Georgia Environmental Facilities Authority

ARRA - American Recovery & Reinvestment Act of 2009
Call Specifics

- Please use the chat feature on your web meeting to submit questions during our call.
- Questions will be addressed intermittently during the call.
- If you must leave please do not put the call on hold; you may subject everyone to music.
- A recording of the call and supporting documents will be available after the call.
Presenters

- David Godfrey, GEFA
- Danny Elijah, GSFIC
- Nathan Jones, GSFIC
- Rey Palma, GSFIC
- Andrew Ladd, GEFA
- PJ Newcomb, GEFA
Points To Cover

- Where we are in the process
- GEFA and GSFIC roles in the project
- Overview of the contracting process
- Introduction and overview to reporting
- Preview proposed measurement and verification components of the projects
- Review the timeline for funding distribution and contract completion
Where we are in the process

- Projects have been selected
- GEFA has obtained all of the funding
- GEFA and GSFIC signed an IAA
- GEFA and USG signed an IAA
- GSFIC will provide support to state agencies’ approved for ARRA funding
- USG Facilities Office will admin USG funded projects
Questions?
Basic Services

- GSFIC will provide procurement and project management services.
- GSFIC will consult with agencies receiving ARRA awards from GEFA on the scope of the energy improvement projects.
- GSFIC will assess the potential for consolidating procurements and construction of similar projects among different agencies.
Basic Services

- GSFIC will consult with agencies for suggested design professionals and select according to established procedures and ARRA requirements.
- GSFIC will solicit competitive ITB, RFQ or RFP’s.
- GSFIC will consult with Agencies for suggested vendors to receive bid notices.
- GSFIC will evaluate, and select vendors according to existing state procurement and ARRA guidelines/policies.
- GSFIC will post all open solicitations to the Georgia Procurement Registry (GPR).
GEFA/GSIFIC - Energy Grants Contracting Program

Grant Process
1. GEFA Application Process
   - (2) Selection Notification
   - (3) Measurement and Verification Process Confirmation
   - (4) Awardee Prepares SOW for GSIFIC Review
   - (5) GSIFIC Notification that SOW is Approved
   - (6) Awardee Plans and Specs Finalized

GSIFIC Process
7. Agency Request to Advertise Project Form
   - (8) GSIFIC Review, Comment and Finalization of Solicitation
   - (9) Final Solicitation Document Prepared
   - (10) Advertising & Bid Period/Pre-bid mtg
   - (11) Bid Opening and Selection
   - (12) Contract Award

Project Management
13. Pre-Construction Conference
   - (14) Notice to Proceed
   - (15) Mobilization & Scheduling
   - (16) Construction Period
   - (17) Punchlist
   - (18) Material Completion

Post Construction
19. Final Completion
   - (20) Warranty Period / Measurement & Verification
   - (21) Auditing Period 3-5 years
   - End

Bold blue indicates general reporting period for Awardee/Vendor.
(3) Measurement & Verification Process Confirmation

- Coordinate through GEFA (ARRA funds can be used if requested in original application)
- Compliance with IPMVP and/or approved variation
- Agency can self perform M&V or contract out to vendor
- A preliminary M&V Plan will be reviewed by GSFIC in consultation with GEFA prior to execution of contract
- GEFA notifies Agency of approved preliminary plan
(4) Awardee Prepares SOW for GSFIC Review

- Draft Scope of Work (SOW) prepared by Agency for GSFIC review (ARRA funds can be used if requested in original application)
- Project allocation shall be all inclusive; no contingency above awarded amount
- Agency will include approved SOW in project manual
Fully complete plans and specs are sent to the GSFIC Design Review Group

- Plans and specs receive GSFIC approval
Questions?
The “Agency Project Request Form” is completed by the Agency.
The form is submitted to Procurement with all required documents attached, e.g., SOW, Plans and Specs, Programming/Concept Docs, etc.
This form will be made available shortly.
(8) GSFIC Review, Comment and Finalization of Solicitation

