

AMENDATORY AGREEMENT

THIS AMENDATORY AGREEMENT is made between the **CITY AND COUNTY OF DENVER**, a municipal corporation of the State of Colorado (the “City”), and **ENERGY OUTREACH COLORADO EFFICIENCY LLC**, a Colorado non-profit organization, with its principal place of business located at 225 East 16th Avenue, Denver, CO 80203 (the “Contractor”), jointly “the parties”.

RECITALS

A. The City and the Contractor entered into an Agreement dated December 7, 2016, (the “Agreement”) under which the Contractor provides to energy efficiency services, weatherization upgrades, and resident education for multi-family residential units.

B. The Parties wish to amend the Agreement to extend its term for an additional year, increase compensation to the contractor, and modify the scope of work to be performed.

NOW, THEREFORE, the parties agree as follows:

1. All references to Exhibit A in the Agreement are amended to read as Exhibits A and A-1. The scope of work marked as Exhibit A-1 is attached and incorporated into the Agreement by this reference.

2. All references to Exhibit B in the Agreement are amended to read as Exhibits B and B-1. The scope of work marked as Exhibit B-1 is attached and incorporated into the Agreement by this reference.

3. Paragraph 3 of the Agreement, entitled “**TERM**”, is amended by deleting and replacing it with the following:

“ **3. TERM**: The Agreement will commence on January 1, 2017, and will expire on December 31, 2018 (the “Term”). Subject to the Director’s prior written authorization, Contractor shall complete any work in progress as of the expiration date and the Term will extend until the work is completed or earlier terminated by the Director.”

4. Paragraph 4(d)(1) of the Agreement, entitled “Maximum Contract Amount”, is amended by deleting and replacing it with the following:

“(d) **Maximum Contract Amount**

(1) Notwithstanding any other provision of the Agreement, the City’s maximum payment obligation will not exceed **One Million Six Hundred Seventy-Five Thousand Dollars and Zero Cents (\$1,675,000.00)** (the “Maximum Contract

Amount”). The City is not obligated to executed an Agreement or any amendments for any further services, including any services performed by Contractor beyond that specifically described in **Exhibits A and A-1**. Any services performed beyond those in **Exhibits A and A-1** are performed at Contractor’s risk and without authorization under the Agreement.”

5. Except as amended herein, the Agreement affirmed and ratified in each and every particular.

6. This Amendatory Agreement will not be effective or binding on the City until it has been fully executed by all required signatories of the City and County of Denver, and if required by Charter, approved by the City Council.

END

SIGNATURE PAGES AND EXHIBITS A-1 and B-1 FOLLOW THIS PAGE

Contract Control Number:

IN WITNESS WHEREOF, the parties have set their hands and affixed their seals at Denver, Colorado as of

SEAL

CITY AND COUNTY OF DENVER

ATTEST:

By _____

APPROVED AS TO FORM:

REGISTERED AND COUNTERSIGNED:

By _____


By _____

By _____



Contract Control Number: HRCRS-201631420-01

Contractor Name: ENERGY OUTREACH COLORADO EFFICIENCY
LLC

By: Skip Arnold 

Name: Skip Arnold
(please print)

Title: Executive Director
(please print)

ATTEST: [if required]

By: _____

Name: _____
(please print)

Title: _____
(please print)



2017-2018 SCOPE OF WORK for
ENERGY OUTREACH COLORADO
MULTI-FAMILY UNIT ENERGY EFFICIENCY PROGRAM

1.0 Scope

1.1 Services: Energy Outreach Colorado (EOC), (Contractor), shall provide energy efficiency services, weatherization upgrades, and resident education for multi-family residential units in the City and County of Denver. Specific services include:

1.1.1 Outreach:

1.1.1.1 EOC will use its existing Multi-family Weatherization (MFW) solicitation and application process to identify qualifying multi-family projects in Denver. Through a combination of outreach events, workshops, direct mail, published announcements in cooperating agency newsletters and through DOSP, and direct marketing by local professional energy auditors, EOC will identify properties to meet the goals of this funding.

1.1.2 Program Screening and Enrollment:

1.1.2.1 All multi-family grant recipients are required to use EOC's online, web-based application to submit for MFW funding. This format ensures a competitive, uniform application process and a fair comparison between projects during the selection process. The online application is password protected and has the most current online security safeguards. Multi-family grant applications must pass a series of checklists prior to final selection and notification. EOC staff will ensure eligibility and work with a volunteer grant selection committee comprised of building science professionals unrelated to any of the applicants. The committee will evaluate each application and compare the project against the following criteria: 1) client eligibility including client priorities is already in accordance with this RFP and from other funders; and 2) property eligibility which evaluates acceptable property type and occupancy status. If an application passes all of the criteria, the grant selection committee will review the initial energy audit reports with calculated energy savings and Savings to Investment Ratio (SIR) for each recommended weatherization measure. Since federal funds are limited to 200% of Federal Poverty Level (FPL) or below, units that have residents with incomes of 200 - 300% FPL could be served with these Denver funds.

1.1.3 Education:

All applicants who are applying for MFW are encouraged to develop an energy efficiency education plan that is most appropriate for their clients and specific to the weatherization measures that are installed. Effective client education resulting in energy consumption behavior change can increase the energy savings of the installed weatherization measures. EOC will require each recipient to create an Energy Team to develop

a plan that will address occupant behavior, understand and track their utility bills, incorporate energy saving protocols into their building maintenance and share their stories with other multifamily building organizations; components which will help to ensure that energy savings targets are being met. Through recent program experience we have learned that the challenge is to affect behavior permanently. Information and education are key elements to change knowledge into action. EOC will tackle the issue of providing long-lasting organizational behavior change by conducting a facility maintenance trainings for Denver multifamily recipients that property managers and facility managers of these building will be required to attend. In addition, some MFW recipients may benefit from retro-commissioning. Retro-commissioning involves recording existing operating conditions and monitoring real time energy consumption with data loggers, then changing those existing conditions and control strategies to achieve additional energy savings without equipment replacement. This can be helpful to ensure that recently installed new equipment has been programmed to operate as efficiently as possible. The installation of data logging devices to measure energy consumption during the retro-commissioning process and provide immediate feedback can help multifamily buildings cut energy consumption by as much as 15-20% with little to no capital improvement cost.

