



Request for Proposals

Commercial and Industrial (C&I) Engineering & Other Ancillary Services

2016-2018 Program Years

Issued: Monday, November 9, 2015

Proposals due: Monday, December 14, 2015

Cape Light Compact, P.O. Box 427, Open Cape Building, Barnstable, MA 02630
www.capelightcompact.org

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I. Introduction

The Cape Light Compact (“the Compact”) is soliciting competitive bid proposals from qualified vendors for Ancillary Services for its Commercial & Industrial Programs. The scope includes provision of engineering and other ancillary energy assessment support services as outlined below, including but not limited to: engineering peer review of 3rd party vendor application calculations; on-site engineering assessments and scoping; engineering project management services for large customer projects; and other miscellaneous engineering services. In addition, this scope includes more general technical and administrative services such as QA/QC field inspection services; application management/processing services; and other miscellaneous non-engineering project support. Bidders may choose to bid on any subset of the service areas specified, and the Compact may select multiple vendors for some or all of this work. The contract(s) for these services are scheduled to begin January 15, 2016 and continue through December 31, 2018 with an option to extend in one or two year increments for up to an additional three years.

Vendor(s) selection will be based on a scored selection criteria detailed in the body of this proposal.

II. Cape Light Compact

The Cape Light Compact, as administered through Barnstable County, is an inter-governmental regional energy services organization made up of all 21 towns of Barnstable and Dukes counties and the counties themselves. The purpose of the Compact is to represent and protect consumer interests in a restructured electric utility industry. As authorized by each town, the Compact administers the regional energy efficiency program and works with the combined buying power of the region's over 200,000 electric consumers to negotiate the best terms and conditions for electric supply and pricing, including a green power offering, and other public benefits. For more information on Cape Light Compact and its energy efficiency programs, please visit www.capelightcompact.org.

III. Background

The Compact administers its Commercial & Industrial (C&I) Energy Efficiency Programs to roughly 20,000 commercial customers on Cape Cod and Martha’s Vineyard. These robust programs include New Construction & Major Renovation, Large Retrofit, and Small Retrofit Direct Install (DI). In 2016, the Compact is also launching two new delivery approaches: A segment-specific delivery initiative for its medium-sized customers, and a new Small Business Services initiative modeled after the Home Energy Services Program (HES) that will include a BEA (Business Energy Assessment) much like the HEA (Home Energy Assessment).¹

The Compact is seeking one or more engineering and/or technical service vendors as part of its 2016-2018 Energy Efficiency Plan, to support the Compact’s C&I program implementation with a variety of engineering and other ancillary support services on an as needed basis. The successful vendor(s) will be familiar with the workings of the existing Massachusetts C&I Programs, be willing and capable of supporting the Compact’s new initiatives, and have the technical expertise, skills and experience to be able to perform a variety of engineering analyses on an ad hoc, as-needed basis, as well as develop reports, and interact as needed with the Compact’s customers in the field and remotely.

Program History and Volume

Below are sample ancillary service volumes, by scope role, for the most recent 3 years of program activity, during the 2013-2015 Three Year Plan:

RETROFIT:

Year	Roles A+B. Engineering Assessments & Peer Review	Role E. QA/QC	Role F. Application Processing & Management
2013	55	124	n/a
2014	88	142	n/a
2015 YTD (Jan-Sept)	42	109	27

NEW CONSTRUCTION:

Year	Roles A+B. Engineering Assessments & Peer Review	Role E. QA/QC	Role F. Application Processing & Management
2013	42	42	n/a
2014	60	60	n/a
2015 YTD (Jan-Sept)	53	56	3

¹ For information on the new Small Business Services initiative, see the Compact’s recent RFP at: <http://www.capelightcompact.org/wp-content/uploads/2015/09/CLC-CSBS-RFP-2015-101315.pdf>.