- GSFIC will receive and process the requesting agency’s full solicitation package
- GSFIC will ensure package compliance with ARRA requirements
(10) Advertising & Bid Period

- Projects will be advertised to the GPR – Georgia Procurement Registry
- The bid period will generally be 30 consecutive calendar days unless otherwise allowed
- A pre-bid conference may be held
- Changes will be managed by addenda
(10) - Continued Advertising & Bid Period (Topics)

- Buy American
- Reporting Requirements
- DUNS
- CCR
- Copeland Act
- Davis Bacon
- Self-performance of work process
- Subcontracts
- Neutrality-Open Competition
- IG/DOE Audits
- Field Audits
- GSFIC Guidelines
(11) Bid Opening & Selection

- Bid openings will be publicly held
- Award shall be to the lowest, responsive, and responsible bidder
- Contracting shall be promptly after evaluation and confirmation of Awardee compliance with all ARRA requirements
(12) Contract Award

- GSFIC/Agency will prepare all contract documents for signature
- Contract will be between vendor/service provider and GEFA
(13) Pre-Construction Conference

- GSFIC will schedule and host the pre-construction conference
- ARRA compliance matters will be discussed
- Form of payment will be discussed
- Sub-Contractor use will be discussed
Questions?
2 Reporting Avenues Required Quarterly

ARRA – 1512
Due between the 1st & 5th day after each quarter

Department of Energy - Attachment 2
Due between the 1st & 15th day after each quarter

Both will be done online from a web browser
State of Georgia ARRA SEP Reporting
Project to GEFA to DOE Process Flow

ARRA 1512 & DOE Attachment 2
Online Reporting Systems

Project Data Entry
Project Vendors &/or Service Providers

Approve
Review
Certify

GEFA
GEorgia STATE FINANCING & INVESTMENT COMMISSION

U.S. DEPARTMENT OF ENERGY
Energy Efficiency & Renewable Energy

State Energy Program

GEorgia Seal 1796
(16) Introduction and Overview of Reporting

Reporting Data

Office of Management and Budget – 1512

- Jobs Created & Retained
- Total # and $ Amount of payments made less than $25,000
- In some cases, sub-recipient top 5 Officers Names and Compensation
### Sub Recipient Report: Grant or Loan

#### Sub Recipient Information
- Sub Recipient Award Number
- Sub Recipient Email Address
- Sub Recipient Name
- Sub Recipient Address1
- Sub Recipient Address2
- Sub Recipient Address3
- Sub Recipient City
- Sub Recipient State
- Sub Recipient Zip Code
- Sub Recipient Country
- Sub Recipient Congressional District

#### Certification

In reliance upon certifications to me by others and after reasonable inspection and review, I certify that the foregoing is correct to the best of my knowledge.

- Date:
- Name:
- Title:

#### Sub Recipient Highly Compensated Officers

<table>
<thead>
<tr>
<th>Officer name</th>
<th>Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<td></td>
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<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Sub Award Information

<table>
<thead>
<tr>
<th>Report Period</th>
<th>Award ID</th>
<th>Amount</th>
<th>Total Disbursed</th>
<th>Award Date</th>
<th>Number of Jobs</th>
<th>Address 1</th>
<th>Address 2</th>
<th>City</th>
<th>State</th>
<th>Zip Code-4</th>
<th>Congressional District</th>
<th>Country</th>
</tr>
</thead>
</table>

#### Sub Recipient Place of Performance

<table>
<thead>
<tr>
<th>Total # of vendors disbursed under $25k</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total amount for vendors disbursed under $25k</td>
</tr>
</tbody>
</table>

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(16) 1512 Reporting Information

For a demo video, slides, & a PDF in regard to 1512 Reporting go to:

