

# Exhibit to Agenda Item # 1

Board Finance & Audit Committee and Special SMUD Board of Directors Meeting  
Tuesday, February 18, 2020 scheduled to begin at 5:30 p.m.  
Auditorium, SMUD Headquarters Building

# Requested Action

Authorize the Chief Executive Officer and General Manager to award a contract to **TRC Engineers, Inc.** to provide professional services to administer SMUD's Complete Energy Solutions Program for a three-year period from March 2, 2020, through February 28, 2023, with an optional one-year extension for a total not-to-exceed amount of \$19.7 million.

# Program Background and Benefits

First started in 2013, provides small & medium business customers a full-service approach to complete multi-measure energy efficiency retrofits.

- Completed 1,000 projects over the last 3 years
- Saved customer an estimated \$1.5 Million in energy costs in 2019 alone

## Easy

- Full-service delivery, with a simple participation process
- Help customers find a qualified Trade Ally contractor
- Fast rebates and incentives

## Responsive

- Streamlined customer workflows through an automated process
- Local commercial energy assessment team

## Personal

- Segmented marketing solutions to business industries ( i.e. restaurants, hotels, etc. )
- Holistic assessment of entire facility including energy efficiency, building electrification, and electric vehicle charger

## Collaborative

- Teaming up with local Trade Allies, distributors, and manufactures to deliver the best products and level of service to customers

# Program Goals

	2020	2021	2022	2023 ( Optional)
Energy Savings*	14 GWh	15 GWh	16 GWh	16 GWh
Electric Vehicle Charging Stations (Level 2)	70 units	90 units	150 units	150 units
Load Flexibility Energy Reduction	1.3 MW			

\*Note: Energy savings goals will be realigned to reflect carbon reduction goals in accordance with January 2020 update to SD-9 for carbon reduction associated with building decarbonization.

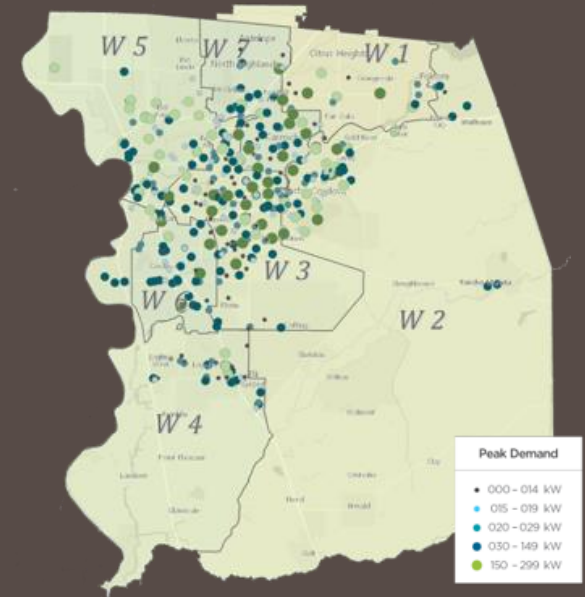
# Program Administrator Overview

## Program Tasks

- Customer outreach, segment specific marketing, referral follow up
- Coordination and communication with Strategic Account Advisors
- Project site energy assessment
- Project review, approval and monitoring of Trade Allies and project closeout
- Training and support for Trade Allies
- Project tracking, quality assurance and reporting metrics

## New Program Elements to Improve Customer Experience and Reach IRP goals

- Increased focus on carbon reduction through building and transportation electrification
- Customer, contractor, program staff, Strategic Account Advisor tracking systems
- Automated workflows
- A robust Trade Ally Network that can be leveraged with other commercial programs
- Opportunity for enrollment in load flexibility programs
- Customer financing options



# Procurement Strategy

RFP incorporated SEED, technical and pricing evaluation criteria

- 7 proposals received, 5 met the mandatory and minimum technical points requirements
- Top 3 interviewed, clarifying technical responses and providing best and final pricing

TRC Engineers, Inc. is the highest evaluated proposer and has partnered with four subcontractors:

- Brighton Energy: 37 % SEED participation
  - Will perform project site energy assessments across the entire service territory
- Applied Energy Group: Vision DSM project management platform and portal
- Enbala: Load flexibility program aggregator solution
- National Energy Improvement Fund: Customer project financing option

# Procurement Outcome

	P/F	SEED Score	Tech Score	Price Score	Total Score	Rank	Proposal Amount	SEED Credit	Evaluated Proposal Amount	Propose Amount
TRC Engineers, Inc.	P	10.00	53.72	27.53	91.25	1	\$19,634,037	\$250,000	\$19,384,037	\$19,700,000
Nexant, Inc.	P	10.00	44.85	30.00	84.85	2	\$18,039,865	\$250,000	\$17,789,865	
DNV GL Energy Services USA, Inc.	P	10.00	45.38	28.84	84.22	3	\$18,752,460	\$250,000	\$18,502,460	
Lime Energy Services Co.	P	10.00	42.99	28.23	81.22	4	\$19,157,020	\$250,000	\$18,907,020	
Consol	P	10.00	41.53	27.33	78.86	5	\$19,774,500	\$250,000	\$19,524,500	

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