

**TABLE OF CONTENTS**

SECTION 1: PROGRAM DESCRIPTION ..... 1

SECTION 2: OBJECTIVES ..... 3

SECTION 3: GENERAL REQUIREMENTS ..... 4

SECTION 4: SCHEDULE OR TASKS DELAYS ..... 4

SECTION 5: STATEMENT OF WORK ..... 4

    Task 1 - Program Ramp-up ..... 4

    Task 2 - Strategic Plan Goal 3 ..... 5

        A. Develop Energy Benchmarking Policy ..... 5

        B. Utility Manager System & ENERGY STAR Portfolio Manager ..... 7

        C. Develop Energy Action Plan ..... 12

        D. Develop Commissioning/Retro-commissioning Policy ..... 15

    Task 3 – Invoicing and Reporting ..... 18

    Task 4 - Ramp-Down and Shut-Down Program ..... 19

    Task 5 - Submit Final Program Report ..... 20

SECTION 6: PAYMENT ..... 20

SECTION 7: PERFORMANCE INDICATORS ..... 21

    Appendix A: Monthly Invoicing and Reporting Requirements ..... 23

    Appendix B: Regulatory Reporting Requirements ..... 25

    Appendix C: Billing Schedule ..... 30

**TABLES**

Table 1: Implementer T&M Fully Burdened Hourly Billing Rate ..... 21

Table 2: Implementer Budget Breakdown ..... 21

## Statement of Work

**PROGRAM IMPLEMENTER:** COUNTY OF SANTA BARBARA

**PROGRAM NAME:** COUNTY OF SANTA BARBARA'S STRATEGIC PLAN STRATEGIES

**PROGRAM BUDGET:** \$492,766

### SECTION 1: PROGRAM DESCRIPTION

**A. Program Background:** Pursuant to Decision 09-09-047, the CPUC authorized Southern California Edison ("SCE") to conduct strategic plan activities centered on energy efficiency and addressing the "Big, Bold" strategies and related local government goals found in the CPUC's California's Long-Term Energy Efficiency Strategic Plan ("CEESP")<sup>1</sup>. Based on this authorization, SCE conducted a solicitation seeking to fund activities that would lead to long-term, sustainable changes as opposed to supporting staffing resources or short-term initiatives that would cease to exist once the funding had ended.

One of the selected programs in this solicitation is the County of Santa Barbara's Strategic Plan Strategies Program ("Program") which will proactively pursue CEESP goals by implementing an utility manager software system ("Utility Manager System"), sometimes known as an enterprise energy management information system ("EEMIS"), to foster improved municipal energy management and energy use reduction, and developing energy benchmarking, and commissioning and retro-commissioning policies, and preparing an energy action plan to develop new Implementer policies and goals to reduce electricity consumption, decrease greenhouse gas emissions, and promote climate-smart activities. The Program will be implemented by the County of Santa Barbara ("Implementer").

The Implementer will perform the tasks required in order to demonstrate how the Program will meet the objectives of the CEESP while utilizing the following CEESP Goal:

- **Strategic Plan Goal 3:** "Local governments lead by example with their own facilities and energy usage practices."

**B. Defined Terms:** Capitalized terms not otherwise defined in this Statement of Work ("SOW") will have the meaning ascribed to them in the Contract, which is attached to the SOW and incorporated herein by reference.

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<sup>1</sup> Please go to [www.californiaenergyefficiency.com](http://www.californiaenergyefficiency.com) for a copy of the CEESP.

1. **Business Day:** The period from one midnight to the following midnight, excluding Saturdays, Sundays, and holidays.
2. **Calendar Day:** The period from one midnight to the following midnight, including Saturdays, Sundays, and holidays.
3. **Campus:** A series of buildings situated closely together as a plaza and served by a single SCE meter. In order to capture the energy use for a single building in this type of arrangement, it is necessary to separately meter (submeter) the energy consumption for that building.
4. **Customer:** A residence or business receiving electric service from SCE and paying the Public Goods Charge.
5. **Month or Monthly:** A term ending on the last Calendar Day of each month.
6. **Change Order:** Document SCE issues to Implementer and, unless otherwise provided in the Contract, Implementer accepts, and which changes or modifies the terms of the Contract.
7. **Contract:** Document issued by SCE to Implementer, as may be amended in writing as provided therein, which authorizes the Work, states the terms and conditions and incorporates by reference the Statement of Work and any other referenced documents, if applicable, all of which form the contractual agreement between SCE and the Implementer, with the following priority in the event of conflicting provisions: Change Orders, from the most recent to the earliest; the Statement of Work; the Contract; and any other referenced documents, and which facilitates payment to the Implementer for the Work described herein.
8. **Contract Program Manager or CPM:** The SCE Representative who will manage the Program.
9. **CPUC:** The California Public Utilities Commission.
10. **Implementer:** County of Santa Barbara
11. **Incentive:** Financial support (e.g., Rebates, low-interest loans) to install energy efficiency Measures. The Incentives are solicited by the Customer and based on the Customer's billing history and/or Customer-specific information. Also see Rebate.
12. **Measure:**
  - Specific action which reduces or otherwise modifies energy end-use patterns.

- A service or a product installation and operation of which results in a reduction in on-site energy use, compared to what would have happened without the service or product installation.
- 13. Performance Indicators:** Specific, measurable, actionable, realistic and time-specific requirements that will directly and measurably contribute to SCE's business goals for the Contract.
- 14. Public Goods Charge:** Non-bypassable systems benefit surcharges imposed on retail electric and gas customers to fund energy efficiency, renewable energy, research, development and demonstration, and low-income assistance programs.
- 15. Rebate:** An identified and pre-specified amount of money to be paid to Customer for the installation of one or more identified Measure at the Customer's facility. There are two kinds of Rebates:
- **Prescriptive or Deemed Rebates:** A prescribed financial Incentive per unit for a prescribed Measure.
  - **Customized Rebate:** A financial Incentive determined using an analysis of the Customer's existing equipment (or applicable base-line for new construction) and the Measure to be installed.
- 16. SCE Representative:** The CPM or such other representative authorized by SCE to manage this Program.
- 17. Subcontractor:** An entity contracting directly or indirectly with Implementer to furnish services or materials as part of or directly related to Implementer's Work.
- 18. Title 24:** California Code of Regulations (CCR), Title 24, also known as the California Building Standards Code (composed of 12 parts). Title 24, Part 6 sets forth California's energy efficiency standards for residential and nonresidential buildings and was established in 1978 in response to a legislative mandate to reduce California's energy consumption. The standards are updated periodically to allow consideration and possible incorporation of new energy efficiency technologies and methods. Title 24, Part 6 is the focus of the Work under this Contract.
- 19. Work:** Any and all obligations of Implementer to be performed pursuant to and during the term of the Contract, any revision to the Contract, or a subsequent Contract or Contract Addendum incorporating this Statement of Work. The Work will include, but may not be limited to, the tasks described in Section 5 of this Statement of Work.

