austin, Austin, TX with Departmental Honors

Mikela Topey, Senior Program Consultant

Mikela Topey is an environmental and economic justice advocate working to ensure energy-efficient and decarbonizing technologies are accessible to all. As a Senior Program Consultant with Frontier Energy, Inc., she supports investor-owned utilities (IOUs), community choice aggregators (CCAs), regional energy networks (RENs), and local governments with program development and program implementation of energy efficiency programs. Her programmatic expertise includes residential retrofit programs, energy efficiency financing, building codes and standards, and workforce development and training.

Mikela currently serves as the project manager for the following programs and pilots: TECH Clean California's Streamlined Permitting Pilot, 3C-REN's Building Performance Training program, 3C-REN's Energy Code Connect program, BayREN's Training and Education program, BayREN's ZNE/ZNC Technical Assistance program, I-REN's Codes and Standards program, and I-REN's Workforce, Education, and Training program. Mikela also works with her clients to facilitate and coordinate partnership opportunities with the California Energy Commission and community-based organizations.

Mikela's support for 3C-REN includes:

- Provide project management support to the Codes and Standards program.
- Conduct outreach to community-based organizations, community colleges, and workforce trainers to develop a Bureau of Instructor to lead building performance trainings to disadvantaged contractors in the tri-county area.
- Develop a set of procedures for collecting, evaluating, and reporting value metrics.
- Draft and edit sections of the business plan and portfolio filing for the workforce, education, and training and codes and standards programs.
- Conduct a gap analysis to assess how the tri-county area is underserved by energy-efficiency programs.
- Evaluate data from the CPUC's Residential Appliance Saturation Study to assess market opportunities for energy-efficiency and electrification programs.
- Edit and review annual reports, annual metric reports, and joint cooperation memos.
- Develop presentations and reports for ABAL workshops.
- Help develop and implement quarterly regional forums for key market actors including policy makers, building professionals, and building department staff to address policy and market barriers, share best practices, and network.

Mikela's BayREN C&S program experience includes:

- Manage budgets, labor hours, and deliverables.
- Submit monthly invoicing and narratives.
- Provide oversight and guidance on monthly reports on Codes & Standards activities.
- Provide analysis of program data, and suggestions for improving metrics and programs.
- Manage relationship with subcontractors and instructors.
- Facilitate and coordination external calls with California Energy Commission and Pacific Gas and Electric.

- Represent BayREN in coordination and engagement with municipal zero net energy related efforts.
- Supervise training materials, scheduling, and online tool updates.
- Supervise forum deliverables.

Education/Certifications/Training

B.S., Environmental Sciences, University of California, Berkeley
Diploma, Indio High School

Tiare Ordanza, Senior Program Consultant

Tiare has over 10 years of experience in energy efficiency working with residential, commercial, and institutional clients. She was instrumental in managing the East Bay Energy Watch/PG&E SmartLights Program that offered technical assistance and rebates and in helping with lighting retrofits, refrigeration tune-ups, controls and seals replacement, as well as assisted in the development and implementation of several pilot programs. Tiare brings a strong background in project management, business development, sales, site audits, outreach and education to her work at Frontier. She supports the TECH Clean California Initiative and the Home Energy Score Program. For BayREN's Codes and Standards Program, she support program design efforts and implementation of traditional and electronic resources and helps facilitate and manage events and trainings.

Education/Certifications/Training

Project Management Certificate Program, California State University East Bay, Oakland, CA
Project Management in Construction, Construction Resource Center, Oakland, CA
Energy Efficiency courses (Lighting Systems, HVAC, Excel for energy auditors, audit tools, data collection techniques, and calculations), Pacific Energy Center, San Francisco, CA
Green Energy Efficiency Sales & Auditing Program, Laney College, Oakland, CA
Green Energy Training GETS Program, Rising Sun Energy Center, Berkeley, CA
Residential Building Codes & Inspection Technology, College of San Mateo, San Mateo, CA

Khain Lun So, Senior Program Consultant – Communications/Graphic UX Designer

Lun brings an artist's eye and a large software, programming, and design toolbox to his work designing and producing materials for websites, outreach campaigns, social media campaigns, and video. In addition to implementing user experience (UX) research, developing and designing websites for the California Fuel Cell Partnership (CaFCP) and DOE-funded educational programs, Lun created websites for a residential energy efficiency program. He has created multiple illustrations and interactive infographics for clients that include CEC, PG&E, and Air Quality Management Districts. His work extends to technical illustrations and maps for reports, presentations, and online materials. Key project experience includes:

- BayREN Codes & Standards Program – Energy code trainings outreach, ICC credit certification, resources/survey coordination, quarterly regional forum promotion design/public outreach with Bay

Area jurisdictions, live event technical support, audience tracking, video editing, Annual Program Report/Municipal Resources Guide design.

- Website design of The Energy Network residential, Northern Illinois Foodservice Rebates, H2USA, and H2 Readiness.
- Technology diagram illustrations/interactive graphics and QA/QC support for the California Energy Commission's EPIC project website EnergizeInnovation.fund, and event forum support as technical moderator.

Education/Certifications/Training

B.S., with honors in Graphic Design, California State University, Sacramento, CA

2017 course in User Experience (UX) Design at General Assembly, San Francisco, CA

Adam Reese, Program Consultant

Adam brings a unique blend of experience, having worked in energy efficiency for 8 years across many types of programs, including residential, new construction, and HVAC. He has over 20 years of experience working closely with contractors and customers, which he puts to use every day in outreach and engagement. Adam is currently a Program Consultant for Frontier Energy, working on the TECH Clean California's Streamlined Permitting Pilot and the PG&E Heat Pump Water Heater Midstream Study.

Adam's relevant C&S program experience includes:

- Lead the development of outreach campaigns and strategies to achieve recruitment objectives.
- Analyze processes and assist in developing alternative strategies.
- Collaborate and design inducement strategies to remove barriers in the permitting process.
- Promote efficiency resources to targeted audiences, driving program participation.
- Perform metrics reporting, data tracking and data quality assurance reviews on regular timelines/deadlines with efficient attention to detail and accuracy.
- Track and review program participation and communicate program updates and general information to stakeholders.
- Assist in the development of stakeholder meetings and help facilitate and engage with attendees.

Education/Certifications/Training

B.S., Liberal Studies, Portland State University, Portland, OR

Alea German, P.E., Engineering Manager

Alea has worked in the energy field since 2006. Her focus is on whole building energy optimization, technology assessment, and code development, particularly as it relates to zero net energy (ZNE) design. Alea is a skilled energy modeler with over a decade of experience using software including CBECC-Res, CBECC-Com, EnergyPlus, BEopt, eQuest, and EnergyPro. Overseeing Frontier's energy code consulting services, she has a broad understanding of California's Title 24, Part 6 code and leads statewide technical code change proposals. For the development of the 2019 and 2022 Residential Title 24 Standards she led the High Performance

Walls and Residential Additions and Alterations Codes and Standards Enhancement (CASE) initiatives. These CASE topic evaluations focused on very detailed cost and feasibility evaluations, balancing the desire for increased energy efficiency against the realities of construction industry practices and capabilities.

As a key technical lead for the California Codes and Standards Reach Codes program, Alea provides technical support to local governments on adopting ordinances intended to support meeting local and/or statewide energy and greenhouse gas reduction goals. Throughout her career, she has provided technical support for PG&E's ZNE Pilot Program, assisting builders in determining the best approach to achieving ZNE, worked on many projects in DOE's Building America program such as the Spring Lake Multifamily ZNE Affordable Community, UC Davis' West Village Community, and the Sonoma Passive House Retrofit, and contributed to research evaluations of residential technologies such as ventilation cooling, mechanical pre-cooling, evaporative cooled condensers, ground coupled heat pumps, air to water heat pumps and radiant delivery, and heat pump water heaters. Previously, Alea conducted measurement and verification of energy incentive programs throughout the country. She has experience with field surveying and testing of energy efficiency measures both in retrofit and new construction applications.

Alea's list of publications is available upon request. Recent examples include:

1. German, A. [High Performance Walls – Final Report](#). 2019 Codes and Standards Enhancement (CASE) Initiative. Prepared by the California Statewide CASE Program. September 2017.
2. Mahone, A., Li, C., Subin, Z., Sontag, M., Mantegna, G., Karolides, A., German, A., Morris, P. (2019). [Residential Building Electrification in California. Consumer economics, greenhouse gases and grid impacts](#). April 2019.
3. German, A., Dakin, B., Pereira, J., White, B., Mendon, V., McCollum, E. (2020). [Residential Energy Savings and Process Improvements for Additions and Alterations](#). 2022 Codes and Standards Enhancement (CASE) Initiative. Prepared by the California Statewide CASE Program. August 2020.
4. Max Wei, Sang Hoon Lee, Hung-Chia Yang, Sarah Price, Jeff Greenblatt, Tianzhen Hong, Brian Conlon, Lucy McKenzie, Zachary Ming, Bob Hendron, and Alea German. [Approaches to Zero Net Energy Cost Effectiveness in New Homes](#). California Energy Commission. Publication Number: CEC-500-2021-025. April 2021.

Education/Certifications/Training

M.S., Mechanical & Aeronautical Engineering, University of California, Davis, 2012

B.S., Mechanical Engineering, Johns Hopkins University, Baltimore, MD, 2003

Registered Mechanical Engineer (M 36710), 2012

CABEC Certified Energy Analyst (R19-13-30076, NR19-14-30028)

Ada Liu, Engineer

Ada provides technical analysis and energy modeling for the Title 24 energy code and field and lab research projects. She is skilled with python scripting and develops automated analysis processes for modeling and monitoring data. Previously, while completing her degree in Mechanical Engineering, Ada worked at SMUD, where she gained experience in streamlining and improving engineering testing processes and worked on diverse activities including a vibrations project and a rowing mechanics modeling project. Since joining Frontier in 2019, Ada's experience includes:

- Automated the development of CBECC-res and CBECC-com models with Python and Excel to evaluate energy efficiency measure and packages to include in Reach Codes and code development.
- Analyzed retrofit package cost and savings for the 2019 and 2022 code cycle.
- Analysis of energy efficiency compliance options for Title 24.
- Data analysis and reporting for field and lab test activities.

Education/Certifications/Training

B.S., Mechanical Engineering, University of California at Davis, 2019

Technical Skills

Software: CBECC Res, CBECC Com, BEopt, C & C++, Object Oriented Programming, Python, MATLAB, GDB debugging, IDE, Git, Unix, LabVIEW

Design: Manufacturing Processes, Rapid Prototyping, SolidWorks 3D Modeling, Fabrication

Stephen Becker, Engineer

Stephen is an Engineer-in-training with experience in zero net energy building research, model development, data analysis, and air quality research. He has built an understanding of residential and commercial building mechanical systems and controls through studies that included modeling building energy use and thermal properties, designing temperature control strategies for a building's radiant-based system to reduce energy use, and testing new control strategies to demonstrate how the addition of solar panels would result in a zero net energy building. Stephen's skills encompass computer model design, testing and experimental design, equipment inspection and calibration, engineering plans evaluation, and data analysis. Since joining Frontier in 2019, Stephen's experience includes:

- Building energy simulation for multiple research projects, including Sonoma Clean Power's Optimized Strategies project, Honda's Smart Home, and the Central Valley Research Homes project (CVRH).
- Analysis of energy efficiency compliance options for Title 24.
- Modeling of energy efficiency measures for inclusion in Reach Codes and code development.
- Support of field and lab testing for multiple technologies, including phase change materials used for insulation, aerosol air sealing technology, air to water heat pumps, and radiant systems.

Education/Certifications/Training

B.S., Mechanical Engineering, University of California at Davis, 2017

Engineer-In-Training, Mechanical Engineering, State of California, License #165704

Subconsultants Biographies

Karen Suarez, Director – Uplift San Bernardino, Making Hope Happen Foundation

A proud daughter of immigrants, Karen is the Director of Uplift San Bernardino, a collective impact program of the Making Hope Happen Foundation. Together, community based organizations, residents, community leaders, students, and more are building a generation of successful adults committed to growing roots in San Bernardino. They are collectively building and aligning systems to advance a more equitable San Bernardino.

For over a decade, Karen has worked in roles to support and advocate for students, women, community and education. She has worked as a Congressional Field Representative for the 43rd Congressional District, Business Development Director for the Go Red for Women campaign for the Inland Empire American Heart Association, the Executive Director for The Dominguez Dream, and more recently the Assistant Vice President, Community Development Officer for Wells Fargo & Company serving Riverside and San Bernardino Counties, focused on housing affordability, small business growth, workforce development, and financial health.

Karen serves as the Co-Chair for the Inland SoCal Housing Collective, and Inland Economic Growth & Opportunity, and serves on other boards and collectives throughout the region.

Education

M.S., Higher Education Administration, Florida State University

B.A., Psychology, California State University, San Bernardino

B.A., Human Development, California State University, San Bernardino

Mirabel Nunez, Director, the Inland Equity Community Land Trust

Mirabel is the daughter of Mexican immigrants and belongs to the first generation of her family to be born in the United States. She leads projects that engage underrepresented people in the political process. Her workshops acquaint people with relevant political issues and equip them with effective advocacy strategies. Previously, for the Inland Equity Partnership, she worked in Riverside, San Bernardino, and Coachella areas to organize effective actions and campaigns that build power in low-income communities.

In 2019, Mirabel co-founded the Inland Equity Community Land Trust (formerly the Inland Equity Partnership) to develop and steward permanent affordable housing in Riverside and San Bernardino counties. In her work with Inland Equity, Mirabel helped organize a coalition to pass anti-poverty measures like Health4All Kids, Repeal the Maximum Family grant, Lift the Lifetime Ban on CalWORKS and CalFresh, and SB-1079, and helped pass eviction moratoriums at the state and local level.

Education

B.A., History, California State Polytechnic University, Pomona

M.A., History Fields: United States and Latin American History, California State University, Los Angeles
Single Subject Credential, Social Science, California State University, Los Angeles

Melanie Steele, Manager, Inland SoCal Housing Collective

Melanie has a background in community organization for sustainable housing. Prior to joining the Inland SoCal Housing Collective, she spent 9 years at Neighborhood Housing Services of the Inland Empire as the Director of Homeownership and Neighborhood Strategies/Interim CEO. Her time there was spent overseeing the housing and counseling team, down payment assistance programs, neighborhood initiatives, and data & reporting for the organization. At the Inland SoCal Housing Collective, Melanie creates and curates all marketing and communication pieces and works to grow the collective's membership by focusing sectors that are not represented in the collaborative space. She supports the work of the local housing initiative and impact models across the region and statewide to share best practices and attract resources for the San Bernardino and Riverside counties.

Education

Master of Social Work, Washington University, St. Louis, MO

Bachelor of Social Work, Azusa Pacific University, Azusa, CA

H. APPENDIX C: COMPANY OVERVIEW

Frontier Energy is an engineering and consulting firm delivering innovative energy efficiency solutions for commercial, industrial, and residential customers. With a team of over 140 professionals in California, Illinois, Minnesota, New York, and Texas, Frontier offers expertise in energy efficiency, decarbonization, demand-side management, building research and consulting, strategic funding, commercial foodservice efficiency, software development, and transportation and power.

Frontier has provided technical and programmatic solutions to state energy agencies, utilities, and regional and local energy providers for over 40 years.

Official registered name (Corporate, D.B.A., Partnership, etc.), Dun & Bradstreet Number, Primary and secondary SEC numbers, address, main telephone number, toll-free number(s), and fax number(s).

Frontier Energy, Inc.

Corporate Headquarters:

12949 Alcosta Blvd, Suite 101

San Ramon, CA 94583-1323

Main Phone: 510-444-9707

Fax: 510-291-9595

SEC Numbers: None (Frontier Energy is a privately held subsidiary to GTI International and is not subject to SEC regulation)

DUNS Number: 13-276-5876

Primary key contact name, title, address (if different from above address), direct telephone, and fax number(s).

Nancy Barba, Director

213-213-1978

nbarba@frontierenergy.com

Person authorized to contractually bind the organization for any Proposal against this RFP.

Jeremy Springer, CFO

916-245-8925

jspringer@frontierenergy.com

I. STATEMENT OF TERMS AND CONDITIONS ACCEPTANCE

Frontier Energy, Inc. agrees to the following terms and conditions:

- A. The awardee must be fully committed to the mission of I-REN.
- B. Termination - A termination agreement is to be negotiated between the parties that includes provisions on termination for cause and termination for convenience.
- C. Oral Presentations - Any individual or firm who submits a Proposal in response to this RFP must be willing to make oral presentations related to contract-related activities at the request of the I-REN Team or management.
- D. Compensation - The total value of this contract is undefined and contains the option of renewal at the discretion of WRCOG. The schedule of compensation will be mutually negotiated. The compensation plan will include payment based upon an assessment of the vendor's attainment of specific, measurable outcomes or "performance benchmarks," which will be mutually developed between WRCOG and the selected Proposer(s).

Frontier Energy, Inc. has reviewed and is prepared to sign WRCOG's standard Professional Services Agreement in order to receive the contract award. No alternative language is proposed by Frontier Energy.

Attachment 3c

WRCOG IREN

Professional Services Agreement
Frontier Codes and Standards

**WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
PROFESSIONAL SERVICES AGREEMENT 2023-80-2080-003**

1. PARTIES AND DATE.

This Agreement is made and entered into this 21st day of February 2023, by and between the Western Riverside Council of Governments, a California public agency ("WRCOG"), and Frontier Energy, Inc., a California corporation ("Consultant"). WRCOG and Consultant are sometimes individually referred to as "Party" and collectively as "Parties."

2. RECITALS.

2.1 Inland Regional Energy Network

The Inland Regional Energy Network ("I-REN") is a consortium of WRCOG, San Bernardino Associated Governments ("SANBAG") and the Coachella Valley Association of Governments ("CVAG") for the purpose of establishing and operating a locally administered, designed, and delivered energy efficiency program. WRCOG is the administrative lead of I-REN and is responsible for entering into contracts on behalf of I-REN.

2.2 Consultant.

Consultant desires to perform and assume responsibility for the provision of certain professional services required by WRCOG on the terms and conditions set forth in this Agreement. Consultant represents that it is experienced in providing Codes & Standards training, education and technical support programs that meet the needs of the I-REN program as described in the Scope of Services, is licensed in the State of California, and is familiar with the plans of WRCOG.

2.3 Project.

WRCOG desires to engage Consultant to render such professional services for the **I-REN Codes & Standards program** ("Project") as set forth in this Agreement.

3. TERMS.

3.1 Scope of Services and Term.

3.1.1 General Scope of Services. Consultant promises and agrees to furnish to WRCOG all labor, materials, tools, equipment, services, and incidental and customary work necessary to fully and adequately supply the to assist the I-REN team with program design, outreach, implementation, and other tasks related to the development of Codes & Standards training, education, and support programs necessary for the Project ("Services"). The Services are more particularly described in Exhibit "A" attached hereto and incorporated herein by reference, and which are stated in the proposal to WRCOG and approved by I-REN's Executive Committee. All Services shall be subject to, and performed in accordance with, this Agreement, the exhibits attached hereto and incorporated herein by reference, and all applicable local, state and federal laws, rules and regulations.

3.1.2 Term. The term of this Agreement shall be from **February 21, 2023** to

December 31, 2025 with no more than two options to renew or amend unless earlier terminated as provided herein. Consultant shall complete the Services within the term of this Agreement and shall meet any other established schedules and deadlines.

3.2 Responsibilities of Consultant.

3.2.1 Control and Payment of Subordinates; Independent Contractor. The Services shall be performed by Consultant or under its supervision. Consultant will determine the means, methods, and details of performing the Services subject to the requirements of this Agreement. WRCOG retains Consultant on an independent contractor basis and not as an employee. Consultant retains the right to perform similar or different services for others during the term of this Agreement. Any additional personnel performing the Services under this Agreement on behalf of Consultant shall also not be employees of WRCOG and shall at all times be under Consultant's exclusive direction and control. Consultant shall pay all wages, salaries, and other amounts due such personnel in connection with their performance of Services under this Agreement and as required by law. Consultant shall be responsible for all reports and obligations respecting such additional personnel, including, but not limited to, social security taxes, income tax withholding, unemployment insurance, disability insurance, and workers' compensation insurance.

3.2.2 Schedule of Services. Consultant shall perform the Services expeditiously, within the term of this Agreement, and in accordance with the Schedule of Services set forth in Exhibit "B" attached hereto and incorporated herein by reference. Consultant represents that it has the professional and technical personnel required to perform the Services in conformance with such conditions. In order to facilitate Consultant's conformance with the Schedule, WRCOG shall respond to Consultant's submittals in a timely manner. Upon request of WRCOG, Consultant shall provide a more detailed schedule of anticipated performance to meet the Schedule of Services.

3.2.3 Conformance to Applicable Requirements. All work prepared by Consultant shall be subject to the approval of WRCOG.

3.2.4 Substitution of Key Personnel. Consultant has represented to WRCOG that certain key personnel will perform and coordinate the Services under this Agreement. Should one or more of such personnel become unavailable, Consultant may substitute other personnel of at least equal competence upon written approval of WRCOG. In the event that WRCOG and Consultant cannot agree as to the substitution of key personnel, WRCOG shall be entitled to terminate this Agreement for cause. As discussed below, any personnel who fail or refuse to perform the Services in a manner acceptable to WRCOG, or who are determined by the WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, or a threat to the safety of persons or property, shall be promptly removed from the Project by the Consultant at the request of the WRCOG. The key personnel for performance of this Agreement are as follows:

Nancy Barba, Director

3.2.5 WRCOG's Representative. WRCOG hereby designates the Executive Director, or his or her designee, to act as its representative for the performance of this Agreement ("WRCOG's Representative"). WRCOG's Representative shall have the power to act on behalf of WRCOG for all purposes under this Contract. Consultant shall not accept

direction or orders from any person other than WRCOG's Representative or his or her designee.

3.2.6 Consultant's Representative. Consultant hereby designates Nancy Barba, Director, or his or her designee, to act as its Representative for the performance of this Agreement ("Consultant's Representative"). Consultant's Representative shall have full authority to represent and act on behalf of the Consultant for all purposes under this Agreement. The Consultant's Representative shall supervise and direct the Services, using his best skill and attention, and shall be responsible for all means, methods, techniques, sequences, and procedures, and for the satisfactory coordination of all portions of the Services under this Agreement.

3.2.7 Coordination of Services. Consultant agrees to work closely with WRCOG staff in the performance of Services and shall be available to WRCOG's staff, consultants, and other staff at all reasonable times.

3.2.8 Standard of Care; Performance of Employees. Consultant shall perform all Services under this Agreement in a skillful and competent manner, consistent with the standards generally recognized as being employed by professionals in the same discipline in the State of California. Consultant represents and maintains that it is skilled in the professional calling necessary to perform the Services. Consultant warrants that all employees and sub-contractors shall have sufficient skill and experience to perform the Services assigned to them. Finally, Consultant represents that it, its employees and sub-contractors have all licenses, permits, qualifications, and approvals of whatever nature that are legally required to perform the Services, and that such licenses and approvals shall be maintained throughout the term of this Agreement. As provided for in the indemnification provisions of this Agreement, Consultant shall perform, at its own cost and expense, and without reimbursement from WRCOG, SANBAG, and/or CVAG for any services necessary to correct errors or omissions which are caused by the Consultant's failure to comply with the standard of care provided for herein. Any employee of the Consultant or its sub-consultants who is determined by WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, a threat to the safety of persons or property, or any employee who fails or refuses to perform the Services in a manner acceptable to WRCOG, shall be promptly removed from the Project by the Consultant and shall not be re-employed to perform any of the Services or to work on the Project.

3.2.9 Laws and Regulations. Consultant shall keep itself fully informed of and in compliance with all local, state and federal laws, rules and regulations in any manner affecting the performance of the Project or the Services, including all Cal OSHA requirements, and shall give all notices required by law. Consultant shall be liable for all violations of such laws and regulations in connection with Services. If the Consultant performs any work knowing it to be contrary to such laws, rules, and/or regulations, and without giving written notice to WRCOG, Consultant shall be solely responsible for all costs arising therefrom. Consultant shall defend, indemnify, and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers and agents free and harmless, pursuant to the indemnification provisions of this Agreement, from any claim or liability arising out of any failure or alleged failure to comply with such laws, rules or regulations.

3.2.10 Insurance.

3.2.10.1 Time for Compliance. Consultant shall not commence the Services under this Agreement until it has provided evidence satisfactory to WRCOG that it has

secured all insurance required under this section, in a form and with insurance companies acceptable to WRCOG. In addition, Consultant shall not allow any sub-contractor to commence work on any subcontract until it has provided evidence satisfactory to WRCOG that the sub-contractor has secured all insurance required under this section.

3.2.10.2 Minimum Requirements. Consultant shall, at its expense, procure and maintain for the duration of the Agreement, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Agreement by the Consultant, its agents, representatives, employees or sub-contractors. Consultant shall also require all of its sub-contractors to procure and maintain the same insurance for the duration of the Agreement. Such insurance shall meet at least the following minimum levels of coverage:

(A) Minimum Scope of Insurance. Coverage shall be at least as broad as the latest version of the following: (1) *General Liability*: Insurance Services Office Commercial General Liability coverage (occurrence form CG 0001 or exact equivalent); (2) *Automobile Liability*: Insurance Services Office Business Auto Coverage (form CA 0001, code 1 (any auto) or exact equivalent); and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

(B) Minimum Limits of Insurance. Consultant shall maintain limits no less than: (1) *General Liability*: \$1,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with general aggregate limit is used, either the general aggregate limit shall apply separately to this Agreement / location or the general aggregate limit shall be twice the required occurrence limit; (2) *Automobile Liability*: \$1,000,000 per accident for bodily injury and property damage; and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation limits as required by the Labor Code of the State of California. Employer's Liability limits of \$1,000,000 per accident for bodily injury or disease.

3.2.10.3 Professional Liability. Consultant shall procure and maintain, and require its sub-consultants to procure and maintain, for a period of five (5) years following completion of the Services, errors and omissions liability insurance appropriate to their profession. Such insurance shall be in an amount not less than \$2,000,000 per claim. This insurance shall be endorsed to include contractual liability applicable to this Agreement and shall be written on a policy form coverage specifically designed to protect against acts, errors, or omissions of the Consultant. "Covered Professional Services" as designated in the policy must specifically include work performed under this Agreement. The policy must "pay on behalf of" the insured and must include a provision establishing the insurer's duty to defend.

3.2.10.4 Insurance Endorsements. The insurance policies shall contain the following provisions, or Consultant shall provide endorsements on forms supplied or approved by WRCOG to add the following provisions to the insurance policies:

(A) General Liability.

(i) Commercial General Liability Insurance must include coverage for (1) Bodily Injury and Property Damage; (2) Personal Injury / Advertising Injury; (3) Premises / Operations Liability; (4) Products / Completed Operations Liability; (5) Aggregate Limits that Apply per Project; (6) Explosion, Collapse and Underground (UCX) exclusion deleted; (7) Contractual Liability with respect to this Agreement; (8) Broad Form

Property Damage; and (9) Independent Consultants Coverage.

(ii) The policy shall contain no endorsements or provisions limiting coverage for (1) contractual liability; (2) cross liability exclusion for claims or suits by one insured against another; or (3) contain any other exclusion contrary to the Agreement.

(iii) The policy shall give WRCOG, its Directors, officials, officers, employees, volunteers and agents insured status using ISO endorsement forms 20 10 10 01 and 20 37 10 01, or endorsements providing the exact same coverage.

(iv) The additional insured coverage under the policy shall be "primary and non-contributory" and will not seek contribution from WRCOG's, SANBAG's, or CVAG's insurance or self-insurance and shall be at least as broad as CG 20 01 04 13, or endorsements providing the exact same coverage.

(B) Automobile Liability.

(i) The automobile liability policy shall be endorsed to state that: (1) WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents and volunteers shall be covered as additional insureds with respect to the ownership, operation, maintenance, use, loading or unloading of any auto owned, leased, hired, or borrowed by the Consultant or for which the Consultant is responsible; and (2) the insurance coverage shall be primary insurance as respects WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents, and volunteers, or if excess, shall stand in an unbroken chain of coverage excess of the Consultant's scheduled underlying coverage. Any insurance or self-insurance maintained by WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents, and volunteers shall be in excess of the Consultant's insurance and shall not be called upon to contribute with it in any way.

(C) Workers' Compensation and Employers Liability Coverage.

(i) Consultant certifies that he/she is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and he/she will comply with such provisions before commencing work under this Agreement.

(ii) The insurer shall agree to waive all rights of subrogation against WRCOG, its Directors, officials, officers, employees, agents, and volunteers for losses paid under the terms of the insurance policy which arise from work performed by the Consultant.

(D) All Coverages. Defense costs shall be payable in addition to the limits set forth hereunder. Requirements of specific coverage or limits contained in this section are not intended as a limitation on coverage, limits, or other requirement, or a waiver of any coverage normally provided by any insurance. It shall be a requirement under this Agreement that any available insurance proceeds broader than or in excess of the specified minimum insurance coverage requirements and/or limits set forth herein shall be available to WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers and agents as additional insureds under said policies. Furthermore, the requirements for

coverage and limits shall be (1) the minimum coverage and limits specified in this Agreement; or (2) the broader coverage and maximum limits of coverage of any Insurance policy or proceeds available to the named insured; whichever is greater.

(i) The limits of insurance required in this Agreement may be satisfied by a combination of primary and umbrella or excess insurance. Any umbrella or excess insurance shall contain or be endorsed to contain a provision that such coverage shall also apply on a primary and non-contributory basis for the benefit of WRCOG (if agreed to in a written contract or agreement) before WRCOG's own insurance or self-insurance shall be called upon to protect it as a named insured. The umbrella / excess policy shall be provided on a "following form" basis with coverage at least as broad as provided on the underlying policy(ies).

