California Commissioning Collaborative
Advisory Council Meeting

June 21, 2007
# Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Presenter</th>
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<tbody>
<tr>
<td>9:30 AM</td>
<td>Welcome, Introductions, and Announcements</td>
<td>Don Frey</td>
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<tr>
<td>10:00 AM</td>
<td>CCC Project Updates</td>
<td>Kirstin Pinit</td>
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<tr>
<td>10:15 AM</td>
<td>Discussion Topic: CCC Guidelines</td>
<td>Don Frey</td>
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<tr>
<td>10:45 AM</td>
<td>BREAK</td>
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<tr>
<td>11:00 AM</td>
<td>Commissioning at Target</td>
<td>Paul Ham</td>
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<tr>
<td>11:30 AM</td>
<td>SCE/SCG/County of Los Angeles Energy Efficiency Partnership Program</td>
<td>Michael Lo</td>
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<td>12:00 PM</td>
<td>LUNCH</td>
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<tr>
<td>1:00 PM</td>
<td>Commissioning, Trademarks, and an Engineering ‘Teaching Hospital’</td>
<td>David Claridge</td>
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<tr>
<td>1:45 PM</td>
<td>BOMA - SCE Marketing Partnership</td>
<td>Amber Ackman</td>
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<tr>
<td>2:15 PM</td>
<td>Wrap - Up</td>
<td>Don Frey</td>
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<tr>
<td>2:30 PM</td>
<td>Advisory Council Meeting Adjourns</td>
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- **Agenda Items**
- **Next Meeting:** August 23 (SMUD)
- **2008 Meeting Dates**
Welcome

• Introductions and Announcements
Project Updates

- Verification of Savings
- Market Research
- RCx Toolkit
- Roadmap to Achieving the Cx Goals of the GBEO
- Owner Outreach
## Verification of Savings

<table>
<thead>
<tr>
<th>Phase I</th>
<th>Phase II</th>
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<tbody>
<tr>
<td>1 Definition of Objectives</td>
<td>5 Revisions Based on Feedback</td>
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<tr>
<td>2 Research Existing Methods</td>
<td>6 New Methods</td>
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<tr>
<td>Develop Categorization</td>
<td>Final Evaluation and</td>
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<tr>
<td>3 Framework</td>
<td>7 Categorization of Methods</td>
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<td>4 Develop Evaluation Framework</td>
<td>8 Research Policy Roadmap</td>
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<td>9 Dissemination Plan</td>
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Project Progress

• Stakeholder Input
  – Questionnaire
  – Other Sources

• Existing Methods
  – RCx programs
  – Evaluation Protocols
  – Other
Project Advisory Committee

• Role: Review & advise on status meetings and deliverables

• ~ 5 Members Needed
  – 2 Recruited: RCx program managers (NYSERDA, PG&E)
  – Need owner, provider, evaluator representatives
Cx R&D Market Research: Project Overview

**Purpose:** Improve owners’ understanding of the value of Cx and RCx

**Approach:** Open-ended interviews with 28 decision makers in the hospital and Class A office building markets → identification of 3 strategies

**Next steps:** Research and implement the strategies
**The Strategies**

#1 Market RCx to commercial property owners as a due diligence or risk management strategy after property acquisition

#2 Educate commissioning providers on findings from the market research. Investigate ways to capitalize on the popularity of LEED, green building, sustainability and carbon emissions reductions in marketing Cx and RCx

#3 Investigate ways to capitalize on the popularity of LEED, green building, sustainability and carbon emissions reductions in marketing Cx and RCx
Strategy #1
Market RCx as a post-acquisition strategy*

- **Project goal**
  
  *Market RCx to Class A commercial building owners as a post-acquisition strategy to improve the bottom line*

- **Complete tasks**
  - Conducted 5 interviews
  - Formulated initial delivery ideas

- **Upcoming tasks**
  - Complete 5 more interviews (late June)
  - Finalize delivery method (early July)