IV. Ancillary Services Vendor Roles and Scope(s) of Work

All vendors, regardless of specific ancillary services role, will be expected to:

- **Have working knowledge** of the Massachusetts statewide C&I Programs, the C&I Retrofit application process in particular, as well as the Massachusetts TRM (Technical Reference Manual).²
- **Create and maintain individual project file records electronically**³, utilizing vendor access to the Compact's EECP database to upload documents and other project related data for customer records.⁴
- **Deliver regular updates and status reports to Compact management** on activities/services provided, on a timeline agreed to with Compact management, and utilizing vendor access functions available within the Compact's EECP database.
- **Interact with the Compact's commercial customers with professionalism, courtesy and competence**, treating their employees, project management associates, and their places of business with respect and sensitivity at all times.
- **Have sufficient professional skill diversity** of project team, to be able to employ the most appropriate and cost-efficient level of expertise for given ancillary service tasks, while maintaining consistency for customer and Compact interaction.
- **Provide all equipment necessary** to properly inspect any applicable projects.
- **Provide electronic invoices for upload** through the Compact's database.
- **Finalize service level agreement (SLA) terms** with the Compact for provision of their respective ancillary service(s).⁵

Specific Ancillary Service Area Roles are outlined below in A through G. Bidders may choose to bid on any one or more of the indicated service roles A through G.

A. Engineering Energy Assessment and Scoping Services

The vendor(s) providing Engineering Energy Assessment and Scoping Services will be called upon by the Compact to perform on site energy assessments of Commercial and Industrial customer sites, providing engineering studies as requested by the Compact which may include:

² The Massachusetts TRM is scheduled to become a digital library, known as the Technical Reference Library (TRL), sometime after the first of the year in 2016.

³ Final details on vendor permissions for workflow steps in CLC database to be determined between the vendor and the Compact once the contract is awarded.

⁴ Please refer to www.capelightcompact.org/rfp/ for sample EECP file upload user guide and import specifications, provided as part of the HES 2016-2018 RFP Questions Set #1.

⁵ See sample SLA for QA/QC on-site inspection services in Exhibit B attached

1. ASHRAE Level I, II, or III Audits
2. Energy usage trending analysis (All energy sources as applicable)
3. Installation and monitor energy metering equipment
4. Site specific energy savings calculations and analysis for any applicable energy efficiency improvements
5. Benefit Cost Screening of Custom projects using the Statewide Dual Fuel Screening Tool
6. Perform computerized energy simulations and benchmarking (DOE-2, eQUEST, ENERGY STAR® Portfolio Manager, and similar programs)⁶
7. Attend customer meetings on the Cape, Vineyard or other off-Cape locations as requested by and coordinated with the Compact, including but not limited to presentations in public forums
8. Perform retro-commissioning analysis, as applicable

B. Engineering Peer Review Services

The vendor(s) providing Engineering Peer Review Services will be called upon to review program application energy calculations, simulations and analyses submitted by 3rd party vendors on behalf of the customer for correctness. In this role, the vendor may also:

1. As requested, conduct pre-installation and post-installation inspections for specific sites for Quality Control of installed retrofit (or applicable new construction) measures and projects with Incentive applications or in some instances QC inspections of installations performed as part of a turnkey program by other Compact vendors ;
2. Review schematic, design document, or construction specifications for all proposed equipment that may qualify for incentives, including electric and other fueled equipment. This review determines whether the equipment will qualify, and if it does not, will provide recommendations on upgrades that will earn an incentive or a rebate through the Compact's programs
3. Perform Benefit Cost Screening of Custom projects using the Statewide Dual Fuel Screening Tool (see sample printout provided in Exhibit C)
4. Perform energy usage trend analysis (based on monthly usage and demand)
5. Install and monitor metering of existing or proposed equipment
6. Other engineering analyses as requested

C. Large Customer Project Management Services

The Vendor providing Large Customer Project Management Services to the Compact will be expected to support Compact Staff with various tasks related to the Compact's Large Commercial and Industrial Program implementation strategy for the less than 100 Compact customers with aggregated usage greater than 1.5 MM kWh per year. As part of that strategy, CLC's largest customers will have a dedicated CLC staff liaison focused on developing multi-year energy efficiency Memorandums of Understanding (MOUs) and/or Strategic Energy Management Plans (SEMPs) with these customers. In any given year, it is estimated that

