

**Response to RFP #18PSX0104:
Energy-Efficiency Retrofits and Energy
Cost-Saving Services for Existing
Buildings**

For:

**State of Connecticut
Department of Administrative
Services**



September 10, 2018

Offeror:



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1. PROPOSER'S QUALIFICATIONS AND CAPABILITY

Celtic Energy (CEI), a Connecticut Subchapter S Corporation, is an energy consultancy based in Glastonbury, CT, with additional offices in the New York City, Washington, D.C., Reno and Las Vegas, NV, and Vancouver, WA metro areas. Founded in 2000 by industry veteran Chris Halpin, we specialize in serving as an Owner's Representative (Third-Party Consultant) to protect and advance property owners' interests in energy and sustainability projects. We focus on quality assurance for Energy Savings Performance Contracts (ESPCs), a role we have been hired to perform over 125 times nationwide, overseeing all of the large Energy Service Companies (ESCOs). CEI also supports public and private sector clients in planning, developing and overseeing microgrid projects. We provide consulting services for clean energy Power Purchase Agreements (PPAs), RFP/RFQ solicitations, alternative financing strategies, design/build project oversight, energy audits, measurement & verification, distributed generation, demand response, energy security and resilience vs. business interruption risks, integrative sustainable design, green building certification, enterprise sustainability, and other energy services. We are subject matter experts in many energy technologies including lighting, chiller and boiler plants, building automation systems, and cogeneration. More specifically, CEI identifies and mitigates potential client risks, helps clients solicit competitive solutions from the marketplace, negotiates contracts that deliver greatest value, and provides quality assurance on contractors during implementation, all to achieve optimal results.

Number of years in the energy business

CEI was founded in 2000 by industry veteran Chris Halpin, who has over 30 years of experience in the energy business. The CEI team has a combined 190+ years of experience in the design, analysis, and implementation of energy efficiency, O&M improvements, and retrofit projects.

Number and value of similar contracts

CEI's staff have negotiated, sold, managed, engineered, executed, commissioned, monitored and verified over \$2 billion worth of energy efficiency related projects and have performed oversight on 125+ ESPCs. We have served clients in 35 states and have secured over \$120 million in government and utility grants, rebates, and incentives. Approximately a third of this work has been performed in the past five years, and many projects are ongoing.

In CT alone, we have performed energy consulting work on more than \$100 million in projects for dozens of clients. This work includes energy audits and energy conservation measure (ECM) design and construction administration services for the Connecticut Department of Construction Services (formerly DPW). We held On-Call Energy Service contracts for many years, and conducted audits and follow up design/CA services for very successful projects at many State of CT properties. Also, while acting as a Quality Control consultant to CL&P (now dba Eversource Energy), CEI conducted focused audits and provided QA services of installation of lighting, VFD, and other simple ECMs at several other State of CT locations.

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We have also provided retro-commissioning services for public and private facilities and served as an ESPC Owner's Rep for a number of CT municipalities and state agencies. CEI has performed a variety of other energy-related consulting for our clients and has served as a provider of energy consulting services for CT utilities.

CEI has recently utilized our current DAS contract to perform energy audits for the CT Army National Guard, and to serve as an ESPC project Owner's Rep for the Town of Hamden, CT.

Number of full-time personnel

The CEI team offers the State of Connecticut a cohesive group of Energy Service professionals, each with a unique area of expertise and a broad base of experience. Each member of the team is capable of working individually yet can also draw on the strengths of other members of the team as required to solve specific problems. We currently have 12 full-time personnel, mainly based out of our CT office, with support staff and project managers in other locations in the U.S.

Members of CEI's current staff that are most likely to work on projects under this contract include:

- **Chris Halpin**, PE, CEM, CMVP, LEED AP – *President*
- **Steve Wells**, PE, CEM, CDSM, LEED AP – *Executive Director of Engineering*
- **Chris Lotspeich**, CEM, MPPM, CMVP, MES – *Director of Sustainability*
- **Jim Pagliaro**, CEM, CMVP, LEED AP – *Project Manager*
- **David-John Plis**, PE, CEM, CMVP – *Project Manager, Senior Energy Engineer*
- **Daniel Clements**, PE, CEM, CMVP, REP, LEED AP – *Energy Engineer*
- **Phil Gordon** – *Energy Engineer*

Resumes of our staff can be provided upon request.

