



DEPARTMENT OF ADMINISTRATIVE SERVICES
Milwaukee County

TO: All Interested Consultants
SUBJECT: Addendum 2 – Retro-Commissioning Phase 1
PROJECT NUMBER: O641-20181
DATE: July 7, 2023

This Addendum to the Request of Proposal is issued to modify, explain or correct the original documents, dated June 15, 2023 and is hereby made part of the Request for Proposal.

Proposers must acknowledge receipt of Addendum 2 in their proposals, or the proposals may be rejected

SCHEDULE UPDATE

The following update is provided for Section IV - Project Schedule

Current:

July 7, 2023: Milwaukee County will not provide any new information related to this RFP after 12:00 pm

July 10, 2023: Consultant proposals due 2:00 pm

July 18, 2023: Verbal notification to selected consultant

October 2, 2023: Project launch – begin CJF audit

Update:

July 21, 2023: Milwaukee County will not provide any new information related to this RFP after 12:00 pm

July 24, 2023: Consultant proposals due 2:00 pm

Aug. 1, 2023: Verbal notification to selected consultant

October, 2023: Project launch – begin CJF audit (flexible)

CLARIFICATION

(Questions asked between 6/30/2023 and 7/5/2023, with Milwaukee County responses. Additional questions are confirmed having been received and will be answered in later addenda.)

Q1: Could the County describe the badging and access requirements for entering the facility and accessing the equipment - what are the costs, what area will we need to be escorted and what areas are we not allowed in?

The selected consultant and their sub-consultant(s) will need to complete and submit a Milwaukee County Sheriff's Office (MCSO) background check form prior to the project launch date. Consultant/sub-consultant(s) may also need to fill out and submit a "Contractor Form for Cards Authorization for Issuance of Keys and Access" prior to the project launch date. There is no submittal fee associated with these forms.

To ensure safety and security, Milwaukee County reserves the right to require an escort anytime during consultant/sub-consultant(s) site visits to the Criminal Justice Facility. Entry into areas such as jail pods may be limited and must be coordinated with MCSO and facilities staff prior to the on-site audit phase. Access to mechanical rooms will be easier to coordinate but may still require a facilities escort.

Q2: For areas where we are not allowed, what will be done to provide information from there that is required?

See response to Q5 on page 2 of Addendum #1.

Q3: Will the County engage a TAB contractor to take measurements of airflow and static pressures where we would like them, or should we provide an allowance to sub-contract those services as needed?

Any TAB work associated with the commissioning process is the responsibility of the selected consultant.

Q4: What are the operations hours on site for commissioning and days allowed? That is, can we work out of normal business hours at our discretion if needed?

Due to security concerns and the potential need for an escort, the selected consultant will need to perform all on-site work during normal business hours of 8:00 am and 4:30 pm Monday through Friday.

Q5: Can testing for equipment outside of its peak time be tested at later dates to provide the best information for the equipment?

Testing must occur during normal business hours – see response to Q9. However, Milwaukee County is open to suggestions regarding on which date(s) testing will occur and/or whether it would be beneficial to repeat testing. Proposers should indicate their recommended approach and schedule for testing/re-testing in their proposals.

Q6: Would the County share at this time the original new building commissioning report? If not available, was original commissioning completed and by whom?

To the Office of Sustainability's knowledge, the Criminal Justice Facility has had no prior commissioning completed.

Q7: Will the County provide documents from the TAB contractor and all TAB reports for the original and all renovations?

See response to Q3. TAB reports for the original are unknown. TAB reports for renovations will be provided to the selected consultant upon their request.

Q8: Does the existing lighting have controls beyond wall switches? For example, a Lutron lighting control system.

See response to Q10 on page 2 of Addendum #1.

Q9: Is the County interested or require assistance with implementing a preventive maintenance program?

No, we do not plan to implement a new preventative maintenance plan at this time.

Q10: Has the County recently participated in the Focus on Energy program? If yes, what year and is a report available?

Two other Milwaukee County buildings were Retro-Commissioned following FOE RCx reporting guidelines in 2020 and 2021. These reports have not been distributed publicly.

