

# Continuous optimization program

## Sample proposal

Proposal for: customer name

Site name:

**NOTE: THE FOLLOWING CONTACT INFORMATION ARE REQUIRED IN THE PROPOSAL.**

Prepared by: Consultant firm

Contact name: Consultant name

Contact email:

Contact phone #:

Date:

## Building description

This proposal is for the XYZ General Hospital. The building area is 100,000 ft<sup>2</sup>. The building was originally constructed in 1970 and had significant additions in 1978 and 1989. The building is served by a central (natural gas) boiler and chiller plant. Mechanical systems include VAV and constant volume reheat. The building has a XX DDC system installed circa 1989.

## Scope of services

ABC Consulting will provide the Lead Service Provider scope of work and deliverables required by the BC Hydro Continuous Optimization program for commercial buildings. Specifically, those services are to conduct the Investigation and Completion phases in accordance with the program guidelines and as outlined under the customer agreement.

The qualified lead service provider will be Sara Jones.

## Investigation phase:

ABC Consulting will conduct a detailed investigation of all HVAC system and controls on customer site. The specific tasks include the followings:

- Site visit to investigate C Op Energy Conservation Measure opportunities.
- Interview with operation and maintenance staff regarding the current HVAC operations.
- Review and analyze the DDC system to identify opportunities for improvement and minor retrofit.
- Review available building documentation (including utility bills, as-built drawings, O&M manuals).
- Generate energy savings estimate calculation and budget costs for recommendations.
- Prepare and complete Recommissioning Workbook and Recommissioning Report to document the analysis and provide recommendations.

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## Implementation phase:

Develop an implementation plan, to establish the level of additional Service Provider assistance desired or warranted for each potential measure. Additional implementation assistance may include: preparing detailed scopes of work, writing detailed control sequences and schematics, working with in-house staff to implement and optimize measures, or providing full turn-key implementation services.

## Completion phase:

Following the implementation of ECMs, ABC Consulting will complete the following activities;

- Verify completion of each measure and update Recommissioning Workbook with final implemented measures including final savings, costs, and payback calculations. Selected measures with significant savings potential should have verification data demonstrating that the measures are operating as intended along with updated savings calculations. When feasible, verification data should include trends or functional test results, though other methods, such as copies of invoices, site visit reports, and before/after photos, may be acceptable.
- Conduct an in-house training presentation for the Applicant and the appropriate building operations personnel covering the new documentation, measures that were implemented, and requirements for ongoing maintenance and monitoring. Document the attendance of the building operations staff.
- Prepare and submit to BC Hydro the updated Recommissioning Workbook and Recommissioning Report (including the Training Completion Form) to document the implemented measures, including, but not limited to: date of completion of each measure, new or improved sequences of operation, the energy savings impact of the measures, the requirements for ongoing maintenance and monitoring of the measures, and contact information for the Service Provider, in-house staff, and contractors responsible for implementation.

The primary deliverables are the Recommissioning Workbook and Recommissioning Report (with Training Completion Form).

## Fees

The maximum upset fee for this project will be:

Activity	On-site hours	Office hours	Total
Investigation phase	40	20	\$9,600
Completion phase	20	10	\$4,800
<b>Sub-total</b>			<b>\$14,400</b>
<b>GST</b>			<b>\$720</b>
<b>Total</b>			<b>\$15,120</b>

Hourly fees charged to the project will be per the following rate schedule:

Name / Position	Title	Hourly Rate
Sara Jones	Lead service provider	\$
Junior Engineering Consultant		\$
Office staff		\$

## Schedule

- Investigation Phase activities will start in MMM, YYYY and will take approximately X months.
- Implementation Phase (to be determined by the customer) will take approximately X months.
- Completion Phase activities including customer training will be conducted over X half day sessions, after implementation of the selected measures is complete.