

Task Order Multisite Solar PV – Procurement through Closeout

Task Order # P59822-2100305.00

This Task Order is pursuant to the Master Services Agreement (“MSA”) between Sage Renewable Energy Consulting, Inc. (“SAGE”) and San Mateo Union High School District (“CLIENT”) dated January 22, 2021.

This Task Order must be mutually executed before work is commenced.

Project Name Multisite Solar PV – Procurement through Closeout
Client San Mateo Union High School District
Physical Location San Mateo, CA
Estimated Start Date July 1, 2022
Estimated End Date February 28, 2025
Estimated Fees Fixed Fee, total of all Tasks: \$247,300

Project Contacts

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Project Overview

CLIENT hired SAGE in 2021 to assist CLIENT with assessing feasibility of solar photovoltaic (PV) and battery energy storage systems (BESS) at 9 CLIENT sites. SAGE completed the investment-grade feasibility study and presented its findings to the District Board of Trustees during its November 18, 2021 Board meeting.

Subsequently, SAGE submitted Interconnection Applications (IAs) to PG&E on behalf of CLIENT for 9 CLIENT sites, refreshed financial feasibility of each site, and presented updated findings to the District Board of Trustees during its May 5, 2022 Board meeting.

This Task Order outlines SAGE’s project management services for the evaluation and potential procurement of solar PV on 9 CLIENT site(s) and BESS on 1 CLIENT site. This Task Order follows the completed investment-grade feasibility study, which focused on the following site(s):

1. Aragon High School
2. Burlingame High School
3. Capuchino High School
4. Hillsdale High School
5. Mills High School
6. San Mateo High School
7. Peninsula High School
8. Maintenance and Transportation
9. District Office

Based on the results of the completed investment-grade feasibility study, this Task Order covers tasks to assist with procurement, contracting, design review, construction support, and commissioning oversight of the PV systems as outlined below.

Scope of Work

Task 1 RFP Preparation & Procurement Management

- 1.1 Create project-specific Request for Proposals (RFP) utilizing CA Government Code 4217 to select “best value” proposals using SAGE RFP templates, including electronic submittal documents, project requirements, specifications, contract terms, and additional information.
- 1.2 Review with CLIENT and CLIENT Legal Counsel.
- 1.3 Produce Final RFP document set based on stakeholder comments.
- 1.4 Manage solicitation notices and electronic distribution to potential solar Developers in coordination with CLIENT.
- 1.5 Coordinate and conduct site walk for proposers.
- 1.6 Manage document access and produce Addenda with RFI responses, as needed.
- 1.7 Assist CLIENT with ongoing critical path project items, such as Division of State Architect (DSA), California Environmental Quality Act (CEQA), California Geological Survey (CGS), utility interconnect, financing, etc.

- 1.8 Manage electronic submission of proposals.

Site Visits: One to conduct RFP site walk.

Task 2 Proposal Evaluation and Vendor Selection

- 2.1 Provide initial summary of responses and preliminary ranking of proposals.
- 2.2 Perform detailed quantitative analysis of top three proposals, including review of pricing, production estimates, and lifecycle cost of energy analysis.
- 2.3 Perform qualitative analysis, including equipment and design review, Developer qualifications, schedule, reference checks, performance guarantees, O&M, contract exceptions, etc.
- 2.4 Participate in CLIENT selection committee workshop to review proposals and rank proposing Developers, including optional interview of highest-ranked vendors.
- 2.5 Provide summary report outlining quantitative and qualitative analysis.
- 2.6 Provide notifications to proposers.

Site Visits: Up to two - one for interview/committee meeting and one for CLIENT board meeting.

Task 3 Contracting Support

- 3.1 Facilitate contract kickoff and meetings with CLIENT, Legal Counsel, and selected Developer.
- 3.2 Assist with contract negotiations, redlining, and finalizing contract documents. Anticipated contract documents include:
 - 3.2.1 Power Purchase Agreement (PPA), Lease, or Cash Purchase contract(s)
 - 3.2.2 General Terms and Conditions
 - 3.2.3 O&M Terms and Performance Guarantees
 - 3.2.4 Requirements stated in RFP (scope, criteria, specifications, and process)
- 3.3 Interface with CLIENT staff, Legal Counsel, and selected Developer as needed.
- 3.4 Participate in contract negotiations and finalization with Legal Counsel and selected Developer.
- 3.5 Work with Legal Counsel to prepare GC 4217.10 et seq. notice, findings, and resolution for Board (if used).
- 3.6 Attend conference calls as needed.

Site Visits: One for CLIENT board meeting for contract approval.

