

# South Bay Cities Council of Governments

October 24, 2013

To: SBCCOG Board of Directors  
From: Jacki Bacharach, SBCCOG Executive Director  
Subject: Strategic Plan Support Training Program for City Staff

Due to extremely tight time limitations in our contract with SCE for training courses, the SBCCOG Steering Committee took action at its October 14 meeting to approve a contract change order allowing new courses and training workshops to be offered to city staff at no charge. The training includes a Building Operator Certification course series and two 2014 Title 24 code update workshops.

## **BACKGROUND**

Through the Strategic Plan Support contract awarded to the SBCCOG by Southern California Edison (Edison) in 2010, over 20 workshops have been held to increase city staff ability to promote energy efficiency at city facilities and in the community. To continue this success, an additional round of training, under this contract, has been approved by Edison through shifting funds between tasks in Phase I. Specifically, funds will be transferred from the overfunded Utility Monitoring task (EEMIS) to the training task through a pair of contract change orders, which were approved by the Steering Committee at its October meeting. SBCCOG is contractually required to complete this new round of training courses by March 30, 2014. All classes are free to the attendees.

The approval from SCE has taken a very long time and now we only have a few months to accomplish these tasks.

## **TRAINING COURSE DETAIL**

The following courses and workshops were developed based on the input from city staff and discussions with Edison.

The Certified Energy Manager (CEM) course is one of the top certifications recognized in the efficiency industry. This certification courses is only taught by the certifying body. The CEM course is taught by the Association of Energy Engineers who provided a sole source justification letter (attachment A). The AEE requires a training agreement for the CEM course (Attachment B).

New workshop content needs to be developed for the Advanced Lighting System Repair and Maintenance workshop, the Embedded Energy: Saving Energy by Saving Water workshop, and the Energy cost reduction: creative finance & managing utility costs workshop. The SBCCOG

staff is proposing to release a Request for Qualifications to assess training vendors for these workshops.

## **PROPOSED SCHEDULE**

The proposed workshop schedule is as follows:

### **November 2013**

1. Building Operator Certification course day 1 & 2 (November 6<sup>th</sup> & 7<sup>th</sup>)
2. Title 24 residential code updates (November 14<sup>th</sup>)
3. Title 24 non-residential code updates (November 14<sup>th</sup>)

### **December 2013**

1. Building Operator Certification course day 3 (December 6<sup>th</sup>)

### **January 2014**

1. Building Operator Certification course day 4 (January 16<sup>th</sup>)
2. Certified Energy Manager course (January 21<sup>st</sup>, 22<sup>nd</sup>, & the morning of the 23<sup>rd</sup>)

### **February 2014**

1. Building Operator Certification course days 5 & 6 (February 5<sup>th</sup> & 26<sup>th</sup>)
2. Advanced lighting system repair and maintenance (Date TBD)
3. Energy Efficiency Procurement Policies (February 13<sup>th</sup>)

### **March 2014**

1. Building Operator Certification course days 7 & 8 (March 12<sup>th</sup> & 26<sup>th</sup>)
2. Embedded energy: saving energy by saving water (Date TBD)
3. Energy cost reduction: creative finance & managing utility costs - for City Finance Directors (Date TBD)

## **BUDGET**

*Overall Budget*            \$110,000

This budget is established by the Strategic Plan Support change order number 2 for the purpose of providing energy efficiency related training to city staff from cities in the South Bay. From the \$110,000 budget, \$57,200 is expected to be used to engage outside training vendors. The remaining \$52,800 will be used in staff labor and expenses to support these trainings.

### *Budget for external trainers*

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|----------|---|
| \$12,000 | Building Operator Certification course (8 full days). This course has a flat instructor fee of \$12,000 assuming 12 participants. Additional participants can join the course for no additional fee. The BOC course is taught by the NEEC. <b><i>Due to time constraints, this course was approved at the October Steering Committee meeting.</i></b> |
| \$23,200 | Certified Energy Manager course. This course has a base instructor cost of \$14,000 for 10 participants – each additional participant adds \$1,150 to the cost.   |

The proposed budget is a not to exceed cost for up to 18 participants or \$23,200. The CEM course is taught by the AEE.

- \$4,000 Title 24 residential and non-residential code updates. This workshop was taught in 2012 by Martyn Dod and was well received by participants. The SBCCOG proposes to engage Martyn Dod again for a not to exceed cost of \$3,500. ***Due to time constraints, this course was approved at the October Steering Committee meeting.***
- \$3,000 Energy Efficiency Procurement Policies. The SBCCOG proposes Greg Stevens as an instructor. Greg is the contract energy engineer to the SBCCOG who recently produced a template Energy Efficiency Procurement Policy document - a suggested policy document for use by South Bay Cities. Greg Stevens has been utilized as an instructor previously for topics such as retro-commissioning.
- \$15,000 RFQ For: Advanced lighting system repair and maintenance, Embedded energy: saving energy by saving water, and Energy cost reduction: creative finance & managing utility. Through this RFQ the SBCCOG proposes engagement with two or three vendors to offer these training topics with an aggregate expense not to exceed \$15,000.