## SECTION 2: OBJECTIVES

In order to more accurately track energy usage and assure facilities achieve maximum efficiency, the Implementer will develop policies and processes to promote benchmarking and commissioning/retro-commissioning, including deploying a Utility Manager System, and will develop an energy action plan for adoption.

### **SECTION 3: GENERAL REQUIREMENTS**

**A. Notice to Proceed (“NTP”):** Implementer may start Work only upon the occurrence of each of the following:

1. Implementer receives the Contract;
2. Implementer provides to the CPM a signed acknowledgement form of the Contract; and
3. CPM provides to Implementer written approval to proceed.

**B. Goals:** The primary goal of the Program is to achieve the objectives and Performance Indicators set forth herein, in the time frame herein. SCE will regularly review the implementation schedule (deliverables, delivery dates, etc.) contained herein against actual Work performed by Implementer to assess the Program’s progress.

### **SECTION 4: SCHEDULE OR TASKS DELAYS**

If the schedule or a task (including achievement of goals as outlined herein) is delayed for any reason, Implementer has the responsibility to notify the CPM in writing within thirty (30) Business Days. SCE may accept the delay, allow time for the remedy of the delay, reduce both the budget and the Work, or terminate the Contract within thirty (30) Business Days following receipt of any written notice of delay from Implementer.

### **SECTION 5: STATEMENT OF WORK**

The Work for each of the CEESP Goals and associated tasks are described herein:

#### **Task 1 - Program Ramp-up**

**A. Attend Program Kick-off Meeting:** Implementer’s representative(s) will attend a half-day Program kick-off meeting with the CPM to discuss Program logistics, marketing coordination, evaluation, monitoring and verification coordination, invoicing requirements, scope of Work, and any remaining Contract issues at an SCE -designated location. To avoid duplication and unnecessary expenditures, CPM will provide Implementer with information and guidance regarding currently available resources (e.g., available templates, energy action plans and climate action plans) to be used by the Implementer in assessing pre-existing resources.

Implementer’s representative will attend the Program kick-off meeting at a time and place to be determined by SCE that does not involve overnight travel by Implementer personnel after the issuance of the NTP.

**B. Program Data, Invoicing, and Reporting Tool Training:** The Implementer will attend a half-day workshop (Webcast) that provides training on the use of SCE invoicing and reporting tool (“IR Tool”). The Implementer will attend IR Tool training at a time and place to be determined by SCE that does not involve overnight travel by Implementer personnel after the issuance of the NTP.

<b>Task 1 Deliverable(s)</b>	<b>Due Date(s)</b>
1. Attend a half-day Program Kick-off Meeting	Determined by SCE after the issuance of the NTP.
2. Attend a half-day IR Tool training session and ongoing IR Tool update training.	Determined by SCE after the issuance of the NTP or notification of IR Tool program changes.
3. Delivery flat files (first draft) to CPM for review and approval.	IR Tool training plus 5 Calendar Days.
4. Delivery of flat files (final draft) to CPM for review and approval.	IR Tool training plus 10 Calendar Days.

**Task 2 - Strategic Plan Goal 3**

*Strategic Plan Goal 3: “Local governments lead by example with their own facilities and energy usage practices.”*

- Task 2.A. (Strategic Plan Task 3.1.1): “Develop energy benchmarking policies and procedures to enable ongoing benchmarking of all local government facilities.”
- Task 2.B. (Strategic Plan Task 3.1.2): “Set up a “Utility Manager” computer program to track municipal usage. Identify need for sub-metering to plan, budget and manage bills.”
- Task 2.C. (Strategic Plan Task 3.2.1): “Develop/adopt an energy chapter for City/ County climate or energy action plan.”
- Task 2.D. (Strategic Plan Task 3.2.4): “Develop commissioning/retro-commissioning policies for municipal facilities.”

**A. Develop Energy Benchmarking Policy:** The Implementer will develop and facilitate the adoption by the Implementer of an energy benchmarking policy for all its municipal buildings (“Benchmarking Policy”). As an initial step in developing the Benchmarking Policy, the Implementer will review and assess existing energy benchmarking policies of

peer municipalities and prepare a report of findings from this review, and a plan for developing and facilitating the adoption of the Benchmarking Policy based on the information gained from the assessment. (“Benchmarking Policy Assessment and Planning Report”).

The Benchmarking Policy will, at a minimum, describe the benchmarking process that will be undertaken and the systematic categorization process for all municipal buildings to enable efficient benchmarking, address how frequency of data updates, and clearly identify the implementation process to assure the data is integrated into the Implementer’s operational decisions, including a discussion of the establishment of appropriate U.S. Environmental Protection Agency (EPA) ENERGY STAR® Portfolio Manager and Utility Manager System accounts, coordination with SCE for the download of utility bill data, analysis of data and recommendations for energy efficiency improvements.

The Implementer will document the process for gathering and incorporating stakeholder input to the development of the Benchmarking Policy, including, at a minimum, a list of all events used to gather stakeholder input (e.g., meetings and workshops), including a list of all attendees and respective contact information, and a discussion of how stakeholder input was used in refining the Benchmarking Policy (“Report on Benchmarking Policy Stakeholder Input”). This input will include Implementer staff feedback on the Benchmarking Policy.

The Implementer will develop and implement a plan to share best practices and lessons learned through work on this Task with other local governments. The Implementer will work collaboratively with SCE and other cities under contract to SCE to provide energy benchmarking policies to contribute to a benchmarking policy template based on best practices and lessons learned of all collaborators, as applicable and practicable.

Implementer will provide all materials developed under this task to CPM for review and comment.

### **Task Goals & Objectives**

The Implementer will fulfill the following goals and objectives:

1. Development of Benchmarking Policy for adoption by Implementer.

### **Task Performance Indicators**

The Implementer will, at a minimum, track the following information:

1. Staff feedback on the effectiveness of Benchmarking Policy.

The Implementer will quantitatively assess the value and benefits of the Program through:

1. Regular assessment of the effectiveness of the Benchmarking Policy based on Implementer staff feedback.

The Implementer will provide all materials developed under this task to CPM for review and comment

Task 2-A: Deliverable(s)	Due Date(s)
1. Benchmarking Policy Assessment and Planning Report	NTP plus 60 Calendar Days
2. Draft Benchmarking Policy	NTP plus 180 Calendar Days
3. Final Benchmarking Policy	NTP plus 8 Months
4. Report on Benchmarking Policy Stakeholder Input	NTP plus 7 Months
5. Documentation of adoption of Benchmarking Policy or documentation of why Benchmarking Policy was not adopted and related alternate plans	NTP plus 9 Months
6. Draft plan to share best practices and lessons learned with other local governments	NTP plus 10 Months
7. Final plan to share best practices and lessons learned with other local governments	NTP plus 11 Months
8. Monthly report of tracked Performance Indicators	Monthly with Invoicing Requirements (see Task 3)

- B. Utility Manager System & ENERGY STAR Portfolio Manager:** The Implementer will establish the appropriate ENERGY STAR Portfolio Manager accounts, as described in the Benchmarking Policy to enable near-term municipal usage tracking and benchmarking procedural training

The Implementer will select and deploy a Utility Manager System for its facilities. The Utility Manager System will provide tools to track energy use, achieve energy cost savings, and set up a system to measure success in reducing energy use and greenhouse gas emissions. Implementer will ensure that the selected Utility Manager System will allow users to review and analyze energy usage data, allowing for analysis of Program success and ways to maximize all available cost and energy savings opportunities. The Utility Manager System will provide for the use of sub-meters to track the energy usage of Implementer facilities. Funding for sub-metering through the Contract is allowable for



a whole building that is part of a Campus. Funding for sub-metering through the Contract is **not** allowable for collecting usage from a selected space in a building, e.g., a mainframe computer room.