* 60% of total strategy budget
Strategy #2 – Educate commissioning providers*

- Two 90-minute webinars - $100 registration fee
  - July 11th 12-1pm PST – Office market
  - July 25th 12-1pm PST – Hospital market
- Presenters: Hannah Friedman and Marti Frank (PECI)
- Owner co-presenters:
  - Dennis Thurman (Transwestern)
  - Hospital co-presenter TBD (working with Kaiser Permanente)
- Announcement email sent 6/18 to 3,657 contacts

* 30% of total strategy budget
Strategy #3 – Market Cx/RCx as “green”*

- Research to begin late July
  - Interviews with leading “green” marketing agencies, USGBC, green builders
- End product likely to be a White Paper/Creative Brief describing potential marketing approaches

* 10% of total strategy budget
RCx Toolkit

• **Work completed**
  – Finalized *Templates* and *Sample Documents* with feedback from peer reviewers
  – Demonstrated *Energy Metrics and Charting Tool* at NCBC Tools and Data Analysis Workshop

• **Upcoming work**
  – Develop spreadsheets for typical energy savings calculations
  – Refine/test/revise three tools originally developed under separate funding:
    • *Utility Bill Analysis Tool* (STAC)
    • *Findings Log* (CA RCx programs)
    • *Energy Metrics and Charting Tool* (NEEA)
Roadmap to Achieving the Cx Goals of the GBEO

• Advisory Council Review – June 5-19
  – If you have not responded, please send your comments by Monday!

• Feedback incorporated by end of June/early July
Owner Outreach

- PowerPoint presentation in development

- Researching contacts into groups and publications
  - Please complete contact information survey to help!

- Developing “Speakers Bureau” of AC and Board members
Discussion: CCC Guidelines
Commissioning Authority Selection Procedure

• Statement to BCA Board of Directors from External Relations Committee

• Concerns are:
  – The narrative includes bidding as an acceptable method of selection of professional services
  – The narrative confuses bids, RFPs and RFQs
The Selection Process

As when evaluating lead qualifications, the selection process should be appropriate to the size, complexity and special needs of the project. If a design engineer, architect, contractor, or independent third-party commissioning lead is desired, there are two primary methods for selection: *competitive bid and selection by qualification*. 
Competitive Bid

A competitive bid selection process is one in which the owner issues a Request for Proposals (RFP). This process can be time-consuming and expensive because it requires the owner to specify the desired commissioning process and rigor, and then carefully evaluate each submission to ensure that leads are offering comparable scopes of work.
Selection by Qualification

Selection by qualification can be used on any project, and is especially useful when the project is simple or small. *In this case, the lead is selected based on qualifications and rate schedule, supplied as a response to a Request for Qualifications (RFQ).* Although often simpler than the competitive bid process, using an RFP does require the owner to carefully evaluate the leads’ qualifications and interview past clients and references.
Discussion: CCC Guidelines
Commissioning Authority Selection Procedure

• Is action required?
• Next steps
BREAK
Commissioning at Target

• Paul Ham, Target Corporation
SCE/SCG/County of Los Angeles Energy Efficiency Partnership Program

• Michael Lo, Southern California Edison Company
Commissioning, Trademarks, and an Engineering ‘Teaching Hospital’

• David Claridge, Texas A&M University
BOMA - SCE Marketing Partnership

• Amber Ackman, EEInitiative
Agenda Items for August

• Program Profiles – Volunteers? Invitations?
• Case Studies – Volunteers? Invitations?
• Topics of Interest
  – Special Guests?
  – Other Ideas?
• Discussion:
  – What do you want the CCC to become?
  – Other ideas?
Future Discussion
What do we want the CCC to become in the future?
Areas of Influence
– Education, Training, Certification
– Marketing and Public Relations
– Policy Development
– Program Design and Implementation
– Research
– Tool/Technology Development
Upcoming Meetings

2007

• August 23 (SMUD)
• November 15 (PG&E)

2008 – tentative ~ check your calendars!

• February 7
• April 17
• June 12
• August 21
• November 7
Adjourn

*Thanks to SoCal Gas for hosting today!*