



287 17th Street, Suite 300  
Oakland, CA 94612  
tel (510) 834-6420  
fax (510) 834-6421  
www.kw-engineering.com

**Technical Contact**  
David C. Struck, CEM  
(510) 229-5618 - office  
(510) 612-5959 - cell  
dstruck@kw-engineering.com

**Contractual Contact**  
Christina Summary  
csummary@kw-engineering.com

---

**Budget Proposal for Continued (Phase II) Energy Planning Services for Proposition 39  
Technical Support and Final Project Completion Reporting**

**Client** San Carlos School District  
**Client Contact** Robert Porter, Chief Operations Officer  
(650) 590-5930 [rporter@scsdk8.org](mailto:rporter@scsdk8.org)

**Proposal Issued** March 25, 2016

---

**Overview**

Per your request, the kW Engineering Team is pleased to submit this budget proposal to San Carlos School District (SCSD) for continued services in support of the District's activities and requirements related to Prop-39, California's Clean Energy Jobs Act.

The original kW Engineering contract, executed in January of 2014, was scoped to audit a select group of District facilities and develop SCSD's initial Energy Expenditure Plan (EEP) for Years 1 & 2 of Prop-39 funding; this proposal is to address all five (5) years of funding. This effort will result in the successful submittal of individual Energy Expenditure Plans (EEPs) for all District Charter facilities by the end of April, 2016. The EEP for Central Middle School will be completed by Waite Works Consultancy. The EEPs submitted by kW must be done individually due to the Charter status of the subject schools.

This proposal also covers continued services in support of project implementation, technical support and Final Project Completion Reporting, as required by Prop-39 guidelines, for the sites under kW's responsibility. The costs of these services, as also allowed by Prop-39, will be funded entirely from Planning Funds originally received by SCSD in 2014.

As a component of our support services under this proposal, kW can also provide a sampling of system commissioning (Cx) on the newly installed building management systems (BMS) and lighting controls systems, as per Title-24 energy code requirements. The anticipated savings for these new systems is essential to the expected performance of SCSD's Prop-39 plan, which will also be reflected in the Final Completion Report, as required by the Energy Commission (CEC).

kW Engineering welcomes this continued and successful partnership in providing SCSD the support and assistance it deserves in the delivery of successful energy efficiency projects throughout the District.

## Proposed Scope and Associated Budget for Years 3 through 5

---

The summary below identifies the events and tasks to be completed under this proposal throughout the remaining years (Years 3-5) of Prop-39 funding.

### Included in Phase II Scope:

---

1. **Full 5-Year EEP Submittal:** Since the original date of contract, kW engineering has performed audits (aka energy assessments and subsequent reports) and worked with SCSD staff, consultants and chosen vendors in developing a scope of work for all Charter School sites. The resulting information, energy savings data and work scope is the foundation of the individual EEPs to be submitted to the CEC for Prop-39 funding. These plan are scheduled to be submitted NLT the end of April, 2016. The sites under kW's responsibility are:
  - Arundel ES
  - Brittan Acres ES
  - Heather ES
  - White Oaks ES
  - Tierra Linda MS
  - San Carlos Charter Learning Center
2. **Technical and Engineering Support:** kW will be available to support the District's staff, Architecture, Engineering and other chosen partner firms in support of Prop-39 measure implementation. This will include, but is not limited to:
  - i. Contractor Bid Walks and Reviews
  - ii. Technical Review of Project Submittals
  - iii. Project Meetings (upon request by Client)
  - iv. Project Administration and Oversight
3. **Year-5 Final Reports:** As per Prop-39 Guidelines, Final Project Completion Reports will be due within 12-18 months of final scope completion: we anticipate Final Reporting for SCSD's Year-5 EEPs to be required near the end of 2018. This proposal covers the administrative and engineering duties involved with the submittal of those Final Reports on the District's behalf.

### Excluded from Scope:

---

**Annual Reporting Oversight:** Each year, based on funding cycles and schedules, SCSD will be required to submit **Annual Reports** to the CEC. These are typically due by Sept. 30<sup>th</sup> of each year. As this is really an accounting task and not one requiring any technical depth, this task can be covered by SCSD's fiscal services and facilities departments. kW Engineering will be happy to assist in this task if needed and requested to do so.