(ii) Consultant shall provide WRCOG at least thirty (30) days prior written notice of cancellation of any policy required by this Agreement, except that the Consultant shall provide at least ten (10) days prior written notice of cancellation of any such policy due to non-payment of premium. If any of the required coverage is cancelled or expires during the term of this Agreement, the Consultant shall deliver renewal certificate(s) including the General Liability Additional Insured Endorsement to WRCOG at least ten (10) days prior to the effective date of cancellation or expiration.

(iii) The retroactive date (if any) of each policy is to be no later than the effective date of this Agreement. Consultant shall maintain such coverage continuously for a period of at least three years after the completion of the work under this Agreement. Consultant shall purchase a one (1) year extended reporting period A) if the retroactive date is advanced past the effective date of this Agreement; B) if the policy is cancelled or not renewed; or C) if the policy is replaced by another claims-made policy with a retroactive date subsequent to the effective date of this Agreement.

(iv) The foregoing requirements as to the types and limits of insurance coverage to be maintained by Consultant, and any approval of said insurance by WRCOG, is not intended to and shall not in any manner limit or qualify the liabilities and obligations otherwise assumed by the Consultant pursuant to this Agreement, including but not limited to, the provisions concerning indemnification.

(v) If at any time during the life of the Agreement, any policy of insurance required under this Agreement does not comply with these specifications or is canceled and not replaced, WRCOG has the right but not the duty to obtain the insurance it deems necessary, and any premium paid by WRCOG will be promptly reimbursed by Consultant or WRCOG will withhold amounts sufficient to pay premium from Consultant payments. In the alternative, WRCOG may cancel this Agreement. WRCOG may require the Consultant to provide complete copies of all insurance policies in effect for the duration of the Project.

(vi) Neither WRCOG nor any of its Directors, officials, officers, employees, volunteers or agents shall be personally responsible for any liability arising under or by virtue of this Agreement.

3.2.10.5 Separation of Insureds; No Special Limitations. All insurance required by this Section shall contain standard separation of insureds provisions. In addition, such insurance shall not contain any special limitations on the scope of protection afforded to WRCOG, its Directors, officials, officers, employees, agents, and volunteers.

3.2.10.6 Deductibles and Self-Insurance Retentions. Any deductibles or self-insured retentions must be declared to and approved by WRCOG. Consultant shall guarantee that, at the option of WRCOG, either: (1) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects WRCOG, its Directors, officials, officers, employees, agents, and volunteers; or (2) the Consultant shall procure a bond guaranteeing payment of losses and related investigation costs, claims, and administrative and defense expenses.

3.2.10.7 Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, licensed to do business in California, and satisfactory to WRCOG.

3.2.10.8 Verification of Coverage. Consultant shall furnish WRCOG with original certificates of insurance and endorsements effecting coverage required by this Agreement on forms satisfactory to WRCOG. The certificates and endorsements for each insurance policy shall be signed by a person authorized by that insurer to bind coverage on its behalf and shall be on forms provided by WRCOG if requested. All certificates and endorsements must be received and approved by WRCOG before work commences. WRCOG reserves the right to require complete, certified copies of all required insurance policies, at any time.

3.2.10.9 Sub-consultant Insurance Requirements. Consultant shall not allow any sub-contractors or sub-consultants to commence work on any sub-contract until they have provided evidence satisfactory to WRCOG that they have secured all insurance required under this section. Policies of commercial general liability insurance provided by such sub-contractors or sub-consultants shall be endorsed to name WRCOG, SANBAG, and CVAG as additional insureds using ISO Form CG 20 38 04 13 or an endorsement providing the exact same coverage. If requested by Consultant, WRCOG may approve different scopes or minimum limits of insurance for particular sub-contractors or sub-consultants.

3.2.11 Safety. Consultant shall execute and maintain its work so as to avoid injury or damage to any person or property. In carrying out its Services, the Consultant shall at all times be in compliance with all applicable local, state, and federal laws, rules, and regulations, and shall exercise all necessary precautions for the safety of employees appropriate to the nature of the work and the conditions under which the work is to be performed. Safety precautions as applicable shall include, but shall not be limited to: (A) adequate life protection and life-saving equipment and procedures; (B) instructions in accident prevention for all employees and sub-contractors, such as safe walkways, scaffolds, fall protection ladders, bridges, gang planks, confined space procedures, trenching and shoring, equipment, and other safety devices, equipment and wearing apparel as are necessary or lawfully required to prevent accidents or injuries; and (C) adequate facilities for the proper inspection and maintenance of all safety measures.

3.3 Fees and Payments.

3.3.1 Compensation. Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Agreement at the rates set forth in Exhibit "C" attached hereto and incorporated herein by reference. The total compensation shall not exceed two million three hundred seventy four thousand dollars (\$2,374,000) without written approval of I-REN Executive Committee. Extra Work may be authorized, as described

below, and, if authorized, said Extra Work will be compensated at the rates and manner set forth in this Agreement.

3.3.2 Payment of Compensation. Consultant shall submit to WRCOG a monthly itemized statement which indicates work completed and hours of Services rendered by Consultant. The statement shall contain the invoice number and date; remittance address; Agreement number 2023-80-2080-003 , and invoice total. The statement shall describe the amount of Services and supplies provided since the initial commencement date, or since the start of the subsequent billing periods, as appropriate, through the date of the statement. WRCOG shall, within 45 days of receiving such statement, review the statement and pay all approved charges thereon.

3.3.3 Reimbursement for Expenses. Consultant shall not be reimbursed for any expenses unless authorized in writing by WRCOG.

3.3.4 Extra Work. At any time during the term of this Agreement, WRCOG may request that Consultant perform Extra Work. As used herein, "Extra Work" means any work which is determined by WRCOG to be necessary for the proper completion of the Project, but which the Parties did not reasonably anticipate would be necessary at the execution of this Agreement. Consultant shall not perform, nor be compensated for, Extra Work without written authorization from WRCOG's Representative.

3.3.5 Prevailing Wages. Consultant is aware of the requirements of California Labor Code Sections 1720, et seq., and 1770, et seq., as well as California Code of Regulations, Title 8, Section 16000, et seq., ("Prevailing Wage Laws"), which require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects. If the Services are being performed as part of an applicable "public works" or "maintenance" project, as defined by the Prevailing Wage Laws, and if the total compensation is \$1,000 or more, Consultant agrees to fully comply with such Prevailing Wage Laws. WRCOG shall provide Consultant with a copy of the prevailing rates of per diem wages in effect at the commencement of this Agreement. Consultant shall make copies of the prevailing rates of per diem wages for each craft, classification, or type of worker needed to execute the Services available to interested parties upon request, and post copies at the Consultant's principal place of business and at the project site. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers, and agents free and harmless from any claims, liabilities, costs, penalties or interest arising out of any failure or alleged failure to comply with the Prevailing Wage Laws.

3.4 Accounting Records.

3.4.1 Maintenance and Inspection. Consultant shall maintain complete and accurate records with respect to all costs and expenses incurred under this Agreement. All such records shall be clearly identifiable. Consultant shall allow a representative of WRCOG during normal business hours to examine, audit, and make transcripts or copies of such records and any other documents created pursuant to this Agreement. Consultant shall allow inspection of all work, data, documents, proceedings, and activities related to the Agreement for a period of three (3) years from the date of final payment under this Agreement.

3.5 General Provisions.

3.5.1 Termination of Agreement.

3.5.1.1 Grounds for Termination. WRCOG may, by written notice to Consultant, terminate the whole or any part of this Agreement at any time and without cause by giving written notice to Consultant of such termination, and specifying the effective date thereof, at least seven (7) days before the effective date of such termination. Upon termination, Consultant shall be compensated only for those services which have been adequately rendered to WRCOG, and Consultant shall be entitled to no further compensation. Consultant may not terminate this Agreement except for cause.

3.5.1.2 Effect of Termination. If this Agreement is terminated as provided herein, WRCOG may require Consultant to provide all finished or unfinished Documents and Data and other information of any kind prepared by Consultant in connection with the performance of Services under this Agreement. Consultant shall be required to provide such documents and other information within fifteen (15) days of the request.

3.5.1.3 Additional Services. In the event this Agreement is terminated in whole or in part as provided herein, WRCOG may procure, upon such terms and in such manner as it may determine appropriate, services similar to those terminated.

3.5.2 Delivery of Notices. All notices permitted or required under this Agreement shall be given to the respective Parties at the following address, or at such other address as the respective parties may provide in writing for this purpose:

Consultant: Frontier Energy, Inc.
12949 Alcosta Blvd, Suite 101
San Ramon, CA 94583-1323

WRCOG: Western Riverside Council of Governments
3390 University Avenue, Suite 200
Riverside, CA 92501
Attn: Casey Dailey

Such notice shall be deemed made when personally delivered or when mailed, forty-eight (48) hours after deposit in the U.S. Mail, first class postage prepaid and addressed to the Party at its applicable address. Actual notice shall be deemed adequate notice on the date actual notice occurred, regardless of the method of service.

3.5.3 Ownership of Materials and Confidentiality.

3.5.3.1 Documents & Data; Licensing of Intellectual Property. This Agreement creates a non-exclusive and perpetual license for WRCOG to copy, use, modify, reuse, or sub-license any and all copyrights, designs, and other intellectual property embodied in plans, specifications, studies, drawings, estimates, and other documents or works of authorship fixed in any tangible medium of expression, including but not limited to, physical drawings or data magnetically or otherwise recorded on computer diskettes, which are prepared or caused to be prepared by Consultant under this Agreement ("Documents & Data"). Consultant shall require all sub-contractors to agree in writing that WRCOG is granted a non-exclusive and perpetual license for any Documents & Data the sub-contractor prepares under this Agreement. Consultant represents and warrants that Consultant has the legal right to license any and all Documents & Data. Consultant makes no such representation and warranty in regard to Documents & Data which were prepared by design professionals other than Consultant or provided to Consultant by WRCOG. WRCOG shall not be limited in any way in its

use of the Documents & Data at any time, provided that any such use not within the purposes intended by this Agreement shall be at WRCOG's sole risk.

3.5.3.2 Intellectual Property. In addition, WRCOG shall have and retain all right, title, and interest (including copyright, patent, trade secret, and other proprietary rights) in all plans, specifications, studies, drawings, estimates, materials, data, computer programs or software and source code, enhancements, documents, and any and all works of authorship fixed in any tangible medium or expression, including but not limited to, physical drawings or other data magnetically or otherwise recorded on computer media ("Intellectual Property") prepared or developed by or on behalf of Consultant under this Agreement as well as any other such Intellectual Property prepared or developed by or on behalf of Consultant under this Agreement.

WRCOG shall have and retain all right, title and interest in Intellectual Property developed or modified under this Agreement whether or not paid for wholly or in part by WRCOG, whether or not developed in conjunction with Consultant, and whether or not developed by Consultant. Consultant will execute separate written assignments of any and all rights to the above referenced Intellectual Property upon request of WRCOG.

Consultant shall also be responsible to obtain in writing separate written assignments from any sub-contractors or agents of Consultant of any and all right to the above referenced Intellectual Property. Should Consultant, either during or following termination of this Agreement, desire to use any of the above-referenced Intellectual Property, it shall first obtain the written approval of the WRCOG.

All materials and documents which were developed or prepared by the Consultant for general use prior to the execution of this Agreement and which are not the copyright of any other party or publicly available and any other computer applications, shall continue to be the property of the Consultant. However, unless otherwise identified and stated prior to execution of this Agreement, Consultant represents and warrants that it has the right to grant the exclusive and perpetual license for all such Intellectual Property as provided herein.

WRCOG further is granted by Consultant a non-exclusive and perpetual license to copy, use, modify or sub-license any and all Intellectual Property otherwise owned by Consultant which is the basis or foundation for any derivative, collective, insurrectional, or supplemental work created under this Agreement.

3.5.3.3 Confidentiality. All ideas, memoranda, specifications, plans, procedures, drawings, descriptions, computer program data, input record data, written information, and other Documents & Data either created by or provided to Consultant in connection with the performance of this Agreement shall be held confidential by Consultant. Such materials shall not, without the prior written consent of WRCOG, be used by Consultant for any purposes other than the performance of the Services. Nor shall such materials be disclosed to any person or entity not connected with the performance of the Services or the Project. Nothing furnished to Consultant which is otherwise known to Consultant or is generally known, or has become known, to the related industry shall be deemed confidential. Consultant shall not use WRCOG's name or insignia, photographs of the Project, or any publicity pertaining to the Services or the Project in any magazine, trade paper, newspaper, television, or radio production or other similar medium without the prior written consent of WRCOG.

3.5.3.4 Infringement Indemnification. Consultant shall defend, indemnify,

and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers, and agents free and harmless, pursuant to the indemnification provisions of this Agreement, for any alleged infringement of any patent, copyright, trade secret, trade name, trademark, or any other proprietary right of any person or entity in consequence of the use on the Project by WRCOG of the Documents & Data, including any method, process, product, or concept specified or depicted.

3.5.4 Cooperation; Further Acts. The Parties shall fully cooperate with one another and shall take any additional acts or sign any additional documents as may be necessary, appropriate, or convenient to attain the purposes of this Agreement.

3.5.5 Attorney's Fees. If either Party commences an action against the other Party, either legal, administrative, or otherwise, arising out of or in connection with this Agreement, the prevailing party in such litigation shall be entitled to have and recover from the losing party reasonable attorney's fees and all other costs of such action.

3.5.6 Indemnification. Consultant shall defend, indemnify, and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, consultants, employees, volunteers, and agents free and harmless from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury, in law or equity, to property or persons, including wrongful death, in any manner arising out of or incident to any alleged acts, omissions, or willful misconduct of Consultant, its officials, officers, employees, agents, consultants and contractors, arising out of or in connection with the performance of the Services, the Project or this Agreement, including without limitation the payment of all consequential damages and attorneys' fees and other related costs and expenses. Consultant shall defend, at Consultant's own cost, expense, and risk, any and all such aforesaid suits, actions, or other legal proceedings of every kind that may be brought or instituted against WRCOG, SANBAG, CVAG, their respective i Directors, officials, officers, consultants, employees, agents or volunteers. Consultant shall pay and satisfy any judgment, award, or decree that may be rendered against WRCOG, SANBAG, CVAG or their respective Directors, officials, officers, consultants, employees, agents, or volunteers, in any such suit, action or other legal proceeding. Consultant shall reimburse WRCOG, SANBAG, CVAG and their respective Directors, officials, officers, consultants, employees, agents, or volunteers, for any and all legal expenses and costs, including reasonable attorneys' fees, incurred by each of them in connection therewith or in enforcing the indemnity herein provided. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, consultants, employees, agents, or volunteers. This section shall survive any expiration or termination of this Agreement. Notwithstanding the foregoing, to the extent Consultant's Services are subject to Civil Code Section 2782.8, the above indemnity shall be limited, to the extent required by Civil Code Section 2782.8, to claims that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant.

3.5.7 Entire Agreement. This Agreement contains the entire Agreement of the Parties with respect to the subject matter hereof, and supersedes all prior negotiations, understandings or agreements. This Agreement may only be modified by a writing signed by both Parties.

3.5.8 Governing Law. This Agreement shall be governed by the laws of the State of California. Venue shall be in Riverside County.

3.5.9 Time of Essence. Time is of the essence for each and every provision of

this Agreement.

3.5.10 WRCOG's Right to Employ Other Consultants. WRCOG reserves the right to employ other consultants in connection with this Project.

3.5.11 Successors and Assigns. This Agreement shall be binding on the successors and assigns of the Parties.

3.5.12 Assignment or Transfer. Consultant shall not assign, hypothecate, or transfer, either directly or by operation of law, this Agreement or any interest herein without the prior written consent of WRCOG. Any attempt to do so shall be null and void, and any assignees, hypothecates or transferees shall acquire no right or interest by reason of such attempted assignment, hypothecation or transfer.

3.5.13 Construction; References; Captions. Since the Parties or their agents have participated fully in the preparation of this Agreement, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any Party. Any term referencing time, days, or period for performance shall be deemed calendar days and not work days. All references to Consultant include all personnel, employees, agents, and sub-contractors of Consultant, except as otherwise specified in this Agreement. All references to WRCOG include its Directors, officials, officers, employees, agents, and volunteers except as otherwise specified in this Agreement. The captions of the various articles and paragraphs are for convenience and ease of reference only, and do not define, limit, augment, or describe the scope, content, or intent of this Agreement.

3.5.14 Amendment; Modification. No supplement, modification, or amendment of this Agreement shall be binding unless executed in writing and signed by both Parties.

3.5.15 Waiver. No waiver of any default shall constitute a waiver of any other default or breach, whether of the same or other covenant or condition. No waiver, benefit, privilege, or service voluntarily given or performed by a Party shall give the other Party any contractual rights by custom, estoppel, or otherwise.

3.5.16 No Third-Party Beneficiaries. There are no intended third-party beneficiaries of any right or obligation assumed by the Parties.

3.5.17 Invalidity; Severability. If any portion of this Agreement is declared invalid, illegal, or otherwise unenforceable by a court of competent jurisdiction, the remaining provisions shall continue in full force and effect.

3.5.18 Prohibited Interests. Consultant maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement. Further, Consultant warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, brokerage fee, gift, or other consideration contingent upon or resulting from the award or making of this Agreement. For breach or violation of this warranty, WRCOG shall have the right to rescind this Agreement without liability. For the term of this Agreement, no member, Director, officer, official, agent volunteer, or employee of WRCOG, during the term of his or her service with WRCOG, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

Updated December 05, 2022

3.5.19 Equal Opportunity Employment. Consultant represents that it is an equal opportunity employer, and it shall not discriminate against any sub-contractor, employee, or applicant for employment because of race, religion, color, national origin, handicap, ancestry, sex, or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff, or termination. Consultant shall also comply with all relevant provisions of any of WRCOG's Minority Business Enterprise Program, Affirmative Action Plan, or other related programs or guidelines currently in effect or hereinafter enacted.

3.5.20 Labor Certification. By its signature hereunder, Consultant certifies that it is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Workers' Compensation, or to undertake self-insurance in accordance with the provisions of that Code, and agrees to comply with such provisions before commencing the performance of the Services.

3.5.21 Authority to Enter Agreement. Consultant has all requisite power and authority to conduct its business and to execute, deliver, and perform the Agreement. Each Party warrants that the individuals who have signed this Agreement have the legal power, right, and authority to make this Agreement and bind each respective Party.

3.5.22 Counterparts. This Agreement may be signed in counterparts, each of which shall constitute an original.

3.6 Subcontracting.

3.6.1 Prior Approval Required. Consultant shall not subcontract any portion of the work required by this Agreement, except as expressly stated herein, without prior written approval of WRCOG. Subcontracts, if any, shall contain a provision making them subject to all provisions stipulated in this Agreement.

[SIGNATURES ON FOLLOWING PAGE]

SIGNATURE PAGE TO

**WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
PROFESSIONAL SERVICES AGREEMENT**

IN WITNESS WHEREOF, the Parties hereby have made and executed this Agreement as of the date first written above.

WESTERN RIVERSIDE COUNCIL
OF GOVERNMENTS

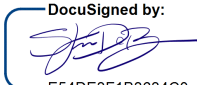
FRONTIER ENERGY, INC

By: _____
Kurt Wilson
Title: Executive Director

By: Jean Krausse Jan 20, 2023
Jean Krausse
Title: Vice President

APPROVED AS TO FORM:

ATTEST:

By:  _____
Steven DeBaun
General Counsel
Best Best & Krieger LLP

By: Jeremy Springer Jan 20, 2023
Jeremy Springer
Its: Chief Financial Officer

*A corporation requires the signatures of two corporate officers.

One signature shall be that of the Chairman of Board, the President or any Vice President, and the second signature (on the attest line) shall be that of the Secretary, any Assistant Secretary, the Chief Financial Officer or any Assistant Treasurer of such corporation.

If the above persons are not the intended signators, evidence of signature authority shall be provided to WRCOG.

EXHIBIT “A”

SCOPE OF SERVICES

I-REN's Codes & Standards Program Objectives

- a. Improve the understanding of energy efficiency codes and standards among local building departments and the building industry to increase implementation and compliance and enforcement.
- b. Make code compliance and enforcement a valuable element of the region's energy efficiency goal attainment with engagement regionwide.
- c. Deliver locally informed resources and tools that streamline code compliance and enforcement and increase permit closeout.
- d. Provide information to local governments on policy tools available at the local level, including reach codes.

SOW 1: Codes & Standards Training & Education Program

This SOW includes professional services for the tasks and deliverables described below, for implementation of I-REN's Codes & Standards Training & Education Program. This program is a non-resource program to establish and implement training and education for building department staff and the building industry to support, understand, and effectively implement energy efficiency codes and standards, including where gaps exist in the Statewide IOU Compliance Improvement program and enforcement activities. The program will also include outreach to engage, educate and involve regional construction firms, architects, industry experts, and building departments, and support compliance and enforcement within regional energy efficiency programs and customers.

To implement the program, the consultant will assist in developing a training curriculum to address gaps in compliance with current requirements and offer ongoing training on changes and trends in codes and standards. The consultant will promote training through I-REN governing agencies' existing marketing channels, through local government partnerships, and through building industry communication networks. The consultant will also collaborate with local governments to design and deliver effective messaging to building departments and private industry during code transitions. It is imperative that the consultant be knowledgeable of existing IOU programs and offerings when developing I-REN's programs to avoid duplication of efforts, which is a requirement of the CPUC.

STRATEGY DEVELOPMENT

The Frontier team provides I-REN with deep expertise in energy program strategy development and technical assistance to help local governments achieve their energy goals. We will draw on recent team perspectives and experience with 3C-REN and the BayREN Codes & Standards program to help I-REN refine existing or design new strategies using the four steps discussed below to maximize the Program's impact.

Research. We will leverage the team's expertise and informational channels, based on decades of Codes and Standards development and local government, utility, and industry relationships, to provide I-REN with cutting edge and technically sound analysis, market characterization, and performance data on advanced energy programs and technologies. This research will encompass major issues at the center of current T24 and local reach code implementation,

such as: heat pumps, renewable generation, and storage technologies; zero emission vehicles; grid integration and demand management strategies; contractor and workforce development; and incentive and financing options. This body of research provides I-REN with an accurate foundational understanding of the market and barriers and opportunities for code compliance and energy policies, on which it can build successful program models.

Design and Refine. The Frontier team can support any type of C&S Program initiative I-REN may elect to pursue. We have designed multiple programs for energy codes and standards implementation, technology commercialization, residential and commercial building retrofits, and building professional education and engagement. We have created program implementation plans, program manuals, program logic models, enrollment and application forms, tracking and reporting processes, and desktop quality assurance and field quality control protocols. We evolve programs through collaboration with embedded/internal and third-party EM&V activities, from technical assistance to trainings to IT solutions.

Implement. Our staff have earned the confidence of our local government partners. We can either lead or provide support to ensure I-REN representatives are fully able to implement program activities. We have in-house resources for technical analysis; events, workshops, and trainings; marketing and outreach; electronic and traditional communications; IT and web development, and data systems and data security. We also understand how and when to support the I-REN representatives based on our work with I-REN since its inception and decades of experience serving similar initiatives in the Bay Area and other local governments.

Measure and Evaluate. The Frontier team understands the importance of defining EM&V activities early during program design. Clearly documenting program goals, objectives, performance targets, and processes not only makes for successful EM&V but for successful programs. We are experienced with systems and tools used by other programs including Salesforce and energyOrbit. We can continue to assist Program development and refinement, drawing on our experience with past successful EM&V collaborations and our deep knowledge of the CPUC Technical and Regulatory process.

COMMUNICATION AND NETWORKING

The Frontier team will further amplify the opportunities and impacts of the C&S Program by ensuring meaningful and regular communication and networking opportunities to increase feedback loops and maximize the impact of program resources. We propose the following efforts to strengthen communication between staff and with other local governments and increase the spread and reach of those communications, both in outgoing channels from I-REN to its stakeholders and in input and feedback loops from those stakeholders to I-REN. We will:

Create a Central Hub. Easy access to current, complete and relevant information will allow I-REN staff the ability to leverage work in other communities to accelerate impact, avoid redundant efforts, and reduce administrative time. We will develop a C&S Intranet that I-REN representatives can use to easily access up-to-date information about regional and statewide C&S efforts, program metrics, committee minutes, internal resources, contact lists, and opportunities to connect with local building departments and building professionals (e.g., local ICC Chapter Meetings). This central location will help C&S county representatives get the latest information and reduce the amount of time they spend opening multiple windows (Google folders, emails, calendars). A public calendar could be added for internal and external events.

Strengthen Communication. Consistent communication platforms and strategies enhance regular communication and access to information. We will use Adobe Connect to create a C&S

“Virtual Meeting Room” to increase collaboration and gather more insight during C&S Committee meetings, and external meetings. Unlike Google Docs, Adobe Connect offers tools to encourage engagement and easily share content.

Make Connections. Access to expertise and information about relevant experiences from other regions and/or sectors create shared learning opportunities and support more action and impact. We will leverage Frontier Energy’s and Make Hope Happen’s network of local government staff, and industry experts to connect C&S county representatives with potential contacts for presentations at Regional Forums or to committees/ groups.

WHY THIS APPROACH

Past C&S efforts have delivered substantial benefits, and we envision continuing and refining these activities to maximize added value. Moving forward, this vision for the I-REN C&S Program encompasses:

Building a strong foundation for this program. Collaborating with the I-REN team on strategy development to address the most relevant building codes with significant potential savings in the Inland Empire. Prioritizing areas and topics that are of interest to code setting bodies and the authority having jurisdiction (AHJ) will help ensure savings opportunities are realized. I-REN is best positioned continue compliance improvement efforts “on the ground,” including targeted compliance efforts and development of electronic compliance infrastructures, to ensure potential savings from advocacy are realized.

Supporting multifaceted objectives. California’s diverse energy and climate-related policy goals include energy efficiency, demand reduction, renewable energy, onsite generation, grid connectivity, automated demand response, energy storage capacity, ZNE buildings, water efficiency, public health, zero emission vehicle infrastructure, sustainability, and equity. I-REN is uniquely positioned to accelerate progress toward these goals, with a C&S Program that is designed and implemented to drive and potentially unite these multifaceted objectives at the local level. We believe I-REN and the C&S Program can recognize and pursue activities that have both indirect energy impacts and non-energy benefits while maintaining energy efficiency as a foundational goal, as we have seen first-hand how this can be accomplished.

Task 1.1: Program Design

The consultant will provide leadership for program design activities in collaboration with the I-REN team. The program’s design must be aligned with I-REN’s Energy Efficiency Business Plan (I-REN BP),¹ CPUC Decision 21-11-013 approving the I-REN BP,² and all other applicable requirements for REN energy efficiency programs. The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN Team within two weeks of final contract execution.
- Develop a program delivery model that supports I-REN’s goals for the Training & Education Program, overcomes public and private sector participation barriers, and prioritizes service to vulnerable communities.

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- Support I-REN in engaging with local and regional stakeholders to ensure the program design fits the needs of local governments and other stakeholders in the region.
- Define program eligibility guidelines and program team roles; document program processes and procedures.
- Establish coordination process with other I-REN energy efficiency programs, services, and implementers, e.g., the Codes & Standards Technical Support Program included in this RFP, to maximize program participation and benefits to customers.
- Identify administrators of other Codes & Standards programs and related offerings in the region and establish coordination process to assist I-REN public and private sector customers with enrolling and participating in those programs.
- Develop participant forms and other collateral.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.
- Assist I-REN in the facilitation of a regularly scheduled Codes & Standards Working Group meeting.
- Track and document quantifiable measures to be used to report the successes of the programs.
- Whenever possible, incorporate existing successful models and programs into the I-REN program portfolio.

Deliverables:

- Develop a kick-off meeting agenda and notes and execute the meeting with the assistance of the I-REN team.
- Work with I-REN staff to develop key program documents which are crucial to getting the program on the right track from the start. The Frontier team will develop a Program Manual and Implementation Plan content in compliance with regulatory requirements. This will also include a definition of program eligibility guidelines, Program team roles and responsibilities, a program process flow diagram, and a logic model. When possible, Frontier will identify existing successful models of other programs and incorporate those practices into the I-REN program portfolio.
- Construct a program delivery model focused on the goals of the program, which includes overcoming public and private sector barriers for participation and puts a strong emphasis on service to vulnerable and disadvantaged communities. This will include supporting I-REN in engaging with local and regional stakeholders to ensure that the program design is fitting their needs. Their feedback will be critical in identifying those barriers and finding the best path forward.
- Utilizing our experience with similar programs, the Frontier team will assist the I-REN team in developing streamlined participant forms and other collateral which make involvement in the program as user-friendly as possible. This includes identifying administrators and processes of other Codes & Standards programs and related offerings in the region, so that we can assist public and private sector customers with any questions they might have about enrollment or participation in those programs.
- Critical to improving the program and molding the future of Codes & Standards in the region, the Frontier Team will provide monthly and quarterly status reports with all quantifiable measures to report the successes and areas of improvement of the programs. This will also include weekly meeting agendas and status updates, and any other ad hoc requests from the I-REN team.

Task 1.2: Outreach & Engagement

Program-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable. The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials and recommend needed changes.
- Recommend and assist in the development of marketing and outreach collateral in various formats targeted to Codes & Standards customer audiences.
- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier.
- Assist in the development of marketing content for e-communicators, social media, and other channels to promote the training sessions, online Code Hub and building professionals' regional forums.
- Support outreach to potential speakers and presenters.
- Identify and implement strategies for outreach to local jurisdictions and agencies and building professionals to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.
- Identify Codes & Standards champions and build relationships with them.
- Set targets and milestones for outreach and engagement (including hard-to-reach communities) and report on progress.