1.1.4 Energy Audits:

1.1.4.1 EOC will work with certified energy auditor to assess the site for energy savings and energy related health and safety problems. Currently EOC works with *Group 14 Engineering*, a woman-owned engineering firm. Energy auditors will also evaluate the following: combustion efficiency and safety, air leakage, thermal performance, electrical safety and base-load testing, and indoor air quality and moisture inspection. Energy Modeling is then completed to ensure that the payback periods for measures average approximately 5-10 years. Measures that have a longer payback require an owner contribution to complete them. The final energy audit report will be submitted to EOC for processing and implementation. EOC will consult with the applicant with the final energy audit report with recommended weatherization measures.

1.1.5 Major Upgrades:

1.1.5.1 For larger projects, EOC will focus funding on projects that make significant impacts on energy savings, at the same time being considerate of the applicant's need to keep the property clean and attractive for clients. EOC will assure that weatherization measures are installed in accordance with the manufacturer's directions. EOC staff will make routine site visits during installation to confirm vendor compliance. EOC will work with the applicant to meet the bidding requirements for installing energy efficiency measures. Product bid

solicitations and procurement will include language describing the manner in which the product will be used and language stating that products offered in the bid response shall be appropriate for that use. All prices will include the cost of labor, materials, clean-up, and removal of any old materials and proper recycling of appliances containing refrigerants. EOC will ensure that E-Verify must be used for all subcontractors. The bid specifications, complete lighting and mechanical inventory of existing equipment, and the recommendations in the executive summary of the audit serve as the scope of work for the bidding contractor. RFPs are published for each project and mandatory bidder's meetings are set to avoid any confusion about existing site conditions. An extensive submittal list is required to properly evaluate each bid and each bid is individually scored based on price, design, and submittal requirements. EOC project managers, the senior energy engineer, and the awarded engineering firm review all submittals and correspond with contractors about any questions regarding their retrofit strategy. Once the project enters into contract, EOC staff, the selected contractor, and the design engineers meet regularly during the construction phase to ensure total compliance with design intent and consult on unforeseen site conditions.

1.1.6 Follow Up:

1.1.6.1 EOC staff will take an active role during project implementation with ongoing site visits. In addition, EOC staff will be responsible for final inspections at every multi-family site. Final inspections will compare the completed project to the energy audit to ensure that all required procedures were performed. The final inspection will also verify the accuracy of the audit including measures that may have been omitted. Health and safety requirements will also be reviewed at this time. EOC will sign off on all projects after they have passed final inspection.

1.2 Projected measurable outcomes include:

	Contract Goal
Total Households Served	600
Total Households Served: Outreach	600
Total Households Served: Education	600
Total Households Served: Audits	600
Total Households Served: Minor Upgrades	600
Total Households Served: Major Upgrades	600
Total Energy Savings: KWh	500,000

	Contract Goal
Total Energy Savings: Therms	60,000
Total Annual Household Dollar Savings	\$150,000
Total Funds Leveraged	\$500,000

2.0 Programmatic and Performance Requirements

2.1 Data Collection and Reporting

- 2.1.1 Contractor will collect and report all activities in the database system SALESFORCE.COM (which is informally known within the City as Denver Energy Efficiency Customer Management System (CMS) on a bi-annual basis due on July 20th and January 20th in accordance with City policies and procedures. (Contractor will comply with and be subject to the terms and provisions contained in the *SalesForce.com Subscription Agreement*.)
- 2.1.2 The Contractor shall ensure its data reporting systems are compatible with City systems and meet City data reporting requirements. The Contractor shall be responsible for supplying and maintaining all required equipment and software.
- 2.1.3 The Contractor will submit a Monthly Activities Report form to accompany each invoice. The Contractor will also submit a full report detailing progress toward project outcomes on a quarterly basis.
- 2.1.4 The Contractor's final program report shall be submitted to DOSP within 45 days after the end of the Contract.

3.0 Administrative Requirements

3.1 Compensation and Methods of Payment

- 3.1.1 The method of payment to the Contractor by DOSP shall be in accordance with City and County of Denver Fiscal Rule 8.3, *Procedures for Accounts Payable*. The Contractor must submit expenses and accruals to DOSP on or before the 20th day of each month for the previous month's activities.
- 3.1.2 The Contractor shall be reimbursed or paid for services provided under this agreement according to the approved cost allocation budget, attached to and made a part of this Agreement.
- 3.1.3 Any changes to the budget must submit a Budget Modification Request form in writing and approved by the Project Manager.

3.1.4 The Contractor shall follow City and County of Denver Fiscal Rule 8.1, Procurement, which requires that at least three (3) documented quotations be secured for all purchases of services (including insurance), supplies, or other property that costs more than \$5,000.00 in the aggregate.

3.1.5 The Contractor shall submit the final invoice for reimbursement within forty-five (45) days after the end of the contract.

3.2 Communication

3.2.1 Contractors using website, radio or television announcements, newspaper advertisements, press releases, pamphlets, mail campaigns, or any other method to market or publicize activities funded by the Denver Office of Strategic Partnerships (DOSP) shall acknowledge DOSP as a source of funding and include the following statement in all relevant communication material: "The funding source for this activity is the Denver Office of Strategic Partnerships."

3.3 Close-Out

3.3.1 The Contractor shall prepare and submit the required DOSP contract closeout reports within sixty (60) days of the expiration date of this contract. The closeout package will be sent to the Contractor prior to the end of the contract. DOSP reserves the right to automatically closeout the contract after sixty (60) days if there are no disallowed costs pending. Once the contract closeout is complete, no further reimbursements will be allowed. Prior to reimbursement for the last invoice, DOSP will review participant files in accordance with DOSP Closeout Policy.

2017-2018 SCOPE OF WORK
ENERGY OUTREACH COLORADO
NONPROFIT ENERGY EFFICIENCY SERVICES PROGRAM (NEEP)

1.0 SCOPE

1.1 Services: Energy Outreach Colorado (EOC), (Contractor) shall provide energy efficiency services, weatherization upgrades, and resident education for nonprofit facilities in the City and County of Denver. Specific services include:

1.1.1 Outreach:

1.1.1.1 EOC provides outreach for this program by conducting workshops throughout the year to educate nonprofits about NEEP and also educates EOC cash assistance agency partners about NEEP through a statewide tour each October. EOC uses an extensive statewide outreach and application process for all of our energy efficiency programs. EOC also plans to directly contact eligible organizations that meet the guidelines that have not participated in our program to date. Currently, EOC has several Denver based nonprofit projects already scheduled for the 2017 grant cycle.

