

10/30/2020

Mike Crowley  
VEIC  
20 Winooski Falls Way  
5th Floor  
Winooski, VT 05404

**RE: Request for Proposal – Statewide Building Energy Performance Ordinance Support Services**

Dear Mr. Crowley:

Overlay LLC, d/b/a Overlay Consulting (Overlay) is pleased to submit this proposal in response to your request for proposal for **Statewide Building Energy Performance Ordinance Support Services**. The following proposal details our approach and related project experience.

Overlay has assembled a highly-qualified team to provide the State of Vermont (State) with the professional experience and expertise to perform the requested services. Our proposed team has direct experience providing building benchmarking data management, help center, outreach, reporting and online mapping for City and County Ordinance programs around the country including Denver, Boulder, Hennepin County, St. Paul, Los Angeles Better Building Challenge and numerous others. We plan to bring this experience along with our deep understanding of building energy efficiency to meet your program needs.

We look forward to the opportunity to work closely with the State on this important project. If you have any questions regarding the approach presented in this proposal or scope of work items, please contact me at 720-961-8250.

Thank you for your consideration.

Sincerely,



Jonathan Dierking  
Principal  
Overlay Consulting  
Ph: 720-961-8250

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## A. COMPANY PROFILE



Overlay Consulting ([www.overlayconsulting.com](http://www.overlayconsulting.com)) is a full-service energy management firm that excels in delivering energy program management services to the private sector, utilities, and governmental agencies. Our team combines the business discipline of management consulting with the technical expertise of a robust engineering firm. We specialize in providing three key service areas:

- 1) Energy Management, Plan Development, and implementation
- 2) Incentive Program Design & Implementation
- 3) Technology based Energy and Sustainability Projects

Our multidisciplinary team of Professional Engineers (PE), Certified Energy Managers (CEM), Certified Energy Procurement Professional (CEP), Incentive Program Experts, Database & Web Development Specialists and professionals accredited in Leadership in Energy and Environmental Design (LEED®) offer leading energy related services to support the technical and programmatic needs of our clients.

Overlay Consulting was started in January 2014 by a team of long-standing energy efficiency professionals with over 40 years of energy experience. We currently employ 10 full-time employees as well as part-time support staff.

Our proposed team has direct experience delivering city and county building ordinance programs. We currently manage the deployment of the numerous building ordinance programs. This work includes data tracking with automated integration to Portfolio Manager reporting, building manager/owner outreach and training, help center (1-800 / email), program results reporting, building scorecard development and online mapping of building performance.

We also have in-depth experience running large scale energy programs on behalf of utilities. We have operated utility incentive program for entities such as AEP Ohio, ConEd, Detroit Edison, KCP&L, among others. We also provide energy engineering support services for national clients such as Amazon, JPMorgan Chase and CBRE.

## B. SCOPE OF WORK

### Overview

Overlay proposes the following project approach to meet the requested scope of work. Based on our experience operating similar energy benchmarking ordinance programs we believe this approach will provide the best customer experience while delivering a high building compliance rate.

## TASK 1 - PROJECT START-UP

### Kick-off Meeting

Overlay proposes to start the project with a team kick-off meeting to introduce the Overlay staff and obtain direct input from the State's team on the design and implementation of the statewide program. The project kick-off meeting will focus on tackling the following key tasks

- Define staff roles
- Outline project communication structure
- Review and confirm project schedule
- Define approach for compiling covered building list data
- Define approach for collaborating with local electric and gas utilities
- Review database functionalities and data integration channels
- Define technical assistance and help materials
- Discuss help center support services
- Discuss integration with current city ordinances
- Define what constitutes success

### Status Meetings

Overlay will plan to meet with the State's team and other partners in person or via conference calls once per week during the peak months, prior to and after the building reporting deadline date, and as needed during non-peak months. The Overlay team will be prepared to provide program performance data such as, but not limited to: compliance rate, rates of data errors observed, exemption requests, and the volume of phone calls / emails received during these meetings. Overlay staff will also provide general input on potential updates or modifications that can be made to the program design, website, communication scripts, score cards, etc.

## TASK 2 – ADVISORY COMMITTEE COORDINATION

### Kick-off Meeting

Overlay proposes to support the coordination of the program with input for an Advisory Committee. Overlay will perform Advisory Committee coordination activities including:

- Coordinate an Advisory Committee that will govern the delivery of the Vermont Commercial Energy Labeling program. The Committee will include representatives from the following organizations:
  - Public Service Department
  - Energy Efficiency Utilities:
    - Efficiency Vermont

- Vermont Gas Systems
  - Burlington Electric Department
  - Office of Economic Opportunity/Weatherization Assistance Program
  - Other interested stakeholders
- The committee will meet regularly (probably quarterly) to regularly to review implementation plans and progress, collect stakeholder input, approve changes, provide ongoing guidance to the program administrator, and report progress and issues to the Vermont Public Service Department (PSD).
- The program administrator will provide regular progress reports and identify issues requiring guidance from the advisory committee. These progress reports could potentially be rolled into existing regulatory processes, which include filing annual plans and quarterly progress reports to the PSD.

## TASK 3 - COVERED BUILDINGS LIST DEVELOPMENT

### *Building Data Compilation*

Overlay Staff will start by compiling a list of all buildings within the state that would be required to comply with the new building energy performance bill. This will include all state buildings above 5,000 sq-ft and nonstate-owned properties above 50,000 sq-ft.

This includes roughly 3,395 commercial and multi-family buildings above 20,000 sq-ft. Data will be compiled from the following sources.

- City and County Assessors data
- City and County GIS Department Data
- CoStar building reports
- Other relevant data sources, as needed

Our goal will be to collect the following information, at a minimum when available.

- Building address
- Parcel ID
- Parcel Sq-ft
- Multiple buildings on a single parcel
  - Count and sq-ft of multiple buildings on a single parcel, if available
- Property management contact information
- Building owner contact information
- Building Classification
- Year built
- Assessor Sector
- GIS location
- CoStar real estate market data

### Data Scrubbing

Upon approval of a specific building list, the Overlay Team will begin scrubbing the data to ensure accurate tracking information. This will include match analysis and removal of redundant data from across the three main data sources (Assessor, GIS, CoStar).

This will also include working to identify parcels with multiple buildings to determine whether they include qualifying or nonqualifying buildings.

### Ongoing Building Data Compilation (New Construction)

The Overlay team will also develop a process for updating the building list with any new buildings constructed throughout the year. This process will be performed once per year in coordination with the individual municipalities.

## TASK 4 - UTILITY COMPANY AUTO UPLOAD CORDINATION

### Utility Data Upload Process Development & Data Accelerator

Overlay will create a working group that includes the electric and gas utilities throughout the state to identify their individual building utility data reporting process. Where possible, the Touchstone Benchmarking™ software does allow for automated upload directly from some utilities using building owner’s utility account logins/passwords.

Based on the results of the working group, Overlay will develop a process flow guideline for building owners on how to obtain and upload their utility data based on their local utility provider.

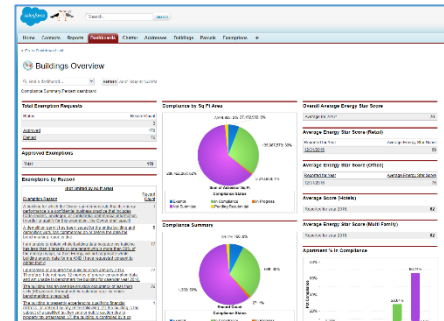
## TASK 5 - DATABASE DESIGN, SETUP & TRACKING

### Database Development

Our proposed approach includes utilizing our new Touchstone Benchmarking™ (Touchstone) licensed data and communication software system specifically design for building energy performance benchmarking programs. This design will allow for automated integration with Portfolio Manager and online exemption request forms with real-time tracking of building data. The system will also allow for communication tracking with building owners for both phone call notes and email tracking.