- Conduct regular (e.g., weekly, or biweekly) meetings with I-REN to provide status updates.

Deliverables:

- Upon contract execution, the Frontier team will review existing I-REN branding, marketing strategies, templates, and other relevant materials to determine which areas need to be prioritized for updating. The Frontier team will then make recommendations and assist in developing the necessary marketing and outreach collateral that is designed to target the customer audiences identified for Codes & Standards. This will include strategies to educate local jurisdictions, agencies, and building professionals to ensure they're up-to-date on program offerings. Frontier is experienced in collaborating with marketing firms to ensure program-specific materials align with overall REN communications and branding.
- The Frontier team puts a high priority on developing and successfully executing a strategy to engage and involve communities where language, socio-economic status, race, ethnicity, and gender have been a barrier. Frontier will engage with local Non-Government Organizations and regional stakeholders to identify these barriers from the people who are experiencing them and collaborate with the I-REN team to roll out a plan to reach those communities and involve them in shaping Codes & Standards.
- Our team will also prioritize identifying and involving key success stories and allies, such as Codes & Standards Champions, potential speakers and presenters, and case studies that highlight local wins we can use to create buy-in with the community. This will include an emphasis on finding such champions and success stories within the disadvantaged communities.
- Pulling from our team of experienced content creators, Frontier will develop an outreach plan to engage with local and regional stakeholders. This plan will utilize e-newsletters, social media, and other channels to promote Codes & Standards resources, but will also heavily emphasize a Code Hub where industry professionals can share best practices and collaborate. The Code Hub will also have a listing of events, resources, and tools for local governments and building professionals.
- The Frontier team will provide monthly and quarterly status reports with all quantifiable measures to report the successes and areas of improvement of the programs. This will also include weekly meeting agendas and status updates, and any other ad hoc requests from the I-REN team.

Task 1.3: Program Implementation

The consultant will lead all Training & Education Program implementation activities in coordination with the I-REN team. The consultant will develop a training curriculum to address gaps in compliance with current Codes & Standards requirements and changes and trends in Codes & Standards. The consultant will assist I-REN in supporting local governments and the building industry during transitions to new codes to deliver effective messaging and resources and increase timely compliance with updated requirements. The consultant will also foster the development of an online Code Hub community for sharing best practices amongst building departments and the building industry and assist with coordination of Regional Forums. The consultant will be responsible for each activity listed below:

- Deliver a minimum of four training sessions and one Regional Forum per year in each of I-REN's subregions.
- Collate information from attendee surveys following each training session.

- Perform updates of training module content and delivery mechanisms to ensure trainings are responsive to key target audience needs.
- Support participation in online training modules.
- Support coordination with International Code Council (ICC), and any required curriculum updates, to facilitate the ability of I-REN to award Continuing Education Units to attendees of I-REN trainings.
- Track and provide information on California and national codes, including updates to Title 24 Parts 6 (California Energy Code) and 11 (California Green Building Standards Code).
- Perform updates to training curriculums to reflect adopted changes to Title 24 Parts 6 and 11.
- Collect, report, and maintain metrics relative to training and education, including numbers of sessions, numbers of and contact information for attendees, and other relevant metrics as needed.
- Provide recommendations, based on analysis of metrics and knowledge of the field, for improvements to I-REN's training program and topics for potential new training sessions.
- Consistent with available budget and direction from I-REN, develop new training modules for in-person or online delivery.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.

Deliverables:

- The Frontier team will develop a Training & Education Program Implementation Plan that includes timeframe/schedule, roles and responsibilities and proposed curriculum. This plan will also include a strategy to promote online training modules for local jurisdictions and building professionals and updates to the training modules and delivery mechanisms to ensure that the trainings are responsive to key target audience needs. Consistent with available budget and direction from I-REN, Frontier will develop new training modules for in-person or online delivery.
- Part of developing accurate training modules will be coordinating with the International Code Council and ensuring that any required curriculum updates are included to ensure the ability of I-REN to offer Continuing Education Units to attendees of I-REN trainings. Frontier will track and provide information on California and national codes, including updates to Title 24 Parts 6 and 11, which will be included in any updates to the training curriculum.
- Drawing from our experience at IHACI and coordinating online forums for contractors and building departments and jurisdictions, Frontier will deliver a minimum of 12 training sessions and three Regional Forums per year throughout the I-REN territory. This will include assistance with event logistics, and follow-up activities, documentation of participant interaction, and our team will collate information from the attendees following each event.
- Frontier will collect, report, and maintain metrics relative to training and education, including numbers of sessions, numbers of and contact information for attendees, and other relevant metrics as needed. Based on this data, Frontier will provide recommendations for improvements to I-REN's training program and topics for potential new training sessions.
- The Frontier team will provide monthly and quarterly status reports with all quantifiable measures to report the successes and areas of improvement of the programs. This will also include weekly meeting agendas and status updates, and any other ad hoc requests from the I-REN team.

Task 1.4: Other Services

The consultant will also be responsible for the activities listed below:

- Provide program-specific content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum (JCM), Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Collect program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Contribute to program performance analysis and evaluation, measurement, and verification (EM&V) activities for tracking program achievements and informing continuous improvement.

Deliverables:

- Develop program-specific content and edits or updates to content for I-REN regulatory filings.
- Provide program data in alignment with CPUC reporting templates.
- Document metrics, indicators, and other performance measurements.
- Provide analysis of program performance and recommendations for future program improvements.

SOW 2: Codes & Standards Technical Support Program

This SOW includes professional services for the tasks and deliverables described below, for implementation of I-REN's Codes & Standards Technical Support Program. This program is a non-resource program to develop technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes to support improved enforcement and compliance. I-REN will also develop regionally appropriate model ordinances, vet and refine them with participating local governments, provide ongoing technical assistance for adoption and implementation, and deliver model ordinance updates to reflect the triennial code cycle.

To implement the program, the consultant will assist in developing technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes. This includes suggesting strategy, conducting research, designing programs and services, and supporting implementation of programs and services to increase energy code compliance rates. The consultant will promote training through I-REN governing agencies' existing marketing channels, through local government partnerships, and through building industry communication networks. The consultant will also assist I-REN in improving consistency in code enforcement and compliance resources across the region by facilitating cooperation among local governments.

The goal of the Technical Support program is to support local jurisdictions in hard-to-reach, disadvantaged, underserved, and environmental and social justice communities by delivering locally informed resources and tools that streamline code compliance and enforcement and increase permit closeout. This program will coordinate with local and statewide programs in providing technical assistance and layer efforts to maximize the benefits attainable in the region.

The Team will design a set of technical assistance tools and resources to assist building departments and the building industry with understanding, evaluating, and permitting the energy codes to support improved enforcement and compliance. In consultation with I-REN and their partners, the Team will conduct program assessments to understand the value of, and barriers to implementing compliance improvement activities together with findings and recommended changes and improvements; and strategic action plans that will be informed by market trends and local or statewide policies, to increase energy code compliance rates and align with I-REN direction, the C&S Implementation Plan, and I-REN Business Plan. The consultant will promote training through I-REN governing agencies' existing marketing channels, through local government partnerships, and through building industry communication networks. The team will leverage existing resources, such as permitting guides, permitting e-tools, load calculators, reference sheets, permitting checklists, and will be customized to fit the needs of the jurisdiction.

The Team's proposes to engage jurisdictions interested in advancing their activities related to climate change through targeted and tailored energy efficiency approaches defined in one of the following plans or documents: climate action plans, community development plans, local and regional resiliency plans, local building stocks and climate conditions, and local workforce capabilities and needs. The team will work with Making Hope Happen Foundation, Inland SoCal Housing Collective, and Inland Equity Partnership to provide boots-on-the ground engagement with jurisdictions.

Stakeholder input and discussion of technical, policy, and operational processes will be vital to the successful adoption and implementation of ordinances and energy code that advance local climate goals. The Team has been successful with a three-prong stakeholder engagement strategy deployed during phases of model reach code development and energy code updates that ensures stakeholders understand project opportunities and concerns.

Identification of key stakeholders. The Team, in coordination with I-REN and its partners, will leverage existing contacts to identify key stakeholders. The Team will work with I-REN to define timeline, specific objectives for engaging individual groups, and general desired outcomes. This process will be completed in a meeting with I-REN and/or local jurisdictions.

Conduct outreach and engagement. The Team, along with Making Hope Happen Foundation, Inland SoCal Housing Collective, and Inland Equity Partnership, will support I-REN to solicit stakeholders to engage in proposed meetings, charrettes, trainings. To ensure that a broad range of people attend these events, the Team will use client recommendations, social media channels, and their own contacts with industry associations to drive attendance to events and share content. This effort underpins having the right stakeholders present and engaged in the process to build support.

Share information and obtain feedback. The Team will support I-REN to engage diverse groups that can contribute to or will be affected by new ordinances or energy code changes to provide balanced input in code development and enforcement. Based on experience, important constituents for this process include code councils, developers, energy experts, community-based organizations, apartment associations, and economic and community development organizations. The Team will collaborate with I-REN to identify other organizations and constituent groups. The Team will work with I-REN and its partners to evaluate approaches for balancing the level of engagement from stakeholder groups during project phases, including: Larger public meetings focused on in-person information sharing but with a remote option. Small meetings with key organizations to build greater support for the process and approach. Small internal meetings with jurisdiction and appropriate councils.

Electronic distribution of materials (potentially with the inclusion for electronic comment).

The Team will support meeting facilitation to elicit feedback, document comments and questions, and provide notes and summaries of findings from stakeholder outreach. This three-pronged approach will be applied to each specific activity, as discussed below.

Lead Development of Model Reach Codes

Engage stakeholders to gain broad support and understand concerns to inform a draft of model reach codes. While this process will not capture the nuances of each jurisdiction, it will capture consistent and important conditions for implementation within the region. The Team will: Support initial stakeholder engagement, draft stakeholder interview questions, and attend initial stakeholder meeting and up to six organizational meetings of specific groups. Support stakeholder feedback process on draft model codes and attend charrettes and final stakeholder meeting.

Identify Tools and Processes for Adoption and Implementation

The Team will engage jurisdictions' stakeholders who will be involved in local adoption and implementation processes to obtain feedback on development and drafts of tools and templates. To streamline this process, a select number of jurisdictions will be targeted collaboratively with I-REN.

Develop Cost-Benefit Analysis

Test assumptions in the cost-benefit analysis with a target group of stakeholders to support a productive charrette and stakeholder engagement process for reach code development. Considerations that could be vetted may include, but are not limited to, costs for new construction or costs for remodel scope.

Provide Technical Assistance for Municipalities for Code Adoption

Conduct internal engagement from specified personnel at interested jurisdictions and a public stakeholder process to understand the specific code application for the jurisdiction and determine the ordinance requirements, triggers, and target for the local ordinance. The Team will coordinate with I-REN to identify jurisdictions and work with jurisdictional leads to identify local stakeholders. The Team will coordinate with jurisdictional staff to refine the ordinance to account for local processes and provide information for council/board and public meetings. The Team will support presentations about the specific ordinance structure, answer technical questions, and create a framework to obtain feedback for implementation. The Team will work with the jurisdiction to respond to meeting comments and incorporate feedback into a revised ordinance as needed.

Provide Technical Assistance for Municipalities for Code Implementation

Stakeholder engagement will focus on clear communication and accessible implementation for internal and external stakeholders who will be impacted by implementation and compliance with the ordinance. The Team will coordinate with jurisdictional staff to define the stakeholder groups and deliver trainings that will focus on the specific impacted building types and address the topics proposed, including:

Overview and Technical Requirements. The audience for this training will be key stakeholders, public professionals, and city staff who will benefit from understanding of ordinance and energy code (i.e., zoning, customer service staff, building department staff, sustainability department staff, etc.). The training will also provide general education to broader internal stakeholders and public stakeholders to support increased compliance and awareness. Training content may

include but not be limited to:

Overview and key components of ordinance and/or energy code.

Communication of ordinance requirements to stakeholders.

General education of benefits.

Technical review of ordinance requirement and standards.

Operational and Implementation Training. The audience for this training will be plan checkers, building inspectors, and other building department staff who will implement the ordinance and/or energy code. The training will support implementation staff as they learn compliance processes and work with permit applicants to ensure consistent application and a high level of compliance.

Training content may include, but not be limited to:

Required compliance at appropriate stages in permit application (planning/zoning, building, etc.).

Review of compliance elements for plan check and field inspections.

Tools and processes required for implementation, including tracking process, permit triggers, compliance, and compliance documentation.

Process and documentation for enforcement of ordinance and energy code.

Task 2.1: Program Design

The consultant will provide leadership for program design activities in collaboration with the I-REN team. The program's design must be aligned with I-REN's Energy Efficiency Business Plan (I-REN BP),³ CPUC Decision 21-11-013 approving the I-REN BP,⁴ and all other applicable requirements for REN energy efficiency programs. The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN team within two weeks of final contract execution.
- Develop a program delivery model that supports I-REN's goals for the Technical Support Program, overcomes public and private sector participation barriers, and prioritizes service to vulnerable communities.
- Support I-REN in engaging with local and regional stakeholders to ensure the program design fits the needs of local governments and other stakeholders in the region.
- Define program eligibility guidelines and program team roles; document program processes and procedures.
- Establish coordination process with other I-REN energy efficiency programs, services, and implementers, e.g., the Codes & Standards Training & Education Program included in this RFP, to maximize program participation and benefits to customers.
- Identify administrators of other Codes & Standards programs and related offerings in the region and establish coordination process to assist I-REN public and private sector customers with enrolling and participating in those programs.
- Develop participant forms and other collateral.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.
- Assist I-REN in the facilitation of a regularly scheduled Codes & Standards Working Group meeting.

³

⁴

- Track and document quantifiable measures to be used to report the successes of the programs.
- Whenever possible, incorporate existing successful models and programs into the I-REN program portfolio.

Deliverables:

- Develop a kick-off meeting agenda and notes and execute the meeting with the assistance of the I-REN team.
- Work with I-REN staff to develop key program documents which are crucial to getting the program on the right track from the start. The Frontier team will develop a Program Manual and Implementation Plan content. This will also include a definition of program eligibility guidelines, Program team roles and responsibilities, a program process flow diagram, and a logic model. When possible, Frontier will identify existing successful models of other programs and incorporate those practices into the I-REN program portfolio.
- Construct a program delivery model focused on the goals of the program, which includes overcoming public and private sector barriers for participation and puts a strong emphasis on service to vulnerable and disadvantaged communities. This will include supporting I-REN in engaging with local and regional stakeholders to ensure that the program design is fitting their needs. Their feedback will be critical in identifying those barriers and finding the best path forward.
- Utilizing our experience with similar programs, the Frontier team will assist the I-REN team in developing streamlined participant forms and other collateral which make involvement in the program as user-friendly as possible. This includes identifying administrators and processes of other Codes & Standards programs and related offerings in the region, so that we can assist public and private sector customers with any questions they might have about enrollment or participation in those programs.
- Critical to improving the program and molding the future of Codes & Standards in the region, the Frontier Team will provide monthly and quarterly status reports with all quantifiable measures to report the successes and areas of improvement of the programs. This will also include weekly meeting agendas and status updates, and any other ad hoc requests from the I-REN team.

Task 2.2: Outreach & Engagement

Program-specific marketing, outreach, and stakeholder engagement activities will be led by the consultant in collaboration with I-REN staff, I-REN's marketing consultant, and other I-REN program implementers as applicable. The consultant will be responsible for each activity listed below:

- Review existing I-REN branding, marketing strategies, templates, and other relevant materials and recommend needed changes.
- Recommend and assist in the development of marketing and outreach collateral in various formats targeted to Codes & Standards customer audiences.
- Develop culturally specific strategies to reach communities where language, socio-economic status, race, ethnicity, etc. have historically been a barrier.
- Assist in the development of marketing content for e-communicators, social media, and other channels to promote the Technical Support Program.

- Identify and implement strategies for outreach to local jurisdictions and agencies and building professionals to educate them about the program offerings, e.g., providing presentations at meetings and with key decision makers.
- Collaborate with local governments, tribes, and special districts and building professionals to design and deliver messaging to the community to promote local leadership in Codes & Standards compliance by highlighting local success stories.
- Set targets and milestones for outreach and engagement (including hard-to-reach communities) and report on progress.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.

Deliverables:

- Upon contract execution, the Frontier team will review existing I-REN branding, marketing strategies, templates, and other relevant materials to determine which areas need to be prioritized for updating. The Frontier team will then make recommendations and assist in developing the necessary marketing and outreach collateral that is designed to target the customer audiences identified for Codes & Standards. This will include strategies to educate local jurisdictions, agencies, and building professionals to ensure they're up-to-date on program offerings.
- The Frontier team puts a high priority on developing and successfully executing a strategy to engage and involve communities where language, socio-economic status, race, ethnicity, and gender have been a barrier. Frontier will engage with local Non-Government Organizations and regional stakeholders to identify these barriers from the people who are experiencing them and collaborate with the I-REN team to roll out a plan to reach those communities and involve them in shaping Codes & Standards. The team will set key performance metrics to ensure accountability for engaging hard-to-reach communities.
- Our team will also prioritize identifying and involving key success stories and allies, such as Codes & Standards Champions, and case studies that highlight local wins we can use to create buy-in with the community. This will include an emphasis on finding such champions and success stories within the disadvantaged communities.
- Pulling from our team of experienced content creators, Frontier will develop an outreach plan to engage with local and regional stakeholders. This plan will utilize e-newsletters, social media, and other channels to promote Codes & Standards resources, but will also heavily emphasize a Code Hub where industry professionals can share best practices and collaborate. The Code Hub will also have a listing of events, resources, and tools for local governments and building professionals.
- The Frontier team will provide monthly and quarterly status reports with all quantifiable measures to report the successes and areas of improvement of the programs. This will also include weekly meeting agendas and status updates, and any other ad hoc requests from the I-REN team.

Task 2.3: Program Implementation

The consultant will lead all Technical Support Program implementation activities in coordination with the I-REN team. The consultant will help I-REN address the areas of greatest need for improved code compliance, in collaboration with local governments and the building industry. The consultant will also provide general support for reach code development and implementation. The consultant will be responsible for each activity listed below:

- Develop and deploy effective survey instruments to gather data and use that data to inform the design of resources to assist building departments and industry professionals.
- Work with local jurisdictions' permit systems and data.
- Work with local jurisdictions, CEC, CALBO, HERS providers, and other key stakeholders on Title 24 Parts 6 and 11 documentation.
- Promote web and mobile permitting tools (e.g., SolarAPP+, CodeCycle) in training sessions and outreach materials.
- Promote use of permit guides or other materials (e.g., checklists, frequently asked questions, e-newsletters) to improve regional best practices for compliance improvement, including:
 - a. Support distribution and placement of guides for public and staff use with local building departments;
 - b. Update guides as necessary based upon feedback from users and participating agencies and businesses;
 - c. Consistent with available budget and I-REN direction, create new guides or other materials for priority areas of compliance improvement.
- Develop training curriculum to address gaps in compliance with current Codes & Standards requirements, in coordination with the Codes & Standards Training & Education Program included in this RFP.
- Assist in developing model reach code ordinances for each Inland Empire climate zone; consistent with available budget and direction from I-REN, tailor ordinances for specific cities based on their building stock, calculate energy, cost and GHG reductions, document cost-effectiveness studies, and prepare adoption, outreach, and implementation materials, in each case using materials developed by the Statewide Codes & Standards Program where available.
- Track and provide information on California and national grant funding opportunities that support improved code compliance.
- Collaborate with local governments, tribes, and special districts and building professionals to design and deliver messaging to the community to promote local leadership in Codes & Standards compliance by highlighting local success stories.
- Collect and analyze metrics for all compliance improvement activities and use the results to suggest changes and improvements.
- Conduct regular (e.g., weekly or biweekly) meetings with I-REN to provide status updates.

Deliverables:

- Develop survey instruments.
- Provide training programs in coordination with the Codes & Standards Training & Education Program included in this RFP.
- Develop permit guides.
- Assist with reach code adoption and implementation materials.
- Provide documentation of participant interactions.
- Provide bi-annual reports on compliance improvement efforts, including metrics and recommendations for program improvement.
- Provide monthly and quarterly status reports.
- Conduct regular biweekly meetings.
- Provide meeting agendas and status updates.
- Provide summaries on California and national grant funding opportunities.

Task 2.4: Other Services

The consultant will also be responsible for the activities listed below:

- Provide program-specific content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum (JCM), Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Collect program data to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Contribute to program performance analysis and evaluation, measurement and verification (EM&V) activities for tracking program achievements and informing continuous improvement.

Deliverables:

- Provide program-specific content and edits or updates to content for I-REN regulatory filings.
- Provide program data in alignment with CPUC reporting templates.
- Document and provide metrics, indicators, and other performance measurements.
- Provide analysis of program performance and recommendations for future program improvements.

EXHIBIT “B”**SCHEDULE OF SERVICES**

Timeline for SOW 1: Proposed timeline per RFP, I-REN was interested in having a “soft launch” of one or more of its programs by the end of 2022, with full deployment for 2023.

	2022	2023				2024				2025			
	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4
Contract Execution													
Task 1.1 Program Design													
Program Implementation Manual													
Program Manual													
1 st Stakeholder & Organizational Meetings													
Program Delivery Model													
Monthly and Quarterly status reports													
Task 1.2 Outreach & Engagement													
Review existing branding & marketing strategies													
Recommendations and assist in developing new materials													
Develop Outreach Plan													
Develop and implement plan to involve non-English speaking and DACs													
Engage with non-English speaking & DACs to gather barriers and feedback.													
Identify success stories, champions, speakers/presenters, and local wins.													
Monthly and quarterly status reports													
Task 1.3 Program Implementation													
T&E Program Implementation Plan													
Plan and Implement Trainings and forums.													
Collect and provide report on metrics relative to T&E.													
Provide monthly and quarterly status reports.													
Task 1.4 Other Services													
Develop content for I-REN regulatory filings.													
Provide program data for CPUC reporting templates.													
Document performance measurements.													
Provide analysis of program performance													

Timeline for SOW 2: Proposed timeline per RFP, I-REN was interested in having a “soft launch” of one or more of its programs by the end of 2022, with full deployment for 2023. Major external dates of significance (i.e., the 2025 Title 24 update cycle) are noted. The Team will work with I-REN and its partners during project scoping to define an appropriate and responsive schedule to meet sponsoring local jurisdictions’ needs. A proposed schedule is provided below based on general timelines for 2022 code adoption. Critical factors that will impact schedule refinement may include ability to leverage existing cost-effectiveness studies; need to coordinate with any program administrators for incentive-based codes; and feasibility of reaching various levels of stringency targeted by I-REN, its partners, or stakeholders.

	2022	2023				2024				2025			
	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4
Contract Execution													
Task 2.1 Program Design													
Program Implementation Manual													
Program Manual													
1 st Stakeholder & Organizational Meetings													
Program Delivery Model													
Monthly and Quarterly status reports													
Task 2.2 Outreach & Engagement													
Review existing branding & marketing strategies													
Recommendations and assist in developing new materials													
Develop Outreach Plan													
Engage with non-English speaking & DACs to gather barriers and feedback.													
Develop and implement plan to involve non-English speaking & DACs													
Identify success stories, champions, speakers/presenters, and local wins.													
Monthly and Quarterly status reports													
Task 2.3 Program Implementation													
Assist jurisdictions with energy code compliance and enforcement													
Research Existing Codes													
1st Stakeholder & Organizational Meetings for code compliance and reach code adoption													
Establish Model Ordinance Framework													
Draft Model Codes													
Develop Survey Instruments													
Conduct Periodic Surveys													
Develop Permit Guides at the request of local jurisdictions.													
Leverage general templates customizing to meet local needs, requirements, and goals for implementation.													
Develop Cost Effectiveness Analysis													
Identify Reach Code Implementation Tools/Processes													
Assist in reach code adoption													
Provide documentation of participant interactions													
Provide bi-annual reports on compliance improvement efforts													
Charrettes & 2nd Stakeholder Meeting for model ordinance													
Final Draft Model Codes													

	2022	2023				2024				2025			
	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4	Q1	Q1	Q1	Q4
Local Stakeholder Engagement (as needed) for model ordinances													
Engage key stakeholders in readings for reach code approval													
CEC Model Ordinance Application/Approval													
File Model Ordinance with California Building Standards Commission													
Provide monthly and quarterly status reports. Conduct biweekly meetings, and summaries on grant funding opportunities.													
Task 2.4 Other Services													
Develop content for I-REN regulatory filings.													
Provide program data for CPUC reporting templates.													
Document performance measurements.													
Provide analysis of program performance													

EXHIBIT “C”**COMPENSATION
BILLING RATES****Budget for SOW 1**

	Estimated Hours by Year				Estimated Labor Cost by Year				Estimated Direct Cost by Year				Total Estimated Cost by Year			
	2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025
Task 1.1: Program Design	220	346	326	272	\$33,350	\$54,082	\$51,624	\$39,928	\$3,000	\$2,000	\$2,000	\$ -	\$36,350	\$56,082	\$53,624	\$39,928
Task 1.2: Outreach & Engagement	158	372	372	368	\$21,740	\$53,388	\$54,456	\$54,352	\$10,000	\$80,790	\$80,790	\$55,790	\$31,740	\$134,178	\$135,246	\$110,142
Task 1.3: Program Implementation	70	1080	1080	840	\$10,900	\$152,904	\$155,928	\$128,352	\$22,855	\$80,000	\$80,000	\$80,000	\$33,755	\$232,904	\$235,928	\$208,352
Task 1.4: Other Services	30	732	732	492	\$5,500	\$97,764	\$99,708	\$71,052	\$ -	\$ -	\$ -	\$ -	\$5,500	\$97,764	\$99,708	\$71,052
Subtotals	478	2,530	2,510	1,972	\$71,490	\$358,138	\$361,716	\$293,684	\$35,855	\$162,790	\$162,790	\$135,790	\$107,345	\$520,928	\$524,506	\$429,474
Total Estimated Cost (Labor and Direct Cost)																\$1,582,253

Budget for SOW 2

	Estimated Hours by Year				Estimated Labor Cost by Year				Estimated Direct Cost by Year				Total Estimated Cost by Year			
	2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025	2022	2023	2024	2025
Task 1.1 Program Design	125	246	246	198	\$18,775	\$39,962	\$40,754	\$35,426	\$ -	\$ -	\$ -	\$ -	\$18,775	\$39,962	\$40,754	\$35,426
Task 1.2: Outreach & Engagement	40	252	156	132	\$6,650	\$39,744	\$28,548	\$22,080	\$10,000	\$46,220	\$46,220	\$36,220	\$16,650	\$85,964	\$74,768	\$58,300
Task 1.3: Program Implementation	30	348	348	258	\$5,250	\$56,952	\$58,044	\$40,896	\$19,355	\$30,600	\$30,600	\$30,600	\$24,605	\$87,552	\$88,644	\$71,496
Task 1.4: Other Services	20	322	322	322	\$2,750	\$47,668	\$48,606	\$49,544	\$ -	\$ -	\$ -	\$ -	\$2,750	\$47,668	\$48,606	\$49,544
Subtotals	215	1,168	1,072	910	\$33,425	\$184,326	\$175,952	\$147,946	\$29,355	\$76,820	\$76,820	\$66,820	\$62,780	\$261,146	\$252,772	\$214,766
Total Estimated Cost (Labor and Direct Cost)																791,464

Estimated direct cost for both SOW 1 and SOW2 include but are not limited to:

- Travel, mileage, airfare, hotel
- Technology and communications platforms
- Materials production and collateral
- Marketing and outreach subcontractors
- Subcontractors: Making Hope Happen Foundation, Inland Equity Community Land Trust (ECLT), Inland SoCal Housing Collective
- Venue rental and logistics
- Training event hosting services including catering
- Instructor and training subcontractors

Hourly Billing Rates

Category	2022	2023	2024	2025
President	300	306	312	318
Vice President / Sr. Director	295	301	307	313
Director / Principal Consultant	275	281	287	293
Sr. Manager / Engineering Manager	245	250	255	260
Manager	218	222	226	231
Sr. Engineer / Sr. Program Manager	198	202	206	210
Engineer / Program Manager	165	168	171	174
Sr. Program Consultant / Sr. Analyst	150	153	156	159
Program Consultant / Analyst	130	133	136	139
Sr. Program Coordinator / Sr. Technician	110	112	114	116
Program Coordinator / Technician	95	97	99	101
Program Associate / Direct Install Technician	79	81	83	85
Administrative	75	75	75	75

Subcontractors

The following fully loaded rates are for a 36 month project period.

Category	Rate
Making Hope Happen	
Contract Manager, Karen Suarez	75
Project Coordinator, TBD	40
Inland Equity Partnership	
Community Outreach Coordinator, Maribel Nunez	50
Inland SoCal Housing Authority	
Project Manager, Melanie Steele	75

Attachment 4a

IREN REN-wide Marketing RFP
22-11

REQUEST FOR PROPOSAL NUMBER 22-11

Inland Regional Energy Network (I-REN)
I-REN-wide Marketing & Communications Services

August 9, 2022



Western Riverside Council of
Governments 3390 University
Avenue, Suite 200
Riverside, CA 92501
(951) 405-6700
wrcog.us

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1. SUMMARY

In 2012, the California Public Utilities Commission (CPUC) authorized a new model for administering energy efficiency programs outside the traditional Investor-Owned Utility (IOU) administered paradigm. These new models are known as Regional Energy Networks (RENs).