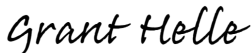
Q11: The Focus on Energy program concentrates on ECM's that have an 18 month or less payback. Is the County interested in ECM's that are outside of the 18-month payback period?

Yes, Milwaukee County is interested in all recommended ECM's, regardless of payback period. See Section 2. Audit Phase, subsection (l.) on page 2 of the RFP for additional information.

Q12: Would the County be able to share the forms required for the submittal?

Please see attachments 1 and 2 for the FOE RCx Enrollment Application and Customer Audit Report Template, respectively. For access to the RCx Workbook Template, please contact Tom Dragotta, Energy Advisor with FOE at tom.dragotta@focusonenergy.com or (715) 720-2151.

Sincerely,



Grant Helle
Energy Program Manager

Attachments:

1. Focus On Energy RCx Enrollment Application
2. Focus on Energy Customer Audit Report Template

cc: S. Carron, DAS-FMD
T. Christian, DAS-FMD
L. Robinson, OEI

ATTACHMENT 1

FOCUS ON ENERGY RCx ENROLLMENT APPLICATION



FOCUS ON RETROCOMMISSIONING

Retrocommissioning (RCx) is the process of improving the performance and energy efficiency of building systems, equipment, and operations as a whole. RCx can save up to 16% each year on energy bills and produce project paybacks of less than one year. The FOCUS ON ENERGY® RCx offering provides assistance in identifying and implementing system and operational changes at your facility, leading to significant energy and costs savings for your organization. By participating in RCx you can make recommended changes to systems, equipment, and practices, leading to significant energy and cost savings.

A few of the benefits of RCx include:

- Managing energy use more effectively.
- Improving indoor air quality and building occupant comfort.
- Catching small maintenance needs before they become costly repairs.

Is RCx right for you?

Owners and managers of existing buildings (must be six years or older and at least six years since the last retrocommissioning) who are motivated to implement efficiency projects, optimize existing equipment and controls, and train staff are ideal candidates for RCx.

Enrollment Process

START	1 Choose an RSP.
	2 Work with the RSP to complete the RCx Enrollment application (pg. 3-4).
AUDIT PHASE	3 Complete the RCx audit within six months of approved enrollment.
	4 RSP submits the estimated savings workbook, audit report, and audit invoice to Focus on Energy. See page 4 for submittal information.
	5 Focus on Energy reviews and approves the workbook and issues an Incentive Agreement to the customer.
IMPLEMENTATION PHASE	6 Chosen RCx measures are implemented within six months of audit approval.
	7 RSP resubmits the workbook with savings verification and implementation invoice and invoices from third-party contractors. <i>Virtual post inspection is required for projects receiving an incentive over \$25,000.</i>
	8 Focus on Energy reviews and approves the final workbook and issues a Project Completion Notice to the customer. The incentive will be sent upon receiving signed Project Completion Notice from the customer.



Choosing an RCx Service Provider

RCx Service Providers (RSP) are Trade Allies who specialize in providing Retrocommissioning services. Customers must work with a Focus on Energy registered RSP to participate in the RCx offering. Find a participating RSP by visiting focusenergy.com/findtradeally.

REDUCING ENERGY WASTE ACROSS WISCONSIN

Focus on Energy, Wisconsin utilities' statewide program for energy efficiency and renewable energy, helps eligible residents and businesses save energy and money while protecting the environment. Focus on Energy information, resources, and financial incentives help to implement energy efficiency and renewable energy projects that otherwise would not be completed.

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RCx OVERVIEW

Buildings enrolling in RCx will receive a base incentive plus additional incentives for achieving a reduction of 5% or more in the building's Energy Use Intensity (EUI).

Energy Use Intensity (EUI)

ENERGY STAR Portfolio Manager® expresses EUI as energy per square foot per year. Calculate EUI by dividing the total energy consumed by the building in one year (measured in kBtu) by the facility's gross square footage.

Below is a table of Median site EUIs for common property types. A full list can be found at energystar.gov.