⁶ A Professional Engineering Stamp is required for submittal of applications for ENERGY STAR® awards

somewhere between 25 and 35 such customers will be participating with actual measure installations, though others could be active with planning as well. The tasks the Compact may want assistance with in this role include, but are not limited to:

1. Any/all of the services outlined in Service Area A – Engineering Energy Assessment and Scoping Services;
2. Any/all of the services outlined in Service Area B – Engineering Peer Review Services;
3. Additional project and relationship management coordination tasks as agreed to with Cape Light Compact and the Customer on a case by case basis; including, but not limited to:
 - a. Coordinating with customer and the Compact to establish long term energy efficiency investment strategy
 - b. Acting as customer contact for general inquires related to specific energy efficiency projects
 - c. Acting as liaison of Cape Light Compact in attendance at on-site project meetings or conference calls
 - d. Attending customer stakeholder meetings to present energy efficiency strategies or project specific information
 - e. Perform and present various Benefit-Cost analyses for presentation to customer, compact and/or other stakeholders. (Including: Total Resource Cost Test, Participant Cost Test, Rate Impact Measure Test, Customer Return on Investment, Net Present Value, etc.)

D. Other Miscellaneous Engineering Support

1. Serve as a resource to the Compact for any technical issues on equipment performance, facilities operation, equipment load shapes, advances in commercial energy efficiency equipment and technology, experience with C&I projects, and other areas of technical relevance in the energy efficiency field.
2. Serve as a resource for energy-related training on all levels;
3. Serve as a subject matter expert/resource for engineering related presentations on behalf of the Compact;
4. Perform energy usage trend analysis (based on monthly usage and demand) as needed;
5. Install and monitor metering of existing or proposed equipment;
6. Provide support calculations and analysis for custom or specialized energy related projects;
7. Perform computerized energy simulations and benchmarking (DOE-2, eQUEST, ENERGY STAR® Portfolio Manager, and similar programs);⁷
8. Author Minimum Requirements Documents to ensure savings; and
9. Other miscellaneous engineering tasks as needed on an ad-hoc basis

⁷ A Professional Engineering Stamp is required for submittal of applications for ENERGY STAR Awards

E. QA/QC On Site Inspection Services⁸

The vendor(s) providing inspection services will be called upon to perform site inspections of pre and/or post installation conditions for participating customers. As part of these services, the vendor(s) will be expected to work with the Compact to determine an appropriate timeline for various inspection and reporting milestones, and:

1. Schedule the Pre or Post Installation Inspection with the customer or their representative and travel to the site
2. Bring appropriate employee identification as well as all necessary equipment to properly inspect the respective projects, including but not limited to Personal Protective Equipment (PPE), ladder, tape measure, screwdrivers, camera or camera-ready smartphone/tablet, and ballast discriminators.
3. Verify that the existing condition and quantity of equipment on site is as stated in the submitted application for the pre installation condition, or for the post-installation inspection verify that the proposed energy efficiency measures were installed accordingly, in the appropriate number, and are operating.
4. Submit the Pre or Post Installation Inspection report to the Compact identifying any discrepancies, per the timeline agreed to with the Compact.

F. Application Processing and Management Services

The Vendor providing Application Processing and Management Services is expected to utilize the Compact database to perform intake, review and process and report on applications on behalf of the Compact, including:

1. Providing application intake on behalf of the Compact and its customers by maintaining a Compact email box and phone line;
2. Reviewing the submitted application for completeness and working with customer or their representative to complete application accordingly
3. Confirm that proposed equipment meets all application requirements, including, but not limited to, checking to ensure that any proposed lighting equipment is on the Qualified Products list, and that minimum efficiency requirements are met
4. Queue the application for Pre-Installation Inspection, where appropriate⁹
5. Receive the Pre-Installation Inspection report and work with customer or their representative to remediate submittal should any discrepancies be found in the pre-Installation inspection, including but not limited to incorrect equipment quantities or hours of operation submitted, or the incorrect application being utilized.
6. Calculate energy savings associated for the proposed prescriptive measures according to the inspected conditions and calculation methodologies provided in the Massachusetts TRM or future TRL (Prescriptive Applications only)

⁸ Note that QA/QC On Site Inspection Services may be combined with Application Processing and Management Services, or be offered separately.