The CPUC sought for the RENs to address the following three operational areas:

- 1) Undertake programs that the IOUs cannot or do not intend to do.
- 2) Target hard to reach areas and disadvantaged communities.
- 3) Design programs that have the potential to be scaled to larger geographic areas.

In addition to these directions provided by the CPUC, RENs were also directed to address Workforce Education & Training (WE&T); Technology development; and programs within the field of Water / Energy Nexus. The goal of a REN is to implement and administer energy efficiency programs the current IOUs cannot or do not have the available resources to implement within their service territory. In addition to this goal, RENs look to fill the economic and geographical gaps of distant, hard to reach, and disadvantaged communities that IOUs cannot access or have a difficult time accessing to promote energy efficiency opportunities.

For the past two years, the Western Riverside Council of Governments (WRCOG) as the lead contracting agency, has partnered with and has been strategizing with the Coachella Valley Association of Governments (CVAG) and San Bernardino Associated Governments (SANBAG) on development of a REN to service the Inland counties of Riverside and San Bernardino, with WRCOG acting as the lead agency. This tri-COG group hereby collectively referred to as the Inland REN ("I-REN" or "I-REN Team") for the purposes of this program, has submitted a Business Plan to the CPUC, and has been approved to become a REN Program Administrator (PA), with the desire to address CPUC goals and objectives described in rulemaking 13-11-005 concerning Energy Efficiency Rolling Portfolios, Policies, Programs, Evaluation, and Related Issues. The I-REN Business Plan addresses three sectors – the Public Sector, the Codes & Standards Sector, and the Workforce, Education, & Training Sector. Throughout these sectors there will be a strong focus on hard-to-reach communities and disadvantaged communities within the I-REN territory.

The I-REN Business Plan was approved by the CPUC on November 18, 2021, with a budget of \$65 million to be funded through program years 2022 to 2027. The I-REN Team is seeking competitive bids for a lead marketing and communications consultant to assist the I-REN Team with developing and implementing a marketing and communications plan to promote I-REN as an organization and its energy efficiency portfolio of programs and services, as well as other tasks described in the Scope of Work.

WRCOG is a joint powers authority whose purpose is to unify Western Riverside County so that it can speak with a collective voice on important issues that affect its members. Representatives from eighteen (18) cities in Western Riverside County, the Riverside County Board of Supervisors, and the Eastern and Western Municipal Water Districts have seats on the WRCOG Executive Committee, the policy setting Board for the Agency. The Riverside County Superintendent of Schools is an ex-officio member of the Executive Committee. As a Joint Powers Authority, WRCOG examines a range of regional matters critical to Western Riverside County's future.

SANBAG is a joint powers authority representing its member agencies on regional issues in San Bernardino County. SANBAG member agencies include 23 cities and San Bernardino County.

CVAG is also a joint powers authority and is the regional planning agency coordinating government services within the Coachella Valley and Eastern Riverside County. CVAG's member agencies include 10 cities, Riverside County, the Agua Caliente Band of Cahuilla Indians, the Cabazon Band of Mission Indians, the Torres Martinez Desert Cahuilla Indians, and the Twenty-Nine Palms Band of Mission Indians.

For more information about WRCOG please visit the website at www.wrcog.us.
For more information about SANBAG please visit the website at <http://gosbcta.com>.
For more information about CVAG please visit the website at www.cvag.org.

2. SUBMISSIONS

All Proposal must be submitted via PlanetBids by **the Proposal Due Date listed in Section 6, Schedule of Events, no later than 5:00 p.m. Pacific Standard Time (PST)** at <https://pbsystem.planetbids.com/portal/36405/portal-home>.

Proposals shall include a Table of Contents listing all sections, disclosures, etc., and their corresponding page numbers. **Please review Section 12 for additional details.** It shall be the responsibility of the Proposer to submit the Proposal and all other required items specified in this RFP via [PlanetBids](#) at or before 5:00 p.m. PST on the Proposal Due Date listed in Section 6, Schedule of Events. WRCOG will not accept any Proposal received after the Proposal submission time and date.

3. QUESTIONS AND ANSWERS REGARDING THIS RFP

Any questions concerning technical specifications or Scope of Work requirements must be submitted in [PlanetBids](#) by 5:00 p.m. on **the date listed in Section 6, Schedule of Events**.

4. PRE-PROPOSAL MEETING

WRCOG will be hosting a pre-Proposal meeting on the date listed in Section 6, Schedule of Events to discuss this RFP. The meeting will convene via Zoom at:

<https://us02web.zoom.us/j/81202939285?pwd=Z3RGM3dRcWZ3TFpiNEl4a3dCQ1ITQT09>

Participation is encouraged but not mandatory.

5. BUDGET PARAMETERS

I-REN's budget was established by the CPUC when the I-REN Business Plan was approved on November 18, 2021. I-REN's approved budget is further broken down by sector and though there is limited flexibility to shift funds within a sector, we cannot exceed the annual approved amounts without a formal CPUC filing. The not-to-exceed amount for this RFP is set at \$250,000.00 per year.

Proposer understands that Proposer is not entitled to the full not-to-exceed amounts outlined in this section. The not-to-exceed amount merely represents the maximum funding available within the applicable budget sectors for these particular services. Pursuant to Section 11 of this RFP, the overall cost of Proposer's Proposal will be a primary consideration in the evaluation and selection of the award of the agreement. It is also possible that these not-to-exceed amounts may be altered based on budget needs and WRCOG reserves the right to alter the not-to-exceed amounts in light of budget considerations.

The contract term for this RFP shall be three years from the date of execution with the option of two one-year extensions.

6. SCHEDULE OF EVENTS

Event	Date
1. RFP Distribution	8/09/22
2. Pre-Proposal Meeting via Zoom	8/22/22 at 2:00 p.m. PST
3. Questions from vendors about scope or approach due	8/23/22 at 5:00 p.m. PST

Event	Date
4. Answers to questions from vendors about scope or approach posted to the PlanetBids portal	8/30/22
5. Proposal Due Date	9/16/22 at 5:00 p.m. PST
6. Review of Proposals	9/19/22 – 9/30/22
7. Potential Interviews	10/03/22 – 10/07/22
8. Anticipated decision and selection of vendor(s)	10/10/22 – 10/21/22
9. Anticipated commencement date of work	11/05/22 - 11/15/22

The interview schedule may be staggered, depending on the number of Proposals received, and could span multiple weeks.

7. WRCOG RIGHTS

Award of a contract resulting from this RFP will be based upon the most responsive Proposal or Proposals which will be most advantageous to WRCOG in terms of cost, functionality, and effectiveness in meeting goals and objectives, and other factors as specified in this RFP.

A. WRCOG reserves the right to:

- Disqualify any and all Proposals that are not submitted in accordance with the required format described in this RFP.
- Reject any and all Proposals submitted.
- Request additional information.
- Issue Addenda to this RFP.
- Award all or part of the work contemplated in this RFP.
- Remedy errors in the RFP.
- Cancel the entire RFP.
- Issue a subsequent RFP.
- Approve or reject the use of a particular subcontractor / supplier.
- Negotiate with any, all, or none of the Proposers. If WRCOG is unable to negotiate final contract Terms and Conditions that are acceptable to WRCOG, WRCOG reserves the right to award the contract to another Proposer(s).
- Accept other than the lowest priced Proposal.
- Award a contract without interviews, discussions, or negotiations.
- Award a contract to one or more Proposers.

B. WRCOG may, at its discretion, and without explanation to prospective Proposer(s), at any time, choose to discontinue this RFP without obligation to such prospective Proposer(s).

C. All Proposers should be aware of the insurance requirements for Contract Award. The Certificate of Insurance must be provided by the successful Proposer(s) prior to Contract Award. A contract may not be awarded if insurance requirements are not met.

D. WRCOG does not reimburse for the cost of Proposal preparation, even in the event of RFP cancellation.

- E. Communication between the Proposer(s) and any member of the Proposal Review Committee during the selection process is prohibited, except in the manner expressly authorized in this RFP. Violation of this restriction is grounds for disqualification of the communicating Proposer's(s) Proposal.
- F. Every Proposal submitted is considered a firm offer that must be valid for a minimum of ninety (90) calendar days.
- G. If applicable, WRCOG prefers that software developed under WRCOG's contract not incorporate proprietary and / or third-party software components. This does not preclude the development of deliverables, which interface with commonly-available, off-the-shelf software. However, contractors must determine in advance whether WRCOG already has, or is willing to procure, appropriate licenses for any proprietary and/or third-party software that would be required. Contractors must also provide the impacts of any enhancements and upgrades. WRCOG will require delivery of documentation and source code for all electronic intellectual property developed under a WRCOG contract prior to releasing final payment to the contractor/consultant.

8. ADDENDA

WRCOG reserves the right to revise the RFP documents. Any WRCOG changes to the requirements will be made by written addenda to this RFP. Any written addenda issued pertaining to this RFP shall be incorporated into the terms and conditions of any contract resulting from this RFP. Addenda will be posted on PlanetBids. It is the responsibility of the Proposer(s) to check PlanetBids to determine if any addenda have been issued. WRCOG will not be bound to any modifications to or deviations from the requirements set forth in this RFP as the result of oral instructions. Proposers shall acknowledge receipt of addenda in their Proposal. Failure to acknowledge receipt of all addenda may cause the Proposal to be deemed non-responsive to this RFP and be rejected without further evaluation.

9. NOTIFICATION OF RIGHT TO PROTEST CONTRACT AWARD

Proposer(s) have the right to protest the contract award. A written protest must be filed with WRCOG's Energy & Environmental Director within five (5) working days after the decision of award is made. WRCOG will not accept any verbal protests. The protest must be a detailed, written statement of the protest grounds and reference the RFP Number and name of the designated Contracts Administrator. Grounds for a protest are that WRCOG failed to follow the selection procedures and adhere to requirements specified in this RFP or any addenda or amendments, there has been a violation of conflict of interest as provided by California Government Code Section 87100 et seq., or violation of State or Federal law. WRCOG will only consider those specific issues addressed in the written protest. The protest must be submitted to WRCOG via 1) certified mail and 2) e-mail using the contact information provided below.

Name	Casey Dailey, Director of Energy & Environmental Programs
Address	3390 University Avenue, Suite 200, Riverside, CA 92501
Phone	(951) 405-6720
Email	cdailey@wrcog.us

A written response from WRCOG will be directed to the protesting Proposer(s) within fourteen (14) calendar days of receipt of the protest, advising of the decision with regard to the protest and the basis of the decision.

10. CONFLICTS OF INTEREST

All Proposers responding to this RFP must avoid organizational conflicts of interest which would restrict full and open competition in this procurement. An organizational conflict of interest means that due to other activities, relationships, or contracts, a Proposer is unable, or potentially unable, to render

impartial assistance or advice to WRCOG; a Proposer's objectivity in performing the work identified in the Scope of Work is or might be otherwise impaired; or a Proposer has an unfair competitive advantage.

11. CRITERIA

Any award to be made pursuant to this RFP will be based upon the Proposal with appropriate consideration given to operational, technical, cost, and management requirements. Evaluation of offers will be based upon each Proposer's responsiveness to the RFP and the total price quoted for all items covered by the RFP.

The following elements will be the primary considerations in evaluating all submitted Proposals and in the selection of a Proposer(s):

- A. Completion of all required responses in the correct format.
- B. Qualifications and experience with similar projects and clients.
- C. Key staff that will actually be working on the proposed tasks.
- D. The extent to which Proposer's proposed solution fulfills WRCOG-stated requirements as set forth in this RFP.
- E. An assessment of the Proposer's ability to deliver the indicated services in accordance with the specifications set out in this RFP.
- F. The Proposer's stability, experience, and record of past performance in delivering relevant services.
- G. Availability of sufficient high-quality personnel with the required skills and experience for the specific approach proposed.
- H. Overall cost of Proposer's Proposal.

12. PROPOSAL INFORMATION, ORGANIZATION, AND CONTENT

Proposer's submittal in response to this RFP will be incorporated into a final agreement between WRCOG and the selected Proposer(s). All Proposals shall contain, at a minimum, the following information:

- A. Title Page
- B. Table of Contents
- C. Cover Letter
- D. Firm Capabilities
- E. Approach and Understanding of the Scope of Work Plan
- F. Appendix A: References
- G. Appendix B: Project Team Staffing
- H. Appendix C: Company Overview

The page limit for Items A - F is **30 total pages**. There is no page limit on appendices.

Title Page

The following must be provided on the title page:

- RFP number
- Title of the project

- Name and address of proposing firms and/or individuals
- Phone and Fax of Proposer
- Primary contact person
- Email address of the primary contact person
- Signature of the individual authorized / obligated to commit the Proposer to this project.

Table of Contents

A clear identification of the materials by section and page numbers are to be included in the Table of Contents.

Cover Letter

The cover letter should be brief (two pages maximum) and outline the Proposer's general approach, qualifications, and experience. In order to address the needs of this procurement, WRCOG will accept teams to propose in which proposing firms work cooperatively in presenting integrated solutions. Proposer's(s') team arrangements may be desirable in that they will enable the companies involved to complement each other's unique capabilities, while offering the best combination of performance, cost, and delivery for financial assistance being provided under this RFP. WRCOG will recognize the integrity and validity of Proposer's(s') team arrangements provided that:

- The arrangements are clearly identified and relationships are fully disclosed; **and**
- A primary (lead) individual is designated who will be fully responsible for all contract performance.

Firm Capabilities

All Proposals must provide a comprehensive, yet concise description of the Proposer's(s') individuals' capabilities including the following:

- A track record of providing successful assistance on similar disciplines and tasks highlighted in the "Request for Detailed Scope of Work and Budget" section.
- A track record of providing successful services to similar governmental entities.
- Descriptions of the key staff that will actually be working on the proposed tasks and their experience working on similar issues.
- If responding as a firm, the ownership, size, and location of the office responsible for providing services to WRCOG.
- If responding as a firm, its legal organization (e.g., corporation, partnership) and year of incorporation.
- If responding as a firm, a description of the firm's equal employment opportunity and non-discrimination policies.
- If responding as firm, a summary of the firm's minority and female recruitment efforts and the percentage of minority and female officers, partners, or the equivalent.
- A statement, in one page or less, of any other relevant factors that should be considered by WRCOG in evaluating the Proposal.

Proposals will be evaluated by a Proposal Review Committee on the basis of the Proposer's(s') skills and experience, proposed cost, presentation and completeness of Proposal, and the ability and willingness to work with WRCOG, its management, and references.

Proposers to this RFP should be mindful that WRCOG's selection process prioritizes experience,

knowledge, and abilities of key individuals more so than experience associated with a particular firm. WRCOG has found that successful completion of a project is heavily reliant on the key staff that will be working with WRCOG on a regular basis.

Approach and Understanding of the Scope of Work Plan

Proposers are encouraged to propose enhancements or procedural or technical innovations to the Scope of Work that do not materially deviate from the objectives or required content of the project. **WRCOG is requesting that the response to this portion of the RFP be limited to 30 total pages.** There is no page limit on appendices.

Proposer(s) shall:

- A. Provide a narrative, which addresses the Scope of Work, and shows understanding of WRCOG's needs and requirements.
- B. Describe the approach to completing the tasks specified in the Scope of Work. The work plan shall be of such detail to demonstrate the Consultant's ability to accomplish the project objectives.
- C. Sequentially outline the activities that would be undertaken to complete the tasks and specify who would perform the tasks.
- D. Include a timeline for the proposed work. Note that REN-wide marketing activities would begin after contract, and program-specific marketing would follow thereafter. I-REN is interested in having a "soft launch" of one or more of its programs by the end of 2022, with full deployment for 2023.
- E. Furnish detailed and itemized pricing for the proposed work, including an estimate of hours required to complete the specified tasks along with a total anticipated budget.
- F. Identify methods that consultant will use to ensure quality control as well as budget and schedule control for the project.
- G. Identify any special issues, problems, or risks that are likely to be encountered in this project and how the Proposer would propose to address them.

Also, please provide hourly billing rates for staff you are proposing to include on this RFP for services not directly identified in the Scope of Work.

Appendix A: References

Please provide three (3) references, including names and contact information. References should not include any WRCOG staff or WRCOG Committee members.

Appendix B: Project Team Staffing

Please include biographies and relevant experience of key staff who would be assigned to the project. Please describe coverage levels of employees who would be assigned to this project. Affirm that no employees working on the engagement have ever been convicted of a felony.

Appendix C: Company Overview

Please provide the following for your company:

- Official registered name (Corporate, D.B.A., Partnership, etc.), Dun & Bradstreet Number, Primary and secondary SEC numbers, address, main telephone number, toll-free number(s), and fax number(s).
- Primary key contact name, title, address (if different from above address), direct telephone, and fax number(s).

- Person authorized to contractually bind the organization for any Proposal against this RFP.

13. REQUEST FOR DETAILED SCOPE OF WORK AND BUDGET

This RFP seeks professional marketing and communications consulting services for the tasks and deliverables described below, to support the promotion of I-REN's energy efficiency program portfolio.

Tasks listed within the scope of work below are provided as guidelines. Proposers may recommend supplemental tasks but must explain their rationale. All tasks and deliverables must be identified as distinct line items with accompanying narrative and costs in bidder proposals.

I-REN Energy Efficiency Program Portfolio Overview

I-REN is a new regional energy network serving the counties of Riverside and San Bernardino. I-REN's Energy Efficiency Business Plan¹ addresses three market sectors – the Public Sector, the Codes & Standards, and Workforce, Education, & Training. I-REN's goals for each sector and portfolio of programs are shown in Table 1 below. Across all I-REN's activities there will be a strong focus on hard-to-reach communities and disadvantaged communities within the I-REN territory. I-REN is currently soliciting proposals from program implementers and engaging in REN development activities to prepare for initial program launches later in 2022 and full program deployment in 2023. Note that program-related RFPs are also available through PlanetBids.

The communities served by I-REN face numerous challenges and barriers to participation in traditional energy efficiency programs. One of those barriers is geographic-- I-REN's service territory is large and characterized by isolated rural and frontier areas. The Riverside-San Bernardino-Ontario Metropolitan Statistical Area (MSA), which includes the counties of Riverside and San Bernardino, makes up approximately 11% of California's total population, but its square mileage comprises approximately 17% of California's land area—an area nearly the size of the state of South Carolina. The region faces other barriers including areas with high poverty rates; unemployment exacerbated by the COVID-19 pandemic; lack of accessible workforce training resources, especially for disadvantaged workers; insufficient resources to serve disadvantaged communities and tribal lands; and extreme climate change impacts with increasingly hot and dry weather.

I-REN, as a local government coalition, has a mission to equitably serve these rural and marginalized communities and is well-positioned to have a positive impact in the region on energy efficiency, decarbonization, and climate resiliency. The I-REN member agencies bring experience in conducting outreach to the region from a long history of work with the local governments the I-REN member agencies serve. Through their committee structures and established communication platforms, the I-REN member agencies have become a trusted voice and advocate in their two counties. They can use this position in support of marketing, education, and outreach (ME&O) activities within the region through their network of member jurisdictions.

Through this RFP, I-REN seeks a consultant to provide leadership for marketing and communications services for the I-REN organization and its energy efficiency portfolio as a whole. The consultant will also provide support for program-specific marketing and outreach efforts, working in close coordination with I-REN program staff, program implementers, and other consultants to ensure consistency of branding and messaging across all programs and activities. The consultant should employ innovative and adaptive marketing and communication strategies to overcome barriers in the region and increase awareness of energy efficiency opportunities. Tracking the results of various approaches and having a feedback loop with I-REN staff and program teams for continuous improvement will help I-REN ensure equitable access to energy efficiency program benefits.

¹ Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

Table 1. I-REN Energy Efficiency Program Portfolio Overview

Market Sectors	Goals	Programs
Public	Goal 1. Build capacity and knowledge to enable local governments to effectively leverage energy efficiency services and to demonstrate best practices.	Technical Assistance and Strategic Energy Planning Program
		Public Buildings NMEC Program
Codes & Standards	Goal 3. Work closely with local building departments and the building industry to support, train, and enable long-term streamlining of energy code compliance	C&S Training and Education Program
		C&S Technical Support Program
Workforce Education & Training	Goal 2. Ensure there is a trained workforce to support and realize energy efficiency savings goals across sectors.	WE&T Training and Education Program
		WE&T Workforce Development Program

Scope of Work: REN-wide Marketing & Communications Services

Task 1: Develop Marketing & Communications Plan

Consultant will be responsible for leading REN-wide marketing activities to promote I-REN as an organization as well as its portfolio of energy efficiency programs and services, in close coordination with I-REN member agency staff, program implementers, and other consultants. Marketing and communications plans must align with and support I-REN's Energy Efficiency Business Plan (I-REN BP)² as approved in CPUC Decision 21-11-013.³

The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN team within 2 weeks of final contract execution.
- Review I-REN's energy efficiency portfolio, BP, Joint Cooperation Memorandum, and existing marketing and communications assets.
- Coordinate with I-REN, implementers, and consultants as appropriate to assess marketing and communications needs across the portfolio.
- Based on needs assessment, develop REN-wide marketing plan including strategies, activity list, calendar, list of collateral, goals and targets, and data collection and reporting.

² Motion of the Western Riverside Council of Governments on Behalf of the Inland Regional Energy Network (I-REN), for Approval of its Energy Efficiency Rolling Portfolio Business Plan and Budget

³ D.21-11-013 Approval of Inland Regional Energy Network Energy Efficiency Business Plan

Anticipated deliverables:

- Kick-off meeting agenda and notes
- Documentation of existing marketing and communications assets
- Needs assessment
- REN-wide marketing plan including strategies, activity list, calendar, list of collateral, goals and targets, and data collection and reporting

Task 2: Implement Marketing and Communications Plan

Consultant will lead the implementation of the agreed-upon marketing and communications plan and all its elements, in close coordination with I-REN member agency staff, program implementers, and other consultants.

The consultant will be responsible for each activity listed below:

- Lead the implementation of marketing activities in coordination with I-REN member agency staff, program implementers, and other consultants.
- Lead the development of marketing collateral including procurement of materials and coordination with vendors and other third parties as needed.
- Track marketing and communications activities and report on progress towards goals and targets. Adapt approaches as needed to improve progress.
- Conduct regular (e.g., weekly or biweekly) meeting with I-REN to provide status updates.

Anticipated deliverables:

- Marketing and communications collateral
- Documentation and tracking of marketing activities to measure performance
- Monthly and quarterly status reports
- Meeting agendas and status updates

Task 3: Other Services

The consultant will also be responsible for the activities listed below:

- Collect marketing-related data as applicable to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Provide marketing-related content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum, Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Contribute to marketing-related performance analysis and evaluation, measurement and verification (EM&V) activities for tracking I-REN energy efficiency portfolio achievements and informing continuous improvement.

Anticipated deliverables:

- Marketing-related data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements
- Marketing-specific content and edits or updates to content for I-REN regulatory filings
- Analysis of marketing-related performance and recommendations for future improvements

14. CONTACT AND REQUESTS FOR CLARIFICATION

The principal contact for WRCOG will be Benjamin Druyon, Program Manager, (951) 405-6727, bdruyon@wrcog.us, or a designated representative, who will coordinate the assistance to be provided by WRCOG to the Proposer. Throughout the RFP Process, Proposer may not contact the following parties regarding this procurement: (1) any other members of WRCOG's staff; (2) members of WRCOG's legislative body; (3) and/or representatives of WRCOG's member agencies that may vote on or influence the proposed agreement. Any and all inquiries and comments regarding this RFP must be communicated pursuant to the process described in this Section 14. WRCOG may, in its sole discretion, disqualify any Proposer who engages in any prohibited communications.

All questions, requests for interpretations or clarifications, either administrative or technical must be submitted via the [WRCOG PlanetBids portal](#). All questions, requests for interpretations or clarifications, if answered, will be answered in writing, conveyed to all interested firms, and posted on the WRCOG PlanetBids portal. To ensure a response, questions must be received via the WRCOG PlanetBids portal by the date and time listed in Section 6 – Schedule of Events. Any communications submitted past this deadline will not be answered.

15. TERMS AND CONDITIONS

Any Proposer or person submitting a Proposal shall state their willingness to agree to the following terms and conditions:

- A. The awardee must be fully committed to the mission of I-REN.
- B. Termination - A termination agreement is to be negotiated between the parties that includes provisions on termination for cause and termination for convenience.
- C. Oral Presentations - Any individual or firm who submits a Proposal in response to this RFP must be willing to make oral presentations related to contract-related activities at the request of the I-REN Team or management.
- D. Compensation - The total value of this contract is undefined and contains the option of renewal at the discretion of WRCOG. The schedule of compensation will be mutually negotiated. The compensation plan will include payment based upon an assessment of the vendor's attainment of specific, measurable outcomes or "performance benchmarks," which will be mutually developed between WRCOG and the selected Proposer(s).

16. WRCOG STANDARD PROFESSIONAL SERVICES AGREEMENT

The successful Proposer(s) will be required to sign WRCOG's standard Professional Services Agreement (PSA) in order to receive the contract award. Proposer(s) must identify in their Proposal any concerns or objections they would have with any of the PSA terms and conditions if selected for contract award. Proposer(s) shall propose alternative language for consideration in their Proposal. If WRCOG is unable to negotiate final contract Terms and Conditions that are acceptable to WRCOG, WRCOG reserves the right to award the contract to another Proposer. The agreement is available in PlanetBids in the Documents tab as part of this RFP.

17. DIVERSE BUSINESS ENTERPRISES (DBE)

Consistent with the California Public Utilities Code and California Public Utilities Commission (CPUC) policy objectives as set out in CPUC General Order 156, Proposers that execute a contract with WRCOG for I-REN work will be required to complete a Supplier Diversity Questionnaire after the

contract has been executed. WRCOG asks that all Proposers refrain from directly or indirectly providing this information when responding to this RFP.

WRCOG encourages all eligible Proposers to get certified with the CPUC as a diverse business enterprise.

For overview information on the CPUC Supplier Diversity Program, please visit the program homepage (<https://www.cpuc.ca.gov/supplierdiversity/>). For information on the certification process and requirements, please visit the Certifications page (<https://www.cpuc.ca.gov/Certifications/>).

Attachment A: Scoring Criteria

Inland Regional Energy Network (I-REN) I-REN-wide Marketing & Communications Services

Evaluation Criteria	Max. Possible Points
<u>TECHNICAL APPROACH</u> • Tasks & approach clearly described • Creative/innovative approach • Project intent has been met	30
<u>CONSULTANT FIRMS</u> <u>Prime Consultant</u> • Familiar with regional and local issues • Experience with similar projects of the same size and scope <u>Sub-Consultants (if any)</u> • Each sub provides unique service(s) to the team • Subs are fully capable of performing their tasks	30
<u>PROJECT MANAGEMENT</u> • Qualifications of key individuals • Time commitment of key individuals	15
<u>PROJECT COSTS</u> • Realistic cost for services to be performed	20
<u>REFERENCES</u> • Similar projects completed on time and within budget	5
TOTAL	100

Attachment 4b

ICF Marketing and Communications Proposal



September 16, 2022

Request For Proposals Number 22-11

→ I-REN-wide Marketing and Communications Services

Submitted to:

**Inland Regional Energy Network
Western Riverside Council of
Governments**

Benjamin Druyon

Program Manager

3390 University Avenue, Suite 200
Riverside, CA 92501

Submitted by:

ICF Resources, L.L.C.

49 Discovery

Irvine, CA 92618

ICF Point of Contact Name

Karen Germain

Director of Marketing, South and West

Phone: (248) 979-7845

Fax: (949) 565-1690

Karen.Germain@icf.com

Signatory: Carolyn Burch



This proposal contains ICF's confidential information and shall not be disclosed to any third party or used for any purpose other than to evaluate this proposal.



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September 16, 2022

Benjamin Druyon, Program Manager
Western Riverside Council of Governments
3390 University Avenue Suite 200
Riverside, CA 92501

Subject: ICF Response to Inland Regional Energy Network (I-REN) Request for Proposal Number 22-11 I-REN-wide Marketing & Communications Services

Dear Benjamin Druyon:

ICF stands ready to deliver Inland Regional Energy Network (I-REN)-wide Marketing & Communications Services. Leveraging our extensive energy efficiency marketing experience, we will create awareness of the I-REN mission, build inclusion across all communities, and channel program participation. Our strategy will position I-REN for success in pursuing your energy efficiency goals. ICF is pursuing this opportunity as the sole provider but will work in collaboration with Western Riverside Council of Governments (WRCOG), the associated implementation partners, and consultants. Working closely the programs' marketing staff, we will direct and support the individual program marketing needs.

We have worked extensively in the California energy efficiency market over the last 20 years helping government, utilities, and RENs market their organizations and services in their communities. ICF specializes in strategic planning, marketing, communications, analytics, digital services, and multicultural engagement. We are a full-service marketing agency custom built to meet exactly the challenges you face as you launch and promote your new organization and your portfolio of services. With more than 30 years of utility and energy efficiency program sponsor marketing experience, we bring more in-depth utility marketing knowledge than any other agency.

ICF's proposal remains valid for a period of 90 days from the closing date of the request for proposals. ICF retains the right to review our submission and to extend our offer or to revise our proposal at the end of the 90-day period. If ICF is selected as the successful bidder, it respectfully requests to negotiate some of the sample contract language as outlined in our proposed redline of the Professional Services Agreement that is provided at the end of this document following the Appendices. For contractual questions, please contact Carolyn Burch, senior contracts manager at (916) 210-5894 or Carolyn.Burch@icf.com. For technical response questions, please contact Karen Germain, director of marketing, at (248) 979-7845 or Karen.Germain@icf.com.

Sincerely,

A handwritten signature in blue ink, appearing to read "K. Germain".

