

Attachment D

Energy Auditing and Analysis (Includes Access to Residential In-Unit Premises)

The Service Provider shall provide the full range of energy efficiency-related auditing and design services, including technical, management expertise and product solutions to meet the requirements of the DCSEU. Specific requirements for each auditing category are defined below. However, the Service Provider will furnish the necessary personnel, materials, equipment, facilities, and other services required to satisfy the energy efficiency capabilities and solutions that will be specified in the IQC and related WOs. As tasked, each Service Provider awarded an IQC through this RFQ shall provide solutions for the Energy Auditing and Analysis efforts for the DCSEU Retrofit Accelerator as further defined below and by any relevant DCSEU Program Protocols and requirements:

Summary of Services

For each Category of Service requested, please provide an affirmation of interest to provide the level of service and the relative price per audit requested. Pricing should be based on a \$/sq-ft for each level of service.

The following provides an outline of the scope of services to be provided to the DCSEU by a selected qualified Respondents:

Scope 1: Project Investigation/Audit

The selected Respondent/team must prepare for and deliver an energy audit that meets the following ASHRAE criteria/or equivalence:

Category 1: ASHRAE Level 1 Audit—this level of audit is defined as identification of opportunities for energy savings based on utility spend analysis and observed existing equipment, programming, and building use. Focus is on energy savings opportunities including (but not limited to) lighting, heating, and cooling equipment, thermal shell, and system scheduling. A written report containing a list of the opportunities with estimates of energy savings potential and costs.

This level of auditing corresponds roughly with a utility bill review and site survey but is required to be performed by a “certified professional.” An example of a Certified Professional includes (but is not limited to) a Professional Engineer (PE), Certified Energy Manager (AEE Certification) or a BPI Certified Building Analyst accredited to the appropriate building category (Multi-Family for example). Additional relevant ASHRAE certifications may also be submitted for consideration.

Category 2: ASHRAE Level 2 Audit—this level of audit is defined as a more extensive examination of building systems which may include (but is not limited to) spot metering and/or data logging to

determine the energy consumption of specific systems and equipment that should be targeted for further investigation for energy savings potential. The written report for Category 2 is inclusive of all Level 1 report requirements and includes the additional work product that identifies specific recommendations for efficiency improvements coupled with the calculated energy savings and implementation costs based on generally accepted energy engineering formulas and local contractor and materials pricing.

Category 3 : ASHRAE Level 3 Audit—this level of audit is inclusive of all Category 1 and Category 2 requirements including the extensive examination of building systems and equipment. The written report is more detailed than the Category 1 & 2 reports and includes specific recommendations for energy equipment upgrades, process and procedure modifications, and a full inventory of equipment including the energy use for each piece of equipment alongside calculated energy savings and implementation costs. The savings and costs are based on generally accepted energy engineering formulas and local contractor and materials pricing. The savings estimates may also include energy modelling to confirm the energy calculations and support future investment / capital financing decisions.

Overall Expectations under each Audit Category:

It is expected that under each Audit category the selected Respondent/team must be equipped to evaluate building facilities and propose applicable and actionable energy conservation measures and provide appropriate certified staff. These include, but are not limited to optimization, installation, retrofit, upgrade, adjustment, Retro commissioning, partial and whole building electrification potential and/or replacement of:

- Heating ventilation and air conditional (HVAC) systems
- HVAC automated control systems
- Cool roofs and roof replacements
- Solar Photovoltaic including (but not limited to):
 - Suitability,
 - Roof condition,
 - Potential capacity
- Interior, exterior, and area lighting
- Water Heaters
- Water conservation equipment (low-flow plumbing fixtures, irrigation controls, etc.)
- Building Automation System (BAS) recommended upgrades
- Staff trainings, remote monitoring services, and/or on-going support services
- Other associated infrastructure and envelope improvements

Other Expectations:

- Coordination with Retrofit Accelerator (RA)/DCSEU/DOEE regarding on site visits to allow relevant staff to “tag along/shadow” during initial building walkthroughs/audits as needed/required/requested.
- Use of a template-based collection system, or audit format for submittal of results, per DCSEU program protocols.
- Documentation of existing building electric infrastructure and the current conditions including but not limited to:

- Customer and/or Utility Owned Transformer size(s) (KVA), type and approximate age
- Customer and/or Utility Owned Switchgear
- Customer Owned Circuit Breakers, related panels and wiring (size and estimated age)
- Existing Building and customer Electric and Gas meter(s) data
- Identification of potential whole building electrification measures for HVAC and related pricing (including heavy ups)
- Coordination and participation with RA/DCSEU staff/building owner to help verify energy benchmarking data inputs
- Energy auditors will be required to submit all energy savings calculations, including algorithms, documentation and assumptions that will clearly support energy savings estimates from submitted audit reports.

General Information:

The DCSEU will also consider other relevant Energy Conservation Measures (ECMs) proposed that will deliver energy and cost savings for the building at the building system level or apartment/unit level, and or recommendations on common space and/or resident space redesign needs, or opportunities given current and/or future occupancy use and loads.

After each audit report has been completed and submitted to the DCSEU, the DCSEU shall hold a follow-up meeting with a representative of the building/building owner to discuss the report findings. If the building owner and/or the DCSEU find the report to be inadequate, the Respondent will be required to update the report as requested and submit for re-review.