

ATTACHMENT A SCOPE OF SERVICES

Phase 1 - ESCO Selection

- Assist the District in preparation of District resources and records for a Utility Savings PC Request for Proposals (RFP).
- Assist in gathering historical maintenance and operational data on the District's buildings.
- Organize and facilitate initial contact with SEO, LGC and other key stakeholders.
- Conduct an on-site walk-through assessment to provide an inventory of energy systems, equipment, and usage.
- Analysis of approach to Utility Savings PC including, evaluation of District facilities for a Performance Contract and developing recommendations on what facilities should be included in the Utility Savings PC.
- Compiling and organizing related District background information based on the preliminary energy analysis.
- Assist in the preparation of the Request for Proposals for an Energy Services Company ("ESCO"), including creating a scope of work. Develop a technical facility profile.
- Conduct ESCO pre-bid meeting and assist in the preparation of the ESCO facilities tours.
- Create a summary review of ESCO proposals.
- Participate in an advisory capacity in the evaluation of RFP responses, the preparation of the ESCO selection committee, and the interview of the short-listed ESCOs.
- Miscellaneous Expenses (Printing, Copies, Phone, etc) + Travel

Phase 2 - IGA Phase

- Assist in the negotiation of the Investment Grade Audit ("IGA").
- Assist in the IGA review, including baseline calculations, operating cost saving measures proposed by the ESCO and make recommendations. 30%, 60%, 90% and Final IGA reviews.
- M&V Tasks: For each energy conservation measure (ECM), evaluate: Baseline methodology; Assumptions; Contract language for adjustments, termination and dispute resolution; Proposed M&V Option and supporting rationale. Perform design reviews for M&V and review software proposed. Perform final review of the proposed M&V Plans, make comments and suggestions to Owner, and work with ESCO to modify M&V to suit Owner requirements. Perform final review of savings calculations to check that projected savings are realistic, achievable and verifiable. Prepare a letter for submittal to LGC.
- Assist in the preparation of the Request for Proposals for Third Party financing.
- Conduct financing pre-bid meeting and create a summary review of proposals.
- Participate in an advisory capacity in the evaluation of RFQ responses, the preparation of the selection committee, and the interview of the short-listed financing firms.
- Assist in the negotiation of the final contract, termed the Energy Services Agreement (ESA).
- Assist the District in incorporating standard terms and conditions in the final contract and with processing drafts through the legal department.
- Assist the District in obtaining final approval from the SEO and LGC.
- Miscellaneous Expenses (Printing, Copies, Phone, etc) + Travel

Phase 3 - Construction Administration

- Provide additional assistance in the design, contractual structure, implementation, and management of the Utility Savings PC. Services include professional resources to provide pre-construction, construction and warranty phase activities associated with the ESCO contract. Tasks include, but are not limited to, on-site monitoring of work in-progress, scheduling, cost management, constructability and coordination reviews, design submittal reviews, contract administration, conducting progress meetings, reviewing pay applications and RFI's, oversight of O&M training, inspections and commissioning, and review of O&M training plans.

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- M&V Tasks: Witness and participate in selected on-site measurements with the ESCO, both pre- and post-installation. Also perform independent measurements on a random basis as directed by the District. Perform site visits to independently confirm, on a spot basis, significant factors such as before and after operating hours of lights or equipment. Observe commissioning of selected ECMs and review ESCO's commissioning report. Advise Owner on findings.
- Miscellaneous Expenses (Printing, Copies, Phone, etc) + Travel

Phase 4 - Annual Measurement & Verification (M&V)

- Review the ESCO's M&V reports for a period equal to the Guaranteed Energy Savings contract term; quarterly for the first year and annually thereafter. Include a review of reports in first month. Perform independent measurement of select ECMs, if necessary. Review savings calculations and confirm correct application of rate schedules. Review baseline adjustments for weather, occupancy and other factors as appropriate. Provide Owner with comments on findings, observations and recommendations.
- Miscellaneous Expenses (Printing, Copies, Phone, etc) + Travel