⁹ Note, QA/QC Services may be combined with Application Processing and Management Services in one vendor, or they may be provided by a separate vendor/contractor with whom the Application Processing and Management Services vendor will have to coordinate with.

7. Work with Cape Light Compact to issue a Pre-Approval Letter to the customer for each project requiring pre-approval with all applicable information such as photos and materials.
8. Upon notification of project completion by the customer, queue the application for Post-Installation Inspection
9. Work with customer or their vendor to obtain invoices and proof of payment for the project
10. Receive the post-installation inspection report and work with the customer to resolve any discrepancies, and amend energy calculations as necessary based on the inspection and invoices from the customer or their representative
11. Submit a completed application package to Cape Light Compact for processing through the database.

In addition, the Application Processing and Management vendor will coordinate with the Compact's Engineering Services vendor in instances of Custom Applications or other instances where Engineering analysis and or equipment inspection/monitoring is required beyond the processing vendor's scope of work.

G. Other Miscellaneous Non-Engineering Program and Project Management Support

Vendors providing Miscellaneous Non-Engineering Program and Project Management Support will be contracted with by the Compact for a specific not to exceed contract value for the purpose of supporting the Compact on both specified projects, as well as on an as needed basis as mutually agreed upon with such vendors for work as yet to be determined.

V. Cape Light Compact Responsibilities

Cape Light Compact responsibilities will include, but are not limited to:

- Providing a principal Cape Light Compact point of contact for coordination and approvals;
- Providing the vendor(s) with database portal access for the purpose of creating and maintaining project files, inspection reports and preapproval letters, and other specified reports and invoicing module;
- Providing a copy of the Massachusetts TRM or future TRL and confirming appropriate calculation methodologies;
- Providing timely signoff on customer reports and other agreed upon deliverables;
- Overseeing and monitoring program performance including:
 - Reviewing and approving any change orders or modifications to program implementation procedures
 - Reviewing and approving all forms, procedures, and protocols for use in providing the specified ancillary services
 - Reviewing all management reports
 - Monitoring and tracking the resolution of customer inquiries or complaints

- Verifying, approving and processing invoices

VI. Proposal Requirements

Proposals should first identify which of the seven service areas, outlined in section IV, numbered A to G, the bidder's proposal is being submitted for. For the indicated services, proposals should include a conceptual overview that demonstrates an understanding and ability to meet the stated objectives that align with the scope for each applicable service as outlined above. Creative approaches utilizing the latest technology available to meet these objectives are encouraged, understanding that the respondent should explain how the approach will meet the objectives of the scope in different ways. In addition, please:

- Explain your proposed approach to each of these requested services being bid on;
- Describe the team that will be assigned to each of these services. Describe what each person's role will be and include a brief background summary for each key staff member assigned;
- Briefly describe your firm's organizational capacity to provide each of the support services being bid on;
- Provide a company profile including length of time in business and core competencies;
- Briefly describe the percentage of staff that would work on these services relative to your entire staff (using full time equivalents). For example, if you would use one FTE staff on this project and you have a staff of ten, the percentage would be 10%.
- List the three most recent proposals for similar services your firm has developed that best reflects your work and relevancy to applicable services. Briefly list the role your firm played in each proposal and any coordination your firm did with other supporting vendors on each;
- Incorporate a schematic diagram showing organizational overview including identification of key staff and any supporting vendors or sub-contractors, if applicable, and;
- Please list and describe any deviations from the Scope as outlined in this Request for Proposals.

VII. Pricing

Vendors' proposals should include a pricing schedule, for each ancillary service role being proposed (A-G), with all labor, overhead, travel, other direct costs associated with these Engineering and Other Ancillary Services. Include all general and administrative costs in hourly labor rates and direct expenses. These terms apply to sub-contractor costs as well.