Based on input received during our initial kickoff meeting, Overlay will customize the Touchstone user interface design and functionality specification for approval by the State. Our provided software solution will include, but is not limited to:

- Auto-integration with Portfolio Manager reporting
  - Automatic nightly download of new building report submissions
- Auto-integration with online exemption request forms
- Automatically scan imported benchmark submissions for 35+ data quality issues including, but not limited to:

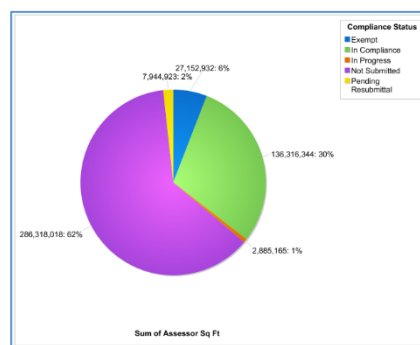


- o EUI outside normal range, Abnormal score, none matching sq-ft, unrealistic # of worker, operating hours, etc);
- Online dashboard to monitor:
  - o Percent approved, denied, exempt, in process, etc.;
- Email and Phone communication tracking
- Direct email generation
- Pre-developed reports
- Automated building scorecard
- Automated integration with public disclosure online map

Upon approval from the State, Overlay’s Web / database development staff will configure the Touchstone software setup. Once the core system is configured, Overlay staff will review the design and layout with State staff to confirm it meets the Team’s expectation.

Upon approval of the initial configuration, Overlay will upload the initial state-wide building list(s) and contact information. Overlay will test system functionality and data for accuracy.

Approved automated email responses will be input into Touchstone to respond to activities such as submittal status, submittal errors, or approvals. Overlay will also configure the approved scorecard design/language for automated direct emailing functionality. The team will setup email accounts and signature lines to mirror the State’s so that it appears building owners are communicating with State staff, thus reducing confusion.



Each consecutive year, new data lists will be uploaded for the newly constructed buildings that are required to comply with the ordinance.

### ***Touchstone Benchmarking™ Software Training***

Once all building data, automated email, and scorecard language has been uploaded and tested, Overlay will host a training session with State staff. Training will include an in-person training session that will be recorded for future use.

As part of the Touchstone software, the system also includes training manuals and video training series which can be referenced for future use or new hires.

### ***Touchstone Benchmarking™ Software Access***

Overlay will configure the software system with unique login and passwords for State staff as determined by the State. This can include varying levels of access including full control, limited editing capabilities and view only access.

The State may also provide access to the individual cities so that they can view the results of the reporting buildings within their city or county. Overlay will work with the State’s team to determine the proper access for State and City staff that will have access to the system.

## TASK 6 - PROGRAM DESIGN & MATERIAL DEVELOPMENT

### Technical Assistance and Program Material Development

The Overlay Team will begin this phase by developing program informational materials for outreach as well as building owner education. Templates for all of the following materials will be developed and then customized for State program design. We recommend materials include, but are not limited to:

- Informational website
  - Program overview
  - Step-by-step compliance instructions
    - Portfolio Manager details
    - Auto energy data upload integration with local utility
      - Details on alternative data collection processes for smaller utilities
    - How to report
- Ordinance post cards to building owners
  - 1<sup>st</sup> year will include physical post cards
  - Following years will include digital post cards, where email addresses are available
- Ordinance formal letters to building owners
- Email templates
- Informational PowerPoint presentations for building owners
  - Coordination with EnergyStar staff and utilities, where possible
- Training PowerPoint for local utility and energy efficiency consulting companies

Overlay can host this website, but we have found that it will be more effective if it is hosted on the State's own internal website. Overlay is open to either option. If the website will be hosted by the State, our expectation is that Overlay will develop all website content and that web develop will executed by the State.

Overlay will develop drafts for all of the aforementioned materials, which will be reviewed and approved by State staff for comment and approval.

## TASK 7 - HELP CENTER SETUP AND ADMINISTRATION

### Communication Channel Setup

The Overlay Team will setup a Help Center to manage all communication and data tracking. We will setup a single 1-800 number to be directed to all Help Center staff. We also recommend setting up a single master email account as well as State branded individual emails for each Help Center staff member. Emails will be channeled through Touchstone using the master email address, but personal communication from individual Help Center staff may be preferred to provide better individual customer service.



### *Training Manual and Process Flow Development*

Overlay will develop process flows for all major activities that will be executed by Help Center staff. This may include, but are not limited to:

- Inputting data into Touchstone
- When and how to respond to questions
- Customer question escalation procedures
- Notification delivery procedures (approved, denied, missing data, exempt etc.)

Overlay will also develop an internal Help Center staff training manual and PowerPoint to address all aspects of the position including how to utilize the different process flow charts as well as the script language to be used during building owner interactions.

### *Communication Script Development*

The Overlay Team will develop email, direct letter and call scripts for help center staff to utilize when communicating with building owners and managers. Script language and documents will be developed, but not limited to, addressing the following building owner touch points.

- Regularly received call questions (i.e.)
  - How do I use Portfolio Manager?
  - Where do I obtain my utility data?
  - How do I submit for certification?
  - Is there a penalty for not submitting?
- Script for out-going non-compliance phone calls
  - Address both missing data or missed deadline
- Standardized email responses
  - Address similar questions as to be developed for phone calls
- Define a process for escalating more complex questions to City staff

Overlay will develop draft scripts, which will be reviewed and approved by State staff.

### *Help Center Administration*

Once the Touchstone software and Help Center initial setup is complete, Overlay will transition to live ongoing Help Center Administration. The Help Center will be staffed with trained energy and sustainability consultants from 9:00am – 5:00pm, Monday through Friday.

The Help Center will be regularly staffed by 2 full-time Help Center Staff during the reporting period of March to August with an additional 2 full-time Help Center Staff during the peak period of May through July.

All phone calls and emails received through the Help Center will be answered directly or responded to within 24 hours. Communications received at the end of the day on Friday or over the weekend will be responded to on Monday.

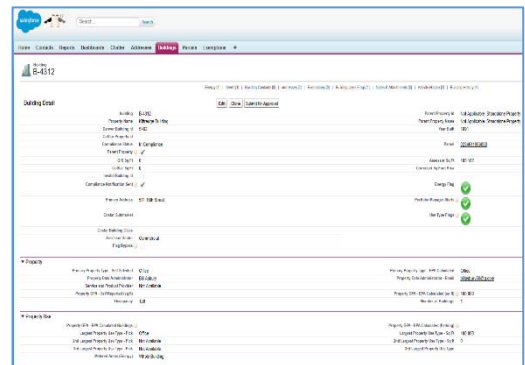
Our Help Center staff will utilize screen sharing technology to easily identify submission issues and correct building owner problems in real-time. Our staff will also coordinate with the local Utilities to facilitate auto utility data uploads, where possible.

All building owner communication will be tracked through the Touchstone software for both emails and phone calls. Help Center staff will have access to all past communication notes and emails to better assist building owners.

### Submission Management

Help Center Staff will receive, track and manage all building owner compliance submissions. Submission approval, denial, and requests for additional information will be tracked by Help Center staff within the Touchstone software system. Upon receiving building owner submittals, Help Center staff will respond within one week with the appropriate approval notification or non-compliance email. Emails will be sent directly from the Touchstone system for tracking purposes and will utilize the State’s letterhead / signature line.

Help Center Staff will also call building owners who have non-compliant submissions directly and personally walk them through the reason for non-compliance and the appropriate steps required for approval. Help Center Staff will also respond within one week to all building owner exemption requests.



### Building Owner Data Updates

Through the course of providing help center outreach and submission support, staff may receive updated building and/or owner data. Help center staff will continually update the Touchstone data tracking system to reflect this new data. For parcels with multiple qualifying buildings, help center staff will work to assign new Benchmarking ID’s for compliance tracking purposes.

## TASK 8 - TRAINING AND OUTREACH

### Training & Outreach Planning and Material Development

#### Development and Voluntary Compliance Years

Overlay will work with the State staff to develop the training and outreach plan to provide effective building owner and city support. This will include developing training materials and coordinating with the individual cities and counties around outreach implementation.

Overlay recommends creating city and county working groups to inform and provide ongoing local governmental staff benchmarking program support. This may include providing initial training to regional city and county working groups as well as monthly status meetings to address issues or needs.

This will also support any cities and counties wishing to participate in and promote the voluntary compliance period.