1.1.2 Program Screening and Enrollment:

1.1.2.1 All NEEP applicants complete an online application which collects pertinent information about the project. EOC staff and other subject matter experts review the applications three times a year, determine if projects meet the eligibility requirements as they are defined in this RFP and by other funding partners including Xcel Energy, and then prioritize the projects based on need, mission, timing, etc. EOC requests that agencies participate in an orientation process and complete an internal energy use assessment prior to receiving and energy audit in order to maximize the benefits of the program. Once an application is approved, the first step in NEEP is to schedule an energy audit by an energy “expert” or consultant to identify the most cost effective changes that can be made to the existing building to save energy.

1.1.3 Criteria for Selection of NEEP Facilities:

1.1.3.1 The Nonprofit must be in Denver.

1.1.3.2 They must own or have a long-term lease (2 years or less in a 5-year lease) on their building and plan to stay in their building for a substantial period of time to see savings. For buildings that are not owned by the nonprofit, lease terms must be structured so that the nonprofit is directly paying for utilities.

1.1.3.3 The mission of the nonprofit must have a relationship to serving low-income populations.

1.1.3.4 Priority should be given to facilities with higher energy uses.

1.1.3.5 Priority should be given to nonprofit shared space facilities, in which four or more nonprofits are co-located for their office space.

1.1.3.6 The Audits/upgrades should be spread amongst agencies, rather than providing upgrades to multiple sites for one agency.

1.1.3.7 Priority should be focused on energy efficiency measures over nonrenewables.

1.1.3.8 Selection for upgrades should be based on a payback of 5-10 years if there is a project that EOC believes warrants moving forward, but that has a longer payback, then that would involve a discussion with DOSP.

1.1.3.9 EOC efforts should work to complement DOSP projects; such as the Denver Shared Space Project, Green and Healthy Homes Initiative, Denver TOD Fund and/or other City initiatives such as: Denver’s Road Home.

1.1.4 Education:

1.1.4.1 EOC works with all NEEP recipients to develop an energy conservation education plan that is most appropriate for their clients and specific to what is funded by NEEP. This is very important to ensure that all energy savings targets are met. This includes an initial meeting with staff to recognize the target audience for conservation education, reviewing the measures installed and identifying appropriate behavior changes to maximize the savings benefits and selecting appropriate presentations for the target audience. EOC provides Energy Conservation presentations for up to twelve months after the measures are installed to assist the organization in adopting significant behavior changes around energy usage. EOC will require each recipient to create an Energy Team to develop a plan that will address occupant behavior, understand and track their utility bills, incorporate energy saving protocols into their building maintenance and share their stories with other nonprofits; components which will help to ensure that energy savings targets are being met. Through recent program experience we have learned that the challenge is to affect behavior permanently. Information and education are key elements to change knowledge into action. EOC will also tackle the issue of providing long-lasting behavior change by conducting two types of facility maintenance trainings for Denver NEEP recipients; one training for the do-it-all nonprofit staffer and a separate training for the more equipment savvy facility manager staff member. In addition some MFW recipients may benefit from retro-commissioning. Retro-commissioning involves recording existing operating conditions and monitoring real time energy consumption with data loggers, then changing those existing conditions and control strategies to achieve additional energy savings without equipment replacement. This can be helpful to ensure that recently installed new equipment has been programmed to operate as efficiently as possible. The installation of data logging devices to measure energy consumption during the retro-commissioning process and provide immediate feedback can help multifamily buildings cut energy consumption by as much as 15-20% with little to no capital improvement cost.

1.1.5 Energy Audits:

1.1.5.1 An energy audit consists of a walkthrough of the entire building(s); an assessment of existing insulation in walls, attics, ceiling cavities, crawlspaces and basements; an inspection of the existing heating source (i.e., furnace or boiler), water heater and cooling source (if applicable); and an assessment of the existing lighting and appliances. Once an audit is completed, energy conservation measures are identified and evaluated to determine which measures are the most cost effective. Currently, EOC is working with Group 14 Engineering, a woman owned engineering firm.

1.1.6 Minor Upgrades or NEEP Lite:

1.1.6.1 EOC is frequently challenged by major renovations that might be seeking LEED certification or smaller projects who need one or two pieces of equipment replaced that have very little leveraging opportunity with our utility partners. These projects need EOC's guidance and support, but in the end, EOC makes a larger investment of time that will not be supported by significant energy savings. Often times, these projects are paying large consulting fees to numerous architects, engineers, and developers who already know what efficient building equipment needs to be part of the design. As part of a new process to the NEEP program, EOC would like to offer a more streamlined version of our traditional NEEP model called "NEEP Lite". EOC would still conduct the building assessment, perform the savings calculations, and conduct an action team meeting to discuss energy conservation behavior changes in the building. The organization would collect all of the bids, manage the building improvement upgrades, and invoice EOC when the project is complete. EOC would then schedule an inspection to ensure all of the funded measures were properly installed. This process would also be appropriate for more recently constructed buildings that only need minor control changes or an upgraded building management system to control relatively newer equipment.

1.1.7 Major Upgrades:

1.1.7.1 Based on the information from the energy audit, EOC will work with our subcontractor to determine costs for installing energy efficiency measures. Product bid solicitations will include language describing the manner in which the product will be used and language stating that products offered in the bid response shall be appropriate for that use. All prices will include the cost of labor, materials, clean-up, and removal of any old materials and proper recycling of appliances containing refrigerants or lighting materials.

1.1.7.2 Once the bids are complete, EOC will compare the cost to install the measures with the predicted energy savings provided by the energy audit to determine the most cost effective measures to be installed at each facility. The goal is maintain an average payback of 5 to 10 years. EOC also runs an energy model to assist with determining the most cost effective measures. EOC will ideally be able to leverage funds from Xcel Energy and other private funders. The ability to leverage funds requires submitting project information to Xcel Energy to determine the level of funding/rebates they will assign each project. EOC evaluates the funding from Xcel Energy and other potential funding sources before determining the level of the City of Denver investment. In some cases, EOC asks nonprofit organizations to financially contribute to the project if there are measures that may be

important but don't pass an adequate return on investment or payback for the project.

1.1.7.3 EOC will comply with federal and state laws pertaining to health and safety risk abatement, and will assure that installation of measures will not be permitted until identified health and safety risks are removed. EOC's experience is that health and safety repairs identified during the energy audit might be included in the scope of work for a facility. EOC will allow for electrical or structural repairs if necessary for the proper installation or maintenance of an energy efficiency measure.