Karen Germain
Director of Marketing, South and Southwest

A handwritten signature in blue ink, appearing to read "C. Burch".

Carolyn Burch
Senior Contracts Manager



Firm Capabilities

ICF is pleased to present our qualifications for professional marketing and communications consulting services for the tasks and deliverables described in *RFP Number 22-11, Inland Regional Energy Network (I-REN) I-REN-wide Marketing & Communications Services*. We bring a long history of developing and growing large-scale energy efficiency initiatives including the California Regional Energy Networks (RENs). This allows ICF to provide the Western Riverside Council of Governments (WRCOG) team with a deep understanding of the marketing necessary to support the portfolio programs and customer needs.

A. Experience With Similar Disciplines and Tasks

ICF was founded over 50 years ago as the Inner City Fund to finance minority-owned businesses in Washington, DC. ICF maintains our founding values through our work to support underserved communities in accessing the resources they need to thrive. We implement more than 50 energy organizations across North America, including 7 of the top 10 American Council for an Energy Efficient Economy (ACEEE)-ranked states. We have also been a prime ENERGY STAR program contractor for more than 25 years.

ICF has provided marketing for more than 20 energy efficiency programs in California over the past decade, including multiple REN projects, IOU third-party programs, and local government initiatives. With energy advisors in every aspect of the industry, ICF's award-winning team implements the largest residential and commercial and industrial (C&I) utility portfolios in the United States. Our programs are recognized as best-in-class by a range of industry associations, regulatory bodies, utilities, and government agencies, including ACEEE, the Consortium for Energy Efficiency, the Association of Energy Services Professionals (AESP), Smart Electric Power Alliance, the Environmental Protection Agency, the Department of Energy (DOE), and Chartwell, Inc. Table 1 below highlights ICF's work with our municipal and utility clients, implementing similar work as required by the request for proposals (RFP).

Table 1. ICF Capabilities and Marketing Experience

Client	Location	Scope of Work (SOW) Requirement				
		Portfolio Strategy	Government	Collateral Development	Program Metrics/Reporting	Regulatory Reporting
SoCalREN	CA	●	●	●	●	●
SoCalGas	CA	●		●	●	●
SCE	CA			●	●	
BayREN	CA		●	●	●	



Client	Location	Scope of Work (SOW) Requirement				
New Mexico Gas Company	NM			•	•	
Salt River Project	AZ	•		•	•	
	NJ					
PSE&G	NJ	•		•		
Pepco	PA	•		•		
BGE	MD	•		•	•	
PECO	DC	•		•	•	

REN Experience

ICF understands the value of RENs in California; we worked with the Association of Bay Area Governments (ABAG) in 2013 to develop a 2-year implementation and marketing program for the Bay Area Regional Energy Network (BayREN). Additionally, we have been successfully administering the Southern California Regional Energy Network (SoCalREN) marketing portfolio since 2015. Over the past 7 years, we have developed a keen understanding of how to market REN offerings to California residents. Our proven marketing strategies and processes will support the I-REN-wide portfolio, following best practices and incorporating lessons learned from evaluation studies and similar programs. Please refer to [Appendix C](#) for case studies of our work; further case studies can be supplied upon request.

Working with SoCalREN, ICF has provided marketing strategy and services to support their efforts to successfully achieve their goals. In doing so, ICF has helped them mine deeper and obtain broader engagement from existing customers, while simultaneously connecting with and converting those customer segments that have historically under participated in various programs. They have worked with SoCalREN to increase program awareness, and then on leading customers on a journey from awareness to action.

Marketing and Communications Experience

ICF brings together an industry-leading marketing services, energy expertise, and on-the-ground knowledge of the your territory and stakeholders. Our professional services and technology solutions affect areas critical to the world's future; we are fluent in the language of change, whether it is driven by markets, technology, or policy. We build brands and change behavior through creative ideas and experiences. Below are a few aspects that set us apart and help us deliver great work. Figure 1 below highlights our successes in the energy efficiency industry.

ICF brings depth and breadth of service and experience, all under one-roof. Our experience with RENS allows us to scale to your needs and adapt to achieve success and unify your communities

behind one vision. ICF is prepared to scale and expand our marketing and communications services should WRCOG choose to include more programs in the overall program portfolio.

Custom built for energy efficiency marketing. ICF understands the “acronym soup” of energy efficiency programs, and we can navigate the sometimes-complex landscape of offerings. ICF-implemented utility programs have led to millions of megawatt hours (MWh) in energy savings over the years. We will translate that understanding into compelling creative campaigns with clear calls to action to ensure you meet your energy efficiency savings goals and your customers are satisfied. ICF provides and has provided energy marketing and customer engagement services to the following: BayREN, SoCalREN, Pacific Gas and Electric Company (PG&E), Seattle City Light, Southern California Gas Company (SoCalGas), and Southern California Edison (SCE).

Figure 1. ICF's Results



One-stop shop. ICF has what you need: creativity, technology, and strategy combined with deep market expertise in the energy and climate sectors. We focus on the right services at the right scale to ensure our clients get the most from their investment. Our services run the full marketing and communications gamut—branding, advertising, public relations (PR), crisis communications, social media, and digital engagement. A sample of our creative work includes the ads in Figure 2.

Our work for WRCOG will be managed from our Irvine, California office. Our team includes storytellers, designers, producers, researchers, data technologists, marketers, and social media specialists, with services that include these:

- Marketing campaign strategy, planning, and execution
- Creative development (print, digital, video, experiential)
- Program materials and collateral development and production
- Copywriting
- Illustration, motion graphics, and print design
- Video production and photography
- Media strategy, planning, and buying
- Digital marketing, search engine optimization (SEO), and search engine marketing (SEM)

Figure 2. Baltimore Gas & Electric Creative



- Data analytics, tracking, and management

Strategic marketing grounded in research. ICF blends the art of customer engagement with the science of data and the power of technology to create an effective marketing strategy. Our goal is to make information seamlessly available to customers throughout their journey, whether they visit your website, YouTube channel, blog, or any other touchpoint. Through customer journey mapping, analysis, and modeling, we identify audiences’ behaviors and motivations and connect them to your program goals and objectives.

We then build the foundation for a data-driven, actionable framework, aimed at stronger customer engagement and alignment of marketing channels and communications. We can develop insights and provide feedback that is technically sound and aligned to the target market and intent of the programs, and we consider the logistical implications of marketing on program operations. This means better results, faster turnarounds, and painless review cycles because you are working with people who understand what you do. On the right is collateral we created for utilities in the state of Maryland’s EmPOWER Maryland programs (figure 3).

Figure 3. EmPOWER Maryland Portfolio Collateral



B. Government and Public-Sector Experience

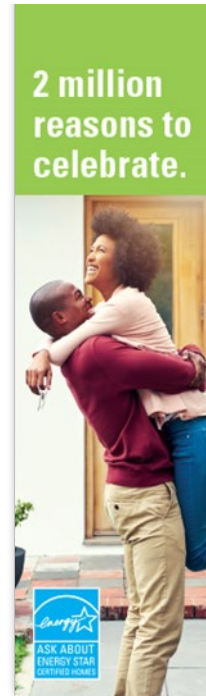
Since our initial founding in 1969, ICF has been, primarily, a provider of technical and consulting services to a wide variety of public-sector clients, from large international governments to cities and agencies within California and throughout the United States. Our employees across the organization—including our corporate services such as accounting and contracts—understand the unique needs of governmental entities and the additional responsibility associated with the use of public dollars for public projects.

ICF has supported EPA for communications and marketing for multiple offices and programs, including voluntary programs such as the ENERGY STAR Labeled Products Program, IndoorAir Plus, and the Certified New Homes program. Additionally, we have helped on guidance documents, webinars, trainings, and fact sheets for the regulated community for many federal agencies like the Office of Air and Radiation.

For example, ICF recently completed a brand refresh for the ENERGY STAR Certified New Homes program that entailed creating new “Brand Pillars” that now serve as the foundation for all marketing and outreach (figure 4).

Figure 4. ENERGY STAR Creative

We understand how to manage programs and portfolios in California and are dedicated to reporting accuracy and regulatory compliance. In addition to tapping our knowledgeable REN and utility teams in California, ICF’s Environment and Planning team will also serve as important partners and subject matter experts advising our team, bringing extensive experience working with public agencies and other entities throughout the I-REN region to support environmental projects. Services the team provides to agencies within the Inland Empire include regulatory permits, preparation of Environmental Impact Reports (EIRs), California Environmental Quality Act compliance, Assembly Bill 52 compliance, and engagement with both public agencies and the constituents they serve. Examples of local clients and projects include the Corona Regional Medical Center (CRMC) Expansion and University of California, Riverside (UCR) Creekside Terrace Slope Protection Project. Additional public-sector samples are noted below.



- San Bernardino Valley Municipal Water District:
 - Upper Santa Ana River Tributaries Restoration Project and Mitigation Reserve Program EIR
 - Upper Santa Ana River Habitat Conservation Plan
- UCR
 - Creekside Terrace Slope Protection Project Mitigated Negative Declarations
 - Glen Mor 2 Student Housing EIR and Habitat Mitigation Monitoring Plan and Mitigation Monitoring
- City of Riverside Community and Economic Development General Plan Housing and Public Safety Updates; Environmental Justice Policies
- San Bernardino County Transportation Authority
 - Downtown San Bernardino Passenger Rail Project Environmental Assessment/EIR
 - I-15 Express Lanes, State Route (SR)-60 to SR-210 Project
- Caltrans District, Riverside and San Bernardino Counties: On-Call Environmental Services
- United Health Services: CRMC Expansion

C. Our Proposed Team

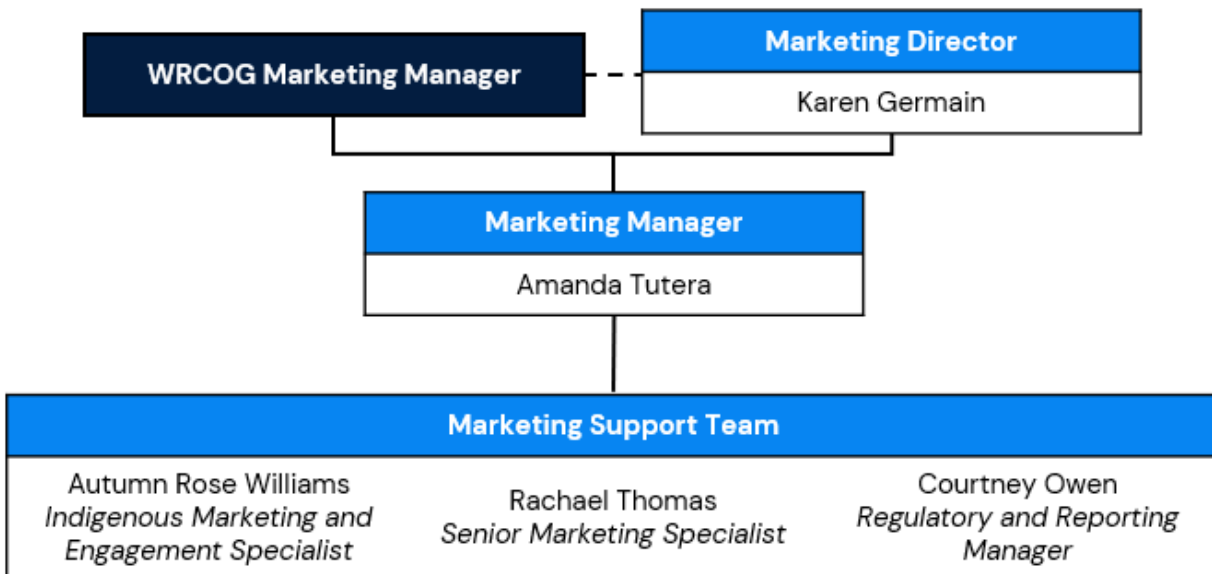
ICF will build the marketing team with the following staff members listed in Table 2 and in the organizational chart in Figure 5 to provide strategic oversight and ongoing implementation. Our

management team will oversee all work and serve as WRCOG's direct contacts within ICF. Creative services will be lead by ICF's California-based creative team.

Table 2. Key Program Staff

Staff	Primary Role and Experience
Karen Germain <i>Director</i>	Karen Germain has 30 years of marketing experience, 20 of which have been focused on energy, climate change, and sustainability. Karen began her work in the California market in 2001 working on the California Low Emission Mandate on behalf of General Motors. She then went on to work in the United Kingdom where she held a number of roles focused on marketing climate change, energy, and sustainability solutions, returning to the United States in 2014, when she began working with organizations across the country to define custom energy efficiency marketing strategies. In 2022, Karen began directing the marketing of SoCalREN and BayREN on behalf of ICF. <i>Karen will oversee the strategic direction and implementation of the program.</i>
Amanda Tuter, <i>Marketing Manager</i>	Based in California, Amanda Tuter has 16 years of extensive experience in the California market, as well as a specialization in engaging with low-income communities. <i>Amanda will lead the day-to-day operations, acting as WRCOG's direct point of contact, and coordinating all activities with the implementers' marketing staff members.</i>
Autumn Rose Williams, <i>Indigenous Marketing and Engagement Specialist</i>	Autumn Rose Williams is a member of ICF's multicultural communications team. She brings professional experience in digital communications, PR, writing for diverse audiences, and social media content creation and analytics knowledge. She is an expert on communicating with Black and Indigenous audiences, as well as understanding tribal government and their relationship with federal government. <i>Autumn will be the Indigenous communications specialist for the I-REN program.</i>
Courtney Owen, <i>Regulatory and Reporting Manager</i>	Courtney Owen has nearly 20 years of experience supporting utility and government energy programs, primarily in Texas and California, with a focus on communications, reporting, regulatory compliance, documents, and digital content management. She leads ICF's team that develops California Public Utilities Commission (CPUC) reports and other documentation for SoCalREN. <i>Courtney will be doing similar regulatory and reporting support for WRCOG.</i>
Rachael Thomas, <i>Senior Marketing Specialist</i>	Rachael Thomas is a senior marketing specialist who supports SoCalREN, the SoCalGas portfolio, and SCE at ICF. Rachel has over 5 years of experience in marketing, communications, data analysis, data visualization, and project management. She currently supports marketing and communication efforts for energy efficiency projects in California, including website development, collateral management, and communications development and delivery. <i>Rachael will support Amanda Tuter for overall program and campaign management.</i>

Figure 5. Organizational Chart



D. ICF Bidder Background

- Ownership: ICF Consulting Group
- Size: 7,516 regular employees
- Service Office Location: Irvine, California

E. ICF Legal Organization Information

- Organization Type: Corporation
- Legal Organization: ICF Resources, L.L.C.
- Year of Incorporation: 1989

F. Equal Employment Opportunity and Non-Discrimination Policy

ICF values diversity in our staff, and we actively pursue it when recruiting and developing talent. We are firmly committed to Equal Employment Opportunity (EEO) for all applicants, purposefully engaging with those of any race, color, creed, religion, ancestry, age, disability, marital status, citizenship, national origin, veteran or military status, sexual orientation, gender identity, and any other protected classifications. For additional information on our EEO policy, please visit our website [Equal Employment Opportunity and Affirmative Action at ICF](#).



G. ICF's Commitment to Diversity

Our recruiters take deliberate actions to deliver candidate pools that include skillsets and professional and personal experiences to elevate and support a diverse workforce, by:

- Using intentional sourcing strategies to widen our reach and connection with a variety of talent, such as fostering relationships with diversity-focused recruiting partners, like the Direct Employers Association's Job Syndication Alliance list.
- Posting jobs and developing partnerships for networking and events with groups that focus on attracting underrepresented groups, such as the American Association of Blacks in Energy, Women in Energy, Association of Women Project Managers, and Hispanic/Latino Professionals Association, as well as Transition Assistance Programs for Veterans and the U.S. Department of Labor Veterans' Employment and Training Service.
- Using conscious, inclusive language and tone within our job descriptions, which is ensured by such techniques as running job description language through a gender decoder tool.

Forbes 2022

- The Best Employers for Diversity
- The Best Employers for Women

ICF Leadership

- 44% female and minority executives
- 37% female officers

H. Other Factors

Hard-to-Reach and Disadvantaged Communities. ICF has worked extensively across the United States with utilities and municipalities seeking to reach and support hard-to-reach and disadvantaged communities. The most effective strategies seek to understand and engage these communities from the outset. Amanda Tuter, account marketing manager, will bring her expertise in hard-to-reach and underserved communities to this program. She will oversee the design of messaging and engagement with these communities, making sure that they are at the forefront of our thinking. Supporting Amanda will be Autumn Rose Williams, a specialist in Indigenous American and Native American engagement.

Approach and Understanding of the SOW Plan

A. Executive Summary

In this section we will describe our approach and process as we address the questions asked in the RFP. ICF understands that WRCOG seeks a marketing and communications specialist firm to lead the development and implementation of all marketing and reporting needs associated with RFP Number 22-11.

Unifying a community is difficult in almost every situation; however, WRCOG has a uniquely challenging situation with both San Bernadino and Riverside Counties covering such a large geographic territory. ICF recognizes the urgent need for clean energy action in the Inland Empire. According to the *2022 American Lung Association The State of the Air report*¹, Riverside and San Bernardino counties suffer from the worst air quality in the nation. Compounding this challenge is the nature of working with hard-to-reach and DACs who have suffered greatly during COVID-19. We understand that the customers are suffering under the impact on unemployment and high poverty rates, and limited by resource accessibility issues. Climate change impacts mean that those least able to contend with weather impacts are those impacted the most.

ICF recognizes these challenges because we have worked to address them in similar programs, and we are prepared to help you unify your community to address them.

We manage performance, collaborate, and ensure quality deliverables and effective communication. In short, we manage projects day-in and day-out. We systematically tackle complex initiatives that often require synchronization and collaboration across multiple projects or organizations. We will work with you to identify and understand the business issues at hand, map out a plan to deal with those issues, and manage our resources against that plan.

We will use industry-proven, time-tested project management tools and techniques to deliver projects in a collaborative and transparent way. In the chart, we lay out the kinds of tools and techniques we typically use, but will work with you to ensure we establish a communications process that work for everyone. Our approach to partnering with WRCOG includes:



A project kickoff meeting to review and finalize our proposed SOW, implementation plan, and any modifications to the team. We begin by unifying behind a shared vision and strategy.



Fostering open and regular communication, enabling a smooth and efficient workflow to create the strongest campaign. Key to success will be effective communication with WRCOG, the implementers, and the consultants. We are one team united behind you.



Leveraging collaborative systems and processes. Collaboration sites, such as Microsoft Teams, Trello, SharePoint, or Basecamp, can house everything from meeting minutes to branding guidelines and creative reports, all in a shared, centralized place.

¹ <https://www.lung.org/research/sota/key-findings>



Monitoring impact and evolving plans. We identify any new insights and evolve our tactics and approach to continue to deliver the desired impact. Innovation and adaptation are key to engagement and inclusion, and in creating awareness for the community at large to understand how WRCOG is supporting them and how they can be involved.



Monthly reports measuring progress toward goals. We will report additional insights into activities conducted during the monthly invoicing period and include information on coordination across program marketing efforts, account management activities, and supporting data for the agreed-upon program metrics. We also will support your efforts with regulators and stakeholder working groups, supplying reports as needed for you to comply with regulatory and legislative requirements. Your relationships with the regulators and stakeholders are important and we understand that supporting your relationship is part of our mission.

B. Scope of Work Approach

Our approach to the SOW is shaped by our experience launching and supporting RENs in California for nearly a decade. Our experience enables us to efficiently use our time in promptly developing WRCOG's marketing plan and implement it as you launch the programs. Outlined below is our plan to accomplish anticipated deliverables from each task as mentioned in the RFP.

Task 1: Develop Marketing and Communications Plan

ICF will cover the three counties, demographics, and customer base that comprise WRCOG while developing the custom-built marketing strategies and promotional plans you need. We will design a portfolio marketing plan to work across the programs with a coordinated and integrated strategy, but also to be effective at engaging customers for specific programs and offers.

We focus on these key steps:



To do this, we know that impactful strategies start with data and insights related to target audiences to ensure we are reaching them effectively. For all programs, ICF's strategies, tactics, and budget allocations are driven by the goal to efficiently reach the desired target audience with engaging messages. It starts with great creative. That begins and ends with a truly strategic and inspiring idea—one that gives customers a compelling reason to invite us into their homes and to advise their businesses. In turn, we reward them for spending time with us. That is why we ask tough questions in building our creative strategy, such as, "Why would people care?" and, "Is this idea helping their business?"



Project Management

ICF will lead REN-wide marketing activities to promote I-REN as an organization as well as its portfolio of energy efficiency programs and services. I-REN has a defined vision and specific need which will inform ICF's staff as they work in coordination with I-REN member agency staff, program implementers, and other consultants. In addition to our work delivering all marketing services for the SoCalREN portfolio, ICF has experience in delivering portfolio-level strategy and implementation services for a variety of agencies and utilities nationwide as demonstrated in [Appendix C, PECO: Portfolio-Based Marketing with Multiple Program Implementers](#).

For SoCalREN, we manage projects day in and day out. We systematically tackle complex initiatives that often require synchronization and collaboration across multiple projects or organizations. Just as we have done with other REN projects, we will work with you to identify and understand the business issues at hand, map out a plan to deal with those issues, and manage our resources against that plan. We will use industry-proven, time-tested project management tools and techniques to deliver projects in a collaborative and transparent way. We have experience working on a portfolio level as well as in conjunction with implementers. ICF will ensure that the customers, local building departments, local governments, the building industry, and local builders are all aware of the opportunities available to them. Working in conjunction with the implementers, ICF will create targeted marketing that not only raises awareness and education but drives engagement and participation.

Karen Germain, director of marketing, and Amanda Tuter, marketing manager, will facilitate the kickoff meeting. Attending this meeting will be key WRCOG staff, implementer marketing staff for each program, and associated consultants. The objective of this meeting will be to socialize the personnel from each organization and share initial timelines associated with Task 1 and its deliverables. Following on from this meeting, ICF will conduct a needs assessment including the following documents:

- I-REN's energy efficiency portfolio
- Business Plan and Joint Cooperation Memorandum
- Any associated, existing marketing and communication assets
- Interviews with key staff at WRCOG, implementers, and consultants

We will map the key target audiences, messaging opportunities, and program hurdles. In addition, we will review the current marketing and communications strategy and assets, evaluate the appropriateness and effectiveness of existing assets, and identify any gaps in the current marketing landscape.

Following on from this, ICF will engage and coordinate with WRCOG member agency staff, the implementers, and consultants and will evaluate the marketing and communications needs for the



individual programs. This evaluation and its findings will be incorporated into the initial mapping exercise. ICF will then develop a portfolio-wide strategy, comprising sections for each program. This strategy will take into consideration the staff and capabilities of the implementers associated with each program and plan accordingly.

As per the RFP, ICF will deliver a marketing plan that includes:

- **Strategies.** Strategies of each program designed to meet their specific needs, leveraging any portfolio-level synergies such as collective buying and shared audiences
- **Activity List.** Breakouts, by program, of the identified activities designed to target and engage audiences and their intended objectives
- **Calendar.** Portfolio-level and program-level activity calendar including regularly scheduled coordination and sharing meetings with the implementation marketing staff, designed to drive continuous improvement
- **Goals and Targets.** Identify goals and targets, by each program, citing the risks associated with them, and mitigation tactics
- **Data Collection.** Inclusion of the data collection to date, with definition of how this will proceed over the course of the program
- **Reporting.** Criteria and reporting schedule to be developed
- **RACI.** An operational RACI chart will be developed for marketing and communications activities, inclusive of WRCOG staff, consultants, and other stakeholders. An example RACI Chart is provided in [Appendix C](#).

At the time of writing this document, we cannot definitively say what ICF's marketing approach will be, as through our process we need to learn from the pre-existing work, listen to your needs, connect with your values, and identify the compelling voice for the I-REN brand. However, based on our work with SoCalREN and BayREN, we expect that the plan may include:



Our work will be grounded in a brand platform and will not be just eye catching—it will also be smart and purpose driven. Your brand is key to your identity and recognition of what opportunities you bring to your customers. In a crowded market such as yours where you have a name similar to that of Inland Region Equality Network (IREN), your brand and your identity are all the more important. We will develop a brand that sets you apart from other organizations, making you easily

recognizable, relatable, and relevant to your communities. Following (figure 6) are examples of the SoCalREN brand guidelines we created for Los Angeles County. We will work with your marketing team to create a unique design for I-REN, incorporating ideas from your service territory.

Figure 6. SoCalREN Brand Guidelines



WRCOG's customers are dynamic, diverse, and continually evolving, as well as covering a large geographic territory. Understanding the customer mindset, their motivations, and the barriers they may be facing is critical. We gain those insights by applying a strategic framework to become intimately familiar with the customer and market you will face in the coming years to meet your energy efficiency goals, as well as customer experience expectations. We will look at customer, category, cultural, and brand truths to uncover the distinct and dynamic environment in which we will communicate with your defined market sectors. These insights will help us identify the core strategic truth that will underpin our entire marketing plan and ensure all efforts drive toward your objectives.

ICF will provide the following anticipated deliverables as per the SOW for Task 1.

Task 1 Deliverables	
Kickoff meeting agenda and notes	X



Documentation of existing marketing and communications assets	X
Needs assessment	X
REN-wide marketing plan including strategies, activity list, calendar, list of collateral, goals and targets, and data collection and reporting	X

Task 2: Implement Marketing and Communications Plan

ICF believes in taking a fully collaborative approach when developing and implementing programs with our client partners. This is particularly important for programs funded by public dollars and serving public interests. To that end, we will begin the engagement with a structured, full-day kickoff meeting.

Kickoff Meeting

ICF's director of marketing, Karen Germain, will coordinate with WRCOG staff to determine the attendee list and agenda and to schedule the kickoff meeting. The kickoff meeting will be held within the 2 weeks following execution of the final contract, with additional consideration of the kickoff meetings for the other I-REN portfolio programs. Staff unable to attend the meeting in person will be provided with a virtual means of participation to ensure representation by all key stakeholders.

Working from the agreed-upon marketing and communications plan, we will establish operational flows and approval structures, reporting frameworks and timeframes, and meeting cadences. We recommend that initially ICF meet weekly with WRCOG during the launch phase and then every other week. However, coordination with and between the marketing staff from the program implementers will require biweekly joint meetings. This will maximize planning and coordination efforts as well as cost efficiencies.

When working with marketing partners across a portfolio, ICF has learned the importance of clarity in roles for all of those involved in developing and delivering the marketing portfolio. To achieve this clarity, ICF will develop, in conjunction with WRCOG staff, a RACI chart identifying those who hold roles of **R**esponsibility, **A**ccountability, **C**onsultation, or simply being **I**nformed. This RACI chart will be socialized with the associated staff of the implementers and consultants. For a full view of this RACI chart, please see [Appendix C](#).

Planning Coordination

Next, ICF will convene a planning session that coordinates all program-specific campaigns and outreach stakeholder material needs. Key to this planning effort is for the program implementers

to identify the individual campaigns they have planned for targeted audiences; culturally specific strategies; and strategies for local jurisdictions, agencies, local governments, tribes, and special districts. During this meeting, we will define opportunities for cross-promotion, cost efficiencies in production, and map creative content resource needs.

Soft Launch

ICF recognizes that WRCOG is keen to initiate a soft launch of at least one program in the balance of the 2022 calendar year. Knowing that the soft launch is incumbent upon the program implementer and their agreement with WRCOG, ICF will support the soft launch and hard launch of associated programs.

Innovation and Adaptation

ICF is a flexible, agile, and transparent partner who specializes in innovation and adaptation. We know that the inspiration for a compelling campaign and impactful change happens at the intersection of capabilities and in partnership with our clients. ICF brings insights, channel best practices, and cultural capabilities to each program that can help inform and identify opportunities to innovate our marketing strategy and adapt the program implementation to achieve overarching strategic marketing plans. Additionally, our approach, if desired, will leverage facilitated design thinking to more efficiently unlock the needs of your end customers and WRCOG. More specifically, these innovation and adaptation capabilities include:



ICF's Design-Thinking Collaboration Workshop. ICF Spark Labs, our proprietary design-thinking workshop and process, accelerates problem solving and improves customer understanding. The Spark Labs approach aligns teams around customer needs and challenges via in-person and/or remote strategy workshops. We use empathy mapping and journey mapping activities to step into customers' shoes, recognize pain points, and develop realistic solutions.



Culturally Specific Campaigns. For those culturally specific campaigns or campaigns needing culturally specific input, ICF will develop strategies to meet the objectives and engagement goals, while developing unique messaging. ICF will draw upon specialist marketers from our Multicultural Marketing practice, including Autumn Rose Williams, Indigenous marketing and engagement specialist.



Energy Industry Insights. We have access to the latest energy efficiency industry research, in-house global advisory energy expertise, results from the cutting-edge pilots and programs we implement across the nation as well as industry conferences and events we host and attend, and collaborative industry research we develop.



Digital, PR, and advertising best practices. We bring the latest marketing and communications trends and insights into our marketing plans for you, from new trends in voice search, artificial intelligence, and virtual and augmented reality to learnings on adapting customer engagement and PR during evolving societal events and crises.

Shown in figure 7 are a few examples of our multilingual marketing tactics, including flyers, tip sheets, and door hangers in Chinese, Korean, and Spanish.

Figure 7. Multilingual Flyers, Tip Sheets, and Door Hangers



ICF will provide the following anticipated deliverables as per the SOW for Task 2.