Introduction and Overview of Reporting

Reporting Data

DOE – Attachment 2

- Phase of the Project & % Complete
- # of Buildings Retrofitted-to-Date
- Square Footage Retrofitted-to-Date
- Jobs Created & Retained
- Management Analysis
- Energy Savings (only after M&V)
## GEFA STATE ENERGY PROGRAM: STATUS REPORTING

State of Georgia, ARRA Funded, Energy Retrofit Projects Status Dashboard

### Agency ECMs

<table>
<thead>
<tr>
<th>ECM ID #</th>
<th>Category</th>
<th>Project Name</th>
<th>Project Location</th>
<th>Budget</th>
<th>Update</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>136</strong></td>
<td>Lighting</td>
<td>Lighting System Upgrades and HVAC Remediation</td>
<td>Georgia National Fairgrounds &amp; Agricenter</td>
<td>$360,411</td>
<td>Update Quarterly Metrics</td>
</tr>
<tr>
<td><strong>261</strong></td>
<td>Building Envelope</td>
<td>Seal Cost Application for Conditioned Buildings Roofs</td>
<td>Various Locations</td>
<td>$463,665</td>
<td>Update Quarterly Metrics</td>
</tr>
<tr>
<td><strong>TOT</strong></td>
<td></td>
<td></td>
<td></td>
<td>$824,076</td>
<td></td>
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<tr>
<td><strong>137</strong></td>
<td>Lighting</td>
<td>&quot;Growing Green in Georgia&quot; - Georgia Farmers' Market Energy Improvement Project</td>
<td>Various Farmers' Markets</td>
<td>$1,200,000</td>
<td>Update Quarterly Metrics</td>
</tr>
<tr>
<td><strong>TOT</strong></td>
<td></td>
<td></td>
<td></td>
<td>$1,200,000</td>
<td></td>
</tr>
<tr>
<td><strong>79</strong></td>
<td>Controls</td>
<td>GBA- Central Energy Plant - Replacement of 3, 1250 ton chillers with new high efficiency chillers and complete chiller plant demand flow optimization</td>
<td>Various Locations</td>
<td>$1,116,068</td>
<td>Update Quarterly Metrics</td>
</tr>
<tr>
<td><strong>159</strong></td>
<td>Mechanical</td>
<td>GBA - 2 Peachtree Facility Energy Conservation projects, 2 Pump/VFD replacements and a High Efficiency Domestic</td>
<td>2 Peachtree Street Tower Building</td>
<td>$493,000</td>
<td>Update Quarterly Metrics</td>
</tr>
</tbody>
</table>
GEFA STATE ENERGY PROGRAM: STATUS REPORTING

GEFA SEP Program Status Quarterly Report

Reporting Quarter
Quarter 4 - 2009

Date Submitted:
12-04-2009

PROJECT INFORMATION

Agency
Agricultural Exposition Authority, Georgia

Category
Lighting/Fixtures

ECM Project #
135

Project Name
Lighting System Upgrades and HVAC Remediation

Total Budget for Project
$366,411

ECM Description
Lighting System upgrade and retrofits - The Georgia Agricultural Exposition Authority performed a detailed evaluation of the lighting systems currently in place throughout 13 buildings and determined there are significant opportunities for electrical energy savings by installing energy efficient fixtures and bulbs and motion sensors. The Georgia Agricultural Exposition Authority proposes converting 900 metal Halides (ranging from 45SW-1000W) to 1,071 T8 fluorescence fixtures (221W). It is estimated that these lights will reduce energy consumption by 59% while adding 35% more light levels. Furthermore, these lights burn at 98 degrees vs 1200 degrees, and thus reduces HVAC costs by keeping the building "cooler". Additionally 60 motion sensors will also be installed that will allow lights to operate only when there is activity in the area. Another benefit and anticipated savings, although not "energy-related", will be in annual maintenance savings of $9,300 in labor and parts.