1.1.7.4 EOC will focus funding on projects that make significant impacts on energy savings, at the same time being considerate of each nonprofits' specific program needs. EOC will assure that efficiency measures are installed in accordance with the manufacturer's directions. EOC staff/subcontractors will make routine site visits during installation to confirm vendor compliance and ensure that the property remains clean and attractive for clients and will be responsible for final inspections at every site. Final inspections will compare the completed project to the energy audit to ensure that all required measures were performed.

1.1.8 Follow Up:

1.1.8.1 For each NEEP project completed, EOC reviews utility bill data and tracks gas and electric consumption to determine energy savings. This piece is critical to ensure efficient use of funds and maximization of energy savings. EOC collects utility bills from NEEP recipients for up to one year after implementation and compares it to utility bills collected prior to work being completed to track actual savings as seen by the facility. EOC uses Energy CAP software to help us improve our process for reviewing utility bills. This is an excellent tool to demonstrate to clients how energy efficiency improvements coupled with conservation/behavior changes are really saving therms, KWh and money on their utility bills. In addition to utility bill analysis, EOC will administer a survey to NEEP recipient organizations to assess their experience with NEEP.

1.2 Projected Measurable Outcomes:

	Contract Goal	(Optional) Total Funds Leveraged for Activity	(Optional) Total Dollar Savings for Activity
Total Households/Buildings Served	14		
Total Households/Buildings Served: Outreach	14		
Total Households/ Buildings Served: Education	14		

	Contract Goal	(Optional) Total Funds Leveraged for Activity	(Optional) Total Dollar Savings for Activity
Total Households/ Buildings Served: Audits	14		
Total Households/ Buildings Served: Minor Upgrades	4		
Total Households/ Buildings Served: Major Upgrades	6		
Total Energy Savings: KWh	250,000		
Total Energy Savings: Therms	14,000		
Total Annual Household/Buildings Dollar Savings	\$50,000		
Total Funds Leveraged	\$250,000		

2.0 Programmatic and Performance Requirements

2.1 Data Collection and Reporting

- 2.1.1 Contractor will collect and report all activities in the database system SALESFORCE.COM (which is informally known within the City as Denver Energy Efficiency Customer Management System (CMS) on a bi-annual basis due on July 20th and January 20th in accordance with City policies and procedures. (Contractor will comply with and be subject to the terms and provisions contained in Exhibit D, *SalesForce.com Subscription Agreement*, a copy of which is attached to the Agreement and incorporated herein by reference.
- 2.1.2 The Contractor shall ensure its data reporting systems are compatible with City systems and meet City data reporting requirements. The Contractor shall be responsible for supplying and maintaining all required equipment and software.
- 2.1.3 The Contractor will submit a Monthly Activities Report form to accompany each invoice. The Contractor will also submit a full report detailing progress toward project outcomes on a quarterly basis.
- 2.1.4 The Contractor's final program report shall be submitted to DOSP within 45 days after the end of the Contract.

3.0 ADMINISTRATIVE REQUIREMENTS

3.1 Compensation and Methods of Payment

- 3.1.1 The method of payment to the Contractor by DOSP shall be in accordance with City and County of Denver Fiscal Rule 8.3, *Procedures for Accounts Payable*. The Contractor must submit expenses and accruals to DOSP on or before the 20th day of each month for the previous month's activities.
- 3.1.2 The Contractor shall be reimbursed or paid for services provided under this agreement according to the approved cost allocation budget, attached to and made a part of this Agreement.
- 3.1.3 Any changes to the budget must submit a Budget Modification Request form in writing and approved by the Project Manager.
- 3.1.4 The Contractor shall follow City and County of Denver Fiscal Rule 8.1, Procurement, which requires that at least three (3) documented quotations be secured for all purchases of services (including insurance), supplies, or other property that costs more than \$5,000.00 in the aggregate.
- 3.1.5 The Contractor shall submit the final invoice for reimbursement within forty-five (45) days after the end of the contract.

3.2 Communication

- 3.2.1 Contractors using website, radio or television announcements, newspaper advertisements, press releases, pamphlets, mail campaigns, or any other method to market or publicize activities funded by the Denver Office of Strategic Partnerships (DOSP) shall acknowledge DOSP as a source of funding and include the following statement in all relevant communication material: "The funding source for this activity is the Denver Office of Strategic Partnerships."

3.3 Close-Out

- 3.3.1 The Contractor shall prepare and submit the required DOSP contract closeout reports within sixty (60) days of the expiration date of this contract. The closeout package will be sent to the Contractor prior to the end of the contract. DOSP reserves the right to automatically closeout the contract after sixty (60) days if there are no disallowed costs pending. Once the contract closeout is complete, no further reimbursements will be allowed. Prior to reimbursement for the last invoice, DOSP will review participant files in accordance with DOSP Closeout Policy.

SCOPE OF WORK for
CDOT CENTRAL 70 ENVIRONMENTAL MITIGATION and
DENVER HOME IMPROVEMENT PROJECT
October 1, 2017 - December 31, 2018

1.0 Scope

1.1 Outreach:

- 1.1.1 EOCE shall coordinate with the Colorado Department of Transportation (CDOT) and the City and County of Denver (the City or Denver) on all communications for this project and shall ensure that all materials prepared by EOCE are provided in English and Spanish.
- 1.1.2 EOCE will work with the identified marketing and community engagement team on promoting the program to and connecting with residents in ESN.
- 1.1.3 EOCE and its subcontractors recognizes that in order to complete this scope of work homes may need to be accessed multiple times. EOCE and its subcontractors will ensure residents schedule the first home visit, are well informed about each subsequent home visit and will work with its subcontractors to minimize disruptions and create an efficient home visitation schedule.
- 1.1.4 Outreach materials will identify CDOT and the City as project partners and be presented in a form acceptable to the City.
- 1.1.5 EOCE shall coordinate with CREA Results on the outreach and education with homeowners. CREA Results will assist EOCE in educating and answering questions or resolving misunderstandings during assessments and construction.

1.2 Services: Energy Outreach Colorado (EOCE), (Contractor), will utilize up to \$175,000 to provide home improvements, energy efficiency services, and energy assistance to mitigate construction dust and noise impacts related to the Central 70 Project construction and to improve specifically identified homes within Elyria-Swansea Neighborhood (ESN) in the City and County of Denver. Additional homes surrounding this area may also be served to the extent that funding is available. Specific services include:

1.2.1 Program Screening and Enrollment:

- 1.2.1.1 Up to 10 homes will be offered the CDOT package of home improvements, described below.
- 1.2.1.2 Up to 10 homes will be offered the City package of home improvements, described below.