As an initial step in the Utility Manager System selection process, the Implementer will assess Utility Manager System solutions used by other peer municipalities, and the process these municipalities used to select and install such software. The Implementer will also assess the possibility of implementing the Los Angeles County enterprise energy management information system (EEMIS) as its Utility Manager System. The Implementer will demonstrate its ability to support collaboration between itself and Los Angeles County in accomplishing this goal. The Implementer will prepare a report on the findings of this assessment and a plan for procuring and deploying the selected Utility Manager System ("Utility Manager System Assessment and Planning Report"). The Utility Manager System Assessment and Planning Report will include, at a minimum, an assessment of at least one available Utility Manager System, Utility Manager System selection criteria, description of the Utility Manager System selected (including pros and cons of the selected Utility Manager System, and all aspects of its use), discussion and list of the needs identified for submetering, plans for procuring and deploying the selected Utility Manager System, and plans for sustaining the Utility Manager System activity beyond the Program period. As part of the deployment of the Utility Manager System, Implementer will use the Utility Manager System to regularly populate its ENERGY STAR Portfolio Manager benchmarking system. In the early stages, however, Implementer will populate the ENERGY STAR Portfolio Manager without the Utility Manager System to ensure staff training and procedures for the Benchmarking Policy can be conducted.

The Utility Manager System Assessment and Planning Report will contain sufficient information to guide the Utility Manager System installation, including documentation of the existing hardware capability, a determination of whether the Implementer has the existing capability to run the Utility Manager System, description of how sub-meters will be utilized to track the energy usage of Implementer facilities and recommendations of any necessary hardware purchases. Additionally, the Utility Manager System Assessment and Planning Report will include a list of all funding sources and amounts funded by each non-SCE source, if any, to implement the Utility Manager System and a contingency plan if there are delays or shortfalls in receiving the non-SCE funding. The Utility Manager System Assessment and Planning Report will also include a plan for assessing impacts, values and benefits of the Utility Manager System, as specified below. The Utility Manager System Assessment and Planning Report will include the following sections:

- A Utility Manager System procurement plan, including the procurement of the required networking software capability;
- A data acquisition and data transfer plan into the Utility Manager System;
- Identification of the meter/sub-meter data requirements, as appropriate;
- A training plan for Utility Manager System users (including audience, scope, schedule, and curriculum description);
- A Utility Manager System maintenance and sustainability plan;
- A Utility Manager System funding list and contingency plan for funding delays or shortfalls;
- A detailed description of the roles and responsibilities for the Implementer and the Utility Manager System provider;
- A detailed discussion of the Implementer's ability to support collaboration between itself and Los Angeles County in implementing the Los Angeles County EEMIS, if this is the Utility Manager System selected for implementation; and
- A plan for assessing impacts, values and benefits of the Utility Manager System, including, at a minimum:
  - Assessment of carbon emissions pre-and post-Utility Manager System installation;
  - Assessment of accuracy of budgets and forecasts pre-and post-Utility Manager System installation; and
  - Assessment of avoided costs pre-and post-Utility Manager System installation.

The Implementer will work with the selected Utility Manager System provider to obtain detailed cost specifications for the procurement of the Utility Manager System, and to develop the Utility Manager System procurement agreement ("Utility Manager System Agreement") to be executed by the selected Utility Manager System provider and the Implementer. The Utility Manager System Agreement will specify the terms and conditions for purchasing the rights to use the Utility Manager System, transferring data into the Utility Manager System, and maintaining the Utility Manager System. The Utility Manager System Agreement will also include a complete description of the responsibilities for all parties. After the Utility Manager System Agreement has been executed, all activities required to make the Utility Manager System functional for the Implementer may proceed.

Implementer will work with the selected Utility Manager System provider to populate the Utility Manager System database and generate reports of energy consumption. Activities will include but are not limited to the following:

- Obtaining and transferring to the Utility Manager System database all relevant facility information;
- Acquiring from SCE billing data and consumption data from existing sources for Implementer facility billing accounts;
- Testing the Utility Manager System database through the submission of initial data and implementing any required modifications; and
- Generating periodic reports on energy usage.

The Implementer will prepare a report documenting the completed installation of the Utility Manager System and status of ongoing Utility Manager System activity (“Utility Manager System Installation Report”). The Utility Manager System Installation Report will include, at a minimum, documentation of completion of the initial Utility Manager System data acquisition, data transfer and report generation activities, and status of ongoing Utility Manager System data acquisition, data transfer and report generation activities.

The Implementer will also develop a related case study (“Utility Manager System Case Study”). The Utility Manager System Case Study will analyze reductions in energy consumption, carbon emissions, and avoided costs and other financial impacts for baseline or energy usage prior to the implementation of these tools, and energy use approximately one year after Program launch, and three months prior to Program end.

The Implementer will develop and implement a plan to share best practices information and lessons learned regarding the Utility Manager System for municipal facilities with other local governments and agencies, including but not limited to the South County Energy Efficiency Partnership (SCEEP) local government partners, as appropriate and requested by CPM.

Implementer will provide all materials developed under this task to CPM for review and comment.

### **Task Goals & Objectives**

The Implementer will fulfill the following goals and objectives:

1. Establish appropriate U.S. EPA ENERGY STAR Portfolio Manager accounts;
2. Leverage existing resources;

3. Evaluate the most appropriate Utility Manager System solutions;
4. Install selected Utility Manager System;
5. Provide Implementer staff with Utility Manager System training, review and analysis of data and recommendations on how data can be used to improve facility operations;
6. Assess the opportunities for energy savings by tracking energy usage;
7. Obtain and analyze data on energy consumption, relative cost of energy and carbon emissions; and
8. Prepare and share information and lessons learned with peer municipalities.

**Task Performance Indicators**

The Implementer will, at a minimum, track the following information:

1. Utility Manager System training information including date and location of training session, and names, roles and contact information of attendees;
2. Number of municipalities and agencies receiving Utility Manager System Case Study;
3. Municipal-wide energy usage;
4. Energy usage per meter of participating facilities;
5. Energy usage for highest energy-consuming facilities; and

The Implementer will quantitatively assess the value and benefits of the Program through:

1. Assessing energy cost and consumption by utility type and provider pre-and post-Utility Manager System installation;
2. Assessing site-by-site facility energy usage comparisons pre-and post-Utility Manager System installation;
3. Assessing energy cost per square foot and cost per employee pre-and post-Utility Manager System installation; and

4. Estimating energy and cost savings resulting from efficiency Measures the Implementer will plan to implement based on findings from Utility Manager System.

Task 2 Deliverable(s)	Due Date(s)
1. Documentation of establishment of U.S. EPA ENERGY STAR Portfolio Manager accounts	NTP plus 30 Calendar Days
2. Draft Utility Manager System Assessment and Planning Report	NTP plus 60 Calendar Days
3. Final Utility Manager System Assessment and Planning Report	NTP plus 90 Calendar Days
4. Utility Manager System Agreement & documentation of procurement of Utility Manager System (invoice for purchase of Utility Manager System or if the County of Los Angeles' EEMIS is selected, agreement between Implementer and the County of Los Angeles to implement EEMIS)	NTP plus 9 Months
5. Draft Utility Manager System Installation Report	NTP plus 12 Months
6. Final Utility Manager System Installation Report	August 1, 2012
7. Draft Utility Manager System Case Study	September 1, 2012
8. Final Utility Manager System Case Study	October 1, 2012
9. Draft Utility Manager System information dissemination plan	NTP plus 13 Months
10. Final Utility Manager System information dissemination plan	NTP plus 14 Months
11. Monthly reports from Utility Manager System	Monthly with Invoicing Requirements (see Task 3), beginning NTP plus 13 Months
12. Monthly reports of tracked Performance Indicators not included in reports from Utility Manager System	Monthly with Invoicing Requirements (see Task 3)

**C. Develop Energy Action Plan:** The Implementer will develop an energy action plan (“EAP”) and facilitate its adoption by the Implementer. The Implementer will conduct a

study of how each Implementer-owned building and other major users of utility resources consume electricity, and investigate and assess methods appropriate for Implementer use to reduce consumption of electric energy resources and to reduce greenhouse gas (“GHG”) emissions through energy efficiency Measures (“EAP Study”). The EAP Study will include an inventory of Implementer buildings and other Implementer-owned electric-energy-using equipment such as streetlights and traffic signals, along with the average energy use of each. The EAP Study will also include a review and assessment of energy action plans adopted by peer municipalities and resources provided by local government support organizations such as ICLEI, and a plan for the development and adoption of the EAP.

The Implementer will use findings from the EAP Study as a basis for the EAP to provide recommendations for methods to decrease resource consumption by all item types inventoried, as well as the estimated kWh and GHG emissions savings potential and financial payback tables for each recommended method and/or Measure. The EAP will include specific information on how to gauge its effectiveness and whether it will meet the Implementer’s energy use and GHG emission reduction goals. The Implementer will, at a minimum, use ICLEI or other SCE-approved industry standards to develop the EAP to ensure that the EAP is both effective for the Implementer and its community, as well as comparable to plans being developed regionally and nationally. The EAP will include a description of its purpose and how it will be used to help Implementer facilities managers plan future energy efficiency retrofits and upgrades. The EAP will be suitable for use for future capital improvement evaluation and budget planning.

The Implementer will conduct public workshops to solicit and gather input on the EAP. The Implementer will document the process for gathering and incorporating stakeholder input to the development of EAP, including, at a minimum, a list of all events used to gather stakeholder input (e.g., meetings and workshops), including a list of all attendees and respective contact information, and a discussion of how stakeholder input was used in refining the EAP (“Report on EAP Stakeholder Input”)

Once completed, the Implementer will make the EAP available to SCE and other local governments. The Implementer will develop and implement a plan to share best practices and lessons learned through work on this Task with other local governments, and will identify approaches to EAP development that can be replicated by other cities and counties that will facilitate its completion and approval.

Implementer will provide all materials developed under this task to CPM for review and comment.

### **Task Goals & Objectives**

The Implementer will fulfill the following goals and objectives:

1. Develop an EAP for adoption by the Implementer that:
  - a. Recognizes energy efficiency as a high-priority energy resource;
  - b. Makes a strong, long-term commitment to implement cost-effective energy efficiency as a resource;
  - c. Broadly communicates the benefits of and opportunities for energy efficiency;
  - d. Provides for sufficient, timely, and stable funding to deliver energy efficiency where cost-effective; and
  - e. Modifies policies to align utility Incentives with the delivery of cost-effective energy efficiency.

**Task Performance Indicators**

The Implementer will, at a minimum, track the following information:

1. Publication date of the EAP Study;
2. Adoption of the EAP by the Implementer; and
3. Information required to conduct the assessments as listed below.

The Implementer will quantitatively assess the value and benefits of the Program through the estimated EAP impact on:

1. Progress toward municipal energy efficiency goals: kWh saved;
2. Changes in governance structure, e.g., establishment of Implementer “green team”;
3. Installation of new energy efficiency technologies and related energy savings;
4. Establishment of energy management policies and procedures called for in EAP; and
5. Other items to be determined in the development of the EAP.

Task 2.C. - Deliverable(s)	Due Date(s)
1. Draft EAP Study	NTP plus 180 Calendar Days

2. Final EAP Study	NTP plus 7 Months
3. EAP Outline	NTP plus 8 Months
4. Draft EAP	NTP plus 9 Months
5. Final EAP	NTP plus 10 Months
6. Report on EAP Stakeholder Input	NTP plus 10 Months
7. Resolution adopting EAP by Implementer or documentation of why EAP was not adopted and related alternate plans	NTP plus 12 Months
8. Draft plan to share best practices and lessons learned with other local governments	NTP plus 13 Months
9. Final plan to share best practices and lessons learned with other local governments	NTP plus 14 Months
10. Monthly report of tracked Performance Indicators	Monthly with Invoicing Requirements (see Task 3)

**D. Develop Commissioning/Retro-commissioning Policy:** The Implementer will develop and facilitate the adoption by the Implementer of a policy for integration of commissioning and retro-commissioning (“Cx/RCx”) into Implementer municipal operations (“Cx/RCx Policy”). The Implementer will conduct a survey of Implementer facilities to identify optimal candidate buildings for Cx/RCx work and to use as the basis for the development of the Cx/RCx Policy by drawing general lessons about the appropriateness of Cx/RCx for different building types. Implementer will review existing resources to aid in the development of the Cx/RCx Policy, including the Cx/RCx policies developed by the California Commissioning Collaborative at <http://www.cacx.org/>. The Implementer will prepare a report of findings from the above-described Implementer facility survey and this review, and a plan for developing, facilitating the adoption of, and training Implementer staff on the Cx/RCx Policy based on the information gained from the assessment (“Cx/RCx Policy Assessment and Planning Report”). The Cx/RCx Policy Assessment and Planning Report will also include a discussion of the methodology used to identify prime candidate buildings for Cx/RCx opportunities, which is applicable across jurisdictional lines, and includes identification of both optimal and inappropriate general building types for Cx/RCx, and criteria for evaluation (including such items as energy cost, systems complexity, occupancy, ownership, and maintenance issues).

The Implementer will conduct stakeholder events to solicit and gather input on the Cx/RCx Policy. The Implementer will document the process for gathering and incorporating stakeholder input to the development of the Cx/RCx Policy, including, at a minimum, a list of all events used to gather stakeholder input (e.g., webinars, meetings



and workshops), including a list of all participants and respective contact information, and a discussion of how stakeholder input was used in refining the Cx/RCx Policy (“Report on Cx/RCx Policy Stakeholder Input”). The Cx/RCx Policy will include, at a minimum, definitions of “commissioning” and “retro-commissioning,” descriptions of the benefits and purpose of each, and how each activity will be conducted by municipal operations staff to maximize building efficiencies, indication of the lead expert within Implementer staff, an assessment of Cx/RCx opportunities for municipal facilities based on SCE’s current Cx/RCx Incentive guidelines, and the long-term objectives of the Cx/RCx Policy. The Cx/RCx Policy will focus on both behaviorally-oriented and hardware-based, non-capital, operations, and maintenance opportunities in municipal buildings’ mechanical, electrical, and control systems to achieve cost-effective energy savings and peak demand reduction. Though energy savings and peak demand reduction will be priorities of the Cx/RCx Policy, Cx/RCx analyses will also be designated to identify other benefits such as reduced maintenance costs, improved comfort, indoor air quality, increased property value, and workforce productivity.

The Implementer will ensure that Implementer staff is fully trained on the Cx/RCx Policy and on best practices for implementing a Cx/RCx program, and will prepare training materials for this purpose.

The Implementer will develop and implement a plan to share best practices and lessons learned through work on this Task with other local governments.

Implementer will provide all materials developed under this task to CPM for review and comment.

### **Task Goals & Objectives**

The Implementer will fulfill the following goals and objectives:

1. Development and adoption of an Cx/RCx Policy that will allow for:
  - a. Identification of building operation, control, and maintenance problems that prevent buildings from performing optimally and in alignment with how the buildings are currently used;
  - b. Measurable energy savings and reductions in operation and maintenance costs for the building;
  - c. Improved equipment performance;
  - d. Improved indoor air quality;

- e. Increased worker satisfaction and productivity;
- f. Complete and accurate documentation of building systems; and
- g. Training Implementer staff on the Cx/RCx Policy.

**Task Performance Indicators**

The Implementer will, at a minimum, track the following information:

1. Number and titles/roles and contact information of Implementer staff trained on the Cx/RCx Policy and implementation.

The Implementer will quantitatively assess the value and benefits of the Program through:

1. Analyzing energy savings, reduced demand in kWh and reduced GHG emissions attributable to the adoption of the Cx/RCx Policy.

Task 2.D - Deliverable(s)	Due Date(s)
1. Cx/RCx Policy Assessment and Planning Report	NTP plus 120 Calendar Days
2. Cx/RCx Policy Outline	NTP plus 180 Calendar Days
3. Draft Cx/RCx Policy	NTP plus 8 Months
4. Final Cx/RCx Policy	NTP plus 10 Months
5. Report on Cx/RCx Policy Stakeholder Input	NTP plus 11 Months
6. Documentation of approval of Cx/RCx Policy by County or documentation of why Cx/RCx Policy was not approved and related alternate plans	NTP plus 14 Months
7. Draft Implementer staff Cx/RCx training materials	NTP plus 11 Months
8. Final Implementer staff Cx/RCx training materials	NTP plus 12 Months
9. Draft plan to share best practices and lessons learned with other local governments	NTP plus 15 Months
10. Final plan to share best practices and lessons learned with other local governments	NTP plus 16 Months
11. Monthly report of tracked Performance Indicators	Monthly with Invoicing Requirements (see Task 3, below)

**Task 3 – Invoicing and Reporting**

- A. IR Tool:** After SCE provides Implementer training on the IR Tool, the Implementer will utilize the IR Tool, which serves three primary purposes:
  1. Enables Implementer to provide SCE with required Program information;
  2. Provides CPM the capability to access Implementer’s Program information and create reports; and
  3. Provides miscellaneous reporting support for SCE’s internal and CPUC reporting requirements.
  
- B. Submission of Information into IR Tool:** Implementer will update the IR Tool on a Monthly basis in accordance with requirements delineated in Appendix A (Monthly Invoicing and Reporting Requirements). Implementer will work collaboratively with the CPM in tailoring the flat files for the Program.
  
- C. Monthly Invoicing and Reporting:** All required Monthly invoice reports can be generated via the IR Tool. Implementer will be responsible for implementing, adhering to, and the submission of, the items as described in Appendix A (Monthly Invoicing and Reporting Requirements) of this Statement of Work, attached hereto and incorporated by reference. The invoice reporting requirements may be amended from time to time, at which time SCE will notify Implementer of the changes and issue a new Appendix A. Implementer will implement these modifications in a timely manner and they will be reflected in future invoice documentation.
  
- D. SCE’s Regulatory Reporting:** Implementer will implement, adhere to, and submit the items as described in Appendix B (Regulatory Reporting Requirements), attached hereto and incorporated herein, as SCE requests. The CPUC reporting requirements may be amended from time to time, at which time SCE will notify Implementer of the changes and issue a new Appendix B. Implementer will implement these modifications in a timely manner and they will be reflected in future invoice documentation.

Implementer acknowledges that SCE may, in its sole discretion, require Implementer to provide such other reports or documentation that SCE deems appropriate or necessary (“Ad Hoc Reports”). Implementer will comply with any request for such Ad Hoc Report(s) within a reasonable time or, if applicable, within the time requested by SCE.

Task 3 Deliverable(s)	Due Date(s)
1. Prepare and submit Monthly invoices and supporting documentation to SCE.	Monthly, by the 15th Calendar Day for Work completed the preceding

	Month
2. Prepare and submit Monthly regulatory report, including flat files and Monthly deliverable work sheet.	Monthly, by the 15th Calendar Day for Work completed the preceding Month
3. Prepare and submit quarterly regulatory reports (Appendix B) to SCE	Quarterly, by the 30 <sup>th</sup> Calendar Day for Work completed the preceding quarter, through October 31, 2012
4. Prepare and submit Ad Hoc Reports	As SCE requests and/or requires
5. Prepare and submit final invoice and Program Report to SCE	By November 15, 2012 for final invoice and by October 31, 2012 for final Program Report

**Task 4 - Ramp-Down and Shut-Down Program**

**A. Program Ramp-Down:** Implementer will provide SCE with a ramp-down plan for the Program. To ensure complete Program shutdown, the Program ramp-down period will commence no later than September 1, 2012. Implementer's plan for Program ramp-down will take into consideration that all Work under Tasks 1-5, except preparation of the final invoice, must be completed by October 15, 2012.

Implementer will resolve all outstanding Program issues and begin preparation of the Final Report beginning September 1, 2012.

**B. Program Shutdown:** Implementer will provide to the CPM a plan with procedures on shutting down the Program.

All Program operations will be completely shut down after the last day of the Contract effective period.