## *Training & Outreach Implementation*

Overlay will provide both in-person trainings and web-based trainings. Trainings will include presentations and interactive help sessions to achieve the most effective results. This will include information on how to benchmark a building as well as how to setup automated utility data uploads, where available. Our recommended training events include a 1-hour presentation on how to comply with an additional 4-hours help session for one-on-one work with building owners.

While, further analysis on the number, location and frequency of training events will be required we initially we propose numerous training session distributed across the state to meet the needs of building owners within all the incorporated municipalities.

### **Voluntary Program (Years 1 & 2) Training Schedule**

Our initial proposed annual training event schedule during the voluntary program years includes delivering 5 to 10 training events both virtually and in-person (when available).

### **Mandatory Program (Years 3 & 5) Training Schedule**

Our proposed annual training event schedule during the mandatory Program years includes delivering 36 training events as follows:

- 2 training events per month per geographic region for the 3 months prior to the June 1<sup>st</sup> deadline
- Divide the state into 6 target geographic regions based on population density

After the first year of statewide compliance we recommend reducing the amount of in-person trainings to the following:

- 2 training events per geographic region prior to the June 1<sup>st</sup> deadline
- Divide the state into 6 target geographic regions based on population density

We will look to coordinate, when possible, with representatives from Energy Star, local utilities and approved local benchmarking specialists.

Overlay will also provide an online video training series customized for the State reporting program.

## *Compliance Outreach*

Help Center Staff will perform Outreach activities to help educate building owners on compliance requirements. This will include email blasts and direct phone calls. We will support direct mailings through the development of content and building address lists. Direct outreach activities will include the following tasks.

- Send two formal compliance reminder notices each year
  - Email and mail
- Send one formal violation reminder notice each year for non-compliant building owners
  - Email and mail
- Two weeks prior to submission deadline, staff will make proactive calls to all building owners who are not in compliance
  - Promote 'How to Benchmark' trainings during calls
- After the compliance deadline, staff will call all non-compliant building owners.

- o If deemed necessary, a 2<sup>nd</sup> round of non-compliance calls will be made to building owners who have yet to submit 2 months after the submittal deadline.

We assume the following physical mailer counts will be required.

Mandatory Compliance Year	Mailer	Number of addresses per bldg.	Number of buildings	Total number of Letters Mailed
Year 1	1st compliance reminders	2	730	1,460
	2 <sup>nd</sup> compliance reminder	2	584	1,168
	1 violation reminder (Assume 20% of buildings will receive a violation notice)	2	146	292
Year 1	1st compliance reminders	2	1,145	2,290
	2 <sup>nd</sup> compliance reminder	2	916	1,832
	1 violation reminder (Assume 20% of buildings will receive a violation notice)	2	229	458
Year 1	1st compliance reminders	2	3,415	6,830
	2 <sup>nd</sup> compliance reminder	2	2,732	5,464
	1 violation reminder (Assume 20% of buildings will receive a violation notice)	2	683	1,366
<b>Total</b>				<b>21,160</b>

Overlay will target achieving a minimum compliance rate of 90%.

## TASK 9 - SCORE CARD DEVELOPMENT AND DISTRIBUTION

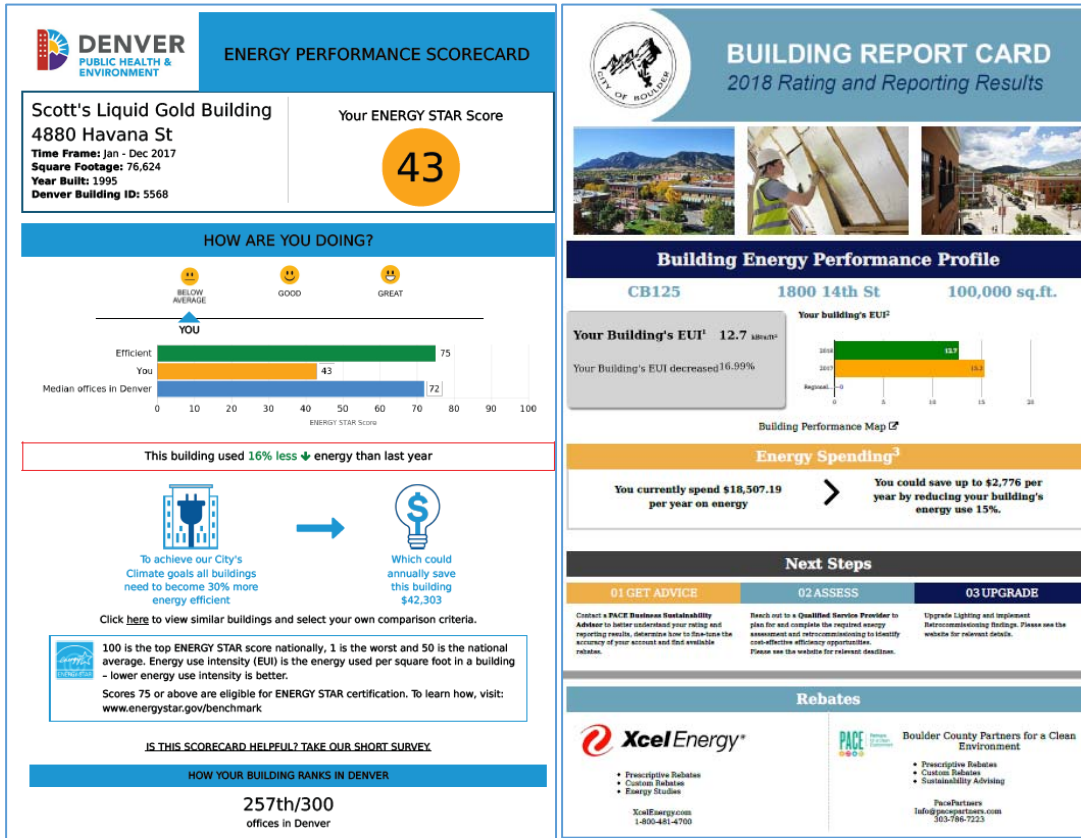
Once the annual target compliance rate is achieved and upon approval from the State, Overlay will work to compile and send out the individual building score cards.

The score card format will be based on previous designs and can include increased analytics available through Touchstone. The report card creation and data inputs will be automated through the Touchstone software. Score cards will be distributed to the relevant building owner or Portfolio Manager reported contact email collected during the benchmarking reporting process.

Recommended data to be presented in the report cards include, but are not limited to:

- Energy Star Score
- EUI
- How their building compares to peers
- Savings potential (high level cost and payback information)
- Energy efficiency program support materials (i.e. rebates, incentive programs, tax credits, etc.)

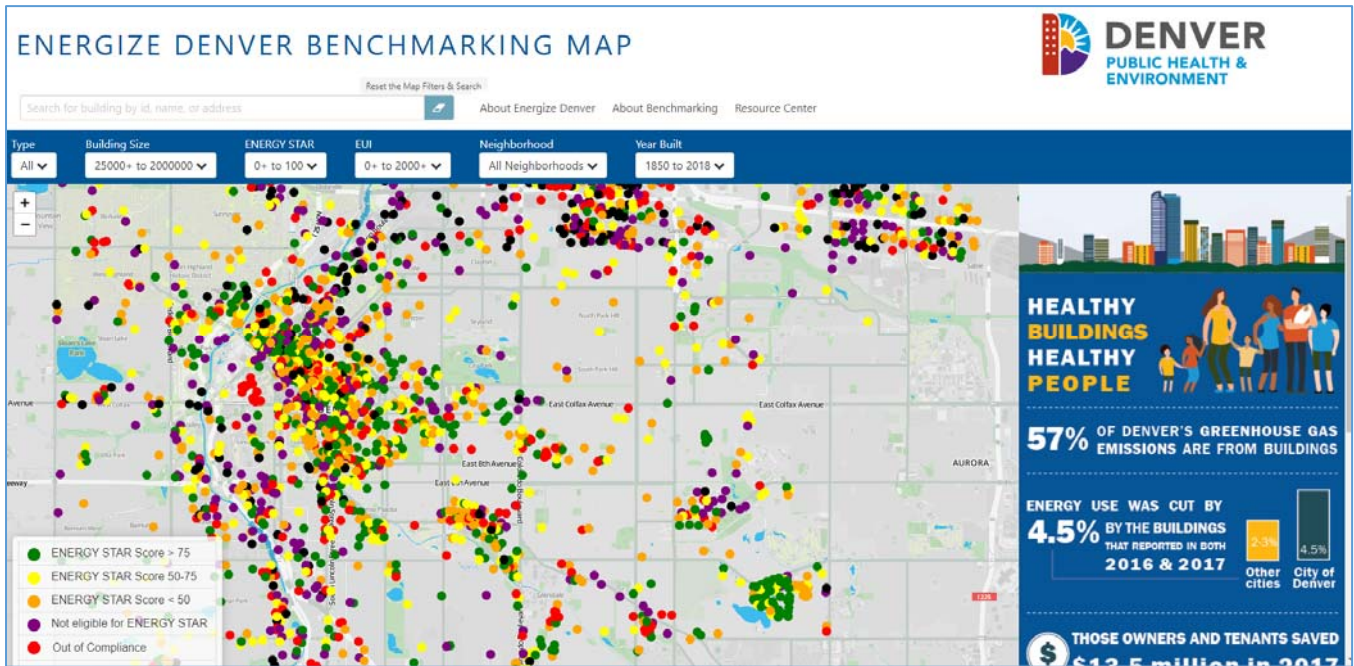
Samples of other city benchmarking scorecards are provided below.