1.2.2 CDOT-funded Mitigation Measures: Unless directed otherwise by the City up to 10 homes will be offered:

- 1.2.2.1 Two portable or window-mounted air conditioning units with air filtration;
- 1.2.2.2 Furnace filters;
- 1.2.2.3 Interior storm windows;
- 1.2.2.4 Caulking-caulking/sealing;
- 1.2.2.5 Weather stripping;
- 1.2.2.6 Carbon monoxide/smoke detectors;
- 1.2.2.7 Programmable thermostats;
- 1.2.2.8 Attic insulation-blown/ loose fill cellulose or fiberglass insulation; and
- 1.2.2.9 Energy bill credits to offset increased usage with cooling.

1.2.3 Home Assessments:

- 1.2.3.1 EOCE will work with various partner entities to assess up to 30 homes to coordinate and plan for providing the CDOT-funded Mitigation Measures. EOCE will consult with the owner and any renter on the final assessment results and recommended home improvement measures.
- 1.2.3.2 EOCE will additionally work with various partner entities to assess up to 30 homes for the following: combustion efficiency and safety, general structural integrity of the home, air leakage, indoor air exhaust capabilities, thermal barrier performance, fire hazards, mold or moisture damage, electrical safety and base-load testing, and indoor air quality and moisture inspection. EOCE will consult with the owner and any renter on the final assessment results and recommended home improvement measures.

1.2.4 City of Denver-funded Home Improvement Measures: Based on the home assessments, up to 10 homes may be offered some or all of the following:

- 1.2.4.1 Window and door replacement -- If windows need to be replaced in order to install interior storm windows; existing windows and doors are broken; or if existing windows and doors are not adequate to prevent dust from entering the home.

- 1.2.4.2 HVAC with MERV filtration– Selected homes' heating systems will be assessed for replacement with 95% high efficiency furnaces.
- 1.2.4.3 Positive pressure air ventilation – Due to the complexity of this measure, a limited number of homes will likely be assessed and positioned to receive this option. If homes have the necessary space, electrical connections, and outside terminations, they will be assessed for this measure. These units will only benefit the client if the filters are cleaned regularly and can be hard to reach on an attic on a roof. These units will be prioritized for homes with hydronic heating systems.
- 1.2.4.4 MERV 16 Filter Return Plenum Boxes will be added to every new installation of a furnace and homes with existing furnaces in good condition will be evaluated for possible MERV 16 retrofit. Homes with hydronic boiler systems will be assessed for positive pressure air ventilation since MERV 16 filters will not be available.
- 1.2.4.5 Energy Efficiency lighting-10 LEDs will be installed in hard wired fixtures and residents' lamps.
- 1.2.4.6 EOCE acknowledges additional contingency may be required for home improvement measures needed in order to address other health and safety issues affecting residents, including, for example, illegal splices in the attic, leaking natural gas piping, or moisture damage. If EOCE anticipates that such corrections may be needed, EOCE shall first receive written approval from Denver prior to initiating work.

1.2.5 Subcontractors

- 1.2.5.1 EOCE intends to work with the following organizations to complete this Scope of work and if selected will contract with them individually:
- Denver Urban Renewal Authority (DURA)
 - Mile High Youth Corps (MHYC)
 - Energy Resource Center (ERC)
 - Groundwork Denver
 - Private Contractors in EOCE's Crisis Intervention Programs and Weatherization Programs
- 1.2.5.2 Subcontractors will be trained by EOCE in all aspects of EOCE programs.

1.2.5.3 Installation personnel shall be easily identified with a wardrobe and badges that clearly identify them as representatives of this project.

1.2.5.4 EOCE shall oversee the work of any subcontractors to ensure that work is performed to the City's satisfaction.

1.2.5.5 Any concerns or questions raised by partners or residents with subcontractors will be dealt with by EOCE immediately.

1.2.6 Utility Usage Data Sharing

1.2.6.1 In order to leverage utility rebate funding for the project Xcel Energy may disclose customer gas or electric billing and usage information to EOCE provided that EOCE meets Xcel Energy's customer data sharing consent requirements. Data shall be provided for a time period spanning 24 months prior to the installation date through 24 months after the completion date, if available. Data provided shall match individual customer billing intervals and shall include, at minimum, the following fields:

- a) Account Number
- b) City
- c) County
- d) Customer First Name
- e) Customer Last Name
- f) Days in Usage/Billing Cycle
- g) Gas or Electric Fee Billing
- h) Gas or Electric Total Billing
- i) Gas or Electric Usage (Therm or kWh)
- j) Gas or Electric Usage/Billing End Date
- k) Gas or Electric Usage/Billing Start Date
- l) Gas or Electric Usage Billing
- m) Invoice Date
- n) Premise Number
- o) State
- p) Street Address
- q) Zip Code

1.2.6.2 Pricing: Xcel Energy Rebate Conditions via Contractor – EOCE will undertake commercially reasonable efforts to leverage additional funding from its existing demand side management contract with Xcel Energy. The following table shows the current rebate values:

Measure	Pre-Condition	Post-Condition	Contribution
Air Sealing		10% reduction	\$200.00
Attic Insulation	≤R19	≥R40	\$715.00
Attic Insulation	>R19	+R25	\$715.00
Bath Aerator	2GPM	1GPM	\$3.00
Belly/Burrito Insulation	R0	≥R19	\$175.00
CFL	Incandescent		\$1.75

Crawlspace Insulation	R0	≥R19	\$175.00
Electronically Controlled Motor	Single speed motor		\$200.00
Floor Insulation	R0	≥R19	\$175.00
Furnace	≤78%	≥95%	\$520.00
Kitchen Aerator	2.2GPM	1.5GPM	\$3.00
LED	Incandescent	A19	\$5.00
LED	Incandescent	BR30	\$8.00
Refrigerator	7-18 years old	EnergyStar 2014 standard	\$630.00
Showerhead	2.5GPM	1.5GPM	\$5.00
Storm Window (≥3)	Single pane		\$1,225.00
Wall Insulation	≤R3	≥R11	\$670.00
Water Heater	<67%	≥67%	\$300.00

1.2.7 Follow Up:

1.2.7.1 EOCE staff will actively supervise subcontractors during project implementation with regular site visits. In addition, EOCE staff will be responsible for final inspections at every site. Final inspections will compare the completed project to the energy assessment to ensure that all required procedures were performed. The final inspection will also verify the accuracy of the assessment including measures that may have been omitted. Health and safety requirements will also be reviewed at this time. EOCE will certify completion of all projects after they have passed final inspection, including a close-out report detailing all work completed for each City site. Completion certifications shall be in a form acceptable to the City.