VIII. Schedule

- | | |
|-----------------------------|---|
| 1. RFP issued: | Monday, November 9, 2015 |
| 2. Pre-bid conference call: | Tuesday, November 24, 2015, 2:00 p.m. EST* |
| 3. Written inquiries due: | Wednesday, November 25, 2015 by 4:00 p.m. EST |

4. Inquiry responses posted: Wednesday, December 2, 2015 (to Cape Light Compact website)
5. All proposals due: Monday, December 14, 2015 by 2:00 p.m. EST
6. Vendor(s) selected: Tuesday, December 22, 2015 (estimated)
7. Kick-off meeting(s): Week of January 4, 2016 (tentative)
8. Implementation: Friday, January 15, 2016 – December 31, 2018

*Please indicate via e-mail to Margaret Downey (mdowney@barnstablecounty.org) your interest in participating in the call by Thursday, November 19, 2015.

IX. Proposal – Number of Copies and Format

Proposals, to be entitled for consideration, must be submitted in accordance with the following instructions. The Bidder shall be responsible for submitting one (1) electronic, one (1) original and three (3) copies of the proposal in such form as set forth below.

Proposals shall be:

- Type written on 8 1/2" x 11" paper;
- The pages numbered; and
- The Proposal must also be signed in longhand in accordance with the instructions as stated in Section XV, "Bidder's Submission Statement"

Acceptance of any proposals remains in the sole discretion of Barnstable County. Proposals which in the judgment of Barnstable County fail to meet the requirements of this RFP or which are incomplete or obscure, or in which errors occur, will be rejected.

X. Bid Due Date

The bound Proposal must be signed and shall be delivered to the Compact within the time set forth in this RFP. Proposals will be enclosed in sealed envelopes and marked as follows:

RFP Title: C&I Ancillary Services Vendor

Dated:

Bidders Name:

Delivered to: Cape Light Compact
Open Cape Building
3195 Main Street
Barnstable, MA 02630

Attention: Margaret Downey
mdowney@barnstablecounty.org
Cape Light Compact Chief Procurement Officer

Bids must be received by Monday, December 14, 2015 by 2:00 p.m. EST. Proposals received after this time will not be considered.

XI. Additional Requirements for Vendor Bids

In addition to the budget requirements in Section VI the narrative should identify tasks and major milestones for commencing the requested work. The Compact anticipates that the same hourly rates would apply for out-of-scope work relating to the requested services which may be contracted for during the original purchase order period. If not, indicate a cap on any increases in labor costs for out-of-scope work and when they would take effect.

XII. Interpretation of the RFP

The Compact is seeking one or more qualified firm(s) to provide the requested services. Proposals shall be in accordance with all requirements set forth in this request for proposals (RFP). Should a Bidder find any ambiguity, discrepancy or omission in the RFP, the bidder should notify the Compact in writing. Such information must be received by November 25, 2015, 4:00 p.m. ET, to afford The Compact an opportunity to send any instructions or interpretations to other Bidders who have received an Invitation to Bid. The Compact will not be responsible for any oral instructions or interpretations. Please send all inquiries to

Cape Light Compact
Barnstable Open Cape Building
3195 Main Street
Barnstable MA, 02630
Attn: Margaret Downey
mdowney@barnstablecounty.org
Cape Light Compact Chief Procurement Officer

XIII. Rights to Modify This Specification

The Compact reserves the right to modify any aspect of this RFP if the change will make the program more customer-responsive.

XIV. Selection Criteria

The final selection of vendor(s) shall be based on the following sets of criteria:

Minimum Evaluation Criteria

- (i) Responsiveness to the issues identified in the RFP
- (ii) Proposed approach to manage the work
- (iii) Team qualifications and experience
- (iv) Submission of all required documentation and certifications detailed in Proposal Contents.
- (v) A minimum of five (5) years related experience in Commercial & Industrial energy efficiency

Contract negotiations will commence in order to complete a signed contract within 15 days of contract award. All contracts will incorporate the general terms and conditions included with the bid package and the written documents provided by the Bidder in its bid.

If a contract is not executed by the chosen Vendor(s) by January 29, 2016, Barnstable County reserves the right to negotiate with alternative Bidder(s) in order to execute contracts by February 29, 2016. All exceptions to the contract must be noted in writing and included within the body of the proposal.

