



Austin Energy Weatherization Program presented to SMBR Weatherization Sub-Committee



Joseph Guerrero
Austin Energy
, Weatherization Program Coordinator
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Mission: Deliver clean, affordable, reliable energy
and excellent customer service.



Austin Energy Weatherization Program

Service to low-income customers enrolled in:

- Customer Assistance Program
- Free Weatherization Program
- Low Income Weatherization Rehabilitation Assistance Program (LWRAP)

All programs will be leveraged with:

- Texas Gas Services, and
- Austin Water Utility funding





Austin Energy Weatherization Program

Customer Assistance Program Weatherization

- Customers must qualify for CAP
- Priority is given to the highest energy users
- Priority will be assigned by CAP
- Two levels of service:
 - Tier 1 basic weatherization, and
 - Tier 2 Basic weatherization and repair or replacement of HVAC
- Eligible Homes will be leveraged with:
 - Texas Gas Services, and
 - Austin Water Utility funding





Austin Energy Weatherization Programs

Free Weatherization Program

- Customers must be at or Below 200% of Poverty Income level
- Priority is given to those on the waiting list (414 potential)
- Priority assigned based on date application received
- Two levels of service:
 - Tier 1 basic weatherization, and
 - Tier 2 Basic weatherization and repair or replacement of HVAC
- Eligible Homes will be leveraged with:
 - Texas Gas Services, and
 - Austin Water Utility funding





Austin Energy Weatherization Programs

Low-income Weatherization Rehabilitation Assistance Program (LWRAP)

- Customers must be at or below 200% of poverty income level
- Referred as dwelling beyond the scope of weatherization by AE
- Referred to AE by a member of the Housing Repair Coalition
- Service may include: basic weatherization, and repair or replacement of HVAC
- Eligible homes maybe leveraged with:
 - Texas Gas Services, and
 - Austin Water Utility funding





Austin Energy Weatherization Programs

Weatherization Funding Source

• Austin Energy EES	\$ 850,000
• Austin Energy CAP	\$1,000,000
• <u>Austin Water Utility</u>	<u>\$ 250,000</u>
Total	\$2,100,000





Austin Energy Weatherization Programs

Funds available for WX Contracting:

• Free weatherization w AWU	\$ 794,000
• CAP with AWU	\$1,075,500
• <i>Weatherization Subtotal</i>	<i>\$1,869,500</i>
• Final Inspections	\$ 105,500
• LWRAP with AWU	<u>\$ 125,000</u>
Total	\$2,100,000



Home Efficiency Assistance Program (HEAP)

Contract Management Department

Purpose

In continuing our effort of providing information to the MBE/WBE & Small Business Procurement Advisory Committee, the MBE/WBE Procurement Weatherization Committee