Task 4 Deliverable(s)	Due Date(s)
1. Submit detailed ramp-down and shut-down plans and schedules to CPM for review and approval	No later than September 1, 2012
2. Resolve outstanding Program issues and begin preparation of Final Report	No later than September 1, 2012
3. Begin Program ramp-down	September 1, 2012, or upon CPM express written approval
4. Complete all Work under Tasks 1-5, except	No later than October 15, 2012

preparation of the final invoice	
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**Task 5 - Submit Final Program Report**

After Program shut-down and follow-up issues have been completed and resolved, the Implementer will submit a final report that reviews the Program’s progress and accomplishments through October 15, 2012 (“Final Report”). At a minimum, the Final Report will cover:

- A. Goal Attainment:** Documentation that substantiates the Implementer’s achievement of the objectives, Program/Task Performance Indicators, and deliverables for the Contract.
- B. Program Achievement Discussion:** Were the goals/objectives met? Were the Program Performance Indicators achieved? Complete Program achievement for each Program/Task Performance Indicator and deliverable indicating the measureable Program accomplishments.
- C. Program Challenges:** What were the significant obstacles that were overcome?
- D. Lessons Learned:** Could a Program of this scale have accomplished more?
- E. Program Improvement Recommendations:** What improvements could have been made to help the Program be even more successful?
- F. Program Next Step:** Should the Program a) be mainstreamed, b) continued to be developed or, c) ended.

Task 5 Deliverable(s)	Due Date(s)
1. Submit draft Final Report for SCE review and approval	No later than October 15, 2012
2. Submit revised Final Report for SCE review and approval	The earlier of October 31, 2012 or within 2 weeks of receipt of SCE comments

**SECTION 6: PAYMENT**

- A. Payment Terms:** The Implementer Budget will utilize 100% time and material based payments (“T&M payments”). Payment of the Implementer’s budget will be based on receipt by SCE of the deliverables set forth herein. All payments will be in accordance with the Billing Rates set forth in Table 1, below and Appendix C (Billing Schedule) and be subject to the Contract and consistent with the budget breakdown

set forth herein. Payment will be based on meeting deliverables and due dates set forth in Section 5 of this Statement of Work.

**B. Implementer Budget Limit:** Under no event will Implementer exceed the total amount budgeted by SCE for this Contract of **\$492,766**.

**Table 1: Implementer T&M Fully Burdened Hourly Billing Rate (See Section 10.2.2 for more information)**

Implementer Job Function	Hourly Rate for years 2010-2012 (\$/Hour)	% of Total Hours
Senior Consultant	\$145.00	NA
Program Director / Oversight	\$145.00	3%
Program Manager	\$125.00	18%
Senior Engineer	\$125.00	10%
Project Engineer/IT Engineer	\$105.00	22%
Senior Analyst	\$95.00	18%
Project Analyst	\$70.00	12%
Maintenance Staff	\$70.00	12%
Admin	\$50.00	5%
<b>Average Rate (Implementer Staff)</b>	<b>\$98.85</b>	<b>100%</b>

**Table 2: Implementer Budget Breakdown**

Item	%	\$
1) Administration	9.8%	\$48,366
2) Marketing/Outreach Costs	1.6%	\$8,000
3) Direct Program Costs	88.6%	\$438,400
<b>Total Implementer Budget: 1) + 2) + 3)</b>	<b>100%</b>	<b>\$492,766</b>

**SECTION 7: PERFORMANCE INDICATORS**

SCE will, at a minimum, monitor the Work based on the following Program Performance Indicators:

- A. Progress made against the goals, deliverables, and due dates above; and

B. Actual performance versus predicted performance as outlined herein.

## **Appendix A: Monthly Invoicing and Reporting Requirements**

### **A. Requirements**

Monthly hard copy invoices are required at the 15th Calendar Day of each Month for Work completed the preceding Month with invoicing supporting files described herein. These invoices and supporting documents are for Work performed by the Implementer and all Subcontractors.

On November 15, 2012 or sooner, Implementer will submit a final invoice associated with Program services that are tied directly to delivery of the Program deliverables. No Work except that associated with preparing the Final Report (Task 6) and final invoice will be performed after October 15, 2012. Subsequent invoices will only contain expenses associated with closing out the Program (i.e., administration expenses, etc.) that are not directly tied to delivery of the Program goals.

### **B. Procedures**

1. Implementer uploads their Customer flat files into the IR Tool. The IR Tool creates a draft invoice for Implementer's review.
2. CPM reviews the draft invoice and advises the Implementer to re-submit their invoice if requested. Implementer is required to submit the following files to SCE by the 15th Calendar Day of each Month with each of their invoice submission:
  - Invoice – Hard Copy and electronic copy uploaded into the IR Tool;
  - Program Tracking Flat File – Uploaded electronically into the IR Tool;
  - Financial Flat File – Uploaded electronically into the IR Tool;
  - Monthly Narrative - Hard Copy with invoice submission;
  - Deliverable Table – Uploaded electronically.
  - Allowable Cost Table (see Appendix B) – Hard Copy with invoice submission; and
  - Supporting documentation – Uploaded electronically into the IR Tool.
3. Upon approval by CPM, the invoice is paid.

### **C. Monthly Narrative**

The Monthly narrative will include a discussion on the following Program activities occurring during the Month:



- Administrative activities;
- Marketing activities;
- Direct Implementation activities;
- Implementer's assessment of Program performance and Program status (is the Program on target, exceeding expectations, or falling short of expectations, etc.);
- Discussion of changes in Program emphasis (new Program elements, less or more emphasis on a particular delivery strategy, Program elements discontinued, Measure discontinued, etc.);
- Discussion of near term plans for Program over the coming Months (i.e., marketing and outreach efforts that are expected to significantly increase Program participation, etc.);
- Changes to staffing and staff responsibilities, if any;
- Changes to contacts, if any;
- Changes to Subcontractors and Subcontractor responsibilities, if any; and
- Number of Program complaints received.

## **Appendix B: Regulatory Reporting Requirements**

### **1. Program Reporting**

Implementer will provide SCE with the requisite information on the prior Month's activities, accomplishments and expenditures related to its respective Work obligations, for purposes of preparing any reports required of SCE by the CPUC including Quarterly and Annual Reports. Requirements for these reports may change per the direction of the CPUC or the CPUC's Energy Division. The current reporting requirements are as follows:

### **2. Quarterly Report**

Implementer will provide SCE with the requisite information to be compiled for the quarterly portfolio reporting.

#### **2.1. Expenditures for the Program per cost; Section 4, below contains a list of allowable costs.**

- a. CPUC authorized budget
- b. Operating Budget
- c. Total Expenditures
  - Administrative Cost
  - Marketing/Advertising/Outreach Costs
  - Direct Implementation Cost

#### **2.2. Program Narratives – For the Program, a description of the Program activities occurring during the quarter.**

- a. Administrative activities
- b. Marketing activities
- c. Direct Implementation activities
- d. Implementer's assessment of Program performance and Program status (is the Program on target, exceeding expectations, or falling short of expectations, etc.)
- e. Discussion of changes in Program emphasis (new Program elements, less or more emphasis on a particular delivery strategy, Program elements discontinued, Measure discontinued, etc.)
- f. Discussion of near term plans for Program over the coming Months (i.e., marketing and outreach efforts that are expected to significantly increase Program participation, etc.)
- g. Changes to staffing and staff responsibilities, if any
- h. Changes to contacts, if any
- i. Changes to Subcontractors and Subcontractor responsibilities, if any
- j. Number of Program complaints received

#### **2.3. Implementer will provide additional data or information as required by the CPUC.**

### 3. Annual Reports

Implementer will provide SCE with the requisite information to be compiled for the annually portfolio reporting.