Market Sector	Property Type	Median Site EUI (kBtu/ft ²)
Education	College/university	84.3
Education	K-12 School	48.5
Food sales and service	Supermarket/grocery store	196
Healthcare	Hospital (General medical and surgical)	234.3
Office	Office	52.9
Warehouse/storage	Distribution center	22.7

Incentive Structure and Eligibility

- Customers who complete the audit and reduce their EUI will receive a minimum base incentive of \$0.10/ft².
- Customers will receive an additional \$0.01/ft² for every 1% EUI reduction over 5%.
- Incentives are capped at a 15% EUI reduction or \$0.20/ft².
- Incentives are capped at 75% of the total cost with a maximum incentive of \$100,000 per project.
- Building baseline EUI will be determined using 24 months of recent utility bills and gross square footage.
- Buildings under 200,000 ft² must audit the entire building.
- Buildings over 200,000 ft² may complete an audit of the entire building or a partial building audit, provided the audited portion of the building is on a separate utility meter.
- Buildings must have direct-digital controls (DDC) with the ability to trend and export data.
- Buildings without DDC (i.e., pneumatic controls) may be eligible for a custom incentive for retrofitting the control system. Control systems may only be repaired as part of RCx.

EUI Reduction	Incentive/ft ²
>0%	\$0.10
1%	
2%	
3%	
4%	
5%	\$0.11 to \$0.20
6%	
7%	
8%	
9%	
10%	
11%	
12%	
13%	
14%	
15%+	\$0.20

Timeline



RCx incentive payment is sent after verifying operational and/or system changes.

Incentive Range Potential

Gross ft² x \$0.10 ft² to Gross ft² x \$0.20 ft²

Minimum Maximum
 \$ _____ to \$ _____

RCx ENROLLMENT APPLICATION

FOR PROJECTS COMPLETED BY 12/31/2023



Complete all sections. Incomplete applications cannot be processed and will delay approval. For an electronic copy of this form visit focusonenergy.com/bldg-opt.

section 1

ACCOUNT AND CUSTOMER INFORMATION

Tax Identification Number (Check one) FEIN or SSN

If you use a Social Security Number (SSN) as your Tax Identification Number, **do not provide it below**. You will be contacted by the Program via email to provide a copy of your W-9 using a secure online portal, if it is not already on file. **You must list an email address in Section 3.**

FEIN

TAX CLASSIFICATION OF CUSTOMER

(Check one. Required for all businesses, including non-profits.)

- Sole Proprietorship Individual Single-Member LLC
 C Corporation S Corporation Partnership
 LLC - C Corp LLC - S Corp LLC - Partnership

OWNER NAME (REQUIRED IF SSN IS USED AS TAX IDENTIFICATION NUMBER)

COMPANY NAME

LEGAL ADDRESS (AS SHOWN ON COMPANY W-9)

CITY STATE ZIP

WHO DID YOU WORK WITH FROM FOCUS ON ENERGY? (CONTACT NAME)

section 2

JOB SITE INFORMATION

(Refer to your utility bills for account numbers below.)

JOB SITE BUSINESS NAME

ELECTRIC UTILITY AT JOB SITE ELECTRIC ACCOUNT #

GAS UTILITY AT JOB SITE GAS ACCOUNT #

- JOB SITE ADDRESS IS SAME AS LEGAL ADDRESS
 JOB SITE ADDRESS IS DIFFERENT (COMPLETE BELOW)

JOB SITE ADDRESS

CITY STATE ZIP

section 3

CUSTOMER CONTACT INFORMATION

JOB SITE CUSTOMER CONTACT NAME

PRIMARY PHONE # EMAIL ADDRESS

- I opt in to receive program updates via text message.
Preferred method of contact: Call Email Text

If Focus on Energy has a question about this application, we should contact: Customer RSP Other _____

section 4

RSP INFORMATION

RSP CONTACT NAME

PRIMARY PHONE # EMAIL ADDRESS

RSP COMPANY NAME

ADDRESS

CITY STATE ZIP

section 5

BUSINESS PAYMENT INFORMATION

Payee is responsible for any associated tax consequences.