Accreditations or other pre-qualifiers

CEI is an accredited QA Provider by the Investor Confidence Project, one of 17 companies with that distinction, and one of only 6 companies credentialed to serve in this capacity in all 50 states. We are also an approved EPA Energy Star Partner and a member of the US Green Building Council, the consortium which sponsors the LEED (Leadership in Energy and Environmental Design) sustainable design and construction rating system. Several of CEI's members are LEED Accredited. Our President, Chris Halpin, serves on the board of the Energy Services Coalition (ESC), and our Director of Business Development, Walt Donzila, serves on the board of the Renewable Energy and Efficiency Business Association (REEBA) in CT. Additionally, we are active members of the Northeast Sustainable Energy Association (NESEA) and the Northeast Clean Energy Council (NECEC).

CEI has one of the best M&V teams in the country, with four Certified M&V Professionals on staff. Mr. Halpin helps maintain M&V publications, reviews and approves related training materials, and helps

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implement the development of new materials. Mr. Halpin also participated in the U.S. Department of Energy's (USDOE) M&V, Commissioning, and O&M Workshops with other industry and government leaders which resulted in the creation of many Federal ESPC Guidance documents. Using our experience in M&V, we are often called to do forensic analysis of major energy projects where actual savings have fallen short of projections.

Our staff also includes some of the most experienced DOE FEMP certified Project Facilitators (PF) in the country, including Professional Engineers, Certified Energy Managers, LEED Accredited Professionals, Certified Measurement & Verification Professionals, and Certified Energy Procurement Professionals. For ten years, CEI held one of only four Project Facilitator contracts in the country with the USDOE to provide ESPC Technical Services for Federal performance contracts. We now have seven certified PFs on staff and are still an active USDOE PF, currently working on energy projects for the DLA, the VA and GSA.

CEI is currently operating as a preferred provider of ESPC oversight services with the Connecticut Council of Municipalities, overseeing major projects for several towns.

2. PROPOSER'S EXPERIENCE

CEI is an energy consulting practice and does not sell equipment nor do design. We protect our client's interests by helping time define their needs, procure solutions from the marketplace, solicit and select contractors, and provide quality assurance on those projects. We provide services nationally, but have a heavy focus on several regions, one being Southern New England. CEI will offer services in Connecticut to DAS clients as summarized below:

- **Owner's Representation on Major Energy projects, including Energy Savings Performance Contracts (ESPC)** – provides independent representation to protect Project Owner's interests, reduce project costs, perform Quality Assurance, and ensure promised savings are realized.
- **Energy-Conscious Design Review** – provides independent energy design review to lower capital costs, reduce operating costs, and plan for inclusion of renewable energy sources.
- **Energy Auditing** – Conducts ASHRAE level I and II audits for all kinds of facilities in CT for public and private entities, to identify Energy Conservation Measures that will lower operating costs.
- **Power Purchase Agreement (PPA) Reviews** – ensures that client is not being overcharged and that contracts are not one-sided.
- **Measurement and Verification (M&V) services** – compares actual post-project energy savings against promised values and advises on remedies.
- **Energy Monitoring** - performs utility billing analysis in support of a wide range of projects such as energy auditing, energy efficiency and distributed generation project scoping and design, and RFP and Technical Facility Profile development for ESPC and renewable PPA development. Help clients draft effective RFPs for energy services.
- **Energy Modeling** – determine expected usages and verify contractor's models.
- **RFP Services** – development of accurate, effective RFPs for energy contracting services and scoring of respondents

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- **Energy Training** – provides training to facilities managers and staff in the areas of Design/Build Construction, Building Operator Certification (Lighting, HVAC, Controls, and other topics), LED Lighting, Energy Efficiency for Financial Managers, LEED Basics, Performance Contracting and Measurement and Verification, M&V processes, and Benchmarking.
- **Street Lighting Consulting** – provide analysis of opportunities, explanation of options and QA management of lighting upgrades.

Representative CEI Direct CT Clients in past 3 years and References

CT Army National Guard – ASHRAE Level 2 Energy Audit

Connecticut Army National Guard (CTARNG) hired Celtic Energy, Inc. (CEI) to perform an ASHRAE Level II Energy Audit at its Hartford, CT facility to identify Energy Conservation Measures (ECMs) to reduce energy and/or improve building system performance.

The Hartford Armory Energy Project energy conservation measures included:

- Interior Lighting Retrofit
- Convert from District Hot Water to Gas Fired Boilers
- Convert from District Cold Water to Electric Chillers

Energy and Operational Savings amount to \$134,332 annually, with greenhouse gas emissions reduced by 2297 tons and electricity reduced by 21,866 kWh. Celtic helped CT ANG find \$61,257 in available incentives from Eversource. This was contracted using our current DAS contract.