## TASK 10 - WEB HOSTED INTERACTIVE MAP DEVELOPMENT

Overlay will develop a web-based statewide interactive public reporting map. The interactive map design allows users to view building compliance statistics, Energy Star Rating, EUI, as well as compare buildings by size, type, location, and numerous other data points. This data is compiled year-over-year to provide historical comparison ability.

The map will integrate directly with Touchstone and update automatically as new building reports are submitted and approved. The map will provide enhanced visuals, comparison capabilities. A sample of the online mapping tool provided to Denver is provided below.



## TASK 11 - BUILDING OWNER BENCHMARKING PORTAL

### *Touchstone Benchmarking™ Building Owner Portal*

Through the Touchstone Benchmarking™ software solution, Overlay provides an optional “Building Owner” portal that can be utilized by building owners to input, track and report their benchmarking performance data. This portal directly integrates with Energy Star’s Portfolio Manager, but provides building owners a much easier and streamlined user interface to input and report building benchmarking data. The portal also provides buildings owners with additional energy management tools, such as:

- Building Performance Dashboard
- Monthly utility data tracking (consumption, cost, carbon, etc.)
  - Direct integration with utility company monthly data uploads (where available)
- Virtual energy audit tool with recommended energy efficiency project recommendations
- Energy efficiency project tracking
- Energy reduction goal setting and results tracking
- Multiple building management dashboard for owners with multiple buildings
- Online help center resources and tools on how to benchmark
- Building specific information on local energy efficiency rebates and incentives

Through the building portal option, the State also has the ability to include custom questions and program details to the building owner as they are inputting their building data into the system. This can help the State obtain deeper insight into specific areas of focus. We are providing this as an optional software module which the State can choose to include or not within the scope of work.

### C. RELATED PROJECT EXPERIENCE

Overlay has in-depth experience providing help center services specifically for the energy efficiency sector. We currently operate multiple city benchmarking programs for cities and counties including:

- State of Colorado
- City of Denver, CO
- City and County of Boulder, CO
- City of Fort Collins, CO
- City of Columbus, OH
- City of San Jose, CA
- Hennepin County, MN
- Saint Paul, MN
- Los Angeles Better Building Challenge, CA
- Edina, MN
- St. Louis Park, MN
- Rochester, MN

City of Denver – Building Benchmarking Ordinance Database & Help Center	
Key Staff & Role:	<b>Jon Dierking</b> , Executive Sponsor; <b>Andrew Carlson</b> , Data/IT Manager; <b>Jamie Westhoven</b> , Program Manager / Sustainability Consultant; <b>Taylor Gries</b> , Sustainability Consultant
Project Dates:	May 2017 - Present
Reference Contact	Katrina Managan, Senior Advisor, Energy Efficiency; Phone: 720-865-2890; Email: <a href="mailto:katrina.managan@denvergov.org">katrina.managan@denvergov.org</a>

Overlay Consulting designed and currently implements the City of Denver’s Building Benchmarking Ordinance Database Tracking System and Help Center. The program collects Energy Star Portfolio Manager reporting data for all buildings above 25,000 sq-ft within the City of Denver.

The Overlay team developed a custom Salesforce database and communication tracking system to manage all interactions with building owner contacts as well as track Portfolio Manager submissions. The database integrates directly with Portfolio Manager utilizing automated nightly report uploads. The system also collects building exemption submissions through an online web form. All Portfolio Manager report submissions are automatically screened through 35 data verification checks with final review performed by energy engineering staff. The customized system provides a real-time dashboard of compliance rates as well as robust reporting functionalities.

The Overlay team also manages an 8-5pm help center providing phone and email support. This includes screen sharing capabilities to provide enhanced customer support for navigating compliance and Portfolio Manager submission issues. All calls and emails are logged and tagged to each building within the Salesforce data tracking system. Overlay staff also provide building owner training presentations as well as one-on-one help sessions throughout the program year.

As part of this program Overlay was also tasked with developing interactive score cards that are sent to each building owner as well as a web-based interactive map. The interactive map design allows users to view building compliance statistics, Energy Star rating, EUI, as well as compare buildings by size, type, location, and numerous other data points.

City of Boulder – Building Benchmarking Ordinance Database & Help Center	
Key Staff & Role:	<b>Jon Dierking</b> , Executive Sponsor; <b>Andrew Carlson</b> , Data/IT Manager; <b>Jamie Westhoven</b> , Program Manager / Sustainability Consultant; <b>Taylor Gries</b> , Sustainability Consultant
Project Dates:	May 2018 - Present
Reference Contact	Kimberlee Rankin, Sustainability Coordinator, Email: rankink@bouldercolorado.gov, Ph: 303-441-4227

Overlay Consulting designed and currently implements the City of Boulder’s Building Benchmarking Ordinance Database Tracking System and Help Center. The program collects Energy Star Portfolio Manager reporting data for all buildings above 5,000 sq-ft within the City of Boulder.

The Overlay team developed a custom Salesforce database and communication tracking system to manage all interactions with building owner contacts as well as track Portfolio Manager submissions. The database integrates directly with Portfolio Manager utilizing automated nightly report uploads. The system also collects building exemption submissions through an online web form. All Portfolio Manager report submissions are automatically screened through 35 data verification checks with final review performed by energy engineering staff. The customized system provides a real-time dashboard of compliance rates as well as robust reporting functionalities.

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Hennepin County – Building Benchmarking Ordinance Database & Help Center	
Key Staff & Role:	<b>Jon Dierking</b> , Executive Sponsor; <b>Andrew Carlson</b> , Data/IT Manager; <b>Jamie Westhoven</b> , Program Manager / Sustainability Consultant; <b>Taylor Gries</b> , Sustainability Consultant
Project Dates:	May 2017 - Present
Reference Contact	Laurel Mattrey / Sustainability & Energy Manager, Email: elamc@bouldercolorado.gov, Ph: 303-441-4936



Overlay Consulting designed and currently implements the Hennepin Counties Building Benchmarking Ordinance Database Tracking System and Help Center. The program includes a collaborative of cities within Hennepin County who all benchmark using a single reporting format and support service. The program currently includes Edina, St. Louis Park, St. Paul, Eden Prairie, Richfield with more adopting each year.

Overlay provides full city benchmarking adoption support services as well as rating and reporting database management, help center management, building owner training, scorecards, and interactive GIS mapping.

City of St. Paul – Building Benchmarking Ordinance Database & Help Center	
Key Staff & Role:	<b>Jon Dierking</b> , Executive Sponsor; <b>Andrew Carlson</b> , Data/IT Manager; <b>Jamie Westhoven</b> , Program Manager / Sustainability Consultant; <b>Taylor Gries</b> , Sustainability Consultant
Project Dates:	May 2018 - Present
Reference Contact	Molly Smith, Sustainability Manager, Email: Molly.Smith@ci.stpaul.mn.us, Ph: 651-266-6653

Overlay Consulting designed and currently implements the City of St. Paul’s Building Benchmarking Ordinance Database Tracking System and Help Center. The program collects Energy Star Portfolio Manager reporting data from all voluntary reporting buildings within the City of St. Paul.