Make incentive check payable to:

- Customer Trade Ally Other Payee

If Other Payee is selected, the relationship to the utility account holder must be identified below:

- Tenant Building Owner Other (specify) _____

For All Payees

- Mail check to:** Customer Legal Address Job Site Address
 RSP Address Alternate Address

COMPANY NAME

LEGAL ADDRESS (AS SHOWN ON COMPANY W-9)

CITY STATE ZIP

ATTENTION TO (OPTIONAL)

For RSP and Other Payees

RSPs must be registered with the Program and have a current W-9 on file to receive payment.

Tax Identification Number (Check one) FEIN or SSN

If you use a Social Security Number (SSN) as your TAX Identification Number, do not provide it below. You will be contacted by the Program via email to provide a copy of your W-9 using a secure online portal, if it is not already on file. You must list an email address below.

FEIN

Tax Classification of Payee

(Check one. Required for all businesses, including nonprofits.)

- Sole Proprietorship Individual Single-Member LLC
 C Corporation S Corporation Partnership
 LLC - C Corp LLC - S Corp LLC - Partnership
 Other _____

Payee Contact Information

NAME EMAIL ADDRESS

INCENTIVE APPLICATION

NEED HELP? Call 800.762.7077



section 6

PROJECT PARAMETERS - ENERGY USE

ANNUAL KWH USED _____

ESTIMATED KWH SAVINGS _____

ANNUAL THERMS USED _____

ESTIMATED THERM SAVINGS _____

CALCULATED BASELINE EUI _____

section 7

BUILDING DETAILS

GROSS SQUARE FOOTAGE OF FACILITY _____

GROSS SQUARE FOOTAGE OF FACILITY BEING AUDITED _____

SQUARE FOOTAGE HEATED _____

SQUARE FOOTAGE AIR CONDITIONED _____

YEAR FACILITY WAS BUILT _____

section 8

UTILITY CUSTOMER AUTHORIZATION

Usage records for the following facilities may be released to Focus on Energy. Additional requests may be listed on an attachment to this form. Data will be provided for multiple meters at a single premise provided they are on the above noted customer's utility account(s).

PREMISE 1

PREMISE ADDRESS (ADDRESS AT THE METER LOCATION) _____

CITY _____ STATE _____ ZIP _____

RELEASE NATURAL GAS USAGE DATA

RELEASE ELECTRIC USAGE DATA

ACCOUNT NUMBER - NATURAL GAS _____

METER NUMBER - NATURAL GAS _____

ACCOUNT NUMBER - ELECTRIC _____

METER NUMBER - ELECTRIC _____

PREMISE 2

PREMISE ADDRESS (ADDRESS AT THE METER LOCATION) _____

CITY _____ STATE _____ ZIP _____

RELEASE NATURAL GAS USAGE DATA

RELEASE ELECTRIC USAGE DATA

ACCOUNT NUMBER - NATURAL GAS _____

METER NUMBER - NATURAL GAS _____

ACCOUNT NUMBER - ELECTRIC _____

METER NUMBER - ELECTRIC _____

The undersigned utility customer requests and authorizes (utility name) _____, hereafter referred to as the utility company, to release the information listed above to the party named in Section 4 of this form. Focus on Energy maintains confidentiality agreements with its contractors and subcontractors and this billing information will be kept confidential and used for Focus on Energy projects only. The utility customer also releases the utility company from any and all liability arising from or connected with providing this information to Focus on Energy. This authorization expires two years from the signature date below and allows Focus on Energy to request data multiple times within this time period if needed to validate savings or benchmark customer energy use.

section 9

CUSTOMER SIGNATURE

I, the Customer, attest that I am the ratepayer (utility account holder) for the site(s) listed in Section 2. If applicable, I assign the right to participate in and receive incentives from the Focus on Energy Program to the Other Payee identified in Section 5.

I understand if the project extends beyond 18 months from enrollment approval, a 25% incentive penalty will be assessed.



CUSTOMER SIGNATURE _____ NAME (PRINT) _____ DATE _____

Submit applications and supporting documentation to:

MAIL: Focus on Energy
725 W. Park Avenue
Chippewa Falls, WI 54729

EMAIL: business@focusonenergy.com

*Incentive may be adjusted based on project caps. See measure requirements and Terms and Conditions for more information.

