

## **TASK ORDER No.: RPU05**

**Date:** April 19, 2019

**Project Description:** Contractor Administered Upstream HVAC Rebate Program

**Participating SCPPA Member(s) (if applicable):** City of Riverside – Utilities

**Contractor:** Cohen Ventures, Inc. DBA Energy Solutions

**SCPPA Resolution No.:** 2019-025

**SCPPA Extension Resolution No.:** N/A

Contractor, SCPPA and the participating Member(s) ("Participant(s)") identified above (if any) agree that Contractor shall provide the Services specified herein pursuant to the terms and conditions of the Goods and Services Agreement ("Agreement") between SCPPA and Contractor dated April 18, 2019, except as specifically modified herein.

### **Scope of Services**

**Effective from July 1, 2019 to June 30, 2020.**

Contractor shall provide program design, outreach, implementation, and incentive payment support to Riverside Public Utilities for an Upstream Rebate Program for High Efficiency Equipment and other services further described in Exhibit A-1, "Scope of Services" (or "Services"). Detailed procedures and practices to be followed while performing the Scope of Services, including completion acceptance, shall be as set forth in the Scope of Services or a subsequent task order issued thereunder.

The pricing represented on Exhibit A-1, "Scope of Services" reflects the 12.5% decrease in pay for performance costs to Riverside Public Utilities from Energy Solutions' initial offering to SCPPA of \$42/ton to \$36.75/ton as presented in the table below for economy scale pricing.

### **Compensation and Schedule**

WORK PRODUCT	MEASUREMENT	PAYMENT RATE	ESTIMATED BUDGET
Program implementation, administration, rebating and marketing	Ton of installed high efficiency equipment	\$36.75 per ton	\$89,000.00
Program Incentives (Rebates)	Amount paid to distributors based on schedule on Attachment 1	\$70.00 per ton (average) Range: \$35.00 to \$300.00 per ton	\$161,000.00
		FY 2019/20 Not-to-Exceed Amount	\$250,000

Upstream High Efficiency Commercial HVAC Program expenses shall not exceed \$250,000.00

## Representative(s) of Participating Member(s)

Ryan Gleason  
Riverside Public Utilities  
3750 University Ave. 3<sup>rd</sup> Floor  
Riverside, CA 92051  
Phone # 951.826.5669  
rgleason@riversideca.gov

## Amendment(s) to the Agreement - none

[SIGNATURE PAGE FOLLOWS]

IN WITNESS WHEREOF, the parties have signed this Task Order as of the date first written above.

**SOUTHERN CALIFORNIA PUBLIC POWER AUTHORITY**

By: \_\_\_\_\_  
Michael S. Webster

Executive Director

Approved as to Legal Form and Content:

\_\_\_\_\_  
Richard J. Morillo  
General Counsel

and;

Cohen Ventures, Inc. DBA Energy Solutions

By: \_\_\_\_\_  
Name: Michael Laffey  
Title: Vice President of Finance

**Participant's Acknowledgement and Agreement**

The undersigned hereby attests that he has the requisite authority to bind the Participant to the obligations set forth in the Task Order and Participant agrees to reimburse SCPPA for all fees and expenses invoiced by Contractor and will be responsible for all payment obligations incurred by SCPPA in connection with the work performed at the direction of or on behalf of Participant. Participant agrees to hold SCPPA and all other SCPPA members harmless for payment for work performed at the direction of, and for the exclusive benefit of Participant.

**City of Riverside - Utilities**

By: \_\_\_\_\_  
Al Zelinka, FAICP  
City Manager

Certified as to Availability of Funds:

Approved as to form:

By: \_\_\_\_\_  
Finance Director

By: \_\_\_\_\_  
Assistant City Attorney

## **Exhibit A-1**

### **Scope of Services**

#### **PROGRAM DESCRIPTION**

Cohen Ventures, Inc. DBA Energy Solutions (the Contractor) shall provide program design, outreach, implementation, and incentive payment support to Riverside Public Utilities for an Upstream Rebate Program for High Efficiency Equipment (Program). These efforts include creating materials necessary to maintain the Program, conducting outreach to eligible Distributors to upsell and stock qualifying equipment and enroll in the program, modifying and maintaining the online application system, processing rebate applications, ensuring Distributor compliance with the terms of the Distributor Participation Agreement, as described below, verifying customer eligibility and product qualifications, providing ongoing program usage information to Riverside Public Utilities, and paying rebates to Program participants.