The city of St. Paul wanted to build off of their Race to Reduce, a voluntary benchmarking program, and establish a mandatory energy and water benchmarking program to increase building participation and impact. Overlay Consulting is assisting with developing the mandatory program’s framework, program resources, Help Center, web-based and in-person trainings as well as comprehensive QA/QC checks

Overlay Consulting has assisted with bringing the city of St. Paul into the Efficient Buildings Cooperative, a collective benchmarking movement driven by Minnesota cities. In 2019 Overlay Team will manage the data collection and analysis of all voluntary benchmarking submissions, as well as the mandatory submissions beginning in 2020.

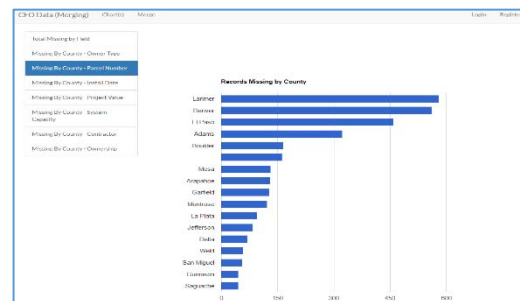
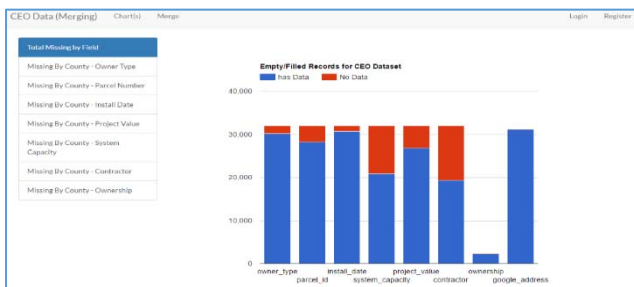
Colorado Energy Office – Renewable Energy Data Validation	
Key Staff & Role:	<b>Jon Dierking</b> , Executive Sponsor; <b>Andrew Carlson</b> , Data/IT Manager; <b>Matt Klahn</b> , Energy Engineer; <b>Paul MacNaughton</b> , Energy Engineer
Project Dates:	April 2016 - Present

Overlay staff performed the CEO’s Colorado Customer-sited Renewable Energy System Data Validation project. Through the execution of this project, Overlay staff developed integration tools to pull data directly from assessor websites, MLS, CoStar, permitting offices and others. The project included capturing and validating over 1.4 Million data points from over 37,000 customers.

Also as part of this project, Overlay’s web and database development staff created a web based tool with a SQL backend database for uploading new data into the master database. This site also included a web interface for viewing the renewable energy data and included:

- A front end that displayed individual or groups of records
- A visualization tool that indicates what data is missing and can be utilized to provide more advanced data analysis
- An upload tool to add additional information to the database.
- Data was stored on a SQL Server database designed to handle large amounts of data

System Id	Address	Permit Number	City	State	County	Zip	Technology	Capacity	Parcel Number	Installer	Ownership
5895	4609 CANYON VIEW DR	15-80392	Castle Rock	CO	Douglas	80104			9606208007		
26003	2350 MEADOWS BLVD	W14-1321	CASTLE ROCK	CO	Douglas	80109					
26004	5838 KINGSFIELD ST	W14-1325	CASTLE ROCK	CO	Douglas	80104			25071712009		Leased
26005	4306 W DEERTRAIL CT	W14-1384	CASTLE ROCK	CO	Douglas	80109			0344040		Leased

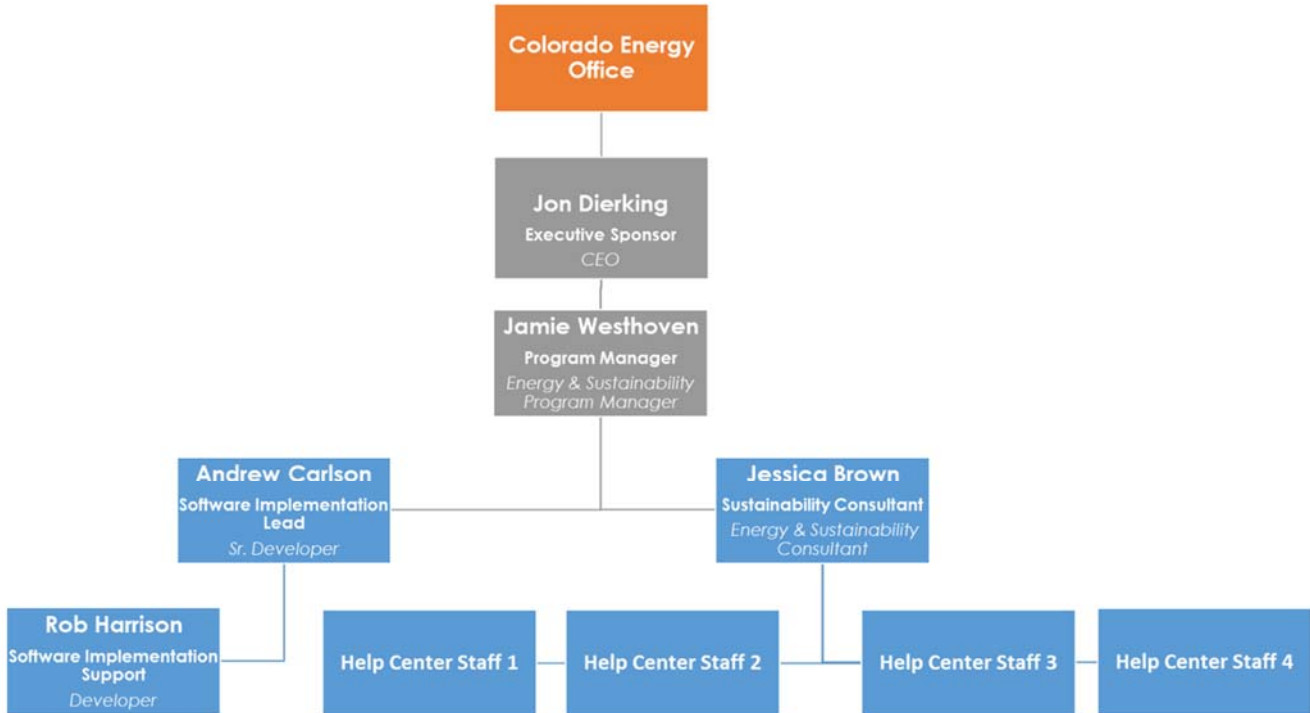


## D. TEAM MEMBERS

### Staff Organizational Chart

Overlay Consulting has assembled a highly-qualified team of energy experts with a long history of developing and implementing energy benchmarking ordinance programs. The team organizational chart and key personnel proposed for this project are provided below with high level bios of each team member.

Team Organizational Chart



## Jonathan Dierking

CEO

*Proposed Role: Executive Sponsor*

### Education

B.S., Mechanical Engineering, University of Colorado, Boulder

### Registrations/Certifications

Professional Engineer (PE) – CO & IL,  
 Certified Energy Manager (CEM),  
 Certified Energy Procurement Professional (CEP)  
 Leadership in Energy and Environmental Design (LEED) Accredited Professional

### Professional Qualifications

As CEO of Overlay Consulting, Mr. Dierking is responsible for the program management and execution of Energy Efficiency, Engineering and Sustainability projects. Prior to Starting Overlay Consulting, Jon served as the Sr. Director of Energy Management for CB&I, as a Sr. Manager within the Building Technology and Sustainability Group for Realfoundations, Inc., as an Energy Consultant for Sieben Energy Associates, and before that, as an Energy Engineer for Nexant, Inc.

Mr. Dierking has 20 years of experience in managing and executing city, state and utility energy efficiency incentive programs, energy management projects, energy audits, building Commissioning/ReCommissioning, LEED and sustainability projects within the public and private sectors. This includes the development and execution of city building benchmarking ordinance programs.

Current professional affiliations include the ASHRAE, USGBC, the Association of Energy Engineers (AEE), and the Association of Energy Service Professionals (AESP).

