Request for Proposals

Metropolitan Mayors Caucus Public Sector Energy Efficiency Program for 2014-15

Funding and technical assistance to improve energy efficiency in public buildings is available through a simple proposal process. Project Proposal Forms are accepted on a rolling basis throughout the year, and multiple deadlines are offered to optimize rebates to public sector applicants:

- **July 30, 2014** – Deadline for Indoor and Outdoor Lighting Projects (to be eligible for supplemental ICECF funding)
- **September 1, 2014** – Early Deadline for All Energy Efficiency Projects (all projects completed by October 31, 2014 are eligible for a 10% bonus)
- **November 1, 2014** – Standard Deadline for All Energy Efficiency Projects (all projects completed by February 14, 2015 are eligible for a 5% bonus)

Work for all projects must be completed by May 15, 2015.

Please note: Project planning can start anytime by submitting a Project Proposal Form. Funding for grant reimbursements is expected to be available as early as September 2014, pending approval from the Illinois Department of Commerce and Economic Opportunity.

WHO IS ELIGIBLE TO PARTICIPATE

All public sector entities in northeastern Illinois which receive service from Illinois investor-owned utilities (ComEd, Peoples Gas, North Shore Gas and Nicor Gas) are eligible to apply for this program, including municipalities, townships, counties, park districts, libraries, schools, community colleges, and more.

For public sector entities outside of northeastern Illinois, additional programs are available from other organizations throughout the state. Contact us for more information or for a referral. Public sector entities that receive service from municipal or cooperative utilities are not eligible to participate in this program.

PROGRAM PARTNERS – WHO'S WHO

The **Metropolitan Mayors Caucus (Caucus)** is a non-profit organization of mayors in the Northeastern Illinois region. It supports municipalities with programs and aligns resources to achieve common local and regional objectives. Through the Caucus Public Sector Energy Efficiency Program, it receives funding to support local energy efficiency projects in public sector buildings throughout the region projects as a partner to the Illinois Department of Commerce and Economic Opportunity.
http://www.mayorscaucus.org

360 Energy Group (360EG) is a full service energy efficiency consulting firm retained by the Caucus for its technical expertise and experience administering energy efficiency programs.
http://360eg.com

The **Illinois Department of Commerce and Economic Opportunity (DCEO)** is the source of funds for projects participating in the Caucus Public Sector Energy Efficiency Program. These funds are collected from all rate payers in Illinois investor-owned utilities as part of the Illinois Energy Now (IEN) Program.
http://www.ildceo.net/dceo/bureaus/energy_recycling/energy/energy+efficiency

The **Illinois Clean Energy Community Foundation** is an independent foundation endowed by Commonwealth Edison that provides funding and support energy efficiency and environmental programs in Illinois.
http://www.illinoiscleanenergy.org/

Cook County Department of Environmental Control is collaborating to reach public agencies within Cook County to invite participation in the program (*NOTE*: Public agencies outside of Cook County are also eligible to participate in this program).
http://blog.cookcountyil.gov/sustainability/advisory-council-report/

The **Smart Energy Design Assistance Center (SEDAC)** is an applied research program at the University of Illinois at Urbana-Champaign that works in partnership with the DCEO to achieve energy efficiency savings by conducting energy assessments in buildings throughout the State of Illinois.
http://smartenergy.illinois.edu/

RESOURCES AVAILABLE

Technical Assistance to assess building energy use; design effective solutions; and draft specifications for work and materials that will save natural gas and electrical energy is available to public agencies. The types of assistance are:

- **Immediate project design assistance**
  360EG are experts in building energy efficiency and can assess public buildings for lighting, HVAC and other energy efficiency opportunities that are ready for immediate implementation.

- **Project management and grant program assistance**
  360EG has expert knowledge of resources to guide public agencies in applications, bidding and timely completion of work. Selected projects will also benefit from bid specifications, evaluation and project oversight, as needed. 360EG staff are knowledgeable about multiple funding sources and can assure all allowable resources are aligned for the most cost-effective projects possible. Once they are approved for assistance, 360EG will assist public agencies with managing deadlines, compliance and reporting.

- **Long-term energy efficiency design assistance**
  Public agencies wishing to comprehensively plan for long-term energy efficiency may also be eligible for a no-cost energy audit and design assistance through the Smart Energy Design Assistance Center (SEDAC).

Funding is available to pay for labor and materials to upgrade lighting, HVAC and other systems to save energy. There are three types of funding available:

- Grant Reimbursements
- Enhanced HVAC Tune-Ups
- Direct Installation of Efficiency Measures

Public agencies are encouraged to take advantage of as many components as are applicable to their energy efficiency needs. Multiple Program Components may be combined in one building, or across multiple buildings, for a public entity.