The specific tasks shall include:

#### **TASK 1- PROJECT MANAGEMENT**

The Contractor shall work with Riverside Public Utilities to design and implement the Program. Project management activities will include: finalizing the Program design, budgeting and budget tracking, developing Program policies and procedures, and coordinating and representing Riverside Public Utilities' interest with other team members, third parties, vendors, and subcontractors. Contractor shall also develop, update and revise documentation related to the above activities as needed.

Contractor shall provide a monthly report detailing activities performed and will meet in person with Riverside Public Utilities' Program Manager as needed. Monthly program reporting will include, but is not necessarily limited to, equipment installing customer contact information and Riverside service address, equipment information, costs, and annual kilowatt-hour and kilowatt savings. This monthly report is due by the 10th day of each calendar month for Riverside Public Utilities' internal reporting. Contractor shall provide Program data or other information necessary to fulfill Program inspection and evaluation requirements.

#### **TASK 2 - OUTREACH**

The Contractor will perform outreach to eligible distributors, dealers, manufacturers, and manufacturer representatives (Distributors) to inform them of the Program, enroll participants, and provide support and training on submitting and tracking applications through the online system. Distributor outreach will include attending meetings with various entities, including, but not limited to, the client, other utilities, account executives, vendors, business groups, local governments, manufacturers, trade associations and other associations. The Contractor shall develop and maintain an updated Program communication database, and will document meetings and phone calls with market actors. The Contractor will provide Riverside Public Utilities with copies of signed Distributor Participation Agreements, specifying each Distributor's

responsibilities, commitments and liabilities associated with Participation in the Program, and a list of participating Distributors.

Distributors will typically receive 1-3 in-person visits per year from Contractor staff. During these visits Contractor will promote sales and stocking strategies for high efficiency equipment sales and provide business cases that outline how the program benefits their business and how their participation compares to that of their competitors. Contractor will work with Distributors to address and resolve questions and barriers in order to facilitate maximum participation. Training for participating Distributors may be provided in person, on the phone, and/or via webinar or video. Contractor will respond quickly to questions and issues as they arise for Distributors submitting applications through the online system or application status. Manufacturers and other key market actors may also be engaged with calls and in-person visits conducted as appropriate. The Contractor shall attend the support activities deemed necessary to the Program success by Program Manager.

### **TASK 3 - ONLINE SYSTEM DATABASE DEVELOPMENT AND MAINTENANCE**

The Contractor shall customize the California Distributor Rebates System (the System) ([www.cainstantrebates.com](http://www.cainstantrebates.com)) to process Program rebates and incentives for participants. The Contractor will operate and maintain the System through dedicated hosting facilities, incorporating data security, data backup and redundancy. The System will include batch application upload, customer address matching, batch equipment upload, qualifying equipment database and verification, and invoicing tracking capabilities.

Customer installation address matching may be done manually by Riverside Public Utilities with support from the Contractor or may be done automatically if Riverside Public Utilities' customer address database(s) is made available to the Contractor. The equipment database shall include equipment that qualifies for the Program. Qualifying equipment is described in Attachment 1 and may be modified by mutual written agreement between Contractor and Riverside Public Utilities. Contractor shall update the online application system and databases as new qualifying equipment is included.

The Contractor will work with Riverside Public Utilities staff to securely maintain the confidentiality of the customer database and all Program information.

### **TASK 4 -APPLICATION PROCESSING AND VERIFICATION**

The Contractor shall review rebate applications for consistency and completeness and shall resolve issues that may prevent applications from being processed. The Contractor shall verify that customer installation addresses provided on rebate applications match valid customer addresses and accounts. The Contractor will verify and approve eligible equipment information provided by Distributors with the qualifying equipment list (Attachment 1). The Contractor will also train Riverside Public Utilities personnel as needed to review applications, payment status, and invoicing.

### **TASK 5 -PAYMENT PROCESSING AND PROGRAM REPORTING**

The Contractor shall be responsible for paying rebates to participating Distributors. Rebates will be batched together on invoices on a weekly or bi-weekly basis, reviewed, and forwarded to the Contractor finance team for payment. Checks will be cut and mailed to Distributors according to payee information provided upon enrollment. Additionally, the Contractor will research and query program data from the System and prepare reporting documents as required by the Program Manager to meet regulatory and other reporting needs.