### Project Experience Examples

#### City of Denver - Building Benchmarking Ordinance Program

- Program Director

#### City of Boulder - Building Benchmarking Ordinance Program

- Program Director

#### Los Angeles Better Buildings Challenge Building Benchmarking Ordinance Program

- Program Director

#### Hennepin County - Building Benchmarking Ordinance Program

- Program Director

#### Saint Paul, MN - Building Benchmarking Ordinance Program

- Program Director

#### St. Louis Park, MN - Building Benchmarking Ordinance Program

- Program Director

#### Edina, MN - Building Benchmarking Ordinance Program

- Program Director

#### Rochester, MN - Building Benchmarking Ordinance Program Public Reporting

- Program Director

#### City of Denver Residential Energy Audit Technical Assistance Program

- Program Director of residential based energy audit program

#### Louisiana DNR State Energy Program, Baton Rouge Illinois

- Program Director of ARRA funded statewide energy program

#### Detroit Edison (DTE) – Energy Efficiency Reverse Auction Program

- Program Director

#### Kansas City Power & Light – Block Bidding Program

- Program Director for the Block Bidding reverse auction program

#### AEP Ohio – Bid to Win Reverse Auction Programs

- Program Director for the AEP Ohio – Bid4Efficiency reverse auction programs

#### Con Edison – Energy Efficiency Auction Program

- Program Director for the reverse auction program.

#### Missouri State Energy Program

- Program Manager of ARRA funded statewide energy program

- Designed and Delivered the Bid-to-Win reverse auction program

**Wisconsin Focus on Energy – Bonus Bid Program**

- Program Director for the reverse auction program

**AEP Ohio – Energy Savers Program**

- Program Director

**Duke Energy – Smart Building Advantage Program**

- Program Director of energy audit incentive program

**Duke Energy – SEM Program**

- Program Director

**ComEd - Community Energy Challenge**

- Project Manager of community based incentive program

## **Jamie Westhoven**

### **Energy & Sustainability Program Manager**

*Proposed Role: Program Manager*

#### **Education**

M.S., Environmental Policy and Management,  
University of Denver, Denver, CO

B.S., Environment, Economy, Development &  
Sustainability, Ohio State University, Columbus,  
OH

#### **Registrations/Certifications**

Leadership in Energy and Environmental Design  
(LEED) Accredited Professional

#### **Professional Qualifications**

As an Energy and Sustainability Program Manager I at Overlay Consulting, Ms. Westhoven continues to expand on her five years within the energy consulting industry. Jamie has extensive experience in the design, implementation, and analysis of energy efficiency programs in the public and private sector, across a number of industries. This work includes program design and implementation for energy benchmarking, utility rebate and incentive optimization, and retrofit cost benefit analysis. In addition, Ms. Westhoven has experience analyzing project results and trends to justify future strategies and investment opportunities.

Prior to joining Overlay Consulting, Jamie attended the University of Denver, where she obtained a Master of Science in Environmental Policy and Management, and Ohio State University, where she studied Environment, Economy, Development and Sustainability. Her education was supplemented with sustainability consulting opportunities with The City of Denver, The City of Columbus, and Kurtz Brothers Supply Company.

#### **Project Experience Examples**

##### **City of Denver - Building Benchmarking Ordinance Program**

- Program Manager  
**City of Boulder - Building Benchmarking Ordinance Program**
- Program Manager  
**Hennepin County - Building Benchmarking Ordinance Program**
- Program Manager  
**Saint Paul, MN - Building Benchmarking Ordinance Program**
- Program Manager  
**St. Louis Park, MN - Building Benchmarking Ordinance Program**
- Program Manager  
**Edina, MN - Building Benchmarking Ordinance Program**
- Program Manager  
**Rochester, MN - Building Benchmarking Ordinance Program Public Reporting**
- Program Manager  
**City of Denver – Green Building Ordinance Program**
- Program Manager  
**Studio Obermeier-Sheykhet Architecture – Sustainability Analysis**
- Energy and Sustainability Consultant  
**ATC –Freddie Mac Energy Audit Program**
- Energy and Sustainability Consultant  
**AEP Ohio – Bid to Win Reverse Auction Programs**
- Program Consultant for the AEP Ohio – Bid4Efficiency reverse auction programs

## **Andrew Carlson**

**Sr. Web Developer – Overlay Consulting**

*Proposed Role: Sr. Developer*

### **Education**

US Navy - Aircraft Electrician courses  
Arapahoe Community College Littleton, CO

### **Registrations/Certifications**

Certified Sun Microsystems Instructor

9 years' experience working on custom platforms, SaaS, and CMS environments on linux. 7+ years in QA

### **Professional Qualifications**

As a Sr. Web Developer and Database Manager with Overlay Consulting, Mr. Carlson leads all aspects of Overlay's web-based online energy efficiency reverse auction platform as well as support technology based programs. This include database development and data acquisition activities. Mr. Carlson has experience from a broad range of IT including server provisioning and management, eCommerce platforms, QA/QC roles, and platform architecture.

### **Project Experience**

#### **City of Denver - Building Benchmarking Ordinance Program**

- Sr. Software Developer

#### **City of Boulder - Building Benchmarking Ordinance Program**

- Sr. Software Developer

#### **Los Angeles Better Buildings Challenge Building Benchmarking Ordinance Program**

- Sr. Software Developer

#### **Hennepin County - Building Benchmarking Ordinance Program**

- Sr. Software Developer

#### **Saint Paul, MN - Building Benchmarking Ordinance Program**

- Sr. Software Developer

#### **St. Louis Park, MN - Building Benchmarking Ordinance Program**

- Sr. Software Developer

#### **Edina, MN - Building Benchmarking Ordinance Program**

- Sr. Software Developer

#### **Rochester, MN - Building Benchmarking Ordinance Program Public Reporting**

- Sr. Software Developer

#### **Detroit Edison (DTE) – Energy Efficiency Reverse Auction Program**

- Sr. Software Developer

#### **Kansas City Power & Light – Block Bidding Program**

- Sr. Software Developer

#### **AEP Ohio – Bid to Win Reverse Auction Programs**

- Sr. Software Developer

#### **Con Edison – Energy Efficiency Auction Program**

- Sr. Software Developer

#### **Wisconsin Focus on Energy – Bonus Bid Program**

- Sr. Software Developer

## Rob Harris

Software Developer

*Proposed Role: Developer*

### Education

B.A., Informatics, The University of Michigan

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### Professional Qualifications

Mr. Harris has served in a wide variety of capacities during his time in the information technology sector. At Overlay Consulting he has focused primarily on software development and deployment to support client benchmarking programs. This support entails the creation, deployment and maintenance of custom web code, and depending on city, may also involve the creation, implementation and deployment of Salesforce objects or schema.

Prior to Overlay, Mr. Harris served as Technical Producer for the real estate marketing firm Engrain. While at Engrain, Mr. Harris was utilized for a wide variety of special and high priority projects; such as custom hardware/software deployments, workflow consultations, salvaging projects that had gone awry, client presentations and maintaining productive vendor relationships.

Mr. Harris is a graduate of the University of Michigan's Informatics program. During his time at Michigan, Mr. Harris's studies focused on the cultural and societal impact of social media, big data applications, complex systems, philosophical and computational logic, and the possibilities offered by video games in educational settings.

### Project Experience Examples

#### City of Denver – Building Benchmarking Ordinance Program

- Software development and Salesforce support

#### City of Boulder - Building Benchmarking Ordinance Program

- Software development and Salesforce support

#### Los Angeles Better Buildings Challenge Building Benchmarking Ordinance Program

- Salesforce development and support

#### Hennepin County - Building Benchmarking Ordinance Program

- Software development and Salesforce support

#### Saint Paul, MN - Building Benchmarking Ordinance Program

- Software development and Salesforce support

#### St. Louis Park, MN - Building Benchmarking Ordinance Program

- Software development and Salesforce support

#### Edina, MN - Building Benchmarking Ordinance Program

- Software development and Salesforce support

#### Rochester, MN - Building Benchmarking Ordinance Program Public Reporting

- Software development and Salesforce support

#### LMC - 'Elle' Leasing Wall Digital Signage

- Technical Project Manager

#### Redpeak - Property Management Website Re-Launch

- Technical Project Manager

#### TCR - Vendor Utilization + Workflow Consultancy

- Analyst and client liaison



## Jessica Brown

### Sustainability Consultant

*Proposed Role: Energy and Sustainability Consultant*

### Education

B.A., Molecular, Cellular, and Developmental Biology, University of Colorado, Boulder

B.A., Sociology, University of Colorado, Boulder

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### Professional Qualifications

As a Sustainability Consultant with Overlay Consulting, Miss Brown is responsible for coordinating and implementing Energy Efficiency and Sustainability projects on a district and state-wide scale. Prior to starting at Overlay Consulting, Jessica served as the Program Director of Green Up Our Schools and as a Sr. Consultant for UHG Consulting LLC.