Task 4 Design Review and Assistance

- 4.1 Organize and attend design kickoff meeting, including site walk with Developer to review contract requirements, existing conditions, design process, and discuss implementation logistics.

- 4.2 Review Developer site discovery scope and results. Discuss any changed conditions and coordinate design modifications with CLIENT and Developer. Optional on-site meeting during site discovery if needed.
- 4.3 Participate in regular design meetings via phone.
- 4.4 Provide technical review and collate CLIENT comments for up to three sets of progress designs.
- 4.5 Evaluate Developer system design, component selection and interconnection scheme for conformance with contract, utility, and industry standards.
- 4.6 Assist with siting issues such as equipment placement, shading, fire issues, future site plans, easements and utilities, local AHJ considerations, etc.

Site visits: Up to two - one for design kickoff and one for existing conditions site walk.

Task 5 Permitting and Interconnection Management

- 5.1 Ensure schedule and submittals tracking for permitting with AHJ(s)
- 5.2 Review and update interconnection applications and agreements with Utility as necessary
- 5.3 Prepare project description for CEQA notice.
- 5.4 Prepare Board resolution for filing of CEQA notice, if needed.

Site visits: None, all work performed remotely.

Task 6 Technical Construction Support

- 6.1 Coordinate and participation in construction kickoff meeting site visit.
- 6.2 Participation in weekly project meetings by phone and attend in-person meetings as per CLIENT needs and project construction activities.
- 6.3 Track Developer-maintained master schedule and look-aheads against milestones.
- 6.4 Review and respond to RFIs.
- 6.5 Review pay-app requests and provide input to CLIENT.
- 6.6 Technical review/comments/support to CLIENT Construction Manager (CM) on design changes, change orders, and Developer's work regarding contract and industry standards.
- 6.7 Attend AHJ inspections as feasible in coordination with site visits.
- 6.8 As-needed support and communications with CLIENT, CLIENT CM, and DSA Inspector of Record (IOR).

Site visits: Up to eight - construction kickoff and twice-monthly visits during active construction. Visits in excess of eight to be paid from contingency budget.

Task 7 Commissioning (Cx) Verification

- 7.1 Review Developer's Cx protocol, confirm that it meets contract requirements and industry standards.

- 7.2 Inspection of systems, including:
 - 7.2.1 System component and design conformance verification
 - 7.2.2 Workmanship evaluation
 - 7.2.3 Performance verification, including IR spot testing, and inverter/system output confirmation
- 7.3 Provide review of documentation, including Developer Cx results and O&M manual.
- 7.4 Coordinate with CM on shutdown and interconnection, confirm Developer achieves utility PTO.

Site visits: One for inspection and verification.

Task 8 Project Closeout

- 8.1 Coordinate with CM to ensure all closeout tasks/submittals have been completed and provide technical assistance as-needed.
 - 8.1.1 Provide input to change order closeout and contract amendments
 - 8.1.2 Provide input to project closeout punch list and coordinate with CM/AHJ inspectors/other stakeholders to verify completion
 - 8.1.3 Ensure all required project documentation and training provided to CLIENT
- 8.2 Produce summary report of Cx verification effort with electronic library of closeout documentation including as-builts, permission-to-operate letters, inspection reports, punch list closeout, etc.

Site visits: Up to one for verification.

Schedule and Deliverables

Task	Start Date	End Date	Deliverables
1 RFP Preparation and Procurement Management	June 2022	August 2022	– RFP Documents, Draft & Final – Distribution & Addenda
2 Proposal Evaluation and Vendor Selection	August 2022	October 2022	– Proposal Evaluation Summary – Presentation (Optional)
3 Contracting Support	October 2022	November 2022	– Redlines of Contract Documents – Savings Analysis for 4217 Resolution
4 Design Review	November 2022	December 2022	– Kickoff meeting notes, existing conditions documentation – Review/Document Comments on Progress Drawings – Updates to Performance/Financial Models as needed – Existing Conditions Documentation
5 Permitting and Interconnection Assistance	December 2022	May 2023	– AHJ permit support and documentation – Project description and supporting information for CEQA filing – Review & supporting documents for Utility Interconnection Agreement
6 Technical Construction Support	May 2023	November 2024	– Review & Comments for Submittals/RFIs/Change Orders/Pay Apps – Input to Punchlist based on inspections
7 Commissioning Verification	November 2024	January 2025	– Inspection and testing reports – Punch list
8 Project Closeout Assistance	January 2025	February 2025	– Project Summary Report, including electronic document reference library

Project Requirements and Assumptions

1. Travel to CLIENT sites per site visit assumptions outlined in Scope of Services. Project travel generally assumes one representative per visit unless otherwise noted. Additional travel beyond the trips listed may require additional budget.
2. Assumes schedule listed. Delays or extension of the assumed schedule outside of SAGE’s control may require additional budget.