Task 2 Deliverables	
Marketing and communications collateral	X
Documentation and tracking of marketing activities to measure performance	X
Monthly and quarterly status reports	X
Meeting agendas and status updates	X

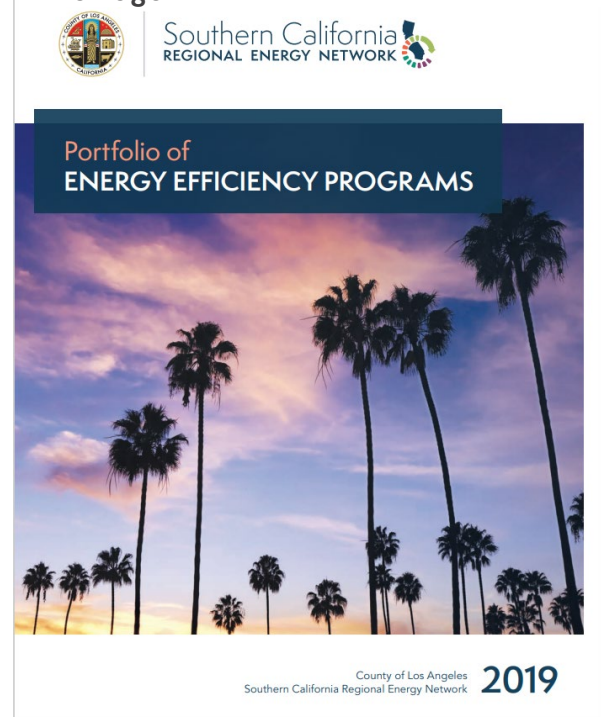
Task 3: Other Services

ICF has experience in supporting federal, state, and local utility energy efficiency efforts across North America. We are well versed in preparing a variety of data analyses, as well as technical reports for submission to governing regulatory bodies such as DOE and public utility commissions across the nation. We will leverage this experience to provide support for all CPUC regulatory reporting activities.

To ensure the timeliness of monthly, quarterly, and annual reporting to CPUC that accurately consolidates the I-REN portfolio, ICF will create a schedule with Western Riverside Council of Governments (WRCOG) and regularly meet with program implementers in the I-REN portfolio to delineate reporting responsibilities. The schedule will provide ample time to review submitted metrics and work with consultants to ensure documentation is accurate prior to CPUC submission. ICF will also support WRCOG with additional reports as requested by CPUC.

We will support WRCOG in developing a visually compelling CPUC Annual Report, like the one we created for SoCalREN in figure 8. The Annual Report will provide CPUC stakeholders and other external parties with highlights of I-REN achievements and impacts across the portfolio, showcasing successful projects, energy and environmental impacts, and the regional distribution of completed projects. Designers within ICF NEXT can develop complete reports facilitating all design, or can provide brand-compliant, stylized templates for use by the reporting teams in creating final documentation. In addition, editorial professionals from ICF NEXT will provide support in completing the quality control (QC) process for all reporting documents as described below.

Figure 8. SoCalREN CPUC Annual Report Title Page



ICF's Report QC Process

Our team has refined a development and QC process for report creation that allows program managers and implementers to work together—and separately as they need to—to produce technically accurate, attractive reports that meet CPUC requirements. We provide writing assignments to individual managers and implementers; then ICF's team of communications and documentation experts edit and synthesize all content, fact check, proofread, format, and create final files for submittal.

Maintaining compliance with CPUC energy savings claims is critical to driving I-REN awareness in the community, ensuring the prioritization of equity, and measuring marketing impacts. ICF's regulatory and reporting support activities will help ensure the I-REN-wide Marketing and Communications Services Program remains compliant with CPUC and other requests. ICF will support I-REN with three key reporting areas as summarized in Figure 9 below and described in further detail in the following section.

Figure 9. Reporting Support Services

Collect Marketing-Related Data	Marketing-Specific Content	Formal Report Development
• Includes CPUC reporting • Data for program metrics, targets, program measures	• Customized content for documents, filings, and marketing activities	• Collaborate with program implementation teams to present data • Design stylized reports that are easily readable

The marketing team will provide both marketing data collection support and overall document coordination and development for the I-REN portfolio. Marketing director Karen Germain will provide executive oversight of reporting support tasks.

1. **Collect marketing-related data.** ICF's regulatory team will collect marketing-related data for inclusion in CPUC reporting, including program metrics, targets, and indicators, as well as other measures of program performance as agreed with WRCOG.
2. **Marketing-specific content.** ICF will support WRCOG's team by developing marketing-related content for I-REN regulatory documents and filings, as well as review any content that may have a relation to I-REN marketing activities. These documents may include Joint Cooperation Memorandum, Annual Reports, Portfolio True-Up, and Mid-Cycle Review Advice Letters. When requested, ICF will provide the same services for responses to evaluators and intervenor data requests.



3. **Formal report creation.** ICF will coordinate with WRCOG, its partners, and all program implementation teams to gather information; synthesize it into a cohesive report; and design an attractive, stylized report for the I-REN portfolio.

ICF will provide the following anticipated deliverables as per the SOW for Task 2.

Task 3 Deliverables	
Marketing-related data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements	X
Marketing-specific content and edits or updates to content for regulatory filings	X
Analysis of marketing-related performance and recommendations for future improvement	X

C. Activities

Table 3 below indicates which team members are primarily Involved In listed activities for each task's deliverables. The **X** Indicates that this person is the lead for the designated activity.

Table 3. I-REN-wide marketing & communications activities

Activities by task	Karen	Amanda	Autumn	Courtney	Rachael
Task 1					
Kickoff meeting	X	X	X		
Documentation				X	
Needs assessment	X	X	X		
Marketing plan	X	X	X		X
Task 2					
Soft launch	X	X	X		X
Collateral and development production	X	X	X		X
Tracking of marketing activities		X			X
Monthly (Dec 2022) and quarterly (Mar 2023) status reports		X	X	X	X
Meeting agendas and updates		X			X
Task 3					
Marketing data, reporting, templates, metrics, etc.		X	X	X	
Marketing-specific content and edits for regulatory filings		X	X	X	
Analysis of marketing-related performance and recommendations		X	X	X	



D. Program Timeline

I-REN's marketing and communications portfolio needs an experienced partner familiar with launching programs. The schedule in Table 4 below illustrates our proposed launch timeline, which assumes the launch of the contract will start in the first week of November 2022 and as directed, plans for at least one program soft launch in 2022.

Table 4. I-REN-wide Schedule for the first 12 months

I-REN Marketing & Communications Services	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Task 1												
Kickoff meeting												
Documentation												
Needs assessment												
Marketing plan												
Task 2												
Soft launch												
Collateral and development production												
Tracking of marketing activities												
Monthly (December 2022) and quarterly status reports (March 2023)												
Meeting agendas and updates												
Task 3												
Marketing data, reporting, templates, metrics, etc												
Marketing-specific content and edits for I-REN regulatory filings												
Analysis of Marketing related performance and recommendations <i>This assumes quarterly performance analysis beginning December 2022</i>												



E. Pricing

The budget below represents those hours worked by the marketing and regulatory support teams, as well as the Innovation, creative and media teams.

Table 5. I-REN-wide Marketing & Communications Services Budgets

Budgets	2022	2023	2024	2025	Total
Task 1 Develop marketing plan	\$28,073	\$16,073			\$44,146
Task 2 Implement marketing plan		\$214,715	\$187,135	\$195,005	\$596,855
Task 3 Other Services	\$9,406	\$40,532	\$32,846	\$24,792	\$107,576
Total	\$37,479	\$271,320	\$219,981	\$219,797	\$748,577

The hours below represent those hours worked by the marketing and regulatory support teams, as well as the Innovation facilitators. They do not represent the hours worked by the creative and media teams.

Table 6. I-REN-wide Marketing & Communications Services Hours

Hours	2022	2023	2024	2025	Total
Task 1 Develop marketing plan	185	52			237
Task 2 Implement marketing plan	195	100	955	920	2,170
Task 3 Other Services	30	210	190	150	580
Total	410	362	1,145	1,070	2,987

F. Quality Control

To ensure we infuse quality management into each step throughout project delivery, we use a series of quality assurance (QA) tactics across our marketing services that are specifically designed to avoid the occurrence of mistakes and errors. To effectively manage the marketing activities and deliverables for this project, we will bring the right balance of centralized data, marketing analytics, regular monitoring of metrics, and the ability to adjust and fine-tune tactics to ensure optimum response related to performance measurements.

Budget management is a key factor in our ongoing approach to QC. Our team meets regularly to review budgets, assess forecasts, and resource needs. Our regular meetings with the I-REN team, implementers, and consultants will include verification of marketing timing and schedules. There



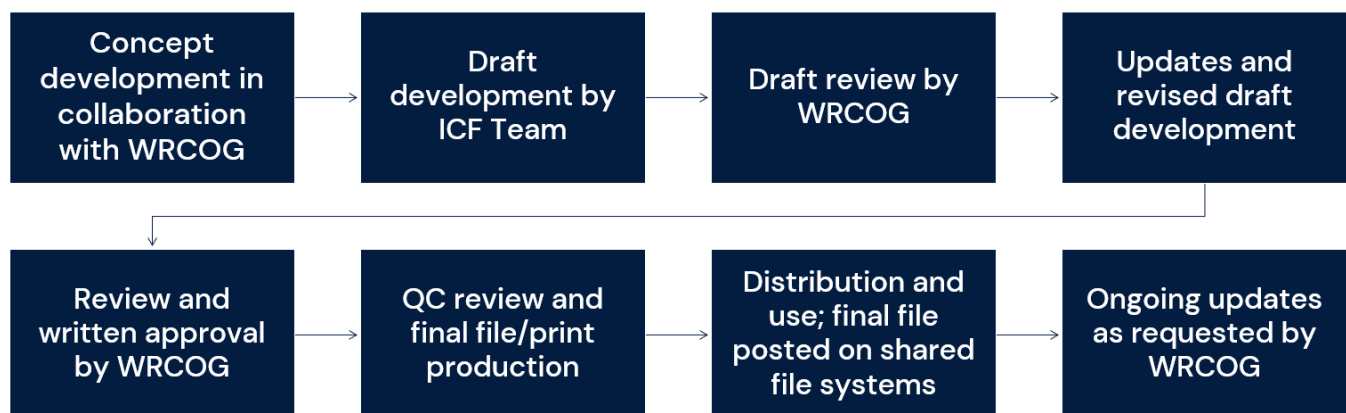
will be ongoing dialogue to identify any changes in program operations that impact marketing campaign launches. The marketing team will closely monitor and make the appropriate adjustments, all the while communicating these changes with the WRCOG team.

Contract responsibilities, including those of subcontractors, will be tracked and managed closely by our marketing team. ICF will maintain ownership of the marketing strategy, using the annual marketing plan process to coordinate all implementers and their specific roles in that planning as well as in tactical execution. We establish QC measures for deliverables and meet regularly with the implementers to ensure this high level of quality is met by all team members.

Collaboration with small and diverse suppliers coupled with implementer integration allows us to build upon our local relationships and infrastructure. This leads to expedited transitions that ensure the customer experience is in alignment with our current standards. We will continually evaluate programs for opportunities to add new diverse suppliers as well as expand scope for existing suppliers.

Our marketing development process is iterative and collaborative and focuses on QA. Every step is built on the bedrock of client collaboration and remains true to your brand. New opportunities arise quickly, so we are flexible under short deadlines. With our large team of art directors, designers, motion graphics artists, illustrators, and copywriters, we have virtually every creative capability in house. An outline of this process is detailed in Figure 10 below.

Figure 10. Marketing Collateral Development Process



G. Risk Management

Our approach for managing risks is to be proactive, anticipate potential challenges and issues before they arise, and develop mitigation plans early to avoid or minimize any problems and deal with them quickly and effectively. To identify and mitigate risks, ICF uses the following approach:



1. Identify and include potential risks in the marketing plan along with an assessment of the probability and severity of the risks and ways to mitigate or avoid them.
2. Leverage our regularly scheduled meetings with WRCOG and our internal team program management meetings to ensure that information, challenges, risks, and lessons learned are communicated and shared across the project.
3. Deploy the key facets of the ICF QA/QC program, for example, the Second Pair of Eyes—deliverables are reviewed by a member of the team who has not been directly involved in the creation of the deliverable but is familiar with the project. This person reviews deliverables for spelling, grammar, brand and content integrity, and approach. WRCOG can be assured that all deliverables produced by ICF have undergone rigorous internal scrutiny before being delivered.
4. Establish an appropriate cadence for the reporting and discussion of progress toward program goals. ICF's monitoring and reporting of program metrics ensure ICF and WRCOG have a strong sense of how performance compares to expectations so forecasts and plans can be adjusted, if needed.

As per the RFP, ICF has already initiated the above approach with potential special issues, problems, and risks listed in table 7 below, accompanied by the associated address.

Table 7. I-REN Specific Issues and Mitigation Tactics

Special Issues, Problems, or Risks	Address
Low awareness of energy efficiency opportunities	Key to the I-REN marketing strategy will be to create awareness and to educate citizens residing within I-REN communities
Low participation	Targeted marketing designed to engage customers and trigger their participation in the energy efficiency programs
Program messaging that does not align with I-REN awareness messaging	ICF will coordinate all program-specific campaigns and outreach stakeholder material needs with program implementation marketing staff to ensure that program messaging not only aligns but complements I-REN awareness messaging
Lack of cross-selling	ICF will coordinate signposting and cross-selling of of programs with program marketing staff. As part of the campaign schedule, ICF will designate which programs and opportunities should be cross-sold. This will be optimized to support program goals.



Billing Rates

Staff listed below are part of our creative, media, and innovation teams that will help support I-REN-wide Marketing and Communications Services.

Table 8. Additional Staff

Staff	Title	Hourly Rates
Sandi Stambaugh	Senior Manager, Web Development	\$135
Sebastian Garcia	Web Development Analyst	\$115
Tai Hoover	Associate Creative Director	\$154
Rebecca Rodgers	Lead Graphic Designer	\$154
Kelly Brentzel	Senior Director, Media	\$276
Lakeeta Brunk	Media Traffic Specialist	\$138
Nick Lange	Lead Facilitator, Innovation	\$200
Raj Ghatalia	Co-Facilitator, Innovation	\$125



Appendix A: References

Reference #1		
Project Name	Southern California Regional Energy Network	
Client	Los Angeles County	
Period of Performance	2015—Present	
Client Reference	Name: Lujana Medina Title: Environmental Initiatives Manager	Phone: (323) 881-2971 Email: lmedina@isd.lacounty.gov

Project Description

ICF provides LA County support on both administering and implementing the SoCalREN portfolio. Since 2015, ICF has provided regulatory, reporting, and communications support to LA County in the administration of the portfolio. Tasks include:

- Tracking and monitoring regulatory activity related to California energy efficiency and clean energy programs, including any activity that directly impacts SoCalREN
- Supporting the drafting and submittal of comments and responses related to CPUC regulatory activity
- Developing and managing the SoCalREN brand in collaboration with other implementers and LA County staff
- Managing all digital assets and coordinating with all implementers and partners to ensure accuracy of content promoted to the public

In addition, ICF currently leads implementation for the residential sector programs, including the current Multifamily and Kits for Kids offerings. Our role as an administrator and implementer gives us a unique perspective and understanding of the challenges faced by all parties when navigating and performing required CPUC reporting duties. The residential programs implemented by ICF consistently achieve program goals and collectively served more than 18,500 individuals through the two above-mentioned programs during 2021.

Reference #2		
Project Name	Energy Upgrade California Santa Clara	
Client	Santa Clara Office of Sustainability	
Period of Performance	2010–2012	
Client Reference	Name: Demetra J. McBride Title: Bureau Chief, Office of Sustainability and Environmental Management (now with Arlington County Department of Environmental Management)	Phone: (571) 317-9535 Email: dmcbride@arlingtonva.us

The Santa Clara County Office of Sustainability worked closely with ICF to develop and implement a residential energy efficiency program/campaign in our county from July 2010 through March 2012. ICF oversaw an \$850,000 marketing contract with ICF, funded by an American Recovery and Reinvestment Act Retrofit Bay Area grant that was on an extremely tight timeline due to political delays. ICF rapidly deployed a broad array of internal resources to help Santa



Clara County develop creative collateral; plan a solid marketing and outreach program, which included home energy assessment rebates; and implement all aspects of the campaign. Within 5 months, nearly 700 home energy assessments were completed by local contractors, with 80% rebated by the County, and over 40% of homeowners who received assessments were in the process of completing home energy upgrades. The County's home energy upgrade jobs in process rose rapidly to the highest in the region, meeting important greenhouse gas reduction goals and creating jobs for our local contractors, who added 33 staff to meet the demand.

The partnership with ICF was absolutely critical to the County's success in meeting grant goals. ICF exceeded client expectations and quickly adapted to meet ever changing programmatic and reporting demands. As a result of ICF's outstanding services and collateral development, this campaign received a Communicator Award of Excellence.

Reference #3		
Project Name	Residential Energy Efficiency Program and New Homes Program	
Client	New Mexico Gas Company	
Period of Performance	2012–2015	
Client Reference	Name: Steve Casey Title: Manager, Energy Efficiency Programs	Phone: (505) 697-3586 Email: steve.casey@nmgco.com

ICF has used the following media strategies to promote New Mexico Gas Company's programs:

- Print advertisements
- Events
- Door hangers
- Yard signs
- Displays
- Flyers
- Contractor outreach
- Rack cards
- Keyword search advertising

These strategies were chosen to complement the utility's general awareness efforts, which include bill inserts, envelope backs, and email newsletters.

The New Mexico Gas Company website has seen a 36.38% increase in sessions, a 43.6% increase in page views, a 31.89% in average session duration, and an 8.72% decrease in bounce rate when comparing the time period of April 20 to May 20, 2014, with March 20 to April 19, 2014. During the same time period, the insulation page has seen a 118.75% increase in page views, a 5% increase in average time on page, and a 13.89% decrease in bounce rate.

Appendix B: Project Team Staffing

The ICF includes subject matter experts with significant marketing delivery experience and industry expertise. All proposed ICF key personnel, listed below, have never been convicted of a felony.



Karen Germain | Marketing Director

Coverage Level | 306 Hours

At ICF, Karen Germain is the director of marketing for clients in California, including SoCalREN and BayREN. As well as the Southwest and South regions of the United States. She has focused her career on ensuring customer centricity, improving the customer experience, driving innovation, and achieving quality goals. Karen is the co-chair for AESP's Marketing Topic Committee and serves as an advisor to several clean energy educational foundations dedicated to developing future leaders. Over the past 8 years, Karen has worked extensively across the Southwest with utilities, including Tucson Electric Power Co., Arizona Public Service Co., Salt River Project, NV Energy, and Public Service Company of New Mexico. As a marketer, Karen has developed strategies and networks composed of market influencers and stakeholders, working with professional bodies, trade associations, and various models of formal and informal influencers. She has worked across the public and private sectors in the United States and England, where she spent over a decade focusing on climate change, unifying business and industry to develop mitigation strategies.

Education: MBA, International Strategy and Management, University of London, Bayes Business School

BS, Organizational Communications, Eastern Michigan University



Amanda Tuter | Marketing Manager

Coverage Level | 1,007 Hours

Amanda Tuter combines 15 years of utility experience with a proven track record of developing innovative campaigns that measurably drive customer awareness and action. In addition to effectively engaging customers around energy issues, she has extensive experience managing specialized and/or in-language campaigns to multicultural and hard-to-reach markets. As a marketing manager at ICF, Amanda is responsible for developing her clients' program marketing strategy, messaging, and customer pipeline and overseeing all marketing operations. Amanda's clients include SoCalREN, BayREN, PG&E, Sonoma County Transportation Authority, Public Service Company of New Mexico, and the Metropolitan Transportation Commission.

Education: MS, Communications Strategy, Columbia University

BS, Business Administration, California State University, Chico



Autumn Rose Williams | Indigenous Marketing and Engagement Specialist

Coverage Level | 830 Hours

Autumn Rose Williams is a member of ICF NEXT's multicultural communications team and will be the Indigenous communications specialist for the I-REN program. Autumn brings over 5 years of professional experience in digital communications, PR, writing for diverse audiences, and social media content creation and analytics knowledge. She is an expert on communicating with Black and Indigenous audiences, as well as understanding tribal government and their relationship with federal government. She supports the Rapid Acceleration of Diagnostics Underserved Populations Program, Oregon Housing and Community Services Department Task Force on Homelessness and Racial Disparities, and Morehouse School of Medicine's Office of Minority Health COVID-19 research and materials development contract.

Education: BS. Mass Communications, Virginia Commonwealth University



Courtney Owen | Regulatory and Reporting Manager

Coverage Level | 590 Hours

Courtney Owen is a senior manager at ICF with more than 20 years of experience supporting utility and government energy programs, primarily in Texas and California, with a focus on communications, reporting, regulatory compliance, documents, and digital content management. She leads ICF's team that develops CPUC reports and other documentation for SoCal REN. Additionally, she has extensive experience in supporting energy efficiency programs during launch and implementation. At ICF, she has worked with clients across the country and in California, including SoCalGas, SCE, BayREN, San Diego Gas & Electric, and PG&E.

Education: BA, Journalism, University of Texas



Rachael Thomas | Senior Marketing Specialist

Coverage Level | 845 Hours

Rachael Thomas is a senior marketing specialist who supports SoCalREN, the SoCalGas portfolio, and SCE at ICF. Rachael has over 5 years of experience in marketing, communications, data analysis, data visualization, and project management. She currently supports marketing and communication efforts for energy efficiency projects in California, including website development, collateral management, communications development and delivery (e.g., e-newsletter production and social media management), and event coordination. Rachael is equipped in data visualization tools (e.g., Power BI, Tableau, Google Data Studio) used to visualize and analyze website metrics (e.g., Google Analytics) to determine key performance indicators (KPIs) that drive data-driven decision making in marketing strategies. During her time at ICF, she has also applied her technical skills to support the Capacity Building Center for States and Child Welfare Information Gateway contracts under the Child Welfare and Education line of business, as well the Leadership, Engagement, Achievement and Development Initiative under the Education Community and Social Programs division.

Education: BS, Marketing, George Mason University



Appendix C: Company Overview

ICF	
Official Registered Name	ICF Resources, L.L.C.
Dun & Bradstreet Number	61-738-8087
Primary & Secondary SEC numbers	8999
Address	49 Discovery Irvine, CA 92618
Phone Numbers	Main (949) 333-6600 Toll Free: N/A
Fax Number	(949) 565-1690
Primary Key Contact	Karen Germain Director of Marketing, South and West (248) 979-7845 Karen.Germain@icf.com
Senior Contracts Manager <i>(Person authorized to contractually bind the organization for any Proposal against this RFP)</i>	Carolyn Burch Senior Contracts Manager Carolyn.Burch@icf.com (916) 210-5894

Case Studies: Portfolio-Based Marketing With Multiple Program Implementers



Why This Matters

The goal of the BayREN program is to promote single-family residential energy efficiency in the nine-county San Francisco Bay Area by providing homeowners with \$4 million in incentives through the Home Upgrade Program and the Assessment portion of the Advance Home Upgrade Program, which is implemented by local utility PG&E.

ICF's Strategy

ICF began working with ABAG in 2013 to develop a 2-year implementation and marketing program for BayREN. ICF is responsible for helping BayREN encourage nearly 3,000 homeowners in the nine-county region to participate in the Home Upgrade or Advanced Home Upgrade Assessment programs. Goals included:

- Ensure maximum success from a regional perspective and in all nine counties
- Turn generated leads into jobs for participating contractors
- Prioritize homes with significant energy savings potential
- Educate single-family homeowners
- Recruit, engage, and support participating contractors in their marketing efforts
- Engage influencers and partners to reach niche target audiences

We developed the messaging, a creative concept, and a “surround-sound” marketing approach promoting a regional message to drive behavior change and encourage program participation. In the second half of 2013, we deployed a paid media, earned media, social media, and community outreach strategy to reach target audiences and engage customers. Simultaneously, we developed all the marketing collateral to support the contractor and consumer outreach to promote the program.



Results

In 2013, a regional awareness building campaign launched across all nine counties in the BayREN territory.

Community Outreach.



- Developed partnerships with Kaiser Permanente and Whole Foods
- Coordinated and staffed more than a dozen regional events
- Supported the county-specific events around the community



Website. The information technology team developed a consumer and contractor-facing website to promote the program at BayAreaEnergyUpgrade.org. The website has generated nearly 96,000 page views from 26,352 unique viewers. On average, viewers visit 2.5 pages and stay on the site for 2 minutes and 36 seconds.



Paid Media. The Regional media campaign deployed from September 30 to December 31, 2013 and generated 13,595,550 impressions from digital and traditional tactics.

- *Radio:* Coverage on five major stations to reach majority of counties
- *Valassis Red Plum Inserts:* Addresses determined based on priority ZIP code data in all counties
- *Internet Banners:* Deployed across all nine counties
- *Consumer E-Blasts:* Two drops sent to 200,000 unique addresses total in high-propensity ZIP codes across all nine counties, with targeted redeploys
- *Facebook Advertising:* Deployed across all nine counties
- *Google Text and Digital Ads:* Deployed across all nine counties
- *Millennial Media Mobile Banner Ads:* Deployed across all nine counties
- *Pandora Audio and Banner Ads:* Mobile and desktop deployed across all nine counties



Earned Media. A press release deployed on PR Newswire on November 21, 2013 and generated 41,877,700 impressions, resulting in news and blog coverage totaling 25,212,720 impressions.



Social Media. Facebook and Twitter pages were set up at program launch to help distribute information about rebates, program features, and events taking place around the community.





Why This Matters

Given WRCOG is delivering its energy efficiency programs through multiple implementers, you need a partner who understands your programs, your brand, and your customers. You also have to have the creativity to build cohesive creative campaigns that represent the brand, connect with stakeholders, boost satisfaction, and change behavior. Before hiring ICF, PECO had the same problem. It worked with multiple program implementers, each of whom developed its own program creative. Inconsistency in branding and messaging resulted in lost opportunities to build customers' trust of PECO as an energy advisor and hindered program participants in taking further steps in their energy efficiency journey.

Situation

PECO is an electric and natural gas utility subsidiary of Exelon Corporation. Spanning southeastern Pennsylvania, PECO is the largest electric and natural gas utility in the state. ICF served as PECO's energy efficiency marketing firm when Phase III of PA Act 129 launched in June 2016. As the umbrella marketing firm, ICF was responsible for developing and executing strategic marketing plans for PECO's portfolio of residential and commercial energy efficiency programs.



Appliances Postcard



HVAC Bill Insert



Recycling Rack Card



When PECO engaged ICF as its umbrella marketing firm, we created distinct campaign collateral for each program that fit within the umbrella marketing plan, taking great care to adhere to PECO brand guidelines. Here are some highlights:

Collaborating with multiple implementers: We coordinated and collaborated with eight program implementers and outreach providers to maximize marketing effectiveness and brand consistency and attain energy savings for residential and commercial portfolios. In addition, we provided a detailed bulletin to the call centers each month to make them aware of upcoming marketing tactics deploying that month, so they were ready for customer enquiries.

Tying KPIs to performance: Our contracts included KPIs for lead generation and customer satisfaction, which led to MWh savings. These were evaluated quarterly and annually across the contract.

Developing targeted residential marketing that drives results: Our marketing team developed and deployed highly successful marketing campaigns designed to reach portfolio and program goals. We developed the humorous “You can’t control everything” umbrella campaign, which cross-promoted the residential programs and successfully led customers to PECO’s website to learn more and act. For this campaign, we created more than 290 marketing pieces across 8 residential programs, which generated a 60% increase in web traffic over the prior year. In fact, marketing of the residential portfolio enabled the residential energy efficiency portfolio to meet and exceed participation and MWh savings goals.

Using lead-generating tactics taking C&I customers through the sales funnel: Our PECO C&I marketing team won numerous awards for their success in targeting customers. ICF identified and targeted businesses with an 80% likelihood of participating based on our propensity model. Those businesses saw participation rates as high as 88% for their prescriptive program. We tracked customers through each stage of the sales funnel, which—coupled with proven metrics and media optimization—increased the number of leads by 68% year over year and increased the speed at which customers converted through the sales funnel (from 9 months to 7 months).

Instituting outbound call campaigns: Our outbound call campaign to generate leads for the commercial program, including contacting 1,000 companies, resulted in 33% of those becoming leads.

PECO Quick Facts

Headquarters: Philadelphia, PA

Electric Customers: 1.6 million

Natural Gas Customers: 505,000

ICF Umbrella Services Portfolio:

From 2016 to 2021, ICF provided full-service energy efficiency portfolio marketing, including:

- Marketing strategy, planning, and execution
- Media strategy, planning, and buying
- Creative development
- Digital marketing, SEO, and SEM
- Web content
- Data analytics, tracking, and management
- Outbound calling
- C&I rebate processing



Conducting rebate processing and fulfillment: We also processed and issued more than \$27.7 million in incentive rebate payments across 5,700 commercial projects as the program implementer for PECO's commercial energy efficiency programs.

Outcomes

Through our marketing and media strategy, award-winning creative, data analytics, customer segmentation, and creative development, we provided innovative, integrated marketing campaigns that helped PECO earn the following accolades:

- 2020 AESP Outstanding Achievement in nonresidential marketing
- 2019 and 2020 Public Relations Society of America Philadelphia Pepperpot/Ladle Awards for direct mail/direct response
- 2018 Chartwell Best Practices Silver Award for Program Marketing for the C&I sector-based digital and print campaign, Solutions Illustrated
- ENERGY STAR Partner of the Year for 2018, 2019, and 2020



Marketing Samples

AEP Texas



DISCOVER THE BENEFITS OF AN ENERGY-EFFICIENT NEW HOME

You'll enjoy more comfort and more savings when you choose a high-performance or an ENERGY STAR® certified new home. Advanced construction improves indoor air quality while reducing your energy bill. And high-efficiency equipment like air-source heat pumps and smart thermostats saves even more. It all adds up to a home that uses 20-30% less energy than typical new homes. Welcome news, indeed.