Project Lead Information:

TELL US HOW YOU HAVE PROGRESSED?
**TELL US HOW YOU HAVE PROGRESSED?**

+ with Green text indicates a line that needs to be updated

A red * indicates a required field

**Project Phase & Completion**

+ Phase

* Current Phase of the Project:  Design

* % Completion of Current Phase

  - Less than 25%
  - More than 25% but Less than 50%
  - More than 50% but Less than 75%
  - More than 75% but Less than 100%
  - 100%

+ Whole

* % of Project Completed

**Plan vs. Actual-to-Date**

The numbers for Plan-vs. Actual should be reported as cumulative figures for the project as a whole, not just for this quarter.

In the approved application you planned called for the following # of buildings to be retrofitted resulting in this amount of square feet being
Questions?
(20) Measurement and Verification

- Each project or energy conservation measure awarded will need to include approved form of measurement and verification of energy savings
- International Performance Measurement and Verification Protocol (IPMVP) 2007
  - International Performance Measurement and Verification Protocol (IPMVP)
**Energy Savings** = (Baseline Energy Use) − (Post-Retrofit Energy Use) + /− (Adjustments)

**Baseline Energy Use** = (Baseline System Performance) x (Baseline Operating Hours)

**Post-Retrofit Energy Use** = (Post-Retrofit System Performance) x (Post-Retrofit Operating Hours)
(20) Measurement and Verification

**Performance** = efficiency or rate of energy use of system/equipment

**Operating Hours** = the total time that a system/piece of equipment runs
(20) Measurement and Verification

Impact of Energy Efficiency Measures

- Baseline Power
- Post Retrofit Power

Current Total Energy Consumption

Operating Hours
- Post Retrofit Hours
- Baseline Hours
(20) Measurement and Verification

- **Option A**—Retrofit Isolation with Key Parameter Measurement
- **Option B**—Retrofit Isolation with All Parameter Measurement
- **Option C** — Whole Bldg Utility Data Analysis
- **Option D**—Calibrated Computer Simulation
Recommendations:

- ECMs with projected annual savings < $10,000/yr can use engineering calculations instead of an official IPMVP method.
- Lighting projects typically **Option A**, perhaps **B**
- Medium and large controls (excl. metering) & mechanical projects within a single building or central plant: **Option B** (where practicable)
- Metering, Commissioning, Building Envelope, and Multi-building Controls projects: **Option C** (10% rule)
(20) Measurement and Verification

**Self-performance M&V:** requires agency to complete plan (may include GEFA/GSFIC assistance)

**Procurement Services** - RFPs should contain M&V requirements, specifically requesting:
- Preliminary/Proposed M&V Plan (including cost estimate)

Energy Savings Report is required under both methods of performance
(20) Measurement and Verification

Measurement and Verification (M&V) Plan

1. A description of the ECM and its intended result
2. Intended M&V option to be used
3. How baseline data will be determined
   a) Parameters to be measured (also, when and for how long),
   b) Parameters to be stipulated (agreed to, held constant)
   c) How & why the baseline may be adjusted (weather, occupancy, etc.)
4. Measurement methods and equipment to be used
5. Schedule for all M&V activities
6. Who will conduct the M&V activities
7. Commitment to providing Energy Savings Report - methods, assumptions, calculations, and results of the M&V
8. Costs of M&V operations and equipment
Questions?
Timeline

- Sign IAA: Nov 24
- Contract templates finalized: Early Dec
- Vendor presentation: Dec 15
- Begin contracting the Work: Mid Jan
- All work to be completed: NLT 3/31, 2012
Contact Information

- GSFIC Phone: 404 463 5600
- GSFIC Project Management
  - Danny Elijah: daniel.elijah@gsfic.ga.gov
  - Nathan Jones: nathan.jones@gsfic.ga.gov
- GSFIC Procurement
  - Rey Palma: rey.palma@gsfic.ga.gov
  - Jim Hyde: jim.hyde@gsfic.ga.gov
- Reporting
  - Andrew Ladd: aladd@gefa.ga.gov
- Measurement & Verification
  - P.J. Newcomb: pjnewcomb@gefa.ga.gov