### **RECOMMENDATION**

Approve the following items for the Strategic Plan Support Training Program for City Staff:

1. Approve the training agreement between the Association of Energy Engineers (AEE) and the SBCCOG for the CEM course with expenditure not to exceed \$23,200.
2. Approve Budget to develop and deliver workshops including: a) Advanced Lighting System Repair Maintenance and Embedded Energy Saving Energy by Saving Water workshops using with an aggregate expenditure not to exceed \$15,000.



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## Association of Energy Engineers®

# Certified Energy Manager (CEM®) **CEM®**

Since its inception by the Association of Energy Engineers (AEE) in 1981, the Certified Energy Manager (CEM®) credential has become widely accepted and used as a measure of professional accomplishment within the energy management field. It has gained industry-wide use as the standard for qualifying energy professionals in the United States and internationally. The CEM® is recognized by the U.S. Department of Energy, the Office of Federal Energy Management Programs (FEMP), and the U.S. Agency for International Development, as well as by numerous Department of Defense branches, Federal energy management programs, state energy offices, major utilities, corporations, and energy service companies.

### Sole Source Provision Statement:

CEM® certification is available only through the Association of Energy Engineers and AEE is the sole source provider of this Certification program. The CEM® is a registered trademark (Reg. No. 1220333 ) of the Association of Energy Engineers. The term “Certified Energy Manager” is a registered mark of AEE (Reg. No. 3681994).

Use of the CEM® and Certified Energy Manager designation must be authorized by AEE and is granted to individuals who have met eligibility requirements, attended an approved training program, passed the CEM® examination completed an individual CEM application and has been approved by the CEM board.

### **CEM® Program Information:**

<http://www.aeecenter.org/cem>

### **CEM® usage in government and industry:**

<http://www.aeecenter.org/certification/CEMarticle.pdf>



**Comprehensive 5-Day Training Program for Certified Energy Managers® (CEM®)**  
**In-House Seminar Agreement between**  
**Association of Energy Engineers (AEE) & South Bay Cities Council of Governments (SBCCOG)**  
Prepared: October 3, 2013

The following is an agreement between the Association of Energy Engineers (AEE), dba Fairmont Press and South Bay Cities Council of Governments (SBCCOG). This agreement summarizes the presentation of the Fast Track Certified Energy Manager (CEM) In-House program for SBCCOG in Torrance, CA on January 21-23, 2014, with the CEM exam being held on January 23, 2014. The scheduled instructor is Clint Christenson.

**Association of Energy Engineers (AEE):**

1. AEE will provide one instructor to present the Fast Track CEM in-house course at a meeting facility in Torrance, CA
2. AEE will provide the *Guide to Energy Management Handbook* for each participant, as well as the Fast Track CEM workbook.
3. The certification exam will be held on the last day. AEE will provide all exam materials and a proctor for the exam. (Students have 4 hours to complete the exam) Exam answer sheets will be returned to AEE by the instructor for grading. AEE will prepare letters containing exam scores, as well as CEM certificates for those who pass the CEM examination and meet all certification prerequisites. All documentation will be sent to one primary contact within SBCCOG, who will be responsible for distributing these documents to course participants.
4. If a candidate does not meet the experience requirement to be a CEM, but receives a passing score on the exam, the candidate may be eligible for the Energy Manager in Training (EMIT™) certification.

**South Bay Cities Council of Governments:**

1. SBCCOG will remit a sum of \$14,000 USD to AEE for up to 10 participants. This amount includes the CEM course fees, textbooks, exam materials and proctoring, shipping and Certification fees. (Regularly \$400 per person) The course may have additional participants over the 10 for the cost of \$1,150 USD per attendee over the initial 10. Instructor travel, lodging and meal expenses will also be an additional charge.
2. SBCCOG will be responsible for providing a venue, audio/visual equipment, and any applicable catering costs for morning coffee/tea and food, if host would like to provide this. Audio/visual needs include laptop, projector, screen, lapel microphone, and white board for working calculations.

**Cancellation Policy:**

In the event SBCCOG cancels the seminar 30 days or less from the seminar date, SBCCOG will be responsible for 10% of the course cost. If the seminar is cancelled 31 days or more from the start of the seminar, SBCCOG will not be responsible for any payment to AEE.

**Confidentiality:**

The mark "Certified Energy Manager" and "CEM" are registered trademarks of the Association of Energy Engineers and can only be used in conjunction with an AEE-approved course. SBCCOG and its representatives agree that all CEM material is the property of AEE and will not disclose any CEM training material, including examination, to a third party, except as may be required by law or legal process. Failure to pay for seminar may result in suspension of any Certification earned under this training agreement.

**Hold Harmless:**

Each party shall hold the other party harmless from any liability resulting under this agreement.

Agreed to this \_\_\_\_ of \_\_\_\_\_ 2013.

**South Bay Cities Council of Governments:**

**ASSOCIATION OF ENERGY ENGINEERS:**

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Signature

\_\_\_\_\_  
Signature

Dan Medina \_\_\_\_\_  
Print Name

Jenn Geho \_\_\_\_\_  
Print Name

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