Find a builder at SouthTXSaves.com.



AEP TEXAS HIGH-PERFORMANCE HOMES PROGRAM

Buy an Energy-Efficient Home and Save

A home is one of the biggest purchases you'll ever make. Make the most of your investment with an energy-efficient home from an AEP Texas High-Performance Homes Program participating homebuilder. You'll enjoy peace of mind knowing your new home meets high energy efficiency standards, provides improved comfort, and helps save you money. You'll also help ensure a better resale value.

The High Standards of Energy-Efficient Homes

Our participating homebuilders construct two categories of energy-efficient homes: high-performance homes and ENERGY STAR® certified homes. Both types of homes are built to use an average of 20% less energy than standard new homes built to code. The ENERGY STAR label means that your builder designed, built, and inspected your new home to standards well above most others on the market, giving you better comfort and energy savings. From the moment you walk into your new ENERGY STAR certified home, you'll know the difference.

Energy-Efficient Home Benefits

- **Know your savings.** Energy-efficient homes can deliver up to \$700 in annual savings on utility bills.
- **Choose comfort.** Properly installed energy efficiency improvements deliver better protection against cold, heat, drafts, moisture, pollution, and noise. You'll have more consistent temperatures, improved indoor air quality, and greater durability.
- **Choose high-quality construction.** Be confident in knowing your home will have highly valued features when it comes time to sell.



To learn more or to find a participating homebuilder, visit SouthTXSaves.com





INVEST IN VALUE YOU WON'T OUTGROW

High-Performance and ENERGY STAR® certified new homes deliver marked energy savings and greater comfort year-round.

FIND A BUILDER





BUILT FOR THIS AND MUCH MORE

You'll enjoy greater comfort and more savings when you choose a high-performance or ENERGY STAR® certified new home. Advanced construction improves indoor air quality while reducing your energy bill. And properly sized, high-efficiency equipment like air-source heat pumps and smart thermostats save even more. It all adds up to a home that uses 20-30% less energy than typical new homes. Reduce the stress of home ownership.



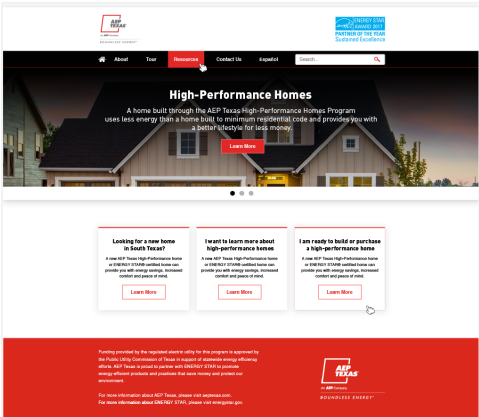
Find a builder at SouthTXSaves.com



INVEST IN VALUE YOU WON'T OUTGROW

FIND A BUILDER







Entergy Solutions



Home is your happy place.

Get weatherization upgrades for more comfort and energy savings.

[Learn more >](#)




A home to smile about

Get an A/C tune-up and energy-saving products at no additional cost.

[Learn more >](#)




Home is your happy place.

Get a no-cost A/C tune-up for more comfort and energy savings.




Programa de Soluciones para Hogares de Bajos Recursos de Entergy Arkansas

Resumen del programa

Un hogar más cómodo ahorrando energía

El Programa de Soluciones para Hogares de Bajos Recursos está diseñado para que su hogar sea más energéticamente eficiente y cómodo durante todo el año, mientras ahorra energía.

Incentivos y ahorros del programa

Como parte del Programa de Soluciones para Hogares de Bajos Recursos, Entergy Arkansas ofrece un conjunto de medidas para mejorar la eficiencia sin un costo adicional para clientes que califican, incluyendo:

- Realizar una evaluación de energía del hogar.
- Sellar fugas en los conductos de aire.
- Sellar fugas de aire en su hogar.
- Añadir aislamiento de techo.

¿Cómo funciona?

El Programa de Soluciones para Hogares de Bajos Recursos realiza una evaluación para determinar la eficiencia energética de su hogar. Si durante la evaluación se identifican formas de reducir el consumo de energía, será elegible para recibir medidas calificadas de eficiencia energética y serán instaladas sin costo adicional por un representante comercial aprobado.

- Proveer un mantenimiento para el alto rendimiento del aire acondicionado.
- Instalar productos que ahorran energía durante la evaluación:
 - Focos de luz LED (hasta 16).
 - Enchufes múltiples avanzados.
 - Cabezales de ducha y aerosoles de bajo flujo (para clientes con calentadores de agua eléctricos).




No-cost energy-saving tips for your entire home

KITCHEN

Clean your refrigerator coils. Dirty coils can require as much as 25% more energy to function properly.

Set your refrigerator to 35 degrees Fahrenheit. If it's any cooler, it forces a defrost cycle and uses additional energy.

BATH

Shorten your 10-minute showers by two minutes. Save 20% of the energy needed.

Check for leaks. One faucet with a constant drip can leak up to 10,000 gallons a year. Toilets can leak as much as 20,000 gallons a year.



Welcome to the Entergy Solutions Smart Direct Load Control Program

You're on the way to automatic savings.

What if I move?

If you move, the participating thermostat stay with the home. Please notify us at 833-807-7682 if you are moving. For more details, visit our FAQ page at [entergyarkansas.com/thermostat](#).

How do I opt out of conservation events?

Once a conservation event begins, you can opt out by decreasing the temperature directly on your thermostat or through the Sensi app. You can also call 833-807-7682 to opt out.

What do I do if I am not receiving event notifications?

Call 833-807-7682 or email [Thermostat@ALark.com](#) if you are not receiving event notifications. For emergency events, we are not able to provide notifications in advance.

How do I earn an incentive? When will I get it?

You automatically earn an incentive by participating in Conservation events. Incentives are based on the number of opt-outs if and you take during the event season. Payments are usually made in November after the season ends.

	0 to 1 opt-outs	2 to 3 opt-outs	4 or more opt-outs
Residential	\$20	\$25	\$50
Nonresidential	\$500	\$500	\$500

If a thermostat is offline during a conservation event, it is considered an opt-out.




How do I operate my Sensi Touch thermostat?

To download the Sensi Touch Operation Manual, scan the QR code with your smartphone or visit [sensitouchmanual.com/en-us/support/learn-manual](#).

What do I do if my heat is not working?

For instructions on how to reconnect your thermostat to Wi-Fi, use the QR code with your smartphone or visit [sensitouchmanual.com/en-us/support/reconnecting-thermostat-to-wifi](#). You may also call Sensi at 888-696-7921.

Can I participate in this program and other Entergy Solutions programs?

Absolutely. Entergy Arkansas offers a variety of residential and commercial energy-saving programs. Visit [entergyarkansas.com](#) for details.

For more FAQs, visit [entergyarkansas.com/thermostat](#).




Home is your happy place.

Keep it comfortable and save energy with energy-efficient services and products.

Our Entergy Solutions programs offer incentives on upgrades that cut energy, bring resources, and more to help lower your energy costs.

[Learn more >](#)



Best sealing

Limit the air leaking through your windows, doors and attic.



Ceiling insulation

Minimize a common temperature in your home at a low cost.



Energy saving products

Save money on your utility bills.

Low-Income Solutions Program Spotlight

Exceptional health and safety project

Health and safety background

Since 2020, the Entergy Arkansas Low-Income Solutions Program has been helping income-qualified households become more comfortable, safe and energy efficient through home weatherization upgrades. The program also helps with home repairs to correct minor problems that may otherwise prevent the building from receiving weatherization upgrades or pose a health or safety risk.

Helping an elderly customer in need

In early 2022, Entergy customer Paulette Washington McDonald heard about the Low-Income Solutions offering from a family member who participated in the program. Ms. Washington McDonald called the same authorized trade ally to find out if her elderly father's home qualified for weatherization upgrades, too.

Bryan's Conservation Services provided an audit of the home and discovered that the 34-year-old HVAC unit no longer worked. The trade ally spent three months searching for an affordable, used HVAC unit as a replacement. They were eventually able to use the Health & Safety Incentive funding available through the program to purchase and install a working unit for the home. Replacing the broken HVAC allowed the home to become eligible for duct and air sealing, which was also performed. Bryan's Conservation Services provided exceptional service and made a positive impact in a family in need through the Low-Income Solutions Program.

For more information

Visit: [entergyarkansas.com/lowincome](#)
Email: [LowIncomeSolutions@alark.com](#)
Call: 866-627-9177

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ENTERGY SOLUTIONS

Working with the program was a good experience. My father's air conditioner had gone out and we'd been trying to find a unit to replace it. Bryan found a used one to replace it and installed it free of charge. It's working and now he's going to get hot again soon. I will really help. I'm glad Bryan was there. God placed him in our lives at the right time. Thank you for the program to help get the home efficient. It's really hard to find this kind of help and is important for our older folks.

Paulette Washington McDonald
2022 Program Participant
Pine Bluff, AR

**Marketing and Communications RACI Chart**

As mentioned in Section B, the approach to SOW below is an example of a RACI chart that could be developed for I-REN award.

Marketing and Communications RACI Chart					
Task	Consumer Programs Coordinator	Consumer Programs Manager	Consumer Programs Marketing Coordinator	Agency on Record	Corporate Communications Director
Strategy/Direction					
Program area of focus	R	A	I	I	I
Program strategy	R	A	I	I	I
Marketing strategy	C	C	R	R	A
Review and evaluate online advertising opportunities	C	I	R	R	A
Content strategy	C	I	R	C	A
Creation					
Creative direction	C	I	R	C	A
Content creation	C	C	R	R	A
QA/QC					
Content brand quality	C	I	R	R	A
Program content accuracy	R	A	C	C	I
Program content completeness	R	A	C	C	I
Messaging					
Tone and voice	C	I	R	R	A
Media placement	C	C	R	R	A
Brand standards	C	I	R	R	A
Electronic messages (social media)	C	I	C	I	A/R
Final approval	C	I	R	I	A
Performance					
Digital standards/effectiveness	C	I	R	I	A
Marketing performance capability	C	I	R	R	A



Collateral placement performance metrics	C	I	R	R	A
Agency performance (content/design/placement) metrics	C	I	R	I	A
Program data collection	R	A	C	I	I
Program measurement and verification	R	A	C	I	I
Reporting/Presentations					
OCC review/regulatory compliance and information	R	A	C	I	I
Internal and external stakeholder presentations, PowerPoint slide decks, and other	R	A	C	I	I
External public PowerPoint slide decks and other	R	A	R	I	C
Internal talking points and communication to senior management, employees, customers, or other clients	R	A	C	I	I
Develop and deliver regular reports to identify marketing trends and key drivers of performance and optimize marketing results	C	I	R	R	A
Evaluate and streamline marketing workflows	C	I	R	C	A
Financial					
Marketing budget development/managing allocated funds with staff and vendors	R	A	C	I	I
Agency A/P Review	R	A	R	I	C
Achieve the company's overall energy efficiency and consumer programs goals and objective	R	A	C	C	I
Key					
R	Responsible: People or stakeholders who do the work. They must complete the task or objective or make the decision. Several people can be jointly responsible.				



A	Accountable: Person or stakeholder who is the “owner” of the work. He or she must sign off or approve when the task, objective, or decision is complete. This person must make sure that responsibilities are assigned in the matrix for all related activities. Success requires only one person to hold this role. “The buck stops there.”
C	Consulted: People or stakeholders who are subject matter experts and can contribute to content creation. These people are in the loop and active participants.
I	Informed: People or stakeholders who need to be kept in the picture. They need updates on progress or decisions, but they do not need to be formally consulted, nor do they contribute directly to the task or decision.



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ICF Climate Center

The ICF Climate Center offers compelling research and unique insights that help organizations establish clear, practical pathways forward through the combination of climate science and predictive analytics.

The Center builds upon the work of 2,000+ climate, energy, and environment experts worldwide—making us one of the world's largest science-based climate consultancies. ICF works with business, government, and nonprofit organizations to design and implement programs and policies that drive low-carbon transitions and build resilience against the effects of climate change. Learn more at icf.com/climate.

About ICF

ICF (NASDAQ:ICFI) is a global consulting services company with approximately 8,000 full-time and part-time employees, but we are not your typical consultants. At ICF, business analysts and policy specialists work together with digital strategists, data scientists and creatives. We combine unmatched industry expertise with cutting-edge engagement capabilities to help organizations solve their most complex challenges. Since 1969, public- and private-sector clients have worked with ICF to navigate change and shape the future.

Attachment 4c

WRCOG - IREN

Professional Services Agreement ICF

**WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
PROFESSIONAL SERVICES AGREEMENT 2023-80-2080-004**

1. PARTIES AND DATE.

This Agreement is made and entered into this 21st day of February 2023, by and between the Western Riverside Council of Governments, a California public agency ("WRCOG"), and ICF Resources, LLC, ("Consultant"). WRCOG and Consultant are sometimes individually referred to as "Party" and collectively as "Parties."

2. RECITALS.

2.1 Inland Regional Energy Network

The Inland Regional Energy Network ("I-REN") is a consortium of WRCOG, San Bernardino Associated Governments ("SANBAG") and the Coachella Valley Association of Governments ("CVAG") for the purpose of establishing and operating a locally administered, designed, and delivered energy efficiency program. WRCOG is the administrative lead of I-REN and is responsible for entering into contracts on behalf of I-REN.

2.2 Consultant.

Consultant desires to perform and assume responsibility for the provision of certain professional services required by WRCOG on the terms and conditions set forth in this Agreement. Consultant represents that it is experienced in providing **I-REN marketing and communication**, is licensed in the State of California, and is familiar with the plans of WRCOG.

2.3 Project.

WRCOG desires to engage Consultant to render such professional services for the **I-REN portfolio-wide marketing and communication** ("Project") as set forth in this Agreement.

3. TERMS.

3.1 Scope of Services and Term.

3.1.1 General Scope of Services. Consultant promises and agrees to furnish to WRCOG all labor, materials, tools, equipment, services, and incidental and customary work necessary to fully and adequately supply the **development and implementation of marketing and communications plans, strategies and activities to support the promotion of I-REN's energy efficiency program portfolio** necessary for the Project ("Services"). The Services are more particularly described in Exhibit "A" attached hereto and incorporated herein by reference, and which are stated in the proposal to WRCOG and approved by WRCOG's Executive Committee. All Services shall be subject to, and performed in accordance with, this Agreement, the exhibits attached hereto and incorporated herein by reference, and all applicable local, state and federal laws, rules and regulations.

3.1.2 Term. The term of this Agreement shall be from **February 21, 2023 to December 31, 2025** with no more than two options to renew or amend unless earlier terminated

as provided herein. Consultant shall complete the Services within the term of this Agreement and shall meet any other established schedules and deadlines.

3.2 Responsibilities of Consultant.

3.2.1 Control and Payment of Subordinates; Independent Contractor. The Services shall be performed by Consultant or under its supervision. Consultant will determine the means, methods, and details of performing the Services subject to the requirements of this Agreement. WRCOG retains Consultant on an independent contractor basis and not as an employee. Consultant retains the right to perform similar or different services for others during the term of this Agreement. Any additional personnel performing the Services under this Agreement on behalf of Consultant shall also not be employees of WRCOG and shall at all times be under Consultant's exclusive direction and control. Consultant shall pay all wages, salaries, and other amounts due such personnel in connection with their performance of Services under this Agreement and as required by law. Consultant shall be responsible for all reports and obligations respecting such additional personnel, including, but not limited to, social security taxes, income tax withholding, unemployment insurance, disability insurance, and workers' compensation insurance.

3.2.2 Schedule of Services. Consultant shall perform the Services expeditiously, within the term of this Agreement, and in accordance with the Schedule of Services set forth in Exhibit "B" attached hereto and incorporated herein by reference. Consultant represents that it has the professional and technical personnel required to perform the Services in conformance with such conditions. In order to facilitate Consultant's conformance with the Schedule, WRCOG shall respond to Consultant's submittals in a timely manner. Upon request of WRCOG, Consultant shall provide a more detailed schedule of anticipated performance to meet the Schedule of Services.

3.2.3 Conformance to Applicable Requirements. All work prepared by Consultant shall be subject to the approval of WRCOG.

3.2.4 Substitution of Key Personnel. Consultant has represented to WRCOG that certain key personnel will perform and coordinate the Services under this Agreement. Should one or more of such personnel become unavailable, Consultant may substitute other personnel of at least equal competence upon written approval of WRCOG. In the event that WRCOG and Consultant cannot agree as to the substitution of key personnel, WRCOG shall be entitled to terminate this Agreement for cause. As discussed below, any personnel who fail or refuse to perform the Services in a manner acceptable to WRCOG, or who are determined by the WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, or a threat to the safety of persons or property, shall be promptly removed from the Project by the Consultant at the request of the WRCOG. The key personnel for performance of this Agreement are as follows:

Karen Germain, Director of Marketing

3.2.5 WRCOG's Representative. WRCOG hereby designates the Executive Director, or his or her designee, to act as its representative for the performance of this Agreement ("WRCOG's Representative"). WRCOG's Representative shall have the power to act on behalf of WRCOG for all purposes under this Contract. Consultant shall not accept direction or orders from any person other than WRCOG's Representative or his or her designee.

3.2.6 Consultant's Representative. Consultant hereby designates Karen

Germain, Director of Marketing, or his or her designee, to act as its Representative for the performance of this Agreement ("Consultant's Representative"). Consultant's Representative shall have full authority to represent and act on behalf of the Consultant for all purposes under this Agreement. The Consultant's Representative shall supervise and direct the Services, using his best skill and attention, and shall be responsible for all means, methods, techniques, sequences, and procedures, and for the satisfactory coordination of all portions of the Services under this Agreement.

3.2.7 Coordination of Services. Consultant agrees to work closely with WRCOG staff in the performance of Services and shall be available to WRCOG's staff, consultants, and other staff at all reasonable times.

3.2.8 Standard of Care; Performance of Employees. Consultant shall perform all Services under this Agreement in a skillful and competent manner, consistent with the standards generally recognized as being employed by professionals in the same discipline in the State of California. Consultant represents and maintains that it is skilled in the professional calling necessary to perform the Services. Consultant warrants that all employees and sub- contractors shall have sufficient skill and experience to perform the Services assigned to them. Finally, Consultant represents that it, its employees and sub-contractors have all licenses, permits, qualifications, and approvals of whatever nature that are legally required to perform the Services, and that such licenses and approvals shall be maintained throughout the term of this Agreement. As provided for in the indemnification provisions of this Agreement, Consultant shall perform, at its own cost and expense, and without reimbursement from WRCOG, SANBAG, and/or CVAG for any services necessary to correct errors or omissions which are caused by the Consultant's failure to comply with the standard of care provided for herein. Any employee of the Consultant or its sub-consultants who is determined by WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, a threat to the safety of persons or property, or any employee who fails or refuses to perform the Services in a manner acceptable to WRCOG, shall be promptly removed from the Project by the Consultant and shall not be re-employed to perform any of the Services or to work on the Project.

3.2.9 Laws and Regulations. Consultant shall keep itself fully informed of and in compliance with all local, state and federal laws, rules and regulations in any manner affecting the performance of the Project or the Services, including all Cal OSHA requirements, and shall give all notices required by law. Consultant shall be liable for all violations of such laws and regulations in connection with Services. If the Consultant performs any work knowing it to be contrary to such laws, rules, and/or regulations, and without giving written notice to WRCOG, Consultant shall be solely responsible for all costs arising therefrom. Consultant shall defend, indemnify, and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers and agents free and harmless, pursuant to the indemnification provisions of this Agreement, from any claim or liability arising out of any failure or alleged failure to comply with such laws, rules or regulations.

3.2.10 Insurance.

3.2.10.1 Time for Compliance. Consultant shall not commence the Services under this Agreement until it has provided evidence satisfactory to WRCOG that it has secured all insurance required under this section, in a form and with insurance companies acceptable to WRCOG. In addition, Consultant shall not allow any sub-contractor to commence work on any subcontract until it has provided evidence satisfactory to WRCOG that the sub-contractor has secured all insurance required under this section.

3.2.10.2 Minimum Requirements. Consultant shall, at its expense, procure and maintain for the duration of the Agreement, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Agreement by the Consultant, its agents, representatives, employees or sub-contractors. Consultant shall also require all of its sub-contractors to procure and maintain the same insurance for the duration of the Agreement. Such insurance shall meet at least the following minimum levels of coverage:

(A) Minimum Scope of Insurance. Coverage shall be at least as broad as the latest version of the following: (1) *General Liability*: Insurance Services Office Commercial General Liability coverage (occurrence form CG 0001 or exact equivalent); (2) *Business Auto Liability*: Insurance Services Office Business Auto Coverage (form CA 0001, code 1 (any auto) or exact equivalent); and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

(B) Minimum Limits of Insurance. Consultant shall maintain limits no less than: (1) *General Liability*: \$1,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with general aggregate limit is used, either the general aggregate limit shall apply separately to this Agreement / location or the general aggregate limit shall be twice the required occurrence limit; (2) *Business Auto Liability*: \$1,000,000 per accident for bodily injury and property damage; and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation limits as required by the Labor Code of the State of California. Employer's Liability limits of \$1,000,000 per accident for bodily injury or disease.

3.2.10.3 Professional Liability. Consultant shall procure and maintain, and require its sub-consultants to procure and maintain, for a period of five (5) years following completion of the Services, errors and omissions liability insurance appropriate to their profession. Such insurance shall be in an amount not less than \$2,000,000 per claim. This insurance shall be endorsed to include contractual liability applicable to this Agreement and shall be written on a policy form coverage specifically designed to protect against acts, errors, or omissions of the Consultant. "Covered Professional Services" as designated in the policy must specifically include work performed under this Agreement. The policy must "pay on behalf of" the insured and must include a provision establishing the insurer's duty to defend.

3.2.10.4 Insurance Endorsements. The insurance policies shall contain the following provisions, or Consultant shall provide endorsements on forms supplied or approved by WRCOG to add the following provisions to the insurance policies:

(A) General Liability.

(i) Commercial General Liability Insurance must include coverage for (1) Bodily Injury and Property Damage; (2) Personal Injury / Advertising Injury; (3) Premises / Operations Liability; (4) Products / Completed Operations Liability; (5) Aggregate Limits that Apply per Project; (6) Explosion, Collapse and Underground (UCX) exclusion deleted; (7) Contractual Liability with respect to this Agreement; (8) Broad Form Property Damage; and (9) Independent Consultants Coverage.

(ii) The policy shall contain no endorsements or provisions limiting coverage for (1) contractual liability; (2) cross liability exclusion for claims or

suits by one insured against another; or (3) contain any other exclusion contrary to the Agreement.

(iii) The policy shall give WRCOG, its Directors, officials, officers, employees, volunteers and agents insured status using ISO endorsement forms 20 10 01 and 20 37 10 01, or endorsements providing the exact same coverage.

(iv) The additional insured coverage under the policy shall be "primary and non-contributory" and will not seek contribution from WRCOG's, SANBAG's, or CVAG's insurance or self-insurance and shall be at least as broad as CG 20 01 04 13, or equivalent providing the exact same coverage.

(B) Business Auto Liability.

(i) The business auto liability policy shall be endorsed to state that: (1) WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents shall be covered as additional insureds with respect to the ownership, operation, maintenance, use, loading or unloading of any auto owned, leased, hired, or borrowed by the Consultant or for which the Consultant is responsible; and (2) the insurance coverage shall be primary insurance as respects WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents, or if excess, shall stand in an unbroken chain of coverage excess of the Consultant's scheduled underlying coverage. Any insurance or self-insurance maintained by WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, agents, and volunteers shall be in excess of the Consultant's insurance and shall not be called upon to contribute with it in any way.

(C) Workers' Compensation and Employers Liability Coverage.

(i) Consultant certifies that he/she is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and he/she will comply with such provisions before commencing work under this Agreement.

(ii) The insurer shall agree to waive all rights of subrogation against WRCOG, its Directors, officials, officers, employees, agents, and volunteers for losses paid under the terms of the insurance policy which arise from work performed by the Consultant.

(D) Coverages. With the exception of Professional Liability, Defense costs shall be payable in addition to the limits set forth hereunder. Requirements of specific coverage or limits contained in this section are not intended as a limitation on coverage, limits, or other requirement, or a waiver of any coverage normally provided by any insurance. It shall be a requirement under this Agreement that any available insurance proceeds broader than or in excess of the specified minimum insurance coverage requirements and/or limits set forth herein shall be available to WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers and agents as additional insureds under said policies. Furthermore, the requirements for coverage and limits shall be (1) the minimum coverage and limits specified in this Agreement; or (2) the broader coverage and maximum limits of coverage of any Insurance policy or proceeds available to the named insured; whichever is greater.

(i) The limits of insurance required in this Agreement

may be satisfied by a combination of primary and umbrella or excess insurance. Any umbrella or excess insurance shall contain or be endorsed to contain a provision that such coverage shall also apply on a primary and non-contributory basis for the benefit of WRCOG (if agreed to in a written contract or agreement) before WRCOG's own insurance or self-insurance shall be called upon to protect it as a named insured. The umbrella / excess policy shall be provided on a "following form" basis with coverage at least as broad as provided on the underlying policy(ies).

(ii) All insurance policies and the Certificate of Insurance shall indicate, that should the policy be cancelled before the expiration date thereof, written notice of said cancellation will be delivered in accordance with the policy provisions, which shall not be less than thirty (30) days' notice of cancellation except for non-payment of premium which shall not be less than ten (10) days' notice of cancellation. If any of the required coverage is cancelled or expires during the term of this Agreement, the Consultant shall deliver renewal certificate(s) including the General Liability Additional Insured Endorsement to WRCOG at least ten (10) days prior to the effective date of cancellation or expiration.

(iii) The retroactive date (if any) of each policy is to be no later than the effective date of this Agreement. Consultant shall maintain such coverage continuously for a period of at least three years after the completion of the work under this Agreement. Consultant shall purchase a one (1) year extended reporting period A) if the retroactive date is advanced past the effective date of this Agreement; B) if the policy is cancelled or not renewed; or C) if the policy is replaced by another claims-made policy with a retroactive date subsequent to the effective date of this Agreement.

(iv) The foregoing requirements as to the types and limits of insurance coverage to be maintained by Consultant, and any approval of said insurance by WRCOG, is not intended to and shall not in any manner limit or qualify the liabilities and obligations otherwise assumed by the Consultant pursuant to this Agreement, including but not limited to, the provisions concerning indemnification.

(v) If at any time during the life of the Agreement, any policy of insurance required under this Agreement does not comply with these specifications or is canceled and not replaced, WRCOG has the right but not the duty to obtain the insurance it deems necessary, and any premium paid by WRCOG will be promptly reimbursed by Consultant or WRCOG will withhold amounts sufficient to pay premium from Consultant payments. In the alternative, WRCOG may cancel this Agreement. WRCOG may require the Consultant to provide complete copies of all insurance policies in effect for the duration of the Project.

(vi) Neither WRCOG nor any of its Directors, officials, officers, employees, volunteers or agents shall be personally responsible for any liability arising under or by virtue of this Agreement.

3.2.10.5 Separation of Insureds; No Special Limitations. All insurance required by this Section shall contain standard separation of insureds provisions. In addition, such insurance shall not contain any special limitations on the scope of protection afforded to WRCOG, its Directors, officials, officers, employees, and agents.

3.2.10.6 Deductibles and Self-Insurance Retentions. Any deductibles or self-insured retentions must be declared to and approved by WRCOG. Consultant shall guarantee that, at the option of WRCOG, either: (1) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects WRCOG, its Directors, officials, officers, employees, agents, and volunteers; or (2) the Consultant shall procure a bond guaranteeing

payment of losses and related investigation costs, claims, and administrative and defense expenses.

3.2.10.7 Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, licensed to do business in California, and satisfactory to WRCOG.

3.2.10.8 Verification of Coverage. Consultant shall furnish WRCOG with original industry standard ACORD forms of insurance and endorsements effecting coverage required by this Agreement on forms satisfactory to WRCOG. The certificates and endorsements for each insurance policy shall be signed by a person authorized by that insurer to bind coverage on its behalf and shall be on forms provided by WRCOG if requested. All certificates and endorsements must be received and approved by WRCOG before work commences. WRCOG reserves the right to require complete, certified copies of all required insurance policies, at any time. If requested, copies of insurance policies and/or endorsements will be provided, marked as "Privileged and Confidential" and also under the condition that said policies that are provided and marked "Privileged and Confidential" will not become part of any public record.

3.2.10.9 Sub-consultant Insurance Requirements. Consultant shall not allow any sub-contractors or sub-consultants to commence work on any sub-contract until they have provided evidence satisfactory to WRCOG that they have secured all insurance required under this section. Policies of commercial general liability insurance provided by such sub-contractors or sub-consultants shall be endorsed to name WRCOG, SANBAG, and CVAG as additional insureds using ISO Form CG 20 38 04 13 or an endorsement providing the exact same coverage. If requested by Consultant, WRCOG may approve different scopes or minimum limits of insurance for particular sub-contractors or sub-consultants.

3.2.11 Safety. Consultant shall execute and maintain its work so as to avoid injury or damage to any person or property. In carrying out its Services, the Consultant shall at all times be in compliance with all applicable local, state, and federal laws, rules, and regulations, and shall exercise all necessary precautions for the safety of employees appropriate to the nature of the work and the conditions under which the work is to be performed. Safety precautions as applicable shall include, but shall not be limited to: (A) adequate life protection and life-saving equipment and procedures; (B) instructions in accident prevention for all employees and sub-contractors, such as safe walkways, scaffolds, fall protection ladders, bridges, gang planks, confined space procedures, trenching and shoring, equipment, and other safety devices, equipment and wearing apparel as are necessary or lawfully required to prevent accidents or injuries; and (C) adequate facilities for the proper inspection and maintenance of all safety measures.

