



Financial Services  
Purchasing Division  
215 North Mason Street  
2nd Floor  
PO Box 580  
Fort Collins, CO 80522  
970.221.6775  
970.221.6707 - fax  
fcgov.com/purchasing

January 12, 2011

JAN 20 2011 REC'D

EnergyLogic  
Attn: Mr. Steve Byers  
PO Box N  
Berthoud, CO 80513

RECEIVED

RE: Renewal, 7075 Home Efficiency Program

Dear Mr. Byers:

The City of Fort Collins wishes to extend the agreement term for the above captioned proposal per the existing terms and conditions and the attached revised Exhibit A – Scope of Work for Efficiency Audits – Home Efficiency Program.


The term will be extended for one (1) additional year, January 1, 2011 through December 31, 2011.

If the renewal is acceptable to your firm, please sign this letter in the space provided **include a current copy of insurance naming the City as an additional insured** and return all documents to the City of Fort Collins, Purchasing Division, P. O. Box 580, Fort Collins, CO 80522, within the next fifteen days.

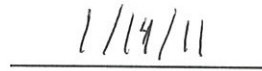
If this extension is not agreeable with your firm, we ask that you send us a written notice stating that you do not wish to renew the contract and state the reason for non-renewal.

Please contact Opal F. Dick, CPPO, Senior Buyer at (970) 221-6778 if you have any questions regarding this matter.

Sincerely,

  
James B. O'Neill II, CPPO, FNIGP  
Director of Purchasing and Risk Management

  
Signature

  
Date

(Please indicate your desire to renew 7075 by signing this letter and returning it to Purchasing Division within the next fifteen days.)

JBO:II

# ACORD™ CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)

01/17/2011

**PRODUCER**

 Lockton Risk Services  
 P.O. Box 410679  
 Kansas City, MO 64141-0679  
 800-806-0263  
 INSURED Energylogic, Inc.

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.

**INSURERS AFFORDING COVERAGE**

NAIC#

INSURER A: Hartford Casualty Insurance Company

INSURER B:

INSURER C:

INSURER D:

INSURER E:

 PO Box N  
 525 E Cty Rd (Hwy 56)  
 Berthoud, CO 80513

**COVERAGES**

THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. AGGREGATE LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR ADD'L LTR INSRD	TYPE OF INSURANCE	POLICY NUMBER	POLICY EFFECTIVE DATE(MM/DD/YY)	POLICY EXPIRATION DATE(MM/DD/YY)	LIMITS
A	GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC	37SBAAR6056-04	10/20/2010	10/20/2011	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS				COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	GARAGE LIABILITY <input type="checkbox"/> ANY AUTO				AUTO ONLY - EA ACCIDENT \$ OTHER THAN EA ACC \$ AUTO ONLY: AGG \$
	EXCESS/UMBRELLA LIABILITY <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE DEDUCTIBLE \$ RETENTION \$				EACH OCCURRENCE \$ AGGREGATE \$ \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? If yes, describe under SPECIAL PROVISIONS below				WC STATU-TORY LIMITS OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
	OTHER				

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES / EXCLUSIONS ADDED BY ENDORSEMENT / SPECIAL PROVISIONS**

Certificate Holder is listed as Additional Insured to the General Liability as respects to work performed by Named Insured per Hartford Policy Form SS 00 08 04 05.

\*10 Day Notice of Cancellation due to Non-Payment of Premium\*

**CERTIFICATE HOLDER**

 City of Fort Collins  
 215 N. Mason Street  
 P.O. Box 580  
 Fort Collins, CO 80522

**CANCELLATION**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL 10 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES.

AUTHORIZED REPRESENTATIVE

ACORD 25 (2001/08)

DS#8701294

990567

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## **IMPORTANT**

If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

## **DISCLAIMER**

The Certificate of Insurance on the reverse side of this form does not constitute a contract between the issuing insurer(s), authorized representative or producer, and the certificate holder, nor does it affirmatively or negatively amend, extend or alter the coverage afforded by the policies listed thereon.