3. All deliverables will be delivered in electronic format.
4. Site information/data will be made available to SAGE as needed. Should on-site review and/or data collection be added to the scope, the on-site work will be limited to visual inspections of potential system locations, electrical services, and existing site conditions.
5. CLIENT will provide estimates of changes in electricity consumption at proposed sites based on energy efficiency measures, anticipated changes site usage, and new construction.
6. CLIENT will provide access to all sites under consideration for site walks, including access to electrical services at each site.
7. Feasibility will not include new or invasive site investigations (e.g. geotechnical studies, structural investigation, shutdown/inspection of electrical services, etc.).
8. CEQA documentation and process management to be provided by CLIENT. SAGE will coordinate with CLIENT and Developer to provide project details needed to prepare CEQA documentation. CLIENT/Developer shall be responsible for any CEQA requirements during construction, with oversight by CLIENT or CLIENT's CM.
9. Financing by others. SAGE will provide detailed modeling and assist with negotiations and contracting with the Developer or financing entity. Should CLIENT elect to pursue grants, bonds, government loans or other financing mechanisms that require preparation and management of applications for financing, SAGE will provide assistance to CLIENT financial managers under a separate scope and budget.
10. Design, construction, and commissioning of project will be performed by others. SAGE will provide design review, technical assistance during construction, review/oversight of Developer's commissioning, inspections/performance assessment as noted.
11. SAGE will interface with the electrical utility company service CLIENT sites during feasibility to assess interconnect constraints. This scope of work assumes the project Developer will assume responsibility for the interconnection process once under contract and will be responsible for interconnection with the electrical utility.
12. CLIENT will self-perform or separately contract day-to-day CM and code inspection services. SAGE will be on-site during construction and commissioning as noted and will perform the tasks listed, including providing technical support to the CLIENT CM.
13. Budget assumes BESS system will only be implemented at up to one site (District Office). Should CLIENT elect to include BESS at other sites, additional budget will be required.

Fee and Payment Schedules

The Task fees listed in this section are based on anticipated workload for the scope set forth in this Task Order. For all tasks performed under this Task Order, SAGE has set a Fixed-Fee payment per Task as shown in the table below.

Task Fee Table

Task		Fixed Fee
1	RFP Preparation and Procurement Management	\$53,100
2	Proposal Evaluation and Vendor Selection	\$14,100
3	Contracting Support	\$27,800
4	Design Review	\$25,300
5	Permitting and Interconnection Assistance	\$11,200
6	Technical Construction Support	\$51,400
7	Commissioning Verification	\$39,200
8	Project Closeout Assistance	\$25,200
Total		\$247,300

Hourly Fee Schedule

T&M work is billed at the hourly rates listed below for project work completed through December 31, 2023. Updated hourly fees will be provided by Sage prior to each new calendar year. SAGE will not exceed NTE limits without consent of CLIENT.

Title	2022	2023
Principal	\$295	\$310
Associate Principal	\$250	\$265
Subject Matter Expert	\$395	\$415
Senior Project Manager	\$245	\$260
Project Manager	\$215	\$225
Senior Engineer/Data Scientist	\$215	\$225
Construction Manager	\$200	\$210
Engineer/Data Scientist	\$185	\$195

Senior Analyst/Technician	\$185	\$195
Analyst/Technician	\$155	\$160
Program Support Specialist	\$115	\$120
Energy Intern	\$115	\$120
Project Administrator	\$90	\$95

Billing and Payment Terms

SAGE invoices monthly with terms of Net 30.

If schedule is extended as a result of CLIENT, regulatory, or Developer or other contractor/vendor actions or inactions, SAGE will consult with CLIENT on extending the budget as needed.

Reimbursable Expenses

Fees assume all deliverable materials for the project will be provided digitally. Printed copies of documents will be billed at cost plus 10%. For time and materials fee structure projects, all reasonable and ordinary expenses are reimbursable at cost plus 10%.

Travel Costs

When air travel is required, coach class airfare will be used for domestic air travel and business class airfare will be used for international travel. Personnel travel time from our office to project location is billable at the full hourly rate. Meals and lodging will be billed at cost. Vehicle driving mileage will be billed at the current IRS mileage rate.

Subconsultant Fees

Subconsultant fees will be passed through at cost plus 15%. Sage does not anticipate usage of subconsultants for this Task Order.

IN WITNESS WHEREOF, authorized representatives of both SAGE and CLIENT have executed this agreement as of the date set forth above.

SAGE	San Mateo Union High School District
Name: Tom Williard	Name:
Title: Vice President	Title:
Date:	Date: