

Attachment 2

LOCAL GOVERNMENT PARTNERSHIP THIRD-PARTY IMPLEMENTER ENERGY EFFICIENCY PROGRAM

County of Sonoma
Sonoma Public Energy

INSTRUCTIONS FOR ATTACHMENT 2

- This template attempts to re-use the Implementer's RFP response and each section references the corresponding RFP Response Template section as applicable. Please read carefully, as some of the requirement information may have changed.
- Please submit this form as a Microsoft Word file format. Other file formats will not be accepted.
- On the front page and in the header of this document, insert the Local Government Partnership Name of the Implementer and the name of the program.
- PG&E will issue a Contract Work Authorization (CWA) to authorize and administer each 3P Implementer EE Program on an Attachment 2. The CWA enables PG&E to assign a Not To Exceed All Inclusive Program Budget for the duration of the Program Term, provide an approved annual Program funding allowance under the Budget to allow Implementers to submit and receive payment for their invoices and through a CWA change order the Parties can make any other changes mutually agreeable or otherwise required to the 3P Implementer's EE Program.
- Implementers must address each requirement as specified in Attachment 1 in this template or in the Attachment 2 Data Form template.
- The use of charts, graphs, infographics and other visual presentation of information is allowed to aid in the clear and efficient communication of information. Implementer should refrain from using excessively small fonts (less than 11-point) in all narrative responses, charts and figures.
- This document should be formatted on 8.5" x 11" page size, have one-inch margins, utilize Arial 11-point font, and at a minimum have 1.15 line spacing.
- The narrative response form must be saved with the following file name convention:

[FULL LGP NAME] - [PROGRAM NAME] – NARRATIVE.docx
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Example:

AWESOME LGP – LEEN & MEEN EE PROGRAM – NARRATIVE.docx
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1 IMPLEMENTER PROGRAM REQUIREMENTS (ATTACHMENT 1 SECTION 2)

1.1 SUMMARY OF THE LGP 3P PROGRAM (ATTACHMENT 1 SECTION 2.1)

County of Sonoma Energy and Sustainability Division will develop and offer the “Sonoma Public Energy” Program. The primary program offering will come in the form of the “Energy Efficiency Roadmap” and its accompanying services outlined throughout this narrative. County of Sonoma Employees, qualified “EE Roadmap Specialists”, and PG&E 3P Resource Program Implementers will assist customers in completing a building assessment resulting in the EE Roadmap report which will outline and help customers to prioritize and plan upgrades and improvements to their building’s equipment over years to come. Referrals to PG&E 3P Resource Programs will be a main focus of Sonoma Public Energy and all leads referred will be tracked and reported through County maintained CRM.

1.2 PROGRAM BUDGET (ATTACHMENT 1 SECTION 2.2)

Sonoma Public Energy 3 Year Budget			
PY 2020	PY 2021	PY 2022	Total Budget
\$ 275,000.00	\$ 315,000.00	\$ 265,000.00	\$ 855,000.00

Refer to Tab E of Attachment 2 Data Form for further Budget detail.

1.3 NON-RESOURCE PROGRAM DESIGN (ATTACHMENT 1 SECTION 2.3)

The Energy and Sustainability Division of Sonoma County shall receive funding for a suite of comprehensive services aimed primarily at the reduction of energy usage, reduction of energy cost, and assistance with access to existing and future resource programs. These services will be focused on facilitating upgrades to Public Facilities, K-12 Schools, Special Districts, Hard To Reach (HTR)¹ customers located within Sonoma County.

The County of Sonoma is to enter into contract as the Local Government Partnership (LGP)

¹ Hard-to-reach (HTR) are nonresidential customers who also meet each of the following criteria: primary language other than English, <20 kW and/or 10,000 therms, and leased/rented facility. If the business resides in a defined Disadvantaged Community or rural community (outside the United States Office of Management and Budget Combined Statistical Areas of the San Francisco Bay Area), then only two of these criteria must be met to be considered HTR.

with Pacific Gas and Electric Company (PG&E), delivered through the General Services Department's Energy and Sustainability Division. Current and proposed services include, but are not limited to:

Identification of Energy Efficiency Projects to Support Energy Savings in the Public Sector

- Benchmarking of energy usage in public buildings
- Facilitating energy efficiency projects in public buildings
- Compiling and maintaining a listing of approved, participating EE contractors
- Implementation of California Green Business Certification Program

Training and Education to Support Building Capacity to Help Save Energy

- Facilitating relevant training for public sector staff
- Encouraging facilities staff to complete Building Operator Certification or ASHRAE training, etc.

Awareness Building in the Community to Magnify the Reach of Energy Efficiency Programs

- Planning and implementing a marketing and outreach plan
- Fostering local connections and interactions within the community to encourage energy efficiency in ways that make the most sense for that community

Innovative Efforts that Allow Flexibility to Best Serve the Public Sector and Larger Community

- Supporting initiatives identified in the California Long-Term Energy Efficiency Strategic Plan
- Documenting an integrated services delivery model that assists potential customers with multiple services
- Developing and implementing a Commercial Building EE Roadmap Program to serve public facilities
- Modeling of "EE Roadmap" for public facilities and DAC/HTR Facilities
- Offering subject matter expertise in construction planning of new facilities

The Energy and Sustainability Division shall implement the development of a public building energy efficiency roadmap program that will include assessment of existing energy consuming equipment and systems, identification and review of legacy equipment and recommendations for improvements to achieve energy and water efficiency in existing nonresidential/public buildings. Informal/technical training sessions will be presented to facility decision makers and building operations staff to provide the energy efficiency roadmap, education about energy efficiency upgrade and equipment replacement options and available related 3P resource programs with referral to 3P resource program contacts.

The Energy Efficiency Roadmap program will provide assessment tools which lend guidance to building managers and operators to investigate, analyze, and identify no-cost, low-cost,, and capital-intensive energy efficiency and demand reduction measures to improve building performance through optimization of existing equipment controls and/or replacement of failing or aging equipment. For facilities that do not have qualified staff or have more complex systems, referral will be provided to the appropriate PG&E 3P resource program to perform the assessment. Else a local firm or firms will be recognized through an RFQ to provide technical support for the assessment. The ultimate deliverable for each customer will be an “EE Roadmap” for the facility and its inhabitants, defining a long term plan towards energy efficiency and sustainability. A periodic “Check In” will be performed by Division staff to identify and document which measures have been implemented and when.

The Division will develop and integrate the necessary tools into Customer Relations Management (CRM) software to generate the roadmap and track program activities on a structure-by-structure basis.

The Energy and Sustainability Division staff will leverage resources available through the Sonoma County Energy Independence Program, the Sonoma County Green Business Certification program, and other services offered by the Division through partner contracts and in-house efforts. At the time of program implementation, the Division will facilitate in helping those customers with necessary upgrades to find the proper resource program(s) to meet their specific needs.

The Division will use program funds to offer/facilitate training for Building Maintenance and Construction Professionals and to continue offering the Green Business Certification Program to public facilities.

Program Goals and Objectives

The primary objective of the Program is to assist staff within Public, K-12, Special District, and HTR, facilities to realize deeper savings and more comprehensive energy savings through a collection of services offered to them at little to no cost.

On site “Energy Efficiency Roadmaps” will be offered both as a free service and as a “DIY” solution to building maintenance professionals in the previously mentioned target sectors. With support from ESD staff qualified maintenance professionals will be able to complete the Energy Efficiency Roadmap workbook themselves and submit their findings to the Division’s tool through CRM software, making the only cost to any customer the actual time of the building maintenance professional. The collection of data necessary to participate in the Program falls within the standard work scope of any building maintenance professional, therefore there are no added costs to the customer to participate in the Program.

The Division will track the implementation of suggested energy efficiency plans through its Customer Relations Management tool over the life of the program, and data will be kept and made available to customers even beyond the lifespan of the program. The Division currently tracks buildings as customers and will use program funds to author the capacity to

record pertinent information related to all served facilities. Data collection will result in both a long term plan for operations, maintenance, and equipment replacement as well as a comprehensive database allowing for all local public buildings within Sonoma County to have the ability to be compared to each other in order to improve EE awareness.

The Division will also track any referrals to Resource Programs that are made as a result of either targeted campaigns or the EE Roadmap Program.

Program Delivery Channels

The Program operates entirely midstream and targets downstream investment. The buildings, as customers, are the target audience in the implementation of these programs. Key Market Actors include City and County Boards of Supervisors, School Board Members, Special District Board Members and Executives as well as top level maintenance staff in all facilities. Decision makers will be marketed to directly in seeking buy-in, leading to mandating of work to be done.

Direct Observable Program Outputs

- Capacity to record collected building data in CRM
- EE Roadmap Workbook
- EE Roadmap Web Page
- EE Roadmap Assessments Completed
- EE Roadmaps Generated
- EE Roadmaps plans adopted for long-term execution
- EE Roadmaps implemented
- EE projects completed (Resource Referrals)

Short-Term Impacts (12 Months)

- Increased knowledge of EE practices amongst public building owners and operators
- Reduced electric use and demand, and reduced natural gas use in public buildings throughout Sonoma County in collaboration with PG&E's 3P resource program offerings
- Expansion of public sector programs and existing project development offerings
- Increased cost effectiveness of EE Programs by identifying potential EE projects in the public sector and within HTR customer group

Medium-Term Impacts (12-36 Months)

- Increased data offerings for public building owners to guide future improvements

- Established public building benchmarking program to track energy usage across agencies
- Promotion of meter-based savings approaches and pay-for-performance models in coordination with PG&E 3P resource programs
- Continued lower energy use and demand

Long-Term Impacts (36+ Months)

- Seamless interaction of public building owners with PG&E's 3P energy efficiency resource programs
- Easy availability to data that identifies energy efficiency opportunities and quantifies savings
- Increased momentum for all public sector customers to transition to zero net energy (ZNE) development
- Sustained progress towards doubling energy efficiency savings in public buildings by 2030

"Energy Efficiency Roadmap" program provides a comprehensive zero cost building and behavioral analysis to PG&E customers in public buildings. The results of the EE Roadmap Program are to be recorded through CRM (Customer Relationship Management) software. Modules will be developed resulting in a deliverable report to the customer, or "EE Roadmap" detailing near and long term goals in energy efficiency for their staff and facility, highlighting the potential benefits behind any employed measures.

The Energy and Sustainability Division will build upon its existing CRM in order to act as an ongoing repository for each customer to catalog the results of building audits, utility bill analysis, EE trainings, customer surveys, benchmarking results, solar bid analysis, past improvement projects, and future improvement opportunities. The report or "EE Roadmap" will be easily printed and/or saved for discussions with third-party contractors or other building performance professionals. This roadmap will make clear the customer's ability to save incrementally by taking steps in order of effectiveness, making energy efficiency investments easier and more attractive. The report and CRM integration will assist in maintaining a consistent thread of communication with the customer looking to the future.

Key benefits:

- Report that expands as information is collected by Energy and Sustainability Division staff throughout the engagement process, increasing the customer's ability to better manage their building's energy.
- Report provides ongoing record of energy efficiency improvements made to the building and a prioritized catalog of recommended future improvements, illustrating their ability to save energy and reduce demand.
- Customers who choose to not move forward immediately with improvements will have access to the information collected so that they can proceed with the recommended improvements when the conditions are right

The Division's unified service delivery model streamlines the offerings of various EE services to all market sectors, positively impacting the experience of the end customer and best demonstrates the Division's ability to reach a greater proportion of customers without proportional budget increases. Tying the Division's offerings together, our approach to energy efficiency in commercial buildings will remain holistic as buildings remain in place while inhabitants do not. When the building itself is treated like a customer, its needs will be met in a well-planned and comprehensive manner spurring deep investment and persistent energy saving.

Geography

The above listed program offerings shall be provided to Public Facilities, K-12 Schools, Special Districts, , and HTR facilities located within Sonoma County

1.4 PROGRAM MANAGEMENT & RISK (ATTACHMENT 1 SECTION 2.4)

Schedule and Deliverables

Key Deliverables: Targeted customer sectors = Public, K-12, Special District, DAC, HTR Facilities

- Number of Contacts
- Number of Leads
- Number of EE Roadmaps prepared and presented
- Number of Projects managed
- Number of Educational Opportunities offered
- Number of Buildings Benchmarked

Deliverables will be reported on a quarterly interval with deeper metrics and analysis to be delivered on an annual basis. A weekly check-in call with a utility representative in order to provide a running report on program/project status and also to ensure that any program requests are heard and met shall be adhered to.

1.5 OUTREACH & ACQUISITION (ATTACHMENT 1 SECTION 2.5)

Marketing and Outreach Approaches

Program's target customers: Public, K-12, Special District, HTR Facilities within Sonoma County.

- Local Governments: City and County government staff from General Services, Facility Operations, Administration and Management, Public Works, and/or Parks Departments.
- Special Districts: Directors and Managers of organizations identified by the Local Agency Formation Commission (LAFCO) as a special district.
- K-12 School Districts: Administrators and building operation staff from local school districts and offices.

Referrals to the Sonoma Public Energy Program shall be made through those other services offered by the Energy and Sustainability Division of Sonoma County General Services.

Program outreach activities:

• Strategy	Target Audience	Market Barrier	Opportunity
Direct contact through phone and in-person meetings	Key decision makers, decision influencers	Lack of buy-in from management/key decision makers	One-on-one time to discuss available services and specific projects, relationship development
Sample resolutions/council/board items	Administrative support staff	Lack of directive and prioritization of EE Improvements from Key Decision Makers, Lack of funding	Assistance preparing for presentations and board items by providing formatted samples
Presentations at meetings	All	Lack of knowledge of availability of programs and services	Increase awareness of available services
Exhibiting at events	All	Lack of knowledge of availability of programs and services	Increase awareness of available services
Workforce development trainings	Facilities staff	Lack of technical knowledge	Training staff on building efficiency operations to run at

			peak performance
Website information page	All	Lack of knowledge of availability of programs and services	Fast way to deliver information about programs and services
Case studies	Facility managers	Lack of knowledge of project benefits	Documented examples of projects completed
Partner with outside agencies	Key decision makers	Lack of buy-in from management/key decision makers	Working with partner agencies to make contacts and presentations
Direct mail	Facility managers	Lack of knowledge of availability of programs and services	Target specific contacts with information
Collateral – brochures, flyers	All	Lack of knowledge of availability of programs and services	Allow for bulk distribution of information

Project Acquisition

The Program offers a simple process providing public building maintenance personnel with expert advice and appropriate measures that will encourage implementation and adoption of the provided EE roadmap as well as access to the Green Business Program. Additionally, the Program will continue to act as the conduit to resource programs resulting in energy efficiency retrofits saving money, saving energy, and reducing greenhouse gas emissions in Sonoma County.

Energy Efficiency Roadmap

Once ESD has engaged key decision makers, staff will perform an initial assessment for all participants to determine the level of support required to complete the site assessment and EE Roadmap Workbook. For smaller facilities with simple mechanical and control systems the workbook and resources will be available for “DIY” completion by onsite facility staff with support and guidance by trained ESD staff. This workbook will be used to complete the EE Roadmap for the facility. For more complex facilities or facilities without qualified onsite staff, ESD staff will coordinate and work with the selected qualified EE Roadmap Specialist(s) to complete the onsite assessment, EE Roadmap Workbook and EE Roadmap with available onsite maintenance staff. Periodic check-ins will occur to determine and overcome roadblocks surrounding the implementation of suggested actions. First check-in is to occur 6 months after EE Roadmap presentation to customer. Second check-in will take place 1 year after EE Roadmap presentation to customer and subsequent check-ins will take place annually following the second check-in.

1.6 COORDINATION WITH OTHER PROGRAMS (ATTACHMENT 1 SECTION 2.6)

The Division is funded by, and coordinates with multiple local agencies through contracts with several local partnerships. By virtue of division funding and function, the Energy and Sustainability Division will necessarily work with other programs operating within Sonoma County. ESD will track coordination and shared projects through its Customer Relationship Management software.

1.7 COMPENSATION & PERFORMANCE (ATTACHMENT 1 SECTION 2.7)

Payment structure behind Sonoma Public Energy will be entirely based on Time and Materials. Detail can be found on Attachment 2 Data Form Tab F. Those hourly compensation levels associated with those job titles detailed in Tab G of Attachment 2 Data Form will apply to those job titles over the 3 year duration of the Sonoma Public Energy Program lifecycle.

1.8 KEY PERFORMANCE INDICATORS AND EVALUABILITY (ATTACHMENT 1 SECTION 2.8)

Key Performance Indicators

- Number of Contacts
- Number of Leads
- Number of EE Roadmaps prepared and presented
- Number of Projects managed
- Number of Educational Opportunities offered
- Number of Buildings Benchmarked

Key Performance Indicators are also detailed in Tab C of attached Data Form.

Performance Data Collection

Data pertaining to KPIs for Sonoma Public Energy will be collected and managed by staff of the Energy and Sustainability Division. Data will be recorded and reported through Division maintained Customer Relationship Management software.

Data is collected by individuals of all job levels within ESD. A customer facing portal will be created which will allow customer building professionals to input data pertaining to their site when completing an EE Roadmap . EE Roadmap data will also be recorded and input into the CRM by ESD staff completing the EE Roadmap and/or by a qualified EE Roadmap Specialist.

Evaluability

Utilizing Division CRM, reports can be generated and delivered in real time, allowing for immediate evaluation of program performance. Through CRM, the program will track all contact and site information for leads acquired, customers engaged, and projects completed. Information collected will include but not be limited to site address, key decision maker(s), date of initial contact and pertinent milestones, lead source and nature of inquiry. ESD employs Salesforce as CRM which is fully customizable and capable of tracking any information desired.

1.9 PROGRAM INNOVATION (ATTACHMENT 1 SECTION 2.9)

INNOVATION

- Documenting an integrated services delivery model that assists potential customers with multiple services
- Developing and implementing a Public Building Energy Efficiency Roadmap Program
- Modeling of “EE Roadmap” for public facilities and DAC/HTR Facilities
- Implementation of California Green Business Certification within target customer facilities.
- Offering subject matter expertise in construction planning of new facilities

The EE Roadmap program will provide assessment tools lending guidance to building managers and operators to investigate, analyze, and identify no-cost, low-cost and capital-intensive energy efficiency and demand response upgrade opportunities and provide direct referrals to PG&E 3P and other Resource Programs to improve building performance and reduce energy, and operating costs through optimization of existing equipment controls and/or replacement of failing or ageing equipment. Every observation made during the Assessment will be recorded with the potential to be reported on through Salesforce. The EE Roadmap Workbook will be developed and modeled after The City of Seattle Building Tune-Up Program workbook. City of Seattle Building Tune-up Program participants have realized a reduction in energy usage of 10-15% on average and a payback on improvements of 2-3 years when implementing suggested actions. For facilities that do not have qualified staff or have more complex systems, referral will be provided to the appropriate PG&E 3P resource program to perform the assessment. Else a local firm or firms will be recognized through an RFQ to provide technical support for the assessment. The ultimate deliverable for each customer will be an “EE Roadmap” for the facility and its inhabitants, defining a long term plan towards energy efficiency and sustainability. It is our hope that the resource program provider(s) announced following PG&E’s early 2019 RFP will be able to perform, and potentially cover the cost of any recommended work that may

not be able to be performed by the participating facility's maintenance staff.

Given that the Program is housed within the County's Energy and Sustainability Division, staff will coordinate closely with, and leverage resources available through the Sonoma County Energy Independence Program, the Sonoma County Green Business Certification program, and other services offered by the Division through partner contracts and in-house efforts. Our "unified service delivery model" has been designed to provide potential customers with a wide range of program options to facilitate energy efficiency and conservation measures that cost-effectively reduce energy use and optimize their mechanical systems. Individual customers can then choose from a full menu of services. When presented with these additional options, some public customers may choose to also seek Green Business Certification, work to reduce their water and waste streams in addition to their energy consumption, or participate in other program options available through the Division.

ESD will build upon its existing CRM tool so that it can act as an ongoing repository for each customer to catalog results of any building audits, utility bill analysis, EE trainings, customer surveys, benchmarking results, solar bid analysis, past improvement projects, and future improvement opportunities. The "EE Roadmap" would be easily printed and/or saved for discussions with third-party contractors or building performance professionals. This roadmap will make clear the customer's ability to save incrementally by taking steps in order of effectiveness, making energy efficiency investments easier and more attractive. The report will be especially helpful in maintaining a consistent thread of communication with the customer, whether the customer is the same individual who began the facility's EE planning or entirely new staff, as many whole building energy efficiency upgrades stretch out over multiple years.

Key benefits:

- Consistently formatted report that expands as information about the customer and their buildings are collected by our staff throughout the entire engagement process, allowing customers to better manage their building's energy
- Report will provide ongoing record of EE improvements made to the building and a prioritized catalog of recommended future improvements.
- Customers who choose to not move forward immediately with improvements will have access to information collected so that they can proceed with recommended improvements when the conditions are right

Our unified service delivery model streamlines offerings of various EE services to all market sectors, positively impacts the experience of the end customer and best demonstrates the Division's ability to reach a greater proportion of customers without proportional budget increases. Our approach to energy efficiency in commercial buildings is holistic as buildings remain in place while inhabitants do not. When the building itself is treated like a customer, its needs will be met in a well-planned and comprehensive manner spurring deep investment and persistent energy saving.

1.10 INTEGRATED DEMAND-SIDE MANAGEMENT (IDSM) (ATTACHMENT 1 SECTION 2.10)

The EE Roadmap Program includes an assessment of existing energy using equipment at a facility where we will identify equipment or systems that are good candidates for energy efficient upgrades. We will then provide leads and referrals to Resource Programs for incentives, financing and demand side management programs. Referral to and lead generation for Resource Programs, including Demand response program, will be integrated into all Sonoma Public Energy Program customer energy efficiency roadmaps and action plans.

1.11 HTR / DAC (ATTACHMENT 1 SECTION 2.11)

The County of Sonoma does not hold a large contingency of Hard to Reach facilities. Primary efforts behind reaching these communities will be put towards those qualifying K-12 Schools and Small to Medium Businesses. As Sonoma Public Energy is a no cost program, Schools and HTR Businesses in these underserved communities can benefit just as those customers meeting qualifying criteria from another target market sector.

1.12 PROGRAM TEAM (ATTACHMENT 1 SECTION 2.13)

Energy and Sustainability Program Manager (Program Manager) – Oversees the Division. Responsibilities include plans, directs, manages, administers and evaluates the countywide energy management, sustainability efforts, and climate adaptation, mitigation and resiliency goals. The ESPM is responsible for the effective planning, management and control of an energy and sustainability program for major portions of County operations through the General Services Department.

Department Program Manager (Program Coordinator) – Responsibilities include plans, organizes, manages and coordinates the work of a major program or group of closely related programs within the Division. Supervises and participates in selection and recruitment of personnel. Ensures staff and contractors comply with mandated program policies and procedures.

Coordinates operations of program with other programs within the Division and with similar programs within the community and with clerical, fiscal, systems and other administrative support units.

Energy and Sustainability Analyst (CST: Department Analyst) (Program Administrator/Project Coordinator) (4 positions) –The E&S Analyst is responsible for the specific duties focused on process development, workflow development, program statistics, metrics and data tracking tools, web site development, and budgetary monitoring. This

position works closely with County departments, other local government and city agencies, special districts, community groups, consultants, business owners and individuals, and has significant involvement with energy projects in County buildings. This position requires extensive communication and coordination between Pacific Gas & Electric Company (PG&E) through the Management of the Local Government Partnership, Sonoma County Energy Watch. This is an essential role, which requires knowledge and understanding of water conservation, energy efficiency and renewable energy generation technology and techniques. The E&S Analyst is required to be familiar with program energy efficiency guidelines, California Energy Code, basic construction techniques and the specifications of various products such as solar systems, HVAC systems, windows, cool roofs, and insulation.

Other duties related to this position supports the Division in the delivery of organizational information and program communication efforts. Through promotion and advancement its high profile programs and services, participating contractor relationships, education and outreach. The E&S Analyst develops and implements a Division marketing plan, promotes projects through established multi-media channel marketing, with, an emphasis to increase customer engagement, and community visibility. This position may also include daily operational supervision of the staff.

Energy and Sustainability Program Specialist (CST: Administrative Aide) (3 positions)

- This position performs a variety of administrative, customer service, outreach and paperwork request processing roles in the daily operation of the Energy and Sustainability Division office. Program Specialist is a key point of contact to business and residential property owners, tenants, property managers, contractors, division partner agencies and the community-at-large. Program Specialist is required to be familiar with the resources available, services offered and programs administered through the Division. Staff is required to be familiar with energy efficiency, water conservation, waste management and pollution prevention guidelines and/or best practices.

Energy and Sustainability Program Representative (CST: Senior Office Assistant)

(Administrative Support) - This position performs a variety of administrative and customer service roles in the daily operation of the Energy and Sustainability Division office. The Division office front desk is the first point of contact for the public-at-large and provides administrative support for other Division staff. The Program Representative will interact with customers, applicants, partners and contractors via telephone, email and face-to-face for information.

Consultants/Subcontractors: Third party consultant firms contracted with the County to perform services related to the projects administered by the Division. Some examples include – engineering, electrical, marketing, climate, etc.

2 OTHER 3P EE PROGRAM REQUIREMENTS (ATTACHMENT 1 SECTION 3)

2.1 CONTRACTOR'S LICENSES (ATTACHMENT 1 SECTION 3.1)

Sonoma Public Energy has not named any additional contractors to complete work. An RFQ shall be generated to select EE Roadmap Specialist(s). Should Specialist(s) be selected, contractor shall provide applicable contractor's licenses and written notification to PG&E 5 business days prior to implementing personnel changes for PG&E's review and approval.

2.2 REGULATORY WORKFORCE STANDARDS REQUIREMENTS (ATTACHMENT 1 SECTION 3.3)

In addition to in-house staff expertise and ongoing professional development for ESD staff, the Division, through a competitive process, also maintains contracts with consultants that provide advanced engineering and analysis work as needed. These firms are available to provide engineering and technical assistance when working with the County, cities, small-and-medium businesses, libraries, and special districts. These contracts resulted from a request for qualifications (RFQ) issued by the County for a broad array of energy and sustainability consulting services:

- Newcomb Anderson McCormick Energy Engineers – Key Staff: John Newcomb, Mike Anderson
- Tierra Resource Consultants – Key Staff: Marshall Keneipp, Floyd Keneipp
- Eide bailey

Development of EE Roadmap Program, Tools, and Training

ESD staff will leverage and customize spreadsheet tools created by Pacific Northwest National Laboratory (PNNL) and used by public programs including the City of Seattle for the Sonoma Public Energy EE Roadmap Program. ESD staff have been in contact with the City of Seattle program operators who are available to provide program support and have confirmed that all program documents, resources and tools are available for public use.

- Initial Site Assessment will be completed by trained ESD Staff with facility maintenance/operator staff; whole building approach to review building systems including: HVAC, lighting, domestic hot water, water usage, and the building envelope.
- ESD staff will provide tech support for facility staff to complete DIY workbook. For more complex facilities or facilities without qualified onsite staff, ESD staff will coordinate with the appropriate PG&E 3P Resource program. Else technical engineering support from qualified EE Roadmap Specialist will be facilitated when necessary during the assessment phase.
- ESD staff will provide technical support and coordinate with facility staff to input findings through CRM software tool to generate complete EE Roadmap for facility.

- ESD staff will provide a portfolio of available resources available including PG&E Resource Programs, local CCA programs.

Specialist Recruitment

The County of Sonoma will identify and create a list of qualified EE Roadmap Specialists and contract with one or more selected qualified EE Roadmap Specialist to provide technical support and complete more complex system assessments. The EE Roadmap Specialist will work collaboratively with ESD staff, in-house staff and communicate with existing maintenance providers during all phases.

For building owners/facility managers who are interested in enhanced, investment grade energy auditing and commissioning services, ESD will direct customer to the 3P energy efficiency resource program and the EE Roadmap Specialist Directory.