- **Grant Reimbursements**
  Grant reimbursements cover up to 75% of costs for lighting, HVAC and mechanical projects that save electricity or natural gas. 360EG will manage the technical and procedural aspects of this program component and the Caucus will administer the funds. The overhead administrative costs of the Caucus and 360EG are paid for directly by the DCEO, resulting in public entities receiving the greatest possible incentive amount.

  Grant reimbursement amounts vary with the scope of the projects and are dependent upon the amount of energy saved, as detailed in the IL DCEO Technical Guidelines for the Illinois Energy Now Program. 360EG will calculate individual grant reimbursement amounts for each project based on energy savings, following DCEO standards. For some projects, prescriptive reimbursement rates will apply; others may be eligible for custom rates of $0.12 per kilowatt hour saved and/or $3.00 per therm saved.

  Early completion of projects is encouraged by the DCEO with additional 'Sweet Deal' Bonuses. As listed above, agencies are eligible to receive an additional 10% if work is completed by October 31, 2014 or 5% if completed by February 14, 2015. All projects must be completed by May 15, 2015 to qualify to receive any grant reimbursements.

  Some lighting projects may be eligible for additional supplementary funding through the Illinois Clean Energy Foundation. Combined with Caucus Public Sector Energy Efficiency grant reimbursements, these funds greatly reduce the cost to public agencies and can sometimes lead to 100% project reimbursement.

- **Enhanced HVAC Tune-Ups**
  This program provides enhanced maintenance services on qualifying packaged rooftop units and split systems in public sector buildings at no cost to participating public agencies. Unlike the reimbursement incentives, the Enhanced HVAC Tune-Up Program does not require public agencies to pay up-front for these services. The Tune-Ups are performed by one of our Qualified Service Providers who are contracted and paid directly through the Caucus Public

Sector Energy Efficiency Program funding. These services result in an estimated heating savings of 6% and cooling savings of 12% per unit. Public agencies with buildings located in ComEd electric service territory and Nicor Gas natural gas service territory will be eligible to receive these enhanced HVAC Tune-Up services.

- **Direct Installation of Efficiency Measures**
  Some HVAC systems may be eligible for the Direct Installation of Energy Efficiency Measures Program Component that provides materials and labor at no cost to participating public agencies. Energy efficiency measures such as HVAC controllers are simple and inexpensive yet achieve measurable savings. The cost of purchase and labor are covered directly by the Caucus Public Sector Energy Efficiency Program.

PROGRAM PROCESS

Initial Process Steps for All Funding Types

1. **Identify public buildings needing energy efficiency improvements.** Eligible buildings include office, garage, water and waste water treatment plants, community centers, libraries, schools and more.

2. **Align potential projects with sustainability goals.** Progress towards energy conservation and greenhouse gas reduction goals can be documented for reporting.

3. **Complete a Project Proposal Form** and submit either a hard or electronic copy to the Caucus, along with a recent gas and electric bill for each building being considered for assistance. Public agencies may submit multiple buildings on one form. Project Proposal Form deadlines:

   July 30, 2014 – Deadline for Indoor and Outdoor Lighting Projects (to be eligible for supplemental ICECF foundation funding)*
   September 1, 2014 – Early Deadline for All Energy Efficiency Projects (all projects completed by October 31, 2014 are eligible for a 10% bonus)
   November 1, 2014 – Standard Deadline for All Energy Efficiency Projects (all projects completed by February 14, 2015 are eligible for a 5% bonus)

   * For eligible interior and exterior lighting projects for municipal buildings only, 360EG can help agencies apply for additional funds from ICECF. It is the public agency's responsibility to complete the ICECF application directly through their online process. Although 360EG can help with the application, the process and decision to award funds are wholly ICECF's. The deadline for this application is September 11, 2014. If approved, ICECF will reimburse applicants directly. Funds may also be available in 2015.

4. **Assess buildings and design projects.** 360EG reviews your proposal, arranges a site visit to asses existing conditions, and assists in the planning of the potential project(s). 360EG works with the public agency to analyze the selected project(s), demonstrate energy and monetary savings, and estimate costs and payback period.

Grant Reimbursements – Specific Program Process Steps

1. **Secure approval.** Each public agency secures approval of the project and informs the Caucus and 360EG that they want to proceed. The Caucus issues an Award Letter to the public agency, which includes Grant Terms, an Award Acceptance Form, and a preliminary Scope of Work, on which the budget is based. The Award Acceptance Form must be accepted and returned promptly.