Contact: Jeff Russo, NFG NG CTARNG

Energy Manager

CT Army National Guard, Hartford Armory

360 Broad Street, Hartford CT, 06105

(860) 883-1102

jeffrey.l.russo2.nfg@mail.mil

Town of Tolland

CEI serves the Town of Tolland as Third-Party Consultant for their \$10.2 million ESPC project, which encompassed 18 facilities and approximately 700,000 square feet. Energy and operational savings amount to \$573,000 annually, with greenhouse gas emissions reduced by 2,585 tons. CEI helped the town secure \$900,000 in incentives from CL&P. Energy conservation measures included the following:

- New building automation system
- Updated lighting controls and energy efficient lighting
- HVAC mechanical upgrades, including new high-efficiency boilers
- Water conservation measures including low-flow toilets and faucets
- Weatherization improvements
- Ground source heat pump systems installed in the two largest schools

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Contact: Beverly Bellody
 Director of Human Services
 860.871.3611
 bbellody@tolland.org

Town of North Haven

CEI serves as Third Party Owner's Representative for the Town of North Haven's \$6 million ESPC project. The project, which covers 11 facilities and 615,000 square feet. North Haven's energy consumption was reduced by 24% and CEI was able to help the town secure approximately \$640,000 in utility incentives. Our expert work has enabled the Town to manage this project successfully and develop an estimated annual energy and O&M savings of approximately \$350,000. Energy conservation measures included the following:

- Lighting energy efficiency upgrades and occupancy sensors
- Upgraded building controls and energy management system
- Heating system upgrades and boiler replacement
- Improved insulation and weatherization
- Water conservation
- Stream trap replacements
- Energy generator addition

Special feature: CEI was asked to help the Town get a contract executed with the ESCO by June 1, 2015 in order to allow the school board to take advantage of the summer break for construction. This only gave us 30 days to review the IGA, help negotiate a contract, working closely with their outside counsel, Jeffrey Donofrio, and come to agreement on scope, M&V, cost reasonableness, escalation rates, etc. which usually take several months to negotiate. In order to accomplish this aggressive schedule, and meet the Town's objectives, CEI scheduled several full day review and negotiating sessions with the ESCO. CEI also worked with the Town to help get a finance RFP issued and an agreement executed with Bank of America in a very short time period.

Contact: Edward Swinkoski
 Director of Finance/Administration
 203.239.5321
 Swinkoski.edward@town.north-haven.ct.us

Town of Hamden

CEI just started serving as Owner's Rep on their ESPC project for municipal and public school facilities, a project that could be valued at \$10 million, with annual energy savings of about \$1 million. This was contracted using our current DAS contract.

Contact: Kathleen Schomaker
 Energy Manager
 203.287.7036
 kschomaker@Hamden.com

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The table below shows additional clients of CEI over the past three years:

Project	State	Description
City of Phoenix	AZ	Ongoing ESPC
City of Stamford	CT	Combination Microgrid/Energy Efficiency ESPC
Greenworks Lending	CT	PACE Technical Reviews
Konica Minolta	CT	ECDR
Town of Windham	CT	Benchmarking
Eversource	CT	Energy Audits
CSCU	CT	Fuel Cell Power Purchase
University of New Haven	CT	Energy Conservation Project
DESEU ESPC Contract Process Advisory Services	DE	Updated State procedures on ESPC process
North Western State University	LA	Ongoing ESPC
FDA White Oak Campus	MD	Nation's largest ESPC; currently providing M&V services
University of Maryland	MD	ECDR
Town of York	ME	Street Light Retrofit
University of Southern Maine	ME	Ongoing ESPC
Appalachian State University	NC	\$16 million ESPC project; currently in the M&V phase
North Carolina Department of Public Safety	NC	Ongoing ESPC
North Carolina Department of Transportation	NC	Ongoing roadway lighting ESPC
University of North Carolina	NC	Combined \$21 million ESPC projects; currently in the M&V phase for Charlotte, Pembroke, and Wilmington campuses
Wake County Public School System	NC	Ongoing ESPC
Winston-Salem State University	NC	\$6.7 million ESPC project; currently in the M&V phase
Carson City Public Works, and School district	NV	Ongoing ESPC
City of Henderson	NV	Ongoing outdoor lighting ESPC
Clark County School District	NV	Ongoing ESPC
College of Southern Nevada	NV	Ongoing ESPC
Western Nevada College	NV	Ongoing ESPC
Town of Mamaroneck	NY	Street Lighting Review
Roosevelt Roads Microgrid	PR	RFP Review
Community College of Rhode Island	RI	\$12 million ESPC project completed in 2014
Pastore Center	RI	\$50 million ESPC project
Rhode Island College	RI	Ongoing ESPC
Zambarano Hospital	RI	\$7 million ESPC project
Furman University	SC	Energy Assessment
DLA Energy's Facility Energy Program	US	Overseeing 17 US Military base ESPCs
VA- Veterans Administration	US	ESPC/UESC at 5 locations
Booz Allen Hamilton	WV	FBI Energy Assessments