Program Budget and Cost Allocation Plan Summary

Contractor Name:

Energy Outreach Colorado

Program Year:

2018

Project :

2017 Multi-family Energy Efficiency Program

Contract Dates:

1/1/17 to 12/31/18

Budget Category	Agency Total (All Funding Sources)	Project Costs		Other City & County of Denver Funding		Total Federal Funding		Other Non-Federal Funding		Agency Total	
		Total	%	Total	%	Total	%	Amount	%	Amount	%
Personnel: Name and Job Title											
Jennifer Gremmert, Deputy Director	\$150,000.00	2,000	1.33%		0.00%	7,000	4.67%	141,000	94%	150,000	100%
Luke Ilderton, Director Energy Efficiency	\$95,000.00	2,000	2.11%		0.00%	40,000	42.11%	53,000	56%	95,000	100%
Andy Caler, Project Manager	\$70,000.00	26,000	37.14%		0.00%	-	0.00%	44,000	63%	70,000	100%
Rose Reed, Director of Administrative Services	\$80,000.00	2,000	2.50%		0.00%	10,000	12.50%	68,000	85%	80,000	100%
Name, Job Title			#VALUE!		#VALUE!		#VALUE!		#VALUE!		#VALUE!
Name, Job Title			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Name, Job Title			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Name, Job Title			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Name, Job Title			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Name, Job Title			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Name, Job Title			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Name, Job Title			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Total Salary:	395,000	32,000	8.10%	-	0.00%	57,000	14.43%	306,000	77%	395,000	100%
Fringes	98,750	8,000	0	0	0	14,250	0	76,500	1	98,750	1
Salary and Fringe Total:	493,750	40,000	8.10%	-	0.00%	71,250	14.43%	382,500	77%	493,750	100%
Non-Personnel:	Total	Amount	%	Amount	%	Amount		Amount	%	Amount	%
Office Expenses, Supplies, postage, printing	\$250,000.00	750	0.30%		0.00%	11,250	4.50%	238,500	95%	250,500	100%
Communication	\$125,000.00	600	0.48%		0.00%	4,000	3.20%	120,400	96%	125,000	100%
Insurance	\$55,000.00	2,500	4.55%		0.00%	20,000	36.36%	32,500	59%	55,000	100%
Travel - Staff(mileage, meals, bldg parking)	\$115,000.00	500	0.43%		0.00%	43,000	37.39%	71,500	62%	115,000	100%
Travel - Client		-	#DIV/0!		#DIV/0!	-	#DIV/0!	-	#DIV/0!	-	#DIV/0!
Equipment rental and leases	\$48,000.00	2,000	4.17%		0.00%	12,500	26.04%	33,500	70%	48,000	100%
Facilities	\$94,000.00	3,750	3.99%		0.00%	27,960	29.74%	62,290	66%	94,000	100%
Educational Materials - Customers			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Meetings/Events			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Professional Services - (Payroll, work comp, HR serv	\$10,000.00	500	5.00%		0.00%	3,000	30.00%	6,500	65%	10,000	100%
Professional Services - (Specify; ie., Legal)	\$20,000.00		0.00%		0.00%		0.00%	20,000	100%	20,000	100%
Professional Services - (Specify; ie., Accountant)	\$38,000.00	-	0.00%		0.00%	10,000	26.32%	28,000	74%	38,000	100%
Subcontractor (energy conservation materials and lab	\$7,500,000.00	399,400	5.33%		0.00%	750,000	10.00%	6,350,600	85%	7,500,000	100%
Subcontractor (audits, evaluation, modeling, educatio	\$400,000.00	-	0.00%		0.00%	40,000	10.00%	360,000	90%	400,000	100%
Subcontractor (Specify)			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Other Direct Expense (specify)			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Other Direct Expense (specify)			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Other Direct Expense (specify)			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Other Direct Expense (specify)			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Construction Costs			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Indirect Costs			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Total Non-Personnel	8,655,000	410,000	4.74%	-	0.00%	921,710	10.65%	7,323,790	85%	8,655,500	100%
Total Project Cost	9,148,750	450,000	4.92%	-	0.00%	992,960	10.85%	7,706,290	84%	9,149,250	100%
Program Income (through funded activities)			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Non-Project:	Total				%						
Personnel Costs:	836,175		0.00%		0	250,000	0.2989805	586,175	70%	836,175	100%
Non-Personnel Costs:	700,000		0.00%		0	100,000	0.1428571	600,000	86%	700,000	100%
Other (Specify): other grant payments	7,125,000		0.00%		0		0	7,125,000	1	7,125,000	100%
Total Non-Project Cost	8,661,175	-	0.00%	-	0.00%	350,000	4.04%	8,311,175	95.96%	8,661,175	100.00%
Grand Total	17,809,925	450,000	3%	-	0.00%	1,342,960	7.54%	16,017,465	90%	17,810,425	100%

Program Budget and Cost Allocation Plan Summary

Contractor Name:

Energy Outreach Colorado

Program Year:

2018

Project :

2017 Nonprofit Energy Efficiency Program

Contract Dates:

1/1/17 to 12/31/18

Budget Category	Agency Total (All Funding Sources)	Project Costs		Other City & County of Denver Funding		Total Federal Funding		Other Non-Federal Funding		Agency Total	
		Total	%	Total	%	Total	%	Amount	%	Amount	%
Personnel: Name and Job Title											
<i>Jennifer Gremmert, Deputy Director</i>	\$150,000.00	1,500	1.00%		0.00%	7,000	4.67%	141,500	94%	150,000	100%
<i>Luke Ilderton, Senior Engineer</i>	\$95,000.00	1,000	1.05%		0.00%	40,000	42.11%	54,000	57%	95,000	100%
<i>Brooke Pike, Project Manager, NEEP</i>	\$60,000.00	16,000	26.67%		0.00%	-	0.00%	44,000	73%	60,000	100%
<i>Rose Reed, Director of Administrative Services</i>	\$80,000.00	3,000	3.75%		0.00%	10,000	12.50%	67,000	84%	80,000	100%
		-	#VALUE!		#VALUE!	-	#VALUE!	-	#VALUE!	-	#VALUE!
<i>Name, Job Title</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Name, Job Title</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Name, Job Title</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Name, Job Title</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Name, Job Title</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Total Salary:	385,000	21,500	5.58%	-	0.00%	57,000	14.81%	306,500	80%	385,000	100%
Fringes	\$96,250.00	5,375	5.58%	-	0.00%	14,250	14.81%	76,625	80%	96,250	100%
Salary and Fringe Total:	481,250	26,875	5.58%	-	0.00%	71,250	14.81%	383,125	80%	481,250	100%
Non-Personnel:	Total	Amount	%	Amount	%	Amount		Amount	%	Amount	%
<i>Office Expenses, Supplies & Equipment, postage, printing</i>	\$250,000.00	1,000	0.40%		0.00%	11,250	4.50%	237,750	95%	250,000	100%
<i>Communication (telephone expense)</i>	\$125,000.00	1,000	0.80%		0.00%	4,000	3.20%	120,000	96%	125,000	100%
<i>Insurance</i>	\$55,000.00	4,500	8.18%		0.00%	20,000	36.36%	30,500	55%	55,000	100%
<i>Travel - Staff (mileage, meals, bldg parking)</i>	\$115,000.00	500	0.43%		0.00%	43,000	37.39%	71,500	62%	115,000	100%
<i>Travel - Client</i>	\$0.00		#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Equipment rental and maintence</i>	\$48,000.00	2,500	5.21%		0.00%	12,500	26.04%	33,000	69%	48,000	100%
<i>Facilities</i>	\$94,000.00	2,000	2.13%		0.00%	27,960	29.74%	64,040	68%	94,000	100%
<i>Educational Materials - Customers</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Meetings/Events</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Professional Services - (Payroll, work comp, HR services</i>	\$10,000.00	500	5.00%		0.00%	3,000	30.00%	6,500	65%	10,000	100%
<i>Professional Services - (Legal)</i>	\$20,000.00		0.00%		0.00%		0.00%	20,000	100%	20,000	100%
<i>Professional Services - (Accountant)</i>	\$38,000.00	500	1.32%		0.00%	10,000	26.32%	27,500	72%	38,000	100%
<i>Subcontractor (Energy conservation materials/Labor)</i>	\$7,500,000.00	260,625	3.48%		0.00%	750,000	10.00%	6,489,375	87%	7,500,000	100%
<i>Subcontractor (Audits, evaluation, modeling, education)</i>	\$400,000.00	-	0.00%		0.00%	40,000	10.00%	360,000	90%	400,000	100%
<i>Subcontractor (Specify)</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Other Direct Expense (specify)</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Other Direct Expense (specify)</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Other Direct Expense (specify)</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Other Direct Expense (specify)</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Contstruction Costs</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
<i>Indirect Costs</i>			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Total Non-Personnel	8,655,000	273,125	3.16%	-	0.00%	921,710	10.65%	7,460,165	86%	8,655,000	100%
Total Project Cost	9,136,250	300,000	3.28%	-	0.00%	992,960	10.87%	7,843,290	86%	9,136,250	100%
Program Income (through funded activities)			#DIV/0!		#DIV/0!		#DIV/0!		#DIV/0!	-	#DIV/0!
Non-Project:	Total				%						
<i>Personnel Costs:</i>	836,175		0.00%	0	0.0597961	50,000	0.0597961	786,175	94%	836,175	100%
<i>Non-Personnel Costs:</i>	700,000		0.00%	0	0.5714286	400,000	0.5714286	300,000	43%	700,000	100%
<i>Other (Specify): other grant payments</i>	7,125,000		0.00%	0	0	0	0	7,125,000	1	7,125,000	100%
Total Non-Project Cost	8,661,175	-	0.00%	-	0.00%	450,000	5.20%	8,211,175	94.80%	8,661,175	100.00%
Grand Total	17,797,425	300,000	2%	-	0.00%	1,442,960	8.11%	16,054,465	90%	17,797,425	100%

Central 70 Home Improvements Costs under Existing EOC Contract - 10/1/2017 - 12/31/2018		
Assessment cost		
# of assessments	Cost per assessment	Subtotal
30	\$500	\$15,000
Construction costs		
# of homes	Average cost per home (CDOT and Denver offerings)	Subtotal
10	\$14,545.45	\$145,455
10% contingency for administrative costs		\$14,545
Total Cost		\$175,000

**Budget Narrative
Energy Outreach Colorado
Nonprofit Energy Efficiency Services
2018**

Personnel

Jennifer Gremmert, Deputy Director \$150,000 x 1% = \$1,500
 Conducts outreach on project, manages all contracts and budgets for the program, works to ensure leveraged funding with other EOC Programs

Luke Ilderton, Director of Energy Efficiency Programs \$95,000 x 4.21% = \$1,000
 Provides technical expertise on all efficiency projects, oversees audit process, modeling and assessment of all efficiency measures.

Brooke Pike, Project Manager, NEEP \$60,000 x 26.6% = \$16,000
 Oversees all NEEP program operations and manages processes.

Rose Reed, Director of Administration \$80,000 x 6.25% = \$3,000
 Oversees all accounting functions, invoicing, payroll, and human resources.

Total Personnel costs = \$21,500

Fringe Benefits

Fringe benefits supported by this contract include but are not limited to:

- Payroll Taxes, including FICA, state and local taxes, and employer contribution Social Security Insurance and Unemployment Insurance
- Medical benefits, including health insurance, vision insurance, dental insurance, short and long term disability and life insurance (percent varies based on employees' individual plans)
- Employer contribution of 8% of employees' salaries to their 401K Plan.

Jennifer Gremmert

Payroll taxes	9.5% x \$1,500 = \$142.50	
Medical benefits	7.5% x \$1,500 = \$112.50	
401 K Plan	8% x \$1,500 = \$120	Total=\$375

Luke Ilderton

Payroll taxes	9.5% x \$1,000 = \$95	
Medical benefits	7.5% x \$1,000 = \$75	
401 K Plan	8% x \$1,000 = \$80	Total=\$250

Brooke Pike

Payroll taxes	9.5% x \$16,000 = \$1,520	
Medical benefits	7.5% x \$16,000 = \$1,200	
401 K Plan	8% x \$16,000 = \$1,280	Total=\$4,000

Rose Reed			
Payroll taxes	9.5% x \$3,000=\$285		
Medical benefits	7.5% x \$3,000=\$225		
401 K Plan	8% x \$3,000=\$240		Total=\$750

Total Fringe Costs = \$5,375

EOC uses an allocation model for all expenses based on EOC staff time spent on various programs. For this 2017 Denver NEEP budget we took into consideration all expenses and estimated costs along with some historical perspective.

Office Expenses – Includes supplies, printing and postage.

\$83.3 x 12 months = \$1,000

Total Office Expenses Cost = \$1,000

Communication: Telephone Expense – includes allocated office phones and internet.