3.3 Fees and Payments.

3.3.1 Compensation. Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Agreement at the rates set forth in Exhibit "C" attached hereto and incorporated herein by reference. The total compensation shall not exceed **seven-hundred and fifty thousand dollars (\$750,000)** without written approval of I-REN Executive Committee. Extra Work may be authorized, as described below, and, if authorized, said Extra Work will be compensated at the rates and manner set forth in this Agreement.

3.3.2 Payment of Compensation. Consultant shall submit to WRCOG a monthly itemized statement which indicates work completed and hours of Services rendered by Consultant. The statement shall contain the invoice number and date; remittance address; Agreement number 2023-80-2080-004, and invoice total. The statement shall describe the amount of Services and supplies provided since the initial commencement date, or since the start

of the subsequent billing periods, as appropriate, through the date of the statement. WRCOG shall, within 45 days of receiving such statement, review the statement and pay all approved charges thereon.

3.3.3 Reimbursement for Expenses. Consultant shall not be reimbursed for any expenses unless authorized in writing by WRCOG.

3.3.4 Extra Work. At any time during the term of this Agreement and upon mutual agreement, WRCOG may request that Consultant perform Extra Work. As used herein, "Extra Work" means any work which is determined by WRCOG to be necessary for the proper completion of the Project, but which the Parties did not reasonably anticipate would be necessary at the execution of this Agreement. Consultant shall not perform, nor be compensated for, Extra Work without written authorization from WRCOG's Representative.

3.3.5 Prevailing Wages. Consultant is aware of the requirements of California Labor Code Sections 1720, et seq., and 1770, et seq., as well as California Code of Regulations, Title 8, Section 16000, et seq., ("Prevailing Wage Laws"), which require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects. If the Services are being performed as part of an applicable "public works" or "maintenance" project, as defined by the Prevailing Wage Laws, and if the total compensation is \$1,000 or more, Consultant agrees to fully comply with such Prevailing Wage Laws. WRCOG shall provide Consultant with a copy of the prevailing rates of per diem wages in effect at the commencement of this Agreement. Consultant shall make copies of the prevailing rates of per diem wages for each craft, classification, or type of worker needed to execute the Services available to interested parties upon request, and post copies at the Consultant's principal place of business and at the project site. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers, and agents free and harmless from any claims, liabilities, costs, penalties or interest arising out of any failure or alleged failure to comply with the Prevailing Wage Laws.

3.4 Accounting Records.

3.4.1 Maintenance and Inspection. Consultant shall maintain complete and accurate records with respect to all costs and expenses incurred under this Agreement. All such records shall be clearly identifiable. Consultant shall allow a representative of WRCOG during normal business hours to examine, audit, and make transcripts or copies of such records and any other documents created pursuant to this Agreement. Consultant shall allow inspection of all work, data, documents, proceedings, and activities related to the Agreement for a period of three (3) years from the date of final payment under this Agreement.

3.5 General Provisions.

3.5.1 Termination of Agreement.

3.5.1.1 Grounds for Termination. WRCOG may, by written notice to Consultant, terminate the whole or any part of this Agreement at any time and without cause by giving written notice to Consultant of such termination, and specifying the effective date thereof, at least seven (7) days before the effective date of such termination. Upon termination, Consultant shall be compensated only for those services which have been adequately rendered to WRCOG, and Consultant shall be entitled to no further compensation. Consultant may not terminate this Agreement except for cause.

3.5.1.2 Effect of Termination. If this Agreement is terminated as provided

herein, WRCOG may require Consultant to provide all finished or unfinished Documents and Data and other information of any kind prepared by Consultant in connection with the performance of Services under this Agreement. Consultant shall be required to provide such documents and other information within fifteen (15) days of the request.

3.5.1.3 Additional Services. In the event this Agreement is terminated in whole or in part as provided herein, WRCOG may procure, upon such terms and in such manner as it may determine appropriate, services similar to those terminated.

3.5.2 Delivery of Notices. All notices permitted or required under this Agreement shall be given to the respective Parties at the following address, or at such other address as the respective parties may provide in writing for this purpose:

Consultant: ICF Resources, L.L.C
1902 Reston Metro Plaza
Reston, VA 20190
Attn: Jarred Miller

With copy to: ICF Resources, L.L.C
49 Discovery
Irvine, CA 92618
Attn: Karen Germain

WRCOG: Western Riverside Council of Governments
3390 University Avenue, Suite 200
Riverside, CA 92501
Attn: Casey Dailey

Such notice shall be deemed made when personally delivered or when mailed, forty-eight (48) hours after deposit in the U.S. Mail, first class postage prepaid and addressed to the Party at its applicable address. Actual notice shall be deemed adequate notice on the date actual notice occurred, regardless of the method of service.

3.5.3 Ownership of Materials and Confidentiality.

3.5.3.1 Documents & Data; Licensing of Intellectual Property. This Agreement creates a non-exclusive and perpetual license for WRCOG to copy, use, modify, reuse, or sub-license any and all copyrights, designs, and other intellectual property embodied in plans, specifications, studies, drawings, estimates, and other documents or works of authorship fixed in any tangible medium of expression, including but not limited to, physical drawings or data magnetically or otherwise recorded on computer diskettes, which are prepared or caused to be prepared by Consultant under this Agreement ("Documents & Data"). Consultant shall require all sub-contractors to agree in writing that WRCOG is granted a non-exclusive and perpetual license for any Documents & Data the sub-contractor prepares under this Agreement. Consultant represents and warrants that Consultant has the legal right to license any and all Documents & Data. Consultant makes no such representation and warranty in regard to Documents & Data which were prepared by design professionals other than Consultant or provided to Consultant by WRCOG. WRCOG shall not be limited in any way in its use of the Documents & Data at any time, provided that any such use not within the purposes intended by this Agreement shall be at WRCOG's sole risk.

3.5.3.2 Intellectual Property. In addition, WRCOG shall have and retain all

right, title, and interest (including copyright, patent, trade secret, and other proprietary rights) in all plans, specifications, studies, drawings, estimates, materials, data, computer programs or software, enhancements, documents, and any and all works of authorship fixed in any tangible medium or expression, including but not limited to, physical drawings or other data magnetically or otherwise recorded on computer media ("Intellectual Property") prepared or developed by or on behalf of Consultant under this Agreement as well as any other such Intellectual Property prepared or developed by or on behalf of Consultant under this Agreement.

WRCOG shall have and retain all right, title and interest in Intellectual Property developed or modified under this Agreement which has been paid for by WRCOG, whether or not developed in conjunction with Consultant, and whether or not developed by Consultant. Consultant will execute separate written assignments of any and all rights to the above referenced Intellectual Property upon request of WRCOG.

Consultant shall also be responsible to obtain in writing separate written assignments from any sub-contractors or agents of Consultant of any and all right to the above referenced Intellectual Property. Should Consultant, either during or following termination of this Agreement, desire to use any of the above-referenced Intellectual Property, it shall first obtain the written approval of the WRCOG.

All materials and documents which were developed or prepared by the Consultant for general use prior to the execution of this Agreement and which are not the copyright of any other party or publicly available and any other computer applications, shall continue to be the property of the Consultant. However, unless otherwise identified and stated prior to execution of this Agreement, Consultant represents and warrants that it has the right to grant the exclusive and perpetual license for all such Intellectual Property as provided herein.

WRCOG further is granted by Consultant a non-exclusive and perpetual license to copy, use, modify or sub-license any and all Intellectual Property otherwise owned by Consultant which is the basis or foundation for any derivative, collective, insurrectional, or supplemental work created under this Agreement.

3.5.3.3 Confidentiality. All ideas, memoranda, specifications, plans, procedures, drawings, descriptions, computer program data, input record data, written information, and other Documents & Data either created by or provided to Consultant in connection with the performance of this Agreement shall be held confidential by Consultant. Such materials shall not, without the prior written consent of WRCOG, be used by Consultant for any purposes other than the performance of the Services. Nor shall such materials be disclosed to any person or entity not connected with the performance of the Services or the Project. Nothing furnished to Consultant which is otherwise known to Consultant or is generally known, or has become known, to the related industry shall be deemed confidential. Consultant shall not use WRCOG's name or insignia, photographs of the Project, or any publicity pertaining to the Services or the Project in any magazine, trade paper, newspaper, television, or radio production or other similar medium without the prior written consent of WRCOG.

3.5.3.4 Infringement Indemnification. Consultant shall defend, indemnify, and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, employees, volunteers, and agents free and harmless, pursuant to the indemnification provisions of this Agreement, for any alleged infringement of any U.S. patent, copyright, trade secret, trade name, trademark, or any other proprietary right of any person or entity in consequence of the use on the Project by WRCOG of the Documents & Data, including any method, process, product, or concept specified or depicted provided that (a) WRCOG promptly notifies Consultant in writing; (b)

Consultant has sole control of the defense and all related settlement negotiations; and (c) WRCOG provides Consultant with the assistance, information and authority necessary to perform Consultant's obligations under this Section 3.5.3.4.

3.5.4 Cooperation; Further Acts. The Parties shall fully cooperate with one another and shall take any additional acts or sign any additional documents as may be necessary, appropriate, or convenient to attain the purposes of this Agreement.

3.5.5 Attorney's Fees. If either Party commences an action against the other Party, either legal, administrative, or otherwise, arising out of or in connection with this Agreement, the prevailing party in such litigation shall be entitled to have and recover from the losing party reasonable attorney's fees and all other costs of such action.

3.5.6 Indemnification. Consultant shall defend, indemnify, and hold WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, consultants, employees, volunteers, and agents free and harmless from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury, in law or equity, to property or persons, including wrongful death, in any manner arising out of or incident to any alleged acts, omissions or willful misconduct of Consultant, its officials, officers, employees, agents, consultants and contractors, arising out of or in connection with the performance of the Services, the Project or this Agreement, including without limitation the payment of all attorneys' fees and other related costs and expenses. Consultant shall defend, at Consultant's own cost, expense, and risk, any and all such aforesaid suits, actions, or other legal proceedings of every kind that may be brought or instituted against WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, consultants, employees, agents or volunteers. Consultant shall pay and satisfy any judgment, award, or decree that may be rendered against WRCOG, SANBAG, CVAG or their respective Directors, officials, officers, consultants, employees, agents, or volunteers, in any such suit, action or other legal proceeding. Consultant shall reimburse WRCOG, SANBAG, CVAG and their respective Directors, officials, officers, consultants, employees, agents, or volunteers, for any and all legal expenses and costs, including reasonable attorneys' fees, incurred by each of them in connection therewith or in enforcing the indemnity herein provided. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by WRCOG, SANBAG, CVAG, their respective Directors, officials, officers, consultants, employees, agents, or volunteers. This section shall survive any expiration or termination of this Agreement. Notwithstanding the foregoing, to the extent Consultant's Services are subject to Civil Code Section 2782.8, the above indemnity shall be limited, to the extent required by Civil Code Section 2782.8, to claims that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant. IN NO EVENT SHALL EITHER PARTY BE LIABLE FOR ANY INDIRECT, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES WHATSOEVER (INCLUDING BUT NOT LIMITED TO LOST PROFITS OR INTERRUPTION OF BUSINESS) ARISING OUT OF OR RELATED TO THE SERVICES PROVIDED UNDER THIS AGREEMENT, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

3.5.7 Entire Agreement. This Agreement contains the entire Agreement of the Parties with respect to the subject matter hereof, and supersedes all prior negotiations, understandings or agreements. This Agreement may only be modified by a writing signed by both Parties.

3.5.8 Governing Law. This Agreement shall be governed by the laws of the State of California. Venue shall be in Riverside County.

3.5.9 Time of Essence. Time is of the essence for each and every provision of this Agreement.

3.5.10 WRCOG's Right to Employ Other Consultants. WRCOG reserves the right to employ other consultants in connection with this Project.

3.5.11 Successors and Assigns. This Agreement shall be binding on the successors and assigns of the Parties.

3.5.12 Assignment or Transfer. Consultant shall not assign, hypothecate, or transfer, either directly or by operation of law, this Agreement or any interest herein without the prior written consent of WRCOG. Any attempt to do so shall be null and void, and any assignees, hypothecates or transferees shall acquire no right or interest by reason of such attempted assignment, hypothecation or transfer.

3.5.13 Construction; References; Captions. Since the Parties or their agents have participated fully in the preparation of this Agreement, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any Party. Any term referencing time, days, or period for performance shall be deemed calendar days and not work days. All references to Consultant include all personnel, employees, agents, and sub-contractors of Consultant, except as otherwise specified in this Agreement. All references to WRCOG include its Directors, officials, officers, employees, agents, and volunteers except as otherwise specified in this Agreement. The captions of the various articles and paragraphs are for convenience and ease of reference only, and do not define, limit, augment, or describe the scope, content, or intent of this Agreement.

3.5.14 Amendment; Modification. No supplement, modification, or amendment of this Agreement shall be binding unless executed in writing and signed by both Parties.

3.5.15 Waiver. No waiver of any default shall constitute a waiver of any other default or breach, whether of the same or other covenant or condition. No waiver, benefit, privilege, or service voluntarily given or performed by a Party shall give the other Party any contractual rights by custom, estoppel, or otherwise.

3.5.16 No Third-Party Beneficiaries. There are no intended third-party beneficiaries of any right or obligation assumed by the Parties.

3.5.17 Invalidity; Severability. If any portion of this Agreement is declared invalid, illegal, or otherwise unenforceable by a court of competent jurisdiction, the remaining provisions shall continue in full force and effect.

3.5.18 Prohibited Interests. Consultant maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement. Further, Consultant warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, brokerage fee, gift, or other consideration contingent upon or resulting from the award or making of this Agreement. For breach or violation of this warranty, WRCOG shall have the right to rescind this Agreement without liability. For the term of this Agreement, no member, Director, officer, official, agent volunteer, or employee of WRCOG, during the term of his or her service with WRCOG, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

3.5.19 Equal Opportunity Employment. Consultant represents that it is an equal opportunity employer, and it shall not discriminate against any sub-contractor, employee, or

applicant for employment because of race, religion, color, national origin, handicap, ancestry, sex, or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff, or termination. Consultant shall also comply with all relevant provisions of any of WRCOG's Minority Business Enterprise Program, Affirmative Action Plan, or other related programs or guidelines currently in effect or hereinafter enacted.

3.5.20 Labor Certification. By its signature hereunder, Consultant certifies that it is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Workers' Compensation, or to undertake self-insurance in accordance with the provisions of that Code, and agrees to comply with such provisions before commencing the performance of the Services.

3.5.21 Authority to Enter Agreement. Consultant has all requisite power and authority to conduct its business and to execute, deliver, and perform the Agreement. Each Party warrants that the individuals who have signed this Agreement have the legal power, right, and authority to make this Agreement and bind each respective Party.

3.5.22 Counterparts. This Agreement may be signed in counterparts, each of which shall constitute an original.

3.6 Subcontracting.

3.6.1 Prior Approval Required. Consultant shall not subcontract any portion of the work required by this Agreement, except as expressly stated herein, without prior written approval of WRCOG. Subcontracts, if any, shall contain a provision making them subject to all provisions stipulated in this Agreement.

[SIGNATURES ON FOLLOWING PAGE]

SIGNATURE PAGE TO
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS
PROFESSIONAL SERVICES AGREEMENT

IN WITNESS WHEREOF, the Parties hereby have made and executed this Agreement as of the date first written above.

WESTERN RIVERSIDE COUNCIL OF
GOVERNMENTS

ICF Resources, L.L.C

By: _____
Kurt Wilson
Title: Executive Director

By: _____
Title:

APPROVED AS TO FORM:

ATTEST:

By: _____
Steven DeBaun
General Counsel
Best Best & Krieger LLP

By: _____
Its: _____

*A corporation requires the signatures of two corporate officers.

One signature shall be that of the Chairman of Board, the President or any Vice President, and the second signature (on the attest line) shall be that of the Secretary, any Assistant Secretary, the Chief Financial Officer or any Assistant Treasurer of such corporation.

If the above persons are not the intended signators, evidence of signature authority shall be provided to WRCOG.

EXHIBIT “A”

SCOPE OF SERVICES

Task 1: Develop Marketing & Communications Plan

Consultant will be responsible for leading REN-wide marketing activities to promote I-REN as an organization as well as its portfolio of energy efficiency programs and services, in close coordination with I-REN member agency staff, program implementers, and other consultants. Marketing and communications plans must align with and support I-REN's Energy Efficiency Business Plan (I-REN BP)² as approved in CPUC Decision 21-11-013.³

The consultant will be responsible for each activity listed below:

- Conduct a kick-off meeting with the I-REN team within 2 weeks of final contract execution.
- Review I-REN's energy efficiency portfolio, BP, Joint Cooperation Memorandum, and existing marketing and communications assets.
- Coordinate with I-REN, implementers, and consultants as appropriate to assess marketing and communications needs across the portfolio.
- Based on needs assessment, develop REN-wide marketing plan including strategies, activity list, calendar, list of collateral, goals and targets, and data collection and reporting.
- Design and build a new brand
- Build holistic marketing strategy

Deliverables:

- Kick-off meeting agenda and notes
- Documentation of existing marketing and communications assets
- Needs assessment
- REN-wide marketing plan including strategies, activity list, calendar, list of collateral, goals and targets, and data collection and reporting

Task 2: Implement Marketing and Communications Plan

Consultant will lead the implementation of the agreed-upon marketing and communications plan and all its elements, in close coordination with I-REN member agency staff, program implementers, and other consultants.

The consultant will be responsible for each activity listed below:

- Lead the implementation of marketing activities in coordination with I-REN member agency staff, program implementers, and other consultants.
- Lead the development of marketing collateral including procurement of materials and coordination with vendors and other third parties as needed.
- Convene a planning session that coordinated all program-specific campaigns and outreach stakeholder materials needs
- Track marketing and communications activities and report on progress towards goals and targets. Adapt approaches as needed to improve progress.
- Conduct regular (e.g., weekly or biweekly) meeting with I-REN to provide status updates.

Deliverables:

- Marketing and communications collateral
- Documentation and tracking of marketing activities to measure performance
- Monthly and quarterly status reports
- Meeting agendas and status updates

Task 3: Other Services

The consultant will also be responsible for the activities listed below:

- Collect marketing-related data as applicable to inform CPUC reporting, program metrics, targets, indicators, and other measures of program performance.
- Provide marketing-related content and/or review of content as needed for I-REN regulatory documents and filings, e.g., Joint Cooperation Memorandum, Annual Report, Portfolio True-Up and Mid-Cycle Review Advice Letters, and responses to evaluator and intervenor data requests.
- Contribute to marketing-related performance analysis and evaluation, measurement and verification (EM&V) activities for tracking I-REN energy efficiency portfolio achievements and informing continuous improvement.

Deliverables:

- Marketing-related data in alignment with CPUC reporting templates, metrics, indicators, and other performance measurements
- Marketing-specific content and edits or updates to content for I-REN regulatory filings
- Analysis of marketing-related performance and recommendations for future improvements

EXHIBIT “B”

SCHEDULE OF SERVICES

I-REN Marketing & Communications Services	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
Task 1												
Kickoff meeting												
Documentation												
Needs assessment												
Marketing plan												
Task 2												
Soft launch												
Collateral and development production												
Tracking of marketing activities												
Monthly (December 2022) and quarterly status reports (March 2023)												
Meeting agendas and updates												
Task 3												
Marketing data, reporting, templates, metrics, etc												
Marketing-specific content and edits for I-REN regulatory filings												
Analysis of Marketing related performance and recommendations												
<i>This assumes quarterly performance analysis beginning December 2022</i>												

EXHIBIT “C”

**COMPENSATION
BILLING RATES**

Budgets	2022	2023	2024	2025	Total
Task 1 Develop marketing plan	\$28,073	\$16,073			\$44,146
Task 2 Implement marketing plan		\$214,715	\$187,135	\$195,005	\$596,855
Task 3 Other Services	\$9,406	\$40,532	\$32,846	\$24,792	\$107,576
Total	\$37,479	\$271,320	\$219,981	\$219,797	\$748,577



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: Workforce, Education & Training Sector Update: Introduction of Fellowship Program

Contact: Tyler Masters, WRCOG Program Manager, (951) 405-6732, tmasters@wrcog.us

Date: February 21, 2023

Requested Action(s):

1. Discuss and provide input.

Purpose:

The purpose of the item is to provide an introduction to the I-REN Fellowship Program intended to develop pathways to energy efficiency jobs and deploy 26 fellows throughout the I-REN service area as early as fall 2023.

Background:

Initiated in 2019, the Inland Regional Energy Network (I-REN) is a consortium of the Western Riverside Council of Governments, the Coachella Valley Association of Governments, and the San Bernardino Council of Governments (I-REN COG partners) that serve the Counties of Riverside and San Bernardino in the implementation of energy efficiency programs and services to support member agencies and the public. These partners joined together and submitted a Business Plan to the CPUC in order to establish locally administered, designed, and delivered energy efficiency programs. On November 18, 2021, the CPUC formally approved the I-REN Business Plan through 2027.

In November 2021, the CPUC approved the I-REN Business Plan with a budget of \$65M for program years 2022 - 2027. The I-REN Business Plan included multiple goals across three program sectors that were developed based upon input from stakeholders within Riverside and San Bernardino Counties since 2019.

One of these program sectors identified within I-REN services territory is Workforce, Education & Training (WE&T). Total budget for the WE&T Sector through 2027 is \$15.1M. The goal of this Sector is to ensure there is a trained workforce to support and realize energy efficiency savings goals across all sectors. I-REN is uniquely positioned to effectively support these initiatives through the direct connections to local governments and stakeholders that I-REN, and its Council of Government member agencies, have with the communities within Riverside and San Bernardino Counties. The intent of this Sector is to not duplicate initiatives already under delivery by Investor-Owned Utilities or various workforce organization, but instead to supplement and tailor programs with a focus on enhancing the energy and energy efficiency knowledge and understanding.

I-REN will serve as facilitator and resource for stakeholder collaboration in addressing workforce needs within its two counties and as part of this service and will focus on the following strategies and tactics to meet its goal:

1. Strategy 1 - Establish local partnerships with existing and potential training providers in the region to deliver targeted, equitable, and relevant energy efficiency training for contractors and other industry stakeholders.
 - Tactic 1 - Assess existing training opportunities
 - Tactic 2 - Assess benefits of offering "train the trainer" opportunities
 - Tactic 3 - Facilitate the expanded development of training programs within more locations in the I-REN territory
2. Strategy 2 - Facilitate industry engagement and development of job pathways to identify demand and jobs for a trained workforce.
 - Tactic 1 - Develop a Working Group with a focus on a green workforce
 - Tactic 2 - Reinforce pathways through educational institutions and trade schools into energy jobs
 - Tactic 3 - Facilitate identifying opportunities for building companies and local workforce partners to network and connect

One of the key tactics to support the development of job pathways into the energy field is to reinforce pathways from high school, trade schools, and/or colleges, in collaboration with established community partners. This tactic is not new and has clear opportunities to increase interest and capacity within energy efficiency fields at public sector agencies, whom have various energy and climate requirements due to ambitious California statewide climate goals. For example, through the deployment of fellowship programs, this tactic has been successful through a broad public sector focus in Western Riverside County and with a climate action focus across the state, each of which have unlocked more job and career pathway opportunities that are needed within the subregion and the state. More information on these initiatives is described below:

- Western Riverside Council of Governments (WRCOG) Public Service Fellowship - Focuses broadly on connecting talented individuals from select universities to WRCOG member agencies' Planning, Finance, Public Works, and city management Departments, WRCOG's Public Service Fellowship has deployed 88 fellows to various city / county offices across Western Riverside County.
- CivicSpark - A Governor's Initiative AmeriCorps Program dedicated to building capacity for local public agencies to address energy, climate change, community resilience issues, water resource management, housing, and mobility. CivicSpark deploys roughly 100 fellows per year. Unfortunately, since its inception nearly a decade ago, only 20 fellows have been placed within the Inland Empire. This is in part due to the lack of project partners, locations to deploy fellows, and lack of eligible projects. In addition to these, the CivicSpark Program also requires matching project partner funding to support the services including but not related to the recruitment, training, professional growth, project management, and other administrative services related to managing and supporting the fellows.

The I-REN budget assumes \$806,000 for the development and/or participation in a fellowship program. This budget includes finding, deploying, supporting and providing compensation for 26 fellows every year across I-REN's service territory. The initial thought is that every other year, each member jurisdiction would have the opportunity to receive a Fellow.

I-REN staff seeks the I-REN Executive Committee's direction on how Fellows could be split, or what the interest in participating in an existing fellowship program would be to ensure equitable deployment of an I-REN Fellowship Program in the fall 2023.

Prior Action(s):

None.

Fiscal Impact:

All costs associated with the development of an I-REN Energy-Efficiency Fellowship Program are included in WRCOG's adopted Fiscal Year 2022/2023 Agency Budget under the Energy & Environmental Department.

Attachment(s):

None.



Inland Regional Energy Network

I-REN Executive Committee

Staff Report

Subject: I-REN Strategic Planning Update

Contact: Kenyon Potter, CVAG Director of Energy & Sustainability, kpotter@cvag.org, (760) 641-8830

Date: February 21, 2023

Requested Action(s):

1. Receive and file.

Purpose:

The purpose of this item is to provide an update on the development of the I-REN Strategic Plan.

Background:

Initiated in 2019, the Inland Regional Energy Network (I-REN) is a consortium of the Western Riverside Council of Governments, the Coachella Valley Association of Governments, and the San Bernardino Council of Governments (I-REN COG partners) that serve the Counties of Riverside and San Bernardino in the implementation of energy efficiency programs and services to support member agencies and the public. These partners joined together and submitted a Business Plan to the CPUC in order to establish locally administered, designed, and delivered energy efficiency programs. On November 18, 2021, the CPUC formally approved the I-REN Business Plan through 2027.

I-REN is developing a 5-year Organizational Strategic Plan to ensure effective and efficient use of CPUC funding, to identify clear priorities and actions, and to ensure that activities and engagement are aligned across all members of I-REN. This process will include several avenues for stakeholder feedback, including a survey, small group conversations, and in-person and virtual community workshops.

The Strategic Plan process presents a key opportunity for the Executive Committee to shape the direction, focus, and priorities of I-REN. The Business Plan serves as "what" I-REN intends to accomplish and the Strategic Plan represents "how" I-REN will accomplish those goals. The development of a Strategic Plan will include input and insight from I-REN Executive Committee members and the communities that I-REN serves and is critical to ensure the effective use of ratepayer dollars in achieving I-REN goals.

At the January 17, 2023, meeting, this Committee was presented an introduction to the development of the I-REN Strategic Plan, including a summary of the planning activities and the estimated timeline for completion of the Strategic Plan.

With input of the three COGs, Blue Point Planning, a subconsultant of Frontier Energy, the consultant for

the I-REN program, has developed two surveys: 1) a member survey for cities, tribes, and local governments that are members of the COGs, and 2) a stakeholder survey for local stakeholders in the I-REN territories as determined by the COGs. These surveys are currently being distributed and survey results will be reported at the next I-REN Exec Committee meeting in March 2023. Blue Point Planning is also conducting interviews with elected representatives of the member COGs comprising the I-REN Executive Committee. Some preliminary interview questions are included as Attachment 1 to this Staff Report.

Prior Action(s):

January 17, 2023: The I-REN Executive Committee authorized the initiation of the I-REN Strategic Plan.

Fiscal Impact:

All costs associated with the development of an I-REN Strategic Plan are included in WRCOG's adopted Fiscal Year 2022/2023 Agency Budget under the Energy & Environmental Department.

In March 2022, after public solicitation of an RFP and evaluation by all partner COGs, Frontier Energy and its subconsultant (Blue Point Planning) was selected to support implementation activities of I-REN, one of which is to facilitate the development of a Strategic Plan. The total contract amount is not-to-exceed \$793,701 through the end of calendar year 2025.

Attachment(s):

[Attachment 1 - IREN Stakeholder Interview Survey Questions](#)

Attachment 1

IREN Stakeholder Interview Survey Questions

Inland Regional Energy Network (IREN) Stakeholder Interview Conversation Guide

The following questions are broad open-ended questions that will generally be used to help guide the conversation and will be adjusted depending on key topics and the individual. All questions will not be a

Name and Contact:

Interview time:

1. Introductions:

- Intro MFC/Interview
- Brief overview of the Strategic Plan and IREN
 - Areas of focus
 - Funding background
 - Brief timeline
 - Purpose of Strategic Plan
- Participant introduction and background in the region

2. How familiar are you with I-REN? What do you see as their primary value for the Region?

3. Do you know of any existing energy efficiency programs or initiatives are in your community? Please elaborate.

4. How do you see energy efficiency programs and funding helping the region?

5. Access and equity related to energy efficiency dollars has been a common conversation – both related to making sure that the various areas in San Bernardino and Riverside receive ratepayer funds appropriately and that those who are most in need can get access to those funds. What is important to you and your constituent's related equity and energy?

6. What are greatest opportunities with the launch of IREN for the area?

7. What are greatest challenges or considerations with the launch of IREN for the area?

8. How do you characterize your community's perception and risk of climate impacts? A major issue? Minor issue? What are the risks?



Inland Regional Energy Network (IREN) Stakeholder Interview Conversation Guide

9. What do you think are the community's greatest priorities overall related to energy or climate?

10. Are there policies or programs that should be aligned with this effort?

11. Anything else I should know?