XV. Proposal Confidentiality

All proposals will become the property of the Compact. As a public entity it may become necessary to supply price information to regulatory agencies for review. The Compact will request that all such information be treated confidentially by the regulatory agencies and the Compact will furnish such information when required. If any proprietary information is contained in the Proposal, it should be clearly identified and will be treated as such provided that the Compact shall be liable for any action taken, or omitted to be taken, in good faith by it or them hereunder or be responsible for the consequences of any oversight or error in judgment thereof except for direct losses due to its or their willful misconduct or gross negligence.

XVI. Return of Proposal Materials

Proposal materials will not be returned to Bidders. All costs incurred by Bidders in the preparation and submission of a proposal and/or oral presentation shall be the sole responsibility of Bidders.

XVII. Oral Presentations

Bidders whose Proposals are deemed as competitive may be required, upon request, to make an oral presentation. The location of the presentation will be stated on the invitation; presentations will be limited to two (2) hours. The first half hour will be allocated to a formal presentation by the Bidder. The balance of the presentation period will be devoted to questions by and discussion with the Compact's representatives.

The oral presentation will be arranged through the Compact. Bidders will receive at least 48 hours' notice to prepare for the presentation. Attendance must include the Bidder's proposed Project Manager. The Compact may disqualify a Bidder on the basis of its refusal to honor its request for an oral presentation.

Results of the oral presentations will be used in part to arrive at ranking the finalist(s) and may result in adjustments to the final rankings assigned. In addition to, or as an alternative to additional technical data provided in a written or oral format, the Compact reserves the right to request a "best and final offer" from said Bidders in order to arrive at a final selection.

Based upon all information, the Compact will select a finalist with which contract negotiations will commence. An electronic copy of the bid must be submitted as part of each proposal.

Electronic submission shall be sent to the individual listed below no later than 2:00 p.m. ET on the date all proposals are due:

Margaret Downey mdowney@barnstablecounty.org

The selected Vendor(s) will be required to sign a Non-Disclosure Confidentiality Agreement upon the start of the project. The confidentiality will specifically pertain to any use of the data provided by the Compact or their representatives. The Vendor(s) will also need to meet all the Terms and Conditions of the Compact. Please refer to APPENDIX A.

XVIII. Bidder's Submission Statement

The following must be completed and included in each Bidder's proposal:

The undersigned Bidder hereby offers to perform the Services as described in the Request for Proposal (RFP) dated November 9, 2015, prepared by Barnstable County, in accordance with the Proposal attached hereto. This bid offer is firm and shall remain in effect for a period of sixty (60) days after receipt thereof by Barnstable County.

In connection with such offer, the undersigned represents and warrants to Barnstable County that it has carefully and thoroughly reviewed the entire RFP and that it possesses the special experience, skills, and abilities necessary to perform the Services bud on in accordance with the specifications detailed in the RFP.

Name of Bidding Firm

Signature

Name of Signatory (print or type)

Position with (print or type)

EXHIBIT A - SAMPLE CONTRACT

To be Provided

EXHIBIT B - SAMPLE SERVICE LEVEL AGREEMENT for QA/QC INSPECTION

Vendor will provide Cape Light Compact (CLC) with the following:

- 1. Confirmation of receipt of any request for inspection.**
- 2. Weekly email status updates of requested inspections**, in simple bulleted or table format, that includes information on which jobs have been inspected or scheduled for inspection during the week, as well as expected estimated time to completion on outstanding jobs.
- 3. Monthly conference call status updates with accompanying excel spreadsheet** to be completed by vendor and issued to CLC program planner by close of business on business day preceding monthly conference call.
- 4. Fully documented QC Reports with counts by individual measure/lamp type** and detailed notes as necessary, even in cases where no discrepancies are found.
- 5. Turnaround of inspections (with completed inspection report) within 2 weeks (10 business days) of assignment**, unless otherwise agreed upon in a specific instance. In certain instances, CLC may request faster than 2 week turnaround. If requested turnaround cannot be met, vendor will inform CLC at the time of the request or as soon as possible afterwards, so that other arrangements can be made.
- 6. Completed QC Inspection Reports scanned and emailed to CLC program planner within 2 business days of completed QC visit.**