PARTICIPATION REQUIREMENTS

NEED HELP? Call 800.762.7077



Use the eligibility requirements below to see if your business qualifies for program incentives. You can also visit [focusonenergy.com](https://www.focusonenergy.com) to find savings opportunities specific to your business.

CUSTOMER ELIGIBILITY

All non-residential customers (agriculture, commercial, government, industrial, multifamily, and schools) located in a participating utility territory are eligible to receive Focus on Energy incentives.

To see if your utility participates, go to [focusonenergy.com/participating-utilities](https://www.focusonenergy.com/participating-utilities). Typical facility types include:

- ▶ School facilities (e.g., public and private K-12, technical colleges, colleges, universities)
- ▶ Commercial facilities (e.g., banks, hotels, offices, convenience stores/gas stations, manufacturing, breweries, restaurants)
- ▶ Healthcare facilities (e.g., nursing homes/skilled nursing, Community-Based Residential Facilities (CBRF), hospitals)
- ▶ Multifamily residential properties with four or more dwelling units under one roof (e.g., apartment/condominium buildings, student housing). Common areas of multifamily buildings such as hallways, exercise rooms, or laundry rooms, along with central HVAC systems are eligible for business incentives included in this catalog. For in-unit efficiency incentives and offerings, refer to [focusonenergy.com/residential](https://www.focusonenergy.com/residential).

INFORMATION AND REQUIREMENTS

Before you start your project, make sure you are familiar with participation requirements, program information and Terms and Conditions.

General Terms and Conditions

Review the Focus on Energy Terms and Conditions at [focusonenergy.com/terms](https://www.focusonenergy.com/terms) or call 800.762.7077 to request a copy.

Incentive Limits

Incentives are limited to \$300,000 per project and \$400,000 per customer per calendar year for all Focus on Energy incentives (prescriptive and custom).

Depending on the business tax classification of the payee, the entity receiving the incentive payment may receive IRS form 1099 for incentives totaling over \$600 in a calendar year.

Trade Ally Information

A Trade Ally represents the company who provided/installed the equipment for a project or performed the service for which a Customer is seeking an incentive. Trade Allies who have signed an agreement with Focus on Energy are allowed to enjoy certain program benefits, one of which is to receive direct payment of incentives at the Trade Ally's request. Incentives can only be paid directly to a registered Trade Ally who has a W-9 on file with Focus on Energy. For more information on becoming a registered Trade Ally, visit [focusonenergy.com/tradeally](https://www.focusonenergy.com/tradeally).

CUSTOM INCENTIVES

Does your project not fit in one of our prescriptive offers? Custom project incentives are calculated on a case-by-case basis for non-standard technologies and are based on estimated first-year energy savings. Whether you operate a large industrial facility, a chain store or franchise, an office, school or municipal building, a farm, or anything in between, we can show you how to be more energy efficient — and how to save on the cost of making improvements.

Before purchasing equipment or proceeding with upgrades, you must contact an Energy Advisor from Focus on Energy. Your Energy Advisor will help you determine if your project qualifies for a Focus on Energy custom incentive and will help you obtain necessary pre-approval. Refer to the green 'Custom Project Idea' boxes throughout the catalog for ideas.

To get started with your custom project, download and complete the Custom Incentive Guide at [focusonenergy.com/custom](https://www.focusonenergy.com/custom).

The Federal Employer Identification Number (FEIN) and Business Classification of the Trade Ally is required IF the incentive is paid directly to the Trade Ally. In this scenario, the credit must be clearly labeled as the Focus on Energy incentive and deducted from the amount due on the Customer's invoice.

If your project was completed by more than one Trade Ally (example, equipment was purchased from one Trade Ally but installed by another Trade Ally) and the incentive is being paid to you the Customer, enter the information of the Trade Ally who installed your equipment in Section 4: RSP Information. If the equipment was self-installed, enter the information of the Trade Ally from whom you purchased the equipment.

Assignment of Incentives to Other Payee

The Customer for the project site listed on the application may assign

ATTACHMENT 2
FOCUS ON ENERGY CUSTOMER AUDIT REPORT
TEMPLATE

Retrocommissioning Customer Audit Report

This *SAMPLE* template is available for your use but is not required. If an alternative report format is used, include the information outlined in this template at a minimum.