**Exhibit A**  
**Scope of Work for**  
**Efficiency Audits – Home Efficiency Program**

**BACKGROUND**

In response to aggressive goals in adopted City policies, Fort Collins Utilities (Utilities) provides robust programs to residential customers in the areas of energy and water conservation. (*Climate Action Plan* at [http://www.fcgov.com/climateprotection/pdf/climate\\_action\\_plan.pdf](http://www.fcgov.com/climateprotection/pdf/climate_action_plan.pdf), *Energy Policy* at <http://www.fcgov.com/electric/pdf/energy-policy.pdf>, *Water Conservation Plan* at <http://www.fcgov.com/water/pdf/conservation-plan.pdf>).

The focus of these programs is installed improvements that deliver energy and water savings, while in many cases also providing other homeowner benefits. The programs are designed to meet consumer needs for credible information and guidance, skilled and trusted contractors, affordable cost to participate and services that are easy to access.

Utilities' programs target both the supply infrastructure (contractors) and demand for services (consumers). To expand the pool of quality service providers, Utilities supports opportunities for training, mentoring, certification and business development.

Utilities energy efficiency programs also include a focus on quality assurance and control to ensure the responsible use of ratepayer funds. Utilities provides other programs and services targeting specific equipment, such as consumer appliances and residential lighting.

**2. PROGRAM DESCRIPTION**

The Home Efficiency Program (Program) is an audit and home improvement program for Utilities electric customers. The goal of the Program is the completion of independently verified energy and water efficiency projects for existing homes.

The program will encourage residents to implement energy and water savings improvements by providing:

- **Audits.** The Efficiency Audit is a comprehensive standardized audit with visual inspections and performance testing.
- **Home-specific improvement recommendations.** Auditors will recommend targeted efficiency measures such as insulation, air sealing, windows and mechanical system upgrades.
- **Participating Contractor network.** Utilities maintains a list of Participating Contractors. Customers must have the improvements completed by a Participating Contractor in order to be eligible for rebates. Contractor lists are maintained through a formal agreement with Utilities.
- **Rebates and financing options.** Utilities will be providing significant rebates and financing for targeted efficiency measures.
- **Project support and coaching.** Customers will be encouraged to contact Utilities Program staff to discuss audit results and improvement recommendations.
- **Quality control.** All improvements will be independently verified.

Eligible housing types in this program include single-family detached and attached housing with separate heating systems. Both owner-occupied and rental properties are eligible (in the case of rental housing, the program will be directed at the owner). Best practices, quality workmanship and a high level of installed performance are expectations that underlie this program.

### **3. PROGRAM GOALS**

2011 Goals: 600 audits (minimum)  
300 completed projects

Utilities does not guarantee Program unit volume.

### **4. SCOPE OF SERVICES**

#### **General**

The Efficiency Audit contractor will provide the following services for the Program:

- Pre-audit services
- Audits and reporting
- Post-audit services
- Tracking and reporting
- Billing
- Remote access to the audit schedule (iRate)

Utilities Representatives: Participating auditors are expected to provide a high level of customer service as representatives of Fort Collins Utilities, and to act as ambassadors for the program.

#### **Pre- Audit Services**

The contractor will:

- Request gas usage data from customers desiring an audit
- Follow-up with customers regarding gas usage data until data is received (maximum of 3 follow-up calls)
- Schedule audits through iRate.
- Provide sufficient capacity to limit the wait time for audits at less than four weeks. During the peak winter months, efforts will be made to keep the wait time as low as possible, with a goal of no more than four weeks.
- Conduct intake interviews

#### **Audit Scope**

The contractor will:

- Identify key customer concerns and goals
- Provide a technical assessment of existing conditions and potential energy and water efficiency improvements in individual homes
- Evaluate combustion safety hazards
- Educate homeowners about techniques for conserving energy and water
- Direct homeowners to the list of Participating Contractors for proposed measures
- Collect audit fee (\$60) from customer

Audits will be standardized, including the following elements:

- Customer interview
- When a customer has expressed concern over high usage during the intake interview, provide utility bill analysis and interpretation (electric and water use data and analysis tool provided by Utilities). Interpretation to consist of explanation of anomalies or large spikes in usage.

- Visual assessment of the interior and exterior of the dwelling, including looking for clues of moisture problems (i.e., fluorescence on inside face of foundation walls) and issues related to solar gains (i.e., excess east, south, or west facing unshaded glazing).
- Visual assessment of energy components:
  - Insulation
  - Heating and cooling equipment and ductwork
  - Fireplaces and wood stoves
  - Electrical appliances
  - Lighting
  - Crawl space and attics: enter space and do a general inspection to identify major thermal bypasses and mechanical system deficiencies (such as disconnected ductwork and ventilation terminations in the attic).
  - Identification of double-pane windows as either clear or low-e glazing.
- Measurement of whole-house air leakage, using blower door, including measuring the air leakage connection between the house and the garage.
- Thermal scan of shell, using infrared camera scan (weather permitting).
- Collect thermostat information (programmable vs. non-programmable).
- For gas-fired furnaces: measurement of furnace heat rise and external static pressure except for newly replaced furnaces.
- Complete combustion safety testing per BPI protocol (gas-fired furnace, water heater, boiler and oven) unless auditor has knowledge of equipment being replaced in the immediate future.
- Based on combustion safety testing results, have the owner sign the CO disclosure form and/or install a CO detector (actions indicated on disclosure form) and provide owner with CO educational handout.
- Test gas pipe connections for leakage and confirm with bubble test .
- Identification of air handling unit motor size and type using data plate information.
- Measurement of hot water temperature.
- Recommend efficiencies around indoor water consumption based on customer's winter quarter average.
- Check for water leaks (dye tablets in toilets and observing sink and appliance areas)
- Provide preliminary recommendations to customer during initial site visit
- Documentation of the audit by taking digital photos of the exterior of the home, specific problem areas and items pertinent to potential improvements; identify style of home; verify approximate square footage versus assessors data.

#### Audit Pricing:

- Home size up to 3,000 sq. ft.: \$293.00 (\$60.00 from customers; \$233.00 from Utilities; \$293.00 from Utilities in the case of a contest winner)
- Home size 3,000 sq. ft. and above: \$318.00 (\$60.00 from customers; \$258.00 from Utilities; \$318.00 from Utilities in the case of a contest winner)

#### **Post- Audit Services**

The contractor will:

- Complete audit report with prioritized recommendations and descriptions of how general efficiency measures apply to the specific home in question. Report also includes a contractor data sheet. Report should be delivered within 7 calendar days of the audit site visit.

- Deliver report to customer (via mail or email; method to be determined during audit), providing interpretation and relevant collateral materials and being available for follow-up questions from customer (maximum 1 hour of consultation)
- Notify program manager of any customer satisfaction or significant health and safety issues prior to the next business day.

**Consultation / Program Provider Meetings**

The contractor may provide additional consultation for the program as requested by the program manager. Contractor will be expected to participate in periodic meetings for the purpose of evaluating and improving the Program. Time for consultation and program meetings can be billed based on the following hourly rate schedule.

Staff Position	
Principal	\$ 90.00
Auditor	\$ 55.00
Admin	\$ 45.00

**Tracking and reporting**

The contractor will:

- Maintain records of audits conducted in iRate
- Grant Utilities read-only access to iRate

**Roles of Utilities**

- Manage the program
- Market the program
- Provide customer verification
- Provide utility data (electric and water as appropriate) to auditors
- Review draft audit reports as needed. Address any revisions during quarterly meetings.
- Provide collateral materials
- Provide training specific to the Program
- Provide CO detectors.

**Data Ownership**

- Customer data is strictly confidential and shall not be used for any purpose other than conducting audits and inspections.
- Provision of services under the Home Efficiency Program may create data which can be used for other purposes, such as program evaluation, development of training materials or worksite protocols. Utilities and contractor will notify each other, and receive approval, of any intended use program information for other purposes.

**Billing**

The contractor will:

- Submit monthly invoices with backup documentation (number of audits conducted, reports delivered, inspection hours, approved consulting hours, program meeting hours) to Utilities for payment.

**Contract Amount**

The total value of the 2011 contract is estimated to be \$152,350. This amount is based on the contractor performing the 2011 goal for number of audits (600) times the value of audits (60% less than 3000 SF, \$233; 35% greater than 3000 SF, \$258; 5% contest winners, \$293), plus an allocation for hourly costs for program consulting and meetings (100 hours at \$55 per hour, \$5,500).

The unit goals for this program are based on estimates of customer demand for efficiency audits. Utilities does not guarantee the contract amount or unit volume of audits.

Future renewals of this contract may have revised goals and associated contract amounts.