When material discrepancies are found, the vendor will:

- 7. Notify the CLC program planner via email within 1 business day** (i.e. Count on application is off of actuals by greater than 20%, existing fixture wattage is off of actuals by greater than 10%, application states that T-12s exist but instead are T8s) and
- 8. Work directly with customer or customer's representative to resolve and correct any misinformation.**

QC inspector shall have the necessary equipment to perform inspections in the field adequately and safely, including:

- 9. Personal protective equipment;**
- 10. Ladder** to climb closer to fixtures for proper identification;
- 11. Sensor Switch discriminator** or similar unit to determine if existing ballasts are magnetic or electronic;
- 12. Camera** for the purpose of photographing existing equipment when further investigation is needed to identify/document existing equipment/conditions; and
- 13. Company Picture ID.**

EXHIBIT C - SAMPLE STATEWIDE SCREENING TOOL INPUT/OUTPUT

Customer Name	EXHIBIT C - SAMPLE STATEWIDE SCREENING TOOL INPUT/OUTPUT - ILLUSTRATIVE PURPOSES ONLY**		
Project Description	VFDs, Kitchen Hood Controls, & D'Mand Circulator Controls		
Existing or Base Case Condition Description	Three (3) pumps ,HW & CW, and Six (6) AHUs operating at constant volume to condition the space, constant circulation DHW (1/3 hp), Four (4) kitchen exhaust hoods running 15 hrs/day at constant volume		
Proposed Description	Installation of nine (9) VSDs on pumps and fans, D'Mand circulator for DHW, and MeLink Kitchen Hood Controls		
State	MA	Utility Contact	
Fuel Type	Dual Fuel	Phone	
Program	Retrofit	Application ID	
Electric PA	CLC		
Gas PA	National Grid Gas		

MEASURE INFORMATION					COST DATA INPUTS					ANNUAL ELECTRIC SAVINGS (INCREASES) INPUTS											
NO.	MEASURE DESCRIPTION	CODE	DEFAULT LIFE	OVERRIDE LIFE	Total Equipment Cost	Total Labor Cost	Total Cost	Nameplate kW (CHP ONLY)	CHP Check	ENERGY						CAPACITY (kW)					
										kWh SAVINGS	Annual % On Peak	Summer On Peak	Summer Off Peak	Winter On Peak	Winter Off Peak	CHECK	June	July	August	December	January
1	Drives on HVAC Systems - 10 Years	VSDH10	10		\$ 74,748		\$ 74,748	No		124,156	57%	22%	20%	35%	23%	OK	20.1	20.1	20.1	16.1	16.1
2	Domestic/Service Water Systems - 10 Years	DHW10	10		\$ 3,000		\$ 3,000	No		2,369	43%	14%	19%	29%	38%	OK	0.2	0.2	0.2	0.3	0.3
3	EMS & HVAC controls - 10yrs	EMSB10	10		\$ 67,745		\$ 67,745	No		24,316	100%	33%	0%	67%	0%	OK	5.9	5.9	5.9	6.0	6.0
4					\$ -		\$ -	No								Should equal 100%					
5					\$ -		\$ -	No								Should equal 100%					
			10	0	\$ 145,493	\$ -	\$ 145,493	-		150,841	64%	24%	17%	40%	20%		26.2	26.2	26.2	22.3	22.3

RETAIL RATES - USED FOR PAYBACK CALCULATION ONLY	
ELECTRIC RETAIL RATE (\$/kwh)	\$ 0.12000
GAS RETAIL RATE (\$/therm)	\$ 1.00000