#### **TASK 6 -ENGINEERING SERVICES AND WORK PAPERS**

Upon request, Contractor will provide work papers that support Riverside Public Utilities Energy Efficiency Programs including, but not limited to, claimed energy and demand savings resulting from the Upstream Rebate Program for High Efficiency Equipment. The work tasks include technical support of calculations used to estimate savings; energy savings modeling; and researching and documenting measure costs and other measure parameters used in cost effectiveness calculations. Specific work may include:

- Develop new work papers, utilizing recent engineering, EM&V, cost data, and/or related software to substantiate savings claims.
- Convert and expand existing work papers, correcting where necessary.
- Participate in the peer review of draft work papers and/or assist in comments resolution.
- Update existing work papers impacted by any recent EM&V study results.
- Participate in meetings and conference calls.
- Coordinate analysis related to DEER measures and the DEER database.
- Analyze studies, code & standards, measures, and data related to work papers.

#### **PAYMENT SCHEDULE:**

<b>ENERGY SOLUTIONS BILL</b> <b>RATES</b> <b>2019 - 2021</b>			
LABOR CATEGORY	RATE (\$/hr)		
	2019	2020	2021
001-Admin Assistant/Admin Associate	75	77	80
002-Intern	83	85	88
100-Analyst	105	108	112
101-Associate	141	147	152
110-Project Manager	159	166	171
210-Project Manager II	176	183	189

710-Sr Project Manager	206	214	221
740-Senior Manager	234	242	250
120-Engineer	173	179	185
220-Engineer II	187	194	200
720-Sr Engineer	217	226	233
160-Information System Manager I	163	172	176
260-Information System Manager II	165	174	180
360-Information System Manager III	198	208	217
760-Senior Information System Manager	219	230	237
170-Software Engineer I	171	178	180
270-Software Engineer II	206	217	224
370-Software Engineer III	216	227	234
770-Senior Software Engineer	241	256	262
810-Director	245	253	264
830-IS Director	251	262	270
910-Officer/Principal	267	276	288

Total contract costs are not to exceed \$250,000.00.

Contractor invoices will be sent to Riverside Public Utilities. Upon approval, Riverside Public Utilities will forward invoices for payment to Southern California Public Power Authority (SCPPA) at [billinginvoices@scppa.org](mailto:billinginvoices@scppa.org).

#### Three-Phase Package and Split Unitary Air Conditioners and Heat Pumps

Equipment Type	Size Category	Unit Type	Sub-Category	Tier	Full Load Cooling Efficiency		Seasonal/Part-Load Cooling Efficiency	Incentive (\$/ton)
Air-Cooled	< 5.4 tons	AC or HP	Split System w/ TXV	1	12.5 EER	Or	15.0 SEER	\$50
			Single Package		12.0 EER	Or	15.0 SEER	



			Split System w/ TXV	2	13.0 EER	Or	16.0 SEER	\$100
			Single Package		12.4 EER	Or	16.0 SEER	
			Split System w/ TXV	3	13.5 EER	Or	17.0 SEER	\$175
			Single Package		13.0 EER	Or	17.0 SEER	
	≥ 5.4 tons and < 11.3 tons	AC or HP	Split System w/ TXV and Single Package	1	11.5 EER	Or	13.4 IEER	\$40
				2	12.0 EER	Or	13.8 IEER	\$65
				3	12.6 EER	Or	14.8 IEER	\$90
				4	13.0 EER	Or	18.0 IEER	\$200
	≥ 11.3 tons and < 20 tons	AC or HP	Split System w/ TXV and Single Package	1	11.5 EER	Or	13.0 IEER	\$40
				2	12.0 EER	Or	13.5 IEER	\$65
				3	12.5 EER	Or	14.0 IEER	\$90
				4	13.0 EER	Or	17.5 IEER	\$200
	≥ 20 tons and < 63.3 tons	AC or HP	Split System w/ TXV and Single Package	1	10.5 EER	Or	11.8 IEER	\$40
				2	10.8 EER	Or	12.5 IEER	\$65
				3	11.1 EER	Or	13.5 IEER	\$90
				4	11.5 EER	Or	15.0 IEER	\$150
	≥ 63.3 tons		Split System w/ TXV and	1	10.2 EER	Or	11.6 IEER	\$40