\$83.3 x 12 months = \$1,000

Total Communications Cost: \$1,000

Insurance: EOC Insurance costs

\$375 x 12 months

Total Insurance Cost = \$4,500

Travel Staff

Includes mileage [\$0.55 per mile] to travel to project sites, appropriate meals and any onsite parking expenses

\$41.66 x 12 months = \$500

Total Travel Costs = \$500

Equipment Rental and Maintenance: Includes copier, postage machine leases and contracted IT services and replacements for all computers and servers.

\$208.3 x 12 months = \$3,500

Total Equipment Costs: \$ 2,500

Facility

EOC Office space is calculated based on the percent of time that EOC staff spends on various programs.

\$166.66 x 12 months = \$2,000

Total Facility costs - \$2,000

Professional Services

Payroll services and accounting services

\$83.33 x 12 months = \$1,000

Total Professional Services = \$1,000

Subcontractor

EOC will contract with various subcontractors for installation of Energy Efficiency Measures – The actual costs will depend on project, but will include the labor and materials. The anticipated expenses charged to this budget are calculated as follows:

$$10 \text{ projects (estimated)} \times \$26,062.25 \text{ (average)} = \$260,625$$

EOC projects are selected through a competitive selection process. Since we don't know exactly which projects will be selected for 2017 the above figures are estimates. Denver funds are leveraged with other funding from Xcel Energy and other private funders. Once a project is selected and goes through an energy audit or assessment, we then collect bids to determine which energy efficiency measures are the most cost effective. The number of measures and the cost of those measures vary greatly from project to project. Our goal is to leverage Denver's funds as much as we can maximizing the number of projects served as well as the potential energy savings achieved.

Total Subcontractor Costs = \$260,625

Construction Costs: Included in subcontractor line item

Match Amount = EOC anticipates leveraging a minimum of \$250,000 from Xcel Energy and other funders.

Total Amount Requested for EOC's NEEP for 2018: \$300,000

**Budget Narrative
Energy Outreach Colorado
Denver Residential Energy Efficiency Services
2018**

Personnel

Jennifer Gremmert, Deputy Director \$150,000 x 1.33% = \$2,000
Conducts outreach on project, manages all contracts and budgets for the program, works to ensure leveraged funding with other EOC Programs

Luke Ilderton, Director of Energy Efficiency Programs \$95,000 x 1.33% = \$2,000
Provides technical expertise on all efficiency projects, oversees audit process, modeling and assessment of all efficiency measures.

Andy Caler, Project Manager, Multi-Family Efficiency \$70,000 x 37% = \$26,000
Oversees all Multi-family program operations and manages processes.

Rose Reed, Director of Administration \$80,000 x 2.5% = \$2,000
Oversees all accounting functions, invoicing, payroll, and human resources.

Total Personnel costs = \$32,000

Fringe Benefits

Fringe benefits supported by this contract include but are not limited to:

- Payroll Taxes, including FICA, state and local taxes, and employer contribution Social Security Insurance and Unemployment Insurance
- Medical benefits, including health insurance, vision insurance, dental insurance, short and long term disability and life insurance (percent varies based on employees' individual plans)
- Employer contribution of 8% of employees' salaries to their 401K Plan.

Jennifer Gremmert

Payroll taxes	9.5% x \$2,000 = \$190	
Medical benefits	7.5% x \$2,000 = \$150	
401 K Plan	8% x \$2,000 = \$160	Total=\$500

Luke Ilderton

Payroll taxes	9.5% x \$2,000 = \$190	
Medical benefits	7.5% x \$2,000 = \$150	
401 K Plan	8% x \$2,000 = \$160	Total=\$500

Andy Caler

Payroll taxes	9.5% x \$26,000 = \$2,470	
Medical benefits	7.5% x \$26,000 = \$1,950	
401 K Plan	8% x \$26,000 = \$2,080	Total=\$6,500

Rose Reed

Payroll taxes	9.5% x \$2,000 = \$190	
Medical benefits	7.5% x \$2,000 = \$150	
401 K Plan	8% x \$2,000 = \$160	Total=\$500

Total Fringe Costs = \$8,000

EOC uses an allocation model for all expenses based on EOC staff time spent on various programs. For this 2017 Denver budget we took into consideration all expenses and estimated costs along with some historical perspective.

Office Expenses Includes supplies, printing and postage

\$62.25 x 12 months = \$750

Total Office Expenses Cost = \$750

Communication: Telephone Expense – includes allocated office phones and internet

\$50 x 12 months = \$600

Total Communications Cost: \$600

Insurance: EOC Insurance costs.

\$208.33 x 12 = \$2,500

Total Insurance Cost = \$2,500

Travel Staff

Includes mileage [\$0.55 per mile] to travel to project sites, appropriate meals and any onsite parking expenses

$\$41.66 \times 12 \text{ months} = \500

Total Travel Costs = \$500

Equipment Rental and Maintenance: Includes copier, postage machine leases and contracted IT services and replacements for all computers and servers.

$\$166.66 \times 12 = \$2,000$

Total Equipment Costs: 2,000

Facility - EOC Office space is calculated based on the percent of time that EOC staff spends on various programs.

$\$312.50 \times 12 \text{ months} = \$3,750$

Total Facility costs - \$3,750

Professional Services

Payroll services $\$41.66 \times 12 \text{ months} = \500

Total Professional Services = \$500

Subcontractor

EOC will contract with various subcontractors for installation of Energy Efficiency Measures – The actual costs will depend on project, but will include the labor and materials. EOC projects are selected through a competitive selection process. The anticipated expenses charged to this budget are calculated as follows:

Projects – $600 \text{ units} \times \$665/\text{unit} = \$399,400$

Since we don't know exactly which projects will be selected for 2017 the above figures are estimates. Denver funds are leveraged with other funding from Xcel Energy and other private funders. Once a project is selected and goes through an energy audit or assessment, we then collect bids to determine which energy efficiency measures are the most cost effective. The number of measures and the cost of those measures vary greatly from project to project. Our goal is to leverage Denver's funds as much as we can maximize the number of projects served as well as the potential energy savings achieved. The retro commissioning projects will end costing less per unit while the major upgrades will be more so we do our best to estimate in this budget process.

Total Subcontractor Costs = \$399,400

Construction Costs: Included in subcontractor line item

Other Direct Expenses: Not applicable for this contract.

Indirect Costs: Not Applicable

Match Amount = EOC anticipates leveraging a minimum of \$500,000 from Xcel Energy, CEO and other funders.

Total Amount Requested for EOC Multi-family Program: \$450,000