## Estimating your Budget

The following is a breakdown of San Carlos School District's Prop-39 anticipated allocations:

| Prop-39                                    |              |            |            |            |            |            |                        |
|--|--------------|------------|------------|------------|------------|------------|------------------------|
|  | As Allocated |            |            | Projected  |            | PLANNING   | TOTAL Rev.<br>Per Site |
|  | 2013-2014    | 2014-2015  | 2015-2016  | 2016-2017  | 2017-2018  |            |                        |
| Arundel (Charter)                          | \$ 100,728   | \$0.00     | \$ 100,548 | \$0.00     | \$ 50,274  | \$ 50,364  | \$ 251,550             |
| Brittan Acres (Charter)                    | \$ 101,108   | \$0.00     | \$ 100,522 | \$0.00     | \$ 50,261  | \$ 50,554  | \$ 251,891             |
| Heather (Charter)                          | \$ 101,932   | \$0.00     | \$ 101,044 | \$0.00     | \$ 50,522  | \$ 50,966  | \$ 253,498             |
| Tierra Linda (Charter)                     | \$ 101,300   | \$0.00     | \$ 100,680 | \$0.00     | \$ 50,340  | \$ 50,650  | \$ 252,320             |
| TL SC Learning Center (Charter)            | \$ 50,015    | \$ 50,012  | \$ 50,025  | \$ 50,025  | \$ 50,025  | \$ 50,015  | \$ 250,102             |
| White Oaks (Charter)                       | \$ 100,222   | \$0.00     | \$ 100,314 | \$0.00     | \$ 50,157  | \$ 50,111  | \$ 250,693             |
| San Carlos SD (District) Central MS/Arroyo | \$ 50,663    | \$ 101,046 | \$ -       | \$ 101,046 | \$ -       | \$ 50,663  | \$ 252,755             |
|  | \$ 605,968   | \$ 151,058 | \$ 553,133 | \$ 151,071 | \$ 301,579 | \$ 353,323 | \$ 1,762,809           |

### Assumptions and Notes:

- **5-Year Allocation:** Prop-39 Allocations for Years 4 & 5 have yet to be scheduled by the CA Dept. of Education (CDE), thus are currently estimates based on Year-3 allocations.
- **Planning Funds:** These were initially received, set-aside and are included in the 5-Year Total.
- Any one-year allocation showing "\$0" denotes an election to receive 2-year funding in alternate years. Total 5-Year funding remains the same, regardless.
- Central MS info is included for reference, but is not tied to kW's proposed scope of work.

The following Table is an overview of the District's anticipated use of all potential Prop-39 Funds:

| San Carlos P39 5-Year Cost Breakdown          |   |                                   |                               |                |  |                                |                  |                            |           |                              |              |
|---|---|-----------------------------------|-------------------------------|----------------|--|--------------------------------|------------------|----------------------------|-----------|------------------------------|--------------|
|   | Total P39<br>Allocations<br>(5 year Est.) | kW Initial<br>Prop-39<br>Contract | kW Eng<br>Phase II<br>Support | Waite<br>Works | Solar<br>Project<br>Consult.<br>(Sage) | Solar<br>Structure<br>Analysis | Training<br>(2%) | Energy<br>Manager<br>(10%) | BMS (IIC) | EE<br>Measures<br>(Net Cost) | Solar (P 39) |
| Arundel (Charter)                             | \$ 251,550                                | \$ 5,000                          | \$ 8,200                      | \$10,000       | \$ 10,868                              | \$ 1,850                       | \$ 4,025         | \$ 20,124                  | \$ 29,450 | \$ 43,277                    | \$ 118,755   |
| Brittan Acres (Charter)                       | \$ 251,891                                | \$ 10,323                         | \$ 8,200                      | \$10,000       | \$ 13,398                              | \$ 1,850                       | \$ 4,030         | \$ 20,151                  | \$ 55,600 | \$ 71,496                    | \$ 56,842    |
| Heather (Charter)                             | \$ 253,498                                | \$ 10,322                         | \$ 8,200                      | \$10,000       | \$ 9,277                               | \$ 1,850                       | \$ 4,056         | \$ 20,280                  | \$ 43,550 | \$ 63,723                    | \$ 82,240    |
| Tierra Linda (Charter)                        | \$ 252,320                                | \$ 5,000                          | \$ 8,200                      | \$10,000       | \$ 20,782                              | \$ 1,850                       | \$ 4,037         | \$ 20,186                  | \$ 57,717 | \$ 34,674                    | \$ 89,874    |
| TL SC Learning Center<br>(Charter)            | \$ 250,102                                | \$ 2,000                          | \$ 3,400                      | \$10,000       | \$ 11,191                              | Inc. w/<br>TL                  | \$ 4,002         | \$ 20,008                  | \$ 31,078 | Inc. w/ TL                   | \$ 168,423   |
| White Oaks (Charter)                          | \$ 250,693                                | \$ 10,322                         | \$ 8,200                      | \$10,000       | \$ 11,165                              | \$ -                           | \$ 4,011         | \$ 20,055                  | \$ 37,470 | \$ 45,640                    | \$ 103,830   |
| San Carlos SD (District)<br>Central MS/Arroyo | \$ 252,755                                | \$ 2,000                          | WAITE                         | \$10,000       | \$ 27,740                              | \$ 1,850                       | \$ 4,044         | \$ 20,220                  | \$ 42,700 | \$ 50,000                    | \$ 94,200    |
|   | \$ 1,762,809                              | \$ 44,967                         | \$44,400                      | \$70,000       | \$104,421                              | \$ 9,252                       | \$28,205         | \$141,025                  | \$297,565 | \$ 308,810                   | \$ 714,164   |