		AC or HP	Single Package	2	11.0 EER	Or	12.3 IEER	\$65
				3	12.0 EER	Or	13.8 IEER	\$90
				4	12.8 EER	Or	15.0 IEER	\$150
Water/Evap. Cooled AC (Three Phase and Single Phase)	< 5.4 tons	AC	Split System w/ TXV and Single Package	1	14.0 EER			\$75
				2	15.0 EER			\$125
				3	16.0 EER			\$200
	≥ 5.4 tons and < 11.3 tons	AC	Split System w/ TXV and Single Package	1	14.0 EER			\$35
	≥ 11.3 tons and < 20 tons	AC	Split System w/ TXV and Single Package	1	14.0 EER			\$70
	≥ 20 tons	AC	Split System w/ TXV and Single Package	1	13.0 EER			\$70
Water Source HP (Three Phase and Single Phase)	< 5.4 tons	HP	Split System w/ TXV and Single Package	1	14.0 EER			\$100
				2	15.0 EER			\$200
				3	16.0 EER			\$300
	≥ 5.4 tons and < 11.3 tons	HP	Split System w/ TXV and Single Package	1	14.0 EER			\$100
	≥ 11.3 tons and < 20 tons	HP	Split System w/ TXV and Single Package	1	14.0 EER			\$100

	≥ 20 tons	HP	Split System w/ TXV and Single Package	1	13.0 EER			\$100
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#### Single-Phase Package and Split Unitary Air Conditioners and Heat Pumps

Equipment Type	Size Category	Unit Type	Sub-Category	Tier	Full Load Cooling Efficiency		Seasonal/Part-Load Cooling Efficiency	Incentive (\$/ton)
Air-Cooled	< 5.4 tons	AC or HP	Split System w/ TXV	1	12.0 EER	And	15.0 SEER	\$50
			Single Package	1	11.6 EER	And	15.0 SEER	

#### Three-Phase Variable Refrigerant Flow (VRF) Equipment

Equipment Type	Size Category	Building Type	Tier	Minimum Qualifying Efficiency	Incentive (\$/ton)
VRF	< 80 tons	Commercial	1	ASHRAE 90.1 - 2010 Minimum	\$400
	≥ 80 tons		1		\$250

#### Three-Phase Air-Cooled Chiller Equipment

Equipment Type	Size Category	Unit Type	Sub-Category	Tier	Full Load Cooling Efficiency		Seasonal/Part-Load Cooling Efficiency	Incentive (\$/ton)
Air-Cooled	All	All	With Condenser	1	11.0 EER	Or	14.2 IPLV	\$50
				2	11.5 EER	Or	15.8 IPLV	\$100

#### Three-Phase Water-Cooled Chiller Equipment

Equipment Type	Size Category	Compressor Type	Minimum Qualifying Efficiency: Percent Improvement above T-24			Incentive e (\$/ton)
			Full-Load		IPLV/NPLV	
Water-Cooled	< 75 tons	Screw/Scroll	T-24 Min.	and	20% (0.48 kW/ton)	\$4.00
	≥ 75 tons and < 150 tons		T-24 Min.	and	20% (0.448 kW/ton)	\$4.00
	≥ 150 tons and < 300 tons		T-24 Min.	and	20% (0.432 kW/ton)	\$3.00
	> 300 tons and < 600 tons		T-24 Min.	and	10% (0.468 kW/ton)	\$2.50
	≥ 600 tons		T-24 Min.	and	10% (0.45 kW/ton)	\$2.50
	≥ 150 tons and < 300 tons	Centrifugal	T-24 Min.	and	15% (0.468 kW/ton)	\$2.50
	≥ 300 tons and < 400 tons		T-24 Min.	and	20% (0.416 kW/ton)	\$1.50
	≥ 400 tons and < 600 tons		T-24 Min.	and	20% (0.40 kW/ton)	\$1.50
	≥ 600 tons		T-24 Min.	and	20% (0.40 kW/ton)	\$1.50

## Residential HVAC Measures

### Single-Phase Package and Split Unitary Air Conditioners and Heat Pumps

Equipment Type	Size Category	Unit Type	Sub-Category	Tier	Seasonal/Part-Load Cooling Efficiency	HSPF (Unitary HP Only)	Incentive (\$/ton)
Unitary Split System	< 5.4 tons	AC	Ducted	1	15.0 SEER		\$50
				2	16.0 SEER		\$100
				3	18.0 SEER		\$125
				4	20.0 SEER		\$150



	< 5.4 tons	HP	Ducted	1	15.0 SEER	8.4 HSPF	\$75
				2	16.0 SEER	8.4 HSPF	\$100
				3	17.0 SEER	8.4 HSPF	\$125
				4	18.0 SEER	8.4 HSPF	\$150

**Single-Phase Mini- and Multi-Split Equipment**

Equipment Type	Size Category	Unit Type	Tier	Seasonal/Part-Load Cooling Efficiency	Incentive (\$/ton)
Mini and Multi-Split System	< 5.4 tons	Heat Pump	1	16.0 SEER	\$100
			2	19.0 SEER	\$200
			3	22.0 SEER	\$300