ESD will create an RFQ to solicit EE Roadmap Service Providers. ESD will create and maintain an EE Roadmap Specialist Directory. Firms listed in the directory will have staff that meet the requirements of the "EE Roadmap Specialist" as defined by the Sonoma Public Energy Program administrator. Inclusion on this list is voluntary and does not represent an endorsement by the County of Sonoma or PG&E.

EE Roadmap Specialist must meet the following qualifications:

At least seven years of experience, including educational and/or professional experience, with commercial building operations and/or building energy management.

AND

One of the following certifications or equivalent:

- Professional Engineer (PE) in mechanical or architectural engineering – California Board for Professional Engineers, Land Surveyors, and Geologists
- Building Operator Certification (BOC) Level II – Northwest Energy Efficiency Council (NEEC)
- Certified Energy Manager – Association of Energy Engineers (AEE)
- Certified Energy Auditor - AEE
- Certified Commissioning Professional (CCP) – Building Commissioning Certification Board (BCCB)
- Commissioning Authority (CxA) – AABC Commissioning Group (ACG)
- Existing Building Commissioning Professional (EBCP) - AEE

2.3 DIVERSE AND DISADVANTAGED BUSINESS AND EMPLOYEE TERMS, INCLUDING SMALL BUSINESS, IF APPLICABLE (ATTACHMENT 1 SECTION 3.4)

When applicable, the County of Sonoma Energy and Sustainability Division shall adhere to Pacific Gas and Electric Company's guidelines regarding Diverse and Disadvantaged Businesses and Employees as outlined in section 3.4 of Attachment 1.

The County of Sonoma is an Equal Opportunity Employer and does not show preference to any individual over another during the hiring process, however qualification as a Diverse and/or Disadvantaged Business shall be recognized through the RFQ process. When presenting Sonoma Public Energy customers with their options in selecting a qualified EE Roadmap Specialist, the list of Qualified Specialists will clearly indicate which Businesses are categorized as Diverse Business Enterprises ("DBEs"), Small Business Enterprises ("SBEs"); and Women, Minority, Disabled Veteran and Lesbian, Gay, Bisexual, and Transgender Business Enterprises ("WMDVLGBTBEs").

The County of Sonoma prioritizes and is committed to continuously providing a workplace where equal employment opportunity is afforded to all people. Diversity and inclusion is woven into our hiring practices and we are constantly challenging ourselves to do more to further equity, diversity, and inclusion practices. The County of Sonoma diligently strives to maintain a workplace free of harassment, discrimination, and retaliation. Our ultimate goal is for everyone who works for, with, and/ or receives services from the County of Sonoma to find that our culture is one that is built upon respect, inclusion, and individual dignity. As such, we require the same of all organizations that do business with the County of Sonoma.

2.4 PROGRAM COORDINATION WITH OTHER PROGRAM ADMINISTRATORS (ATTACHMENT 1 SECTION 3.6)

The Energy and Sustainability Division provides services to support the Bay Area Regional Energy Network (BayREN) programs in Sonoma County. The scope of this work includes administrative support, program implementation, and outreach for the single family, multi-family, small and medium business, green labeling, and codes and standards.

Through its contractual obligations with the Regional Climate Protection Authority (RCPA), the Energy and Sustainability Division will continue to coordinate with BayREN until said contract expires on 12/31/2020. Current contract has potential for extension through 2022.

2.5 QUALITY ASSURANCE PROCEDURES (ATTACHMENT 1 SECTION 3.7)

Procedures shall be formulated to ensure quality assurances in the following areas:

- Mechanism for tracking and resolving customer complaints – Tracking customer contact is currently possible through Division CRM. The CRM includes a "Cases" feature that can be used to log problematic issues, escalate for supervisory review, and track steps taken by program staff to reach resolution.
- Procedures to ensure that eligibility conditions are met during the product development and implementation phases – A series of checks shall be formulated to ensure that inquiring parties do in fact qualify for services provided by Sonoma Public Energy before services are provided. These checks will be incorporated directly into Division CRM.
- Documentation to support program influence – Incorporation of surveys into Existing CRM shall track program influence. Additionally ESD service delivery model has multiple customer check-ins over a long period of time that will be instrumental in tracking program influence and customer satisfaction.