Customer Name: ABC Industry
 Site Address: 123 ABC Street, Anytown, WI 12345
 Completed by: ABC Engineering
 RSP Contact: John Doe
 Report Date: 01/02/2021

Contents

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Executive Summary

The executive summary should include a brief description of the facility, history of HVAC system (install, commissioned, and previous improvement dates), and scope of the RCx audit as well as the specific dates when the audit occurred. Additionally, this section should include a summary of the energy conservation measures (ECM) including estimated measure costs and simple payback.

Summary of Measures

Description	Estimated Peak Electric Demand	Estimated Annual Electric Energy	Estimated Annual Natural Gas	Estimated Annual Energy Cost	Estimated Measure Cost (\$)	Simple Payback (Years)
-------------	--------------------------------	----------------------------------	------------------------------	------------------------------	-----------------------------	------------------------

		Savings (kW)	Savings (kWh)	Savings (Therm)	Savings (\$)		
M1	Example	XX.XX	XX,XXX	XX,XXX	\$X,XXX	\$X,XXX	X.XX
M2							
MX							
	Estimated Totals	XX.XX	XX,XXX	XX,XXX	\$X,XXX	\$X,XXX	X.XX

Energy Conservation Measures (ECM)

Include the following components for each ECM.

Measure Summary

Brief description of how energy savings resulting from the energy efficiency improvement(s) are being accomplished. Identify what equipment will be impacted; list specifically all AHUs, fans, pumps, vav, chillers, etc.

Savings Summary

Table including: Estimated cost to implement (\$), Annual Savings (\$), Simple Payback (Yrs), Peak kW Reduction, Annual kWh Savings, and Annual Therm Savings.

Baseline Conditions and Operation

Brief description of the baseline conditions and how the equipment is currently being operated and controlled. Identify current setpoint values, operating schedule periods, run times, etc. Documentation such as trend data from a BAS, screen shots, on/off schedules, or pictures of spot measurements should be included in the RCx workbook to show how the measurements are being used in the savings calculation to arrive at baseline energy.

Assumptions

Include source and key details such as temperatures, pressures, dimensions, flow rates, speeds, operating hours, weights, concentrations, and other physical parameters associated with producing the energy savings. Include nameplate data of efficiency for motors and references of standard efficiencies used when nameplate data is not available.

Proposed Conditions

Brief description of the proposed conditions, corrections, and/or improvements and how the equipment will be operated and controlled. Identify new setpoint values, operating schedule periods, reduced run times, etc.

Implementation Process

Describe the specific improvements that will be made and the approximate schedule or sequencing for the Measure. Identify specific changes to operating sequences, setpoint values, inclusion, or addition of control devices such as CO₂, temperature, or humidity sensors. Identify who will be conducting the work (i.e., temperature control contractor, testing and balancing contractor, building operator). If balancing work is part of the measure, provide a description of the work that balancer must do to achieve final operating conditions. Identify what measurements the balancer is expected to take and record. Identify what measurements need to be trended on the BAS to verify the work.

Impact on Operations

Describe how operations will be impacted during implementation phase, if applicable, as well as the potential impacts the measure may have on the operations going forward.

Verification Process

Provide a detailed description of the plans to verify savings. Describe trend data and BAS screenshots that will be provided. Verification should use the exact same method and process shown in the savings calculation and used to establish the baseline.

Energy Use

Use actual utility data for the latest 12 months to determine the average blended electric and natural gas rates.

Electricity Data

Provide the electric rate used to estimate energy cost savings.

Natural Gas Data

Provide the natural gas rate used to estimate energy cost savings.

Recommended Capital Improvements

This is optional – but if recommended capital improvements are identified during the RCx audit, the projects should be separate from RCx measures (i.e., lighting, VFDs).

Supplemental Documentation

Provide a list of AHUs, fans, pumps, and motors listing vital information; rated HP, CFM, GPM, chiller and boiler sizes and efficiencies. Include vital drawings or sequences that help explain or detail the measures.