2. **Perform Scope of Work.** The public agency completes the energy efficiency work described in the Scope of Work by performing the work in-house or awarding a contract and/or purchase order to their chosen supplier and contractor and paying them directly. The public agency issues contracts and/or purchase orders directly with their own vendors for the work to be performed.

3. **Complete all work by May 15, 2015.** Necessary changes in the Scope of Work are allowable with documentation and approval. 360EG and the Caucus are available to help agencies to assure successful project completion, as needed.

4. **Complete necessary paperwork.** Throughout the process, 360EG completes and submits any required paperwork to the DCEO, acting for the public agency and the Caucus, including calculating final energy savings and corresponding final grant/incentive amount. The public agency provides all necessary documents to close out the project including certification forms, copies of contractor invoices and any other documents required by DCEO.

5. **Request reimbursement.** The public agency receives a Final Scope of Work from the Caucus, along with reimbursement instructions. The public agency invoices the Caucus for the amount of the DCEO incentive listed in the Final Scope of Work. As this amount is based on actual energy savings from the project, it may be greater or less than estimated in the preliminary Award Letter.

6. **Receive project inspection.** 360EG inspects all approved projects before and after completion and verifies the final scope of work in cooperation with the public agency. The public agency may also receive an audit from a 3rd party verifier.

7. **Receive reimbursement from the Caucus.**

Enhanced HVAC Tune-Ups – Specific Program Process Steps

1. The Caucus and 360EG will provide public agencies with details about the Enhanced HVAC Tune-Up Program and help them to determine eligibility. Once eligibility is determined, 360EG will guide the public agency in selecting a Qualified Service Provider from our Pre-Approved Provider List.

2. The Qualified Service Provider assists the public agency to complete an Enhanced HVAC Tune-Up Application and Consent Agreement, and submit to 360EG along with a copy of the public agency's last month's electric and natural gas utility bills. Applications are accepted on a rolling basis throughout the program year, pending availability of funds.

3. Once a list of public agency HVAC units has been approved, they are contacted by the Qualified Service Provider to schedule work. HVAC units receive evaluation, service, and inspection from the Qualified Service Provider. **All work must be completed by May 15, 2015.** The Qualified Service Provider will assist the Public Agency to fill out and sign a Proof of Completion, which will then be submitted to 360EG.

4. The Qualified Service Provider is paid directly by the Caucus for work performed, making this a cost-free program for the public agency.

Direct Installation of Efficiency Measures – Specific Program Process Steps

1. If appropriate for public agency buildings, the Caucus and 360EG will provide public agencies with details about the Direct Installation of Efficiency Measures and help them to determine eligibility.

2. The Caucus issues a Direct Installation of Energy Efficient Measures Project Description, Scope of Work, Warranty Information, and Consent Agreement to the public agency. The Consent Agreement must be signed and returned promptly.

3. The public agency is contacted by 360EG or a qualified contractor to schedule work. HVAC units receive installation of equipment to optimize performance. **All work must be completed by May 15, 2015.**

4. 360EG completes and submits any required paperwork to the DCEO, acting for the public agency and the Caucus. 360EG inspects all approved projects before and after completion and verifies the final scope of work in cooperation with the public agency. All equipment and contractors are paid directly by the Caucus, making this a cost-free program for the public agency.

PROGRAM SUMMARY

Funding Types	Payment Process	How To Apply
Grant Reimbursements	Public agency pays up front for work performed, and receives a grant reimbursement from the Caucus and/or from ICECF	For all funding types, submit a Project Proposal Form to the Caucus. Project Proposal Forms are accepted on a rolling basis throughout the year, and multiple deadlines are offered to optimize rebates to public sector applicants: • **July 30, 2014** – Deadline for Indoor and Outdoor Lighting Projects (to be eligible for supplemental ICECF funding) • **September 1, 2014** – Early Deadline for All Energy Efficiency Projects (all projects completed by October 31, 2014 are eligible for a 10% bonus) • **November 1, 2014** – Standard Deadline for All Energy Efficiency Projects (all projects completed by February 14, 2015 are eligible for a 5% bonus)
Enhanced HVAC Tune-Ups	All materials and labor are paid directly by the Caucus	
Direct Installation of Efficiency Measures	All materials and labor are paid directly by the Caucus	

CONTACT INFORMATION

Submit Project Proposal Forms to:

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For Questions or Project Planning Assistance:

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