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Previous CT Public Sector Clients:

CEI Clients through State Agency work:

- 18-20 Trinity Drive, Hartford (DAS former offices)
- 79 Elm St. Hartford (DEEP headquarters)
- Bridgeport Courthouse
- Bridgeport Juvenile Detention Center
- 10 Franklin Square (CT PURA headquarters)
- Danbury Courthouse

CEI Clients through Eversource subcontracting:

- UCONN Law School
- UCONN West Hartford Campus
- UCONN Torrington Campus
- UCONN Storrs – Jorgensen Auditorium



3. PRICING AND FEES

Energy Audits

- Provision of technical energy auditing services
 - Minimum of 50,000 sq. ft. building
 - Level 1 ASHRAE Audit is \$0.10 / sq. ft.
 - Level 2 ASHRAE Audit is \$0.125 / sq. ft.
 - Any other services would be at our normal prices (see table below). A large fraction of our work on the services offered to DAS clients would be handled by Project Managers and the Engineering staff.

Professional Rate Schedule	
Principal	\$300
Senior Engineer / Executive Director	\$289
Director	\$230
Project Manager	\$215
Senior Energy Engineer	\$180
Energy Engineer	\$150
Administrative	\$89

Other Services – for all other services listed fees may be fixed or hourly as negotiated depending on project size and complexity. CCM member towns may qualify for some services with no up-front costs.

CEI does not sell products, so there are no markups to be provided. Our pricing above represents all costs including travel in CT. We do not provide maintenance services, and the monitoring we do is as requested at hourly rates above, or at a negotiated fixed rate based on the service.

As a highly experienced Owner’s Rep, CEI is used to searching for all the energy rebates and incentives available to our clients. We work closely with the appropriate utility company to identify these funds, and help customers apply for them. We also review State and Federal programs for grants and tax incentives that may apply and provide technical information to complete government applications.



**EXHIBIT B, RFP-16
PRICE SCHEDULE**

CONTRACT NAME:	ENERGY EFFICIENCY RETROFITS AND COST SAVINGS PROGRAMS FOR EXISTING BUILDINGS	RFP NO: 18PSX0104
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DESCRIPTION OF GOODS AND SERVICES OFFERED BY CONTRACTORS

INSTRUCTIONS: PROVIDE A DESCRIPTION OF YOUR COMPANY ALONG WITH THE GOODS AND SERVICES THAT IT INTENDS TO PROVIDE THE STATE OF CONNECTICUT THROUGH THIS CONTRACT. THIS IS THE DESCRIPTION THAT WILL APPEAR IN THE CONTRACT FOR END USERS SEEKING TO MAKE ACQUISITIONS FROM IT. THE DESCRIPTION MUST BE LIMITED TO THE SPACE PROVIDED HERE. ALL ADDITIONAL PAGES, DOCUMENTATION OR VERBIAGE WILL BE DISREGARDED AND DESCRIPTION WILL BE EDITED AT THE DISCRETION OF THE DAS CONTRACT SPECIALIST.

Table row height has been frozen. Please restrict entry to Calibri, 11-point, regular font. Navigation between rows may be accomplished only by placement of cursor with mouse or by manipulating touchpad.

CEI is a CT energy consultancy that performs many kinds of advisory services for municipalities, public schools, state
agencies, colleges and universities. We specialize in providing INDEPENDENT representation and quality assurance
Services for energy project owners to protect their interests, ensure their project costs are reasonable, and that
expected savings are realized. Specific services include:
<ul style="list-style-type: none"> • Owner’s Representation on Energy Savings Performance Contracts (ESPC) or other major energy projects
<ul style="list-style-type: none"> • Energy-Conscious Design Reviews to reduce capital costs and operating costs for new/remodeled facilities
<ul style="list-style-type: none"> • Energy Audits (ASHRAE Level 1 and 2) for all kinds of facilities to identify energy cost savings
<ul style="list-style-type: none"> • Review of Power Purchase Agreements to prevent overcharges and protect buyer’s interests
<ul style="list-style-type: none"> • Measurement and Verification (M&V) services to ensure promised energy savings are realized
<ul style="list-style-type: none"> • Energy Monitoring to benchmark facilities’ energy usage and create energy baselines
<ul style="list-style-type: none"> • Energy Modeling to determine expected usages or independently verify models developed by other service
<ul style="list-style-type: none"> • RFP development and scoring of contractors
<ul style="list-style-type: none"> • Energy Training on a variety of subjects including Building Energy Operations, LEDs, M&V, LEED Basics, etc.
<ul style="list-style-type: none"> • Street lighting analysis and project Quality Assurance