Miss Brown has 8 years of experience in managing and executing district, city, and state sustainability management plans, LEED projects, energy audits, building benchmarking portfolios, and building ReCommissioning, within the public and private sectors.

### Project Experience Examples

#### City of Denver - Building Benchmarking Ordinance Program

- Sustainability Consultant

#### City of Boulder - Building Benchmarking Ordinance Program

- Sustainability Consultant

#### Hennepin County - Building Benchmarking Ordinance Program

- Sustainability Consultant

#### Saint Paul, MN - Building Benchmarking Ordinance Program

- Sustainability Consultant

#### St. Louis Park, MN - Building Benchmarking Ordinance Program

- Sustainability Consultant

#### Edina, MN - Building Benchmarking Ordinance Program

- Sustainability Consultant

#### Denver Public Schools, CO – Sustainability Management Plan Resulting in Districtwide Free Recycling & Composting Services Program

- Program Director

#### Adams 12 Schools, CO – Sustainability Management Plan Resulting in Districtwide Free Recycling & Composting Services Program

- Program Director

#### Douglas County School District, CO – Sustainability Management Plan Resulting in Districtwide Free Recycling Service Program

- Program Director

#### Newport Beach School District, CA – Sustainability in Education Goals Resulting in the Eliminated Styrofoam Trays

- Program Director

#### Costa Mesa School District, CA – Green Design Award

- Program Director

#### Durango, CO – Sustainability Management Plan

- Program Director

#### Colorado Convention Center, CO – LEED-EB Certification

- Consultant

#### SugarCube, CO – LEED EBOM Silver Certification

- Consultant

#### Sheraton Four Points Downtown Tallahassee, FL – LEED NC Silver Certification

- Consultant

#### St Julien Hotel & Spa, CO – Reduced Material Waste by 90%

- Consultant

#### Silver Oaks Estates Apartment Village, OH – Reduced Water by 30%

- Consultant

## E. REFERENCES

The following project references show the experience and versatility of Overlay Consulting and our staff within the energy management sector. Additional references can be provided upon request.

### *Project References*

	Reference # 1	Reference # 2	Reference # 3
<b>Reference Company</b>	City of Denver	Hennepin County	City of Boulder
<b>Project Name</b>	Energize Denver Benchmarking Ordinance	Efficient Building Collaborative Benchmarking Ordinance	Building Performance Ordinance
<b>Project Dates</b>	2017 - Present	2018 - Present	2018 - Present
<b>Contact Name / Title</b>	<b>Katrina Managan</b> / Senior Advisor, Energy Efficiency	<b>Leah Hiniker</b> / Energy Manager	<b>Laurel Mattrey</b> / Sustainability & Energy Manager
<b>Contact Phone</b>	720-865-2890	612-543-1219	303-441-4936
<b>Email</b>	katrina.managan@denvergov.org	leah.hiniker@hennepin.us	elamc@bouldercolorado.gov

## F. PROGRAM IMPLEMENTATION SCHEDULE

Overlay Consulting proposes the following multi-year implementation schedule to meet the State's benchmarking ordinance adoption timeframe.

### 1st year (2021):

- Outreach to building owners to make them aware of requirements of statute.
- Administrator of benchmarking initiative begins putting systems in place for the collection and reporting (to public) of benchmarking data, including a confidentiality agreement for public data sharing.
- Administrator begins collecting existing ESPM data in VT and populating database.
- Report on administrative plan.

### 2nd year (2022):

- Building owners begin collecting data and practicing benchmarking and reporting.
- Administrator works the bugs out of benchmarking data collection and reporting.
- Conduct evaluation and report findings.

### 3rd year (2023):

- Commercial building owners for properties 70k square feet or larger begin mandatory reporting. (~730 buildings)
- Conduct evaluation and assessment on whether to move forward with next phase.
- Report on findings of the evaluation and recommendations for next phase

### 4th year (2024):

- Commercial building owners for properties 50k square feet or larger begin mandatory reporting. Conduct evaluation. (~415 buildings)
- Report on findings of the evaluation

### 4th year (2024):

- Commercial building owners for properties 20k square feet or larger begin mandatory reporting. (~2,250 buildings)
- Conduct evaluation.
- Report on findings of the evaluation.

## G. PRICING STRUCTURE

Overlay Consulting proposes to perform the services outlined within the Scope of Work on a time and material basis. The following table list the estimated hours & fee estimate associated with the different tasks.

### Annual Budget Summary

Program Year	FEE									Total Budget
	Covered Building List Development & Update	Utility Company Data Upload Coordination	Touchstone Software Configuration & License	Program Design, Material Development, & Updates	Help Center Setup & Admin	Training & Outreach	Scorecard Design & Distribution	Interactive Map	Building Owner Portal (Optional)	
2021	\$23,750	\$14,250	\$67,750	\$46,000	\$0	\$22,000	\$0	\$0	\$0	\$173,750
2022	\$8,500	\$2,000	\$47,000	\$0	\$30,750	\$13,000	\$24,500	\$25,000	\$56,875	\$207,625
2023	\$9,500	\$2,000	\$47,875	\$10,875	\$51,625	\$71,490	\$9,000	\$9,000	\$50,000	\$261,365
2024	\$9,500	\$2,000	\$47,875	\$10,875	\$64,625	\$75,225	\$9,000	\$9,000	\$50,000	\$278,100
2025	\$9,500	\$2,000	\$47,875	\$10,875	\$137,425	\$95,655	\$9,000	\$9,000	\$50,000	\$371,330

### 2021 Program Year Budget

Staff Title	HOURLY RATE	HOURS AND COST										Total Hours	Total Budget
		Covered Building List Development	Utility Company Data Upload Coordination	Touchstone Software Configuration	Program Design & Material Development	Help Center Setup & Admin	Training & Outreach	Scorecard Design & Distribution	Interactive Map	Building Owner Portal (Optional)			
Executive Sponsor	\$175	10	10	10	40							70	\$12,250
Program Manager	\$150	80	50	40	150		80					400	\$60,000
Sustainability Consultant	\$100	100	50		100		100					350	\$35,000
Help Center Staff	\$65				100							100	\$6,500
Help Center Staff	\$65											-	\$0
Help Center Staff	\$65											-	\$0
Help Center Staff	\$65											-	\$0
Sr. Web Developer	\$175			40								40	\$7,000
Web Developer	\$150			80								80	\$12,000
Director of Energy Engineering	\$150											-	\$0
<b>Total Hours</b>		190	110	170	390	-	180	-	-	-	-	1,040	
<b>Total Fee</b>		\$23,750	\$14,250	\$26,750	\$46,000	\$0	\$22,000	\$0	\$0	\$0	\$0		\$132,750
DIRECT COST		Cover Building List Development	Utility Company Data Upload Coordination	Touchstone Software Configuration	Program Design & Material Development	Help Center Setup & Admin	Training & Outreach	Scorecard Design & Distribution	Interactive Map	Building Owner Portal (Optional)		Total Budget	
Touchstone Annual Software License				\$41,000								\$41,000	
Travel Expenses												\$0	
Mailer Expenses (\$2.25 per Letter) - 3,415 total												\$0	
<b>Total Direct Costs</b>		\$0	\$0	\$41,000	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$41,000	
<b>Total Fee</b>		\$23,750	\$14,250	\$67,750	\$46,000	\$0	\$22,000	\$0	\$0	\$0	\$0	\$173,750	

### 2022 Program Year Budget

Staff Title	HOURLY RATE	HOURS AND COST										Total Hours	Total Budget
		Covered Building List Update	Utility Company Data Upload Coordination	Touchstone Software Configuration	Program Design & Material Update	Help Center Setup & Admin	Training & Outreach	Scorecard Design & Distribution	Interactive Map	Building Owner Portal (Optional)			
Executive Sponsor	\$175										5	5	\$875
Program Manager	\$150					40	20	40	40			140	\$21,000
Sustainability Consultant	\$100	20	20			150	100					290	\$29,000
Help Center Staff	\$65	100				150						250	\$16,250
Help Center Staff	\$65											-	\$0
Help Center Staff	\$65											-	\$0
Help Center Staff	\$65											-	\$0
Sr. Web Developer	\$175							20	40			60	\$10,500
Web Developer	\$150			40				80	80	80		280	\$42,000
Director of Energy Engineering	\$150							20	20	20		40	\$6,000
<b>Total Hours</b>		120	20	40	-	340	120	160	160	105	1,065		
<b>Total Fee</b>		\$8,500	\$2,000	\$6,000	\$0	\$30,750	\$13,000	\$24,500	\$25,000	\$15,875			\$125,625
DIRECT COST		Cover Building List Development	Utility Company Data Upload Coordination	Touchstone Software Configuration	Program Design & Material Development	Help Center Setup & Admin	Training & Outreach	Scorecard Design & Distribution	Interactive Map	Building Owner Portal (Optional)		Total Budget	
Touchstone Annual Software License				\$41,000						\$41,000		\$82,000	
Travel Expenses												\$0	
Mailer Expenses (\$2.25 per Letter) - 3,415 total												\$0	
<b>Total Direct Costs</b>		\$0	\$0	\$41,000	\$0	\$0	\$0	\$0	\$0	\$41,000		\$82,000	
<b>Total Fee</b>		\$8,500	\$2,000	\$47,000	\$0	\$30,750	\$13,000	\$24,500	\$25,000	\$56,875		\$207,625	

### 2023 Program Year Budget

Staff Title	HOURLY RATE	HOURS AND COST										Total Hours	Total Budget
		Covered Building List Update	Utility Company Data Upload Coordination	Touchstone Software Configuration	Program Design & Material Update	Help Center Setup & Admin	Training & Outreach	Scorecard Distribution	Interactive Map	Building Owner Portal (Optional)			
Executive Sponsor	\$175			5	5	5						15	\$2,625
Program Manager	\$150	20		40	40	125	20	20	20			305	\$45,750
Sustainability Consultant	\$100		20		40	125	288					473	\$47,300
Help Center Staff	\$65	100				300						400	\$26,000
Help Center Staff	\$65											-	\$0
Help Center Staff	\$65						288					288	\$18,720
Help Center Staff	\$65											-	\$0
Sr. Web Developer	\$175											-	\$0
Web Developer	\$150							40	40	40		120	\$18,000
Director of Energy Engineering	\$150											-	\$0
<b>Total Hours</b>		120	20	45	85	555	596	60	60	60		1,601	
<b>Total Fee</b>		\$9,500	\$2,000	\$6,875	\$10,875	\$51,625	\$50,520	\$9,000	\$9,000	\$9,000			\$158,395

DIRECT COST	Cover Building List Development	Utility Company Data Upload Coordination	Touchstone Software Configuration	Program Design & Material Development	Help Center Setup & Admin	Training & Outreach	Scorecard Design & Distribution	Interactive Map	Building Owner Portal (Optional)	Total Budget
Touchstone Annual Software License			\$41,000						\$41,000	\$82,000
Travel Expenses						\$14,400				\$14,400
Mailer Expenses (\$2.25 per Letter) - 730 total						\$6,570				\$6,570
<b>Total Direct Costs</b>	\$0	\$0	\$41,000	\$0	\$0	\$20,970	\$0	\$0	\$41,000	\$102,970
<b>Total Fee</b>	\$9,500	\$2,000	\$47,875	\$10,875	\$51,625	\$71,490	\$9,000	\$9,000	\$50,000	\$261,365

2024 Program Year Budget

Staff Title	HOURLY RATE	HOURS AND COST										Total Hours	Total Budget
		Covered Building List Update	Utility Company Data Upload Coordination	Touchstone Software Configuration	Program Design & Material Update	Help Center Setup & Admin	Training & Outreach	Scorecard Distribution	Interactive Map	Building Owner Portal (Optional)			
Executive Sponsor	\$175			5	5	5						15	\$2,625
Program Manager	\$150	20		40	40	125	20	20	20			305	\$45,750
Sustainability Consultant	\$100		20		40	125	288					473	\$47,300
Help Center Staff	\$65	100				500						600	\$39,000
Help Center Staff	\$65											-	\$0
Help Center Staff	\$65						288					288	\$18,720
Help Center Staff	\$65											-	\$0
Sr. Web Developer	\$175											-	\$0
Web Developer	\$150							40	40	40		120	\$18,000
Director of Energy Engineering	\$150											-	\$0
<b>Total Hours</b>		120	20	45	85	755	596	60	60	60		1,801	
<b>Total Fee</b>		\$9,500	\$2,000	\$6,875	\$10,875	\$64,625	\$50,520	\$9,000	\$9,000	\$9,000			\$171,395
DIRECT COST		Cover Building List Development	Utility Company Data Upload Coordination	Touchstone Software Configuration	Program Design & Material Development	Help Center Setup & Admin	Training & Outreach	Scorecard Design & Distribution	Interactive Map	Building Owner Portal (Optional)		Total Budget	
Touchstone Annual Software License				\$41,000						\$41,000		\$82,000	
Travel Expenses							\$14,400					\$14,400	
Mailer Expenses (\$2.25 per Letter) - 1,145 total							\$10,305					\$10,305	
<b>Total Direct Costs</b>		\$0	\$0	\$41,000	\$0	\$0	\$24,705	\$0	\$0	\$41,000		\$106,705	
<b>Total Fee</b>		\$9,500	\$2,000	\$47,875	\$10,875	\$64,625	\$75,225	\$9,000	\$9,000	\$50,000		\$278,100	



2025 Program Year Budget

Staff Title	HOURLY RATE	HOURS AND COST										Total Hours	Total Budget
		Covered Building List Update	Utility Company Data Upload Coordination	Touchstone Software Configuration	Program Design & Material Update	Help Center Setup & Admin	Training & Outreach	Scorecard Distribution	Interactive Map	Building Owner Portal (Optional)			
Executive Sponsor	\$175			5	5	5						15	\$2,625
Program Manager	\$150	20		40	40	125	20	20	20			305	\$45,750
Sustainability Consultant	\$100		20		40	125	288					473	\$47,300
Help Center Staff	\$65	100				540						640	\$41,600
Help Center Staff	\$65					540						540	\$35,100
Help Center Staff	\$65					540	288					828	\$53,820
Help Center Staff	\$65											-	\$0
Sr. Web Developer	\$175											-	\$0
Web Developer	\$150							40	40	40		120	\$18,000
Director of Energy Engineering	\$150											-	\$0
<b>Total Hours</b>		120	20	45	85	1,875	596	60	60	60		2,921	
<b>Total Fee</b>		\$9,500	\$2,000	\$6,875	\$10,875	\$137,425	\$50,520	\$9,000	\$9,000	\$9,000			\$244,195
DIRECT COST		Cover Building List Development	Utility Company Data Upload Coordination	Touchstone Software Configuration	Program Design & Material Development	Help Center Setup & Admin	Training & Outreach	Scorecard Design & Distribution	Interactive Map	Building Owner Portal (Optional)		Total Budget	
Touchstone Annual Software License				\$41,000						\$41,000		\$82,000	
Travel Expenses							\$14,400					\$14,400	
Mailer Expenses (\$2.25 per Letter) - 3,415 total							\$30,735					\$30,735	
<b>Total Direct Costs</b>		\$0	\$0	\$41,000	\$0	\$0	\$45,135	\$0	\$0	\$41,000		\$127,135	
<b>Total Fee</b>		\$9,500	\$2,000	\$47,875	\$10,875	\$137,425	\$95,655	\$9,000	\$9,000	\$50,000		\$371,330	