**3.1. Expenditures** for the Program per cost; Section 4, below contains a list of allowable costs.

- a. CPUC authorized budget
- b. Operating Budget
- c. Total Expenditures
  - Administrative Cost
  - Marketing/Advertising/Outreach Costs
  - Direct Implementation Cost

**3.2. Program Narratives** – For the Program, a description of the Program activities occurring during the year.

- a. Administrative activities
- b. Marketing activities
- c. Direct Implementation activities
- d. Implementer's assessment of Program performance and Program status (is the Program on target, exceeding expectations, or falling short of expectations, etc.)
- e. Discussion of changes in Program emphasis (new Program elements, less or more emphasis on a particular delivery strategy, Program elements discontinued, etc.)
- f. Discussion of near term plans for Program over the coming Months (i.e., marketing and outreach efforts that are expected to significantly increase Program participation, etc.)
- g. Changes to staffing and staff responsibilities, if any
- h. Changes to contacts, if any
- i. Changes to Subcontractors and Subcontractor responsibilities, if any
- j. Number of Program complaints received

**3.3. Implementer will provide additional data or information as required by the CPUC.**

4. Allowable Costs

<b>Allowable Costs Table</b>	
The cost items listed on the Allowable Costs sheet are the only costs that can be claimed for ratepayer- funded energy efficiency work. The costs reported should be only for costs actually expended. Any financial commitments are to be categorized as commitments. If the reporting entity does not have a cost as listed on the cost reporting sheet, then no cost is to be reported for that item. These Allowable Cost elements are to be used whenever costs are invoiced or reported to the CPM. If there is a desire to include additional Allowable Cost elements, the CPM should be contacted in order to seek approval from the CPUC.	
	3/30/2006
<b>Cost Categories</b>	<b>Allowable Costs</b>
<p><b>Administrative Cost Category</b></p> <p>Note 1: These allowable costs are to be allocated towards the direct implementation category.</p> <p>Note 2: Travel and Conference Fees associated with Implementer Labor (e.g., Program Design, Program Development, Program Planning, and Program/Project Management) are to be allocated towards the direct implementation category.</p>	<b>Managerial and Clerical Labor</b>
	Implementer Labor – Clerical
	Implementer Labor - Program Design
	Implementer Labor - Program Development
	Implementer Labor - Program Planning
	Implementer Labor - Program/Project Management
	Implementer Labor - Staff Management
	Implementer Labor - Staff Supervision
	<b>Human Resource Support and Development</b>
	Implementer Labor- Human Resources
	Implementer Labor - Staff Development and Training
	Implementer Benefits - Administrative Labor
	Implementer Benefits - Direct Implementation Labor
	Implementer Benefits - Marketing/Advertising/Outreach Labor
	Implementer Payroll Tax - Administrative Labor
	Implementer Payroll Tax - Direct Implementation Labor
	Implementer Payroll Tax - Marketing/Advertising/Outreach Labor
	Implementer Pension - Administrative Labor
	Implementer Pension - Direct Implementation Labor
	Implementer Pension - Marketing/Advertising/Outreach Labor
	<b>Travel and Conference Fees</b>
	Implementer - Conference Fees
	Implementer Labor - Conference Attendance
	Implementer - Travel – Airfare
	Implementer - Travel – Lodging
	Implementer - Travel – Meals
	Implementer - Travel – Mileage
	Implementer - Travel – Parking
	Implementer - Travel - Per Diem for Misc. Expenses
	<b>Overhead (General and Administrative) - Labor and Materials</b>
	Implementer Equipment Communications
	Implementer Equipment Computing
	Implementer Equipment Document Reproduction

<b>Allowable Costs Table</b>	
<p>The cost items listed on the Allowable Costs sheet are the only costs that can be claimed for ratepayer- funded energy efficiency work. The costs reported should be only for costs actually expended. Any financial commitments are to be categorized as commitments. If the reporting entity does not have a cost as listed on the cost reporting sheet, then no cost is to be reported for that item. These Allowable Cost elements are to be used whenever costs are invoiced or reported to the CPM. If there is a desire to include additional Allowable Cost elements, the CPM should be contacted in order to seek approval from the CPUC.</p>	
	<b>3/30/2006</b>
<b>Cost Categories</b>	<b>Allowable Costs</b>
	Implementer Equipment General Office
	Implementer Equipment Transportation
	Implementer Food Service
	Implementer Office Supplies
	Implementer Postage
	Implementer Labor - Accounting Support
	Implementer Labor - Accounts Payable
	Implementer Labor - Accounts Receivable
	Implementer Labor - Facilities Maintenance
	Implementer Labor - Materials Management
	Implementer Labor - Procurement
	Implementer Labor - Shop Services
	Implementer Labor - Administrative
	Implementer Labor - Transportation Services
	Implementer Labor - Automated Systems
	Implementer Labor - Communications
	Implementer Labor - Information Technology
	Implementer Labor - Telecommunications
<b>Marketing/Advertising/Outreach Cost Category</b>	
	Implementer - Bill Inserts
	Implementer - Brochures
	Implementer - Door Hangers
	Implementer - Print Advertisements
	Implementer - Radio Spots
	Implementer - Television Spots
	Implementer - Website Development
	Implementer Labor - Marketing
	Implementer Labor - Media Production
	Implementer Labor - Business Outreach
	Implementer Labor - Customer Outreach
	Implementer Labor - Customer Relations
<b>Direct Implementation Cost Category</b>	
	<b>Financial Incentives to Customers</b>
	<b>Activity - Direct Labor</b>
	Implementer Labor - Facilities Audits
	Implementer Labor - Curriculum Development
	Implementer Labor - Customer Education and Training
	Implementer Labor - Customer Equipment Testing and Diagnostics
	<b>Installation and Service - Labor</b>

<b>Allowable Costs Table</b>	
<p>The cost items listed on the Allowable Costs sheet are the only costs that can be claimed for ratepayer- funded energy efficiency work. The costs reported should be only for costs actually expended. Any financial commitments are to be categorized as commitments. If the reporting entity does not have a cost as listed on the cost reporting sheet, then no cost is to be reported for that item. These Allowable Cost elements are to be used whenever costs are invoiced or reported to the CPM. If there is a desire to include additional Allowable Cost elements, the CPM should be contacted in order to seek approval from the CPUC.</p>	
	<b>3/30/2006</b>
<b>Cost Categories</b>	<b>Allowable Costs</b>
	Implementer Labor - Customer Equipment Repair and Servicing
	Implementer Labor - Customer Equipment Repair and Servicing
	<b>Direct Implementation Hardware and Materials</b>
	Implementer - Direct Implementation Literature
	Implementer - Education Materials
	Implementer - Energy Measurement Tools
	Implementer - Installation Hardware
	Implementer -Audit Applications and Forms
	<b>Rebate Processing and Inspection - Labor and Materials</b>
	Implementer Labor - Field Verification
	Implementer Labor - Rebate Processing
	Implementer - Rebate Applications