NO.	MEASURE DESCRIPTION	INCLUDE	BCR	ANNUAL MWH	LIFETIME MWH	LIFETIME KW-YEARS	UNITS (MA ONLY)	ANNUAL THERMS	LIFETIME THERMS	PAYBACK PERIOD (YEARS) - NO INCENTIVE			NOTES
										ELEC	GAS	TOTAL	
										1	Drives on HVAC Systems - 10 Years	Y	
2	Domestic/Service Water Systems - 10 Years	Y	6.31	2	24	2	26	2,099	20,990	1.67	1.20	1.26	
3	EMS & HVAC controls - 10yrs	Y	1.35	24	243	59	302	5,760	57,600	10.36	6.51	7.81	
4			-	-	-	-	-	-	-	-	-	-	
5			-	-	-	-	-	-	-	-	-	-	
TOTAL			1.98	151	1,508	262	1,771	7,859	78,590	6.17	4.29	5.60	

PROJECT ELIGIBILITY	TOTAL AUTHORIZED INCENTIVE	ELECTRIC BENEFITS (PERCENTAGE)	GAS BENEFITS (PERCENTAGE)	TOTAL PROJECT RESULTS & INCENTIVE CALCULATIONS																
				PAYBACK PERIOD (YEARS)			ELECTRIC INCENTIVES								GAS INCENTIVES					
				NO INCENTIVE	CALC INCENTIVE	AUTHORIZED INCENTIVE	CALCULATED				AUTHORIZED				CALCULATED			AUTHORIZED		
							TOTAL ELEC	\$/Annual MWh	\$/Lifetime MWh	\$/UNIT	TOTAL ELEC	\$/Annual MWh	\$/Lifetime MWh	\$/UNIT	TOTAL GAS	\$/ANNUAL THERM	\$/LIFETIME THERM	TOTAL GAS	\$/ANNUAL THERM	\$/LIFETIME THERM
Y	\$ 67,667	77%	23%	5.60	2.80	3.00	\$ 55,878	\$ 370.45	\$ 37.04	\$ 31.56	\$ 55,878	\$ 370.45	\$ 37.04	\$ 31.56	\$ 16,868	\$ 2.15	\$ 0.21	\$ 11,789	\$ 1.50	\$ 0.15

****EXHIBIT C - SAMPLE STATEWIDE SCREENING TOOL PROJECT SUMMARY OUTPUT****

CUSTOM PROJECT SUMMARY

Customer Name	EXHIBIT C - SAMPLE STATEWIDE SCREENING TOOL INPUT/OUTPUT - ILLUSTRATIVE PURPOSES ONLY**
Project Description	VFDs, Kitchen Hood Controls, & D'Mand Circulator Controls
Existing or Base Case	Three (3) pumps ,HW & CW, and Six (6) AHUs operating at constant volume to condition the space, constant circulation DHW (1/3 hp), Four (4) kitchen exhaust hoods running 15 hrs/day at constant volume
Proposed Description	Installation of nine (9) VSDs on pumps and fans, D'Mand circulator for DHW, and MeLink Kitchen Hood Controls

Lead PA Contact	
Electric PA	Cape Light Compact
Gas PA	National Grid Gas
Program	Retrofit

Electric Savings	
Total Annual kWh	150,841
Percent Energy On Peak	64%
Summer kW (Capacity)	26.23

Proposed Measures to be Installed	
Drives on HVAC Systems - 10 Years	
Domestic/Service Water Systems - 10 Years	
EMS & HVAC controls - 10yrs	

Gas Savings (therms)	
Gas Heating Savings	5,760
Gas Non-Heating Savings	2,099
Gas Process Savings	-
Gas Total	7,859

Payback		
Electric Retail Rate	\$ 0.120	per kWh
Electric Savings	\$ 18,101	per year
Gas Retail Rate	\$ 1.00	per therm
Gas Savings	\$ 7,859	per year
Total Retail Savings	\$ 25,960	per year
Simple Payback	5.60	years
Buy Down Payback	3.00	years

Other Savings	
Oil (mmbtu)	-
Propane (mmbtu)	-
Water & Sewer (gallons)	-
Other Benefits (\$)	\$ -

Project Info	
Lifetime	10
Project Type	Dual Fuel
Project Cost	\$ 145,493
Proposed Incentive	\$ 67,667
Customer Cost	\$ 77,826

Financial Metrics		
	Without Incentive	With Incentive
Discount Rate	5.00%	
NPV	\$ 71,478	\$ 131,464
ROI	-22%	134%
Payback	5.60	3.00