### Assumptions and Notes:

- **kW's initial contract** (\$44,497) covered full energy assessments of three (3) sites, and the technical review and/or scope development on four (4) others, as requested by SCSD. This included a budget increase (December-2015) to assist in final EEP development.
- **kW "Phase II"** and **Waite Works** costs estimated are NTE for the remainder of the Prop-39 program, including all tasks related to successful project completion and closeout.



- **Waite Works** is the primary consultant on all issues related to Central MS and the development of Arroyo MS. Waite Works is already under contract and this includes increases, as discussed with SCSD.
- **Solar Project Consultation (Sage):** SCSD has retained the services of Sage Renewables to drive the District's Solar PV initiatives. The amounts listed are estimated cost for those consulting services, including feasibility study, RFP and vendor selection, design review, construction technical support, commissioning verification, and year 1 PV operations asset management.
- **Solar Structure:** Structural analysis on designated facility roof structures for possible installation of Solar PV systems.
- **Energy Manager and Training:** out of each year's allocation, 10% and 2% (for Energy Manager and Training, respectively) can be set aside for those functions. It is best to do this up front as SCSD can use these funds later for project costs, but the funds cannot be applied in the reverse.
- **BMS (IIC):** *I'm-In-Control* (IIC) is the designated controls and advanced metering contractor chosen by SCSD for implementation at the sites listed. Given their performance (Pilot Project) at Arundel, their scope of work has also become an essential component of the Final Reporting aspect of Prop-39 requirements.
- **Energy Manager (EM):** can basically be any internal or external function to support District Energy Efficiency Initiatives.
- **Training:** is best to be used on "soft" program costs and/or staff training. This can be through internal initiatives or outside consultants.
- **EE Measures:** energy efficiency measures, as identified through the various energy assessments (audits) to reduce electrical and gas usage at all sites. NOTE – for purposes related to this proposal, the EE measures for the Learning Center are included with those at Tierra Linda MS.
- **Solar (P-39):** The remaining implementation funds available through Prop-39 are applied to the installation of Solar PV systems at the sites, as listed. It is our understanding that SCSD will use these funds to "buy-down" the total cost of Solar PV installations throughout the District.
- **San Carlos Learning Center (SCLC):** Prop-39 costs and savings will be submitted under an individual EEP for SCLC, but for the purposes of this budget proposal, they are included with Tierra Linda MS since the two sites are co-located.
- **Central MS Costs (misc.):** At this time, it is undetermined if the Solar PV Measure at Central Middle School can be funded out of Prop-39 allocations. Since this is out of KW's scope, we have entered the numbers as place holders, TBD later. Energy Efficiency measures will also be determined through CleaResult, under direction of Waite Works.

#### **Summary:**

kW Engineering is proposing the services and support within this proposal as continued support of SCSD's Prop-39 initiatives, reporting requirements and technical support, as needed.

#### **Deliverables**

- Complete and Submit EEP on all Charter Facilities, including any CEC review correspondence, by end of April 2016.
- Final Project Completion Report: Estimated end of 2018.
- Technical Support for EE Initiatives, as requested by SCSD.
- All Technical and Project Management activities and described herein.
- Commissioning activities and reports as requested by SCSD and as funding permits.

## Terms

Terms are net 30 days after receiving invoice. Work to be billed monthly based on hours spent. This proposal is valid for thirty (30) days.

Our budget proposal for the expanded services, described as **Phase II** is **\$44,400**.

Should you have any questions regarding this proposal, please feel free to contact David Struck at 510-229-5618.

Thank you again for your trust in our abilities and the quality of our services.

Benchmarking

Schools

Audits

M&V

Retrocommissioning

Renewables

Schools are a specialty at kW Engineering. We provide school districts with objective, independent consulting services to manage and reduce their energy use. Achieving energy savings is a complex process. kW Engineering serves as owner's representative in preparing and executing energy plans to reduce energy costs and improve infrastructure reliability, while involving students to provide valuable education opportunities.



[www.kw-engineering.com](http://www.kw-engineering.com)

approved: *DA Struck*  
4/25/2016