**Appendix C: Billing Schedule**



Phase 2\_County of  
Santa Barbara\_Apper

Strategic Plan Task	Task Title	Task ID	Implementer Costs		Subcontractor Costs		Total Program Costs
			Labor	Expenses	Labor	Expenses	
<b>Task 1: Program Ramp-up</b>							
<b>Task 1.1: Not-to-Exceed Budget</b>							
<b>Task 2: Strategic Plan Goals</b>							
<b>A. Develop Energy Benchmarking Policy</b>							
	A.1. Develop Benchmarking Policy Assessment and Planning Report (Deliverable 2.A.1)	3.1.1	\$ 700	\$ 300	\$ 5,000	\$ 6,000	
	A.2. Develop Benchmarking Policy (Deliverables 2.A.2, 2.A.3, 2.A.4 & 2.A.5)	3.1.1	\$ 13,167	\$ 1,000	\$ 26,000	\$ 40,167	
	A.3. Develop plan to share best practices and lessons learned with other local governments (Deliverables 2.A.6 & 2.A.7)	3.1.1	\$ 2,200	\$ 300	\$ 15,680	\$ 18,180	
	A.4. Report Monthly Tracked Performance Indicators (Deliverable 2.A.8)	3.1.1	\$ 2,000	\$ -	\$ 8,000	\$ 10,000	
<b>B. Implement Utility Manager System / Establish ENERGY STAR Portfolio Manager Accounts</b>							
	B.1. Establish ENERGY STAR Portfolio Manager Accounts (Deliverable 2.B.1)	3.1.2	\$ 19,700	\$ 300	\$ 5,000	\$ 25,000	
	B.2. Develop Utility Manager System Assessment and Planning Report (Deliverables 2.B.2 & 2.B.3)	3.1.2	\$ 5,699	\$ 300	\$ 11,000	\$ 16,999	
	B.3. Install & implement Utility Manager System (Deliverables 2.B.4, 2.B.5 & 2.B.6)	3.1.2	\$ 35,000	\$ 5,000	\$ 180,000	\$ 220,000	
	B.4. Develop Benchmarking Case Study (Deliverables 2.B.7 & 2.B.8)	3.1.2	\$ 2,000	\$ -	\$ 6,000	\$ 8,000	
	B.5. Develop plan to share best practices and lessons learned with other local governments (Deliverables 2.B.9 & 2.B.10)	3.1.2	\$ 1,000	\$ -	\$ 4,000	\$ 5,000	
	B.6. Report Monthly Tracked Performance Indicators (Deliverables 2.B.11 & 2.B.12)	3.1.2	\$ 1,500	\$ -	\$ 3,500	\$ 5,000	
<b>C. Develop EAP (Energy Action Plan)</b>							
	C.1. Prepare EAP Study (Deliverables 2.C.1 & 2.C.2)	3.2.1	\$ 2,000	\$ 500	\$ 11,000	\$ 13,500	
	C.2. Develop EAP (Deliverables 2.C.3, 2.C.4, 2.C.5, 2.C.6 & 2.C.7)	3.2.1	\$ 20,500	\$ 4,500	\$ 26,500	\$ 51,500	
	C.3. Develop & Implement EAP Information Dissemination Plan (Deliverables 2.C.8 & 2.C.9)	3.2.1	\$ 2,500	\$ -	\$ 6,000	\$ 8,500	
	C.7. Report Monthly Tracked Performance Indicators (Deliverable 2.C.10)	3.2.1	\$ 1,500	\$ -	\$ 5,000	\$ 5,500	
<b>D. Develop Cx/RCx Policy</b>							
	D.1. Develop Cx/RCx Policy Assessment and Planning Report (Deliverable 2.D.1)	3.2.4	\$ 1,040	\$ 300	\$ 3,000	\$ 4,340	
	D.2. Develop Cx/RCx Policy (Deliverables 2.D.2, 2.D.3, 2.D.4, 2.D.5 & 2.D.6)	3.2.4	\$ 11,000	\$ 1,900	\$ 18,660	\$ 31,560	
	D.3. Develop County staff Cx/RCx training plan and materials (Deliverables 2.D.7 & 2.D.8)	3.2.4	\$ 3,340	\$ 1,500	\$ 5,000	\$ 9,840	
	D.4. Develop plan to share best practices and lessons learned with other local governments (Deliverables 2.D.9 & 2.D.10)	3.2.4	\$ 2,340	\$ -	\$ 4,000	\$ 6,340	
	D.5. Report Monthly Tracked Performance Indicators (Deliverable 2.D.11)	3.2.4	\$ 1,340	\$ -	\$ 5,000	\$ 6,340	
<b>Task 2.1: Not-to-Exceed Budget</b>							
<b>Task 3: Publish and Reporting</b>							
<b>Task 3.1: Not-to-Exceed Budget</b>							
<b>Task 4: Ramp Down and Shutdown Programs</b>							
<b>Task 4.1: Not-to-Exceed Budget</b>							
<b>Task 5: Submittal Program Report</b>							
<b>Task 5.1: Not-to-Exceed Budget</b>							
<b>Grand Total (All Tasks) Not-to-Exceed Budget</b>							
							\$ 492,766
<b>Notes:</b>							
1)	Labor: Implementer shall invoice SCE at the fixed hourly rates for the applicable labor categories stated in the Contract for time spent directly engaged in performance of the Work by Implementer's employees. Such fixed hourly rates shall be inclusive of all of Implementer's overhead costs (including all taxes and insurance), administrative and general fees, and profit.						
2)	Expenses: All reimbursable expenses shall be authorized by SCE in writing prior to the expenditure. Any expenses not so approved by SCE shall not be reimbursed. All expenses shall be charged at cost, without mark-up, and shall be necessary, reasonable and ordinary.						
	a) Material Costs: Material costs shall be substantiated with an invoice stating the unit price, quantity, and other information as required to identify the Work.						
	b) Subcontract Labor Costs: Subcontracted Work shall be charged at the hourly rates actually paid by Implementer, not to exceed the hourly rates set forth in the Contract for Work performed by the Implementer. Implementer shall provide Subcontractor invoices for any Implementer's invoice that includes Subcontractor costs.						
	c) Out-of-Pocket expenses: Miscellaneous costs such as telephone communications, routine copying, electronic mail, facsimiles, computer time and in-house technical software are deemed to be included in Implementer's overhead costs will not be reimbursed.						
	d) Travel Costs: Approved air travel costs shall in no case exceed economy or coach fare, whichever is reasonably available. Automobile travel from Implementer's office to the Jobsite and to SCE's general offices shall be paid at the fixed mileage rate stated in the Contract, or if not stated, at SCE's rate for SCE employees.						
3)	Budget Changes: Changes in the Not-to-Exceed Budgets (highlighted in grey) require a Contract change order. All other changes in the Budget require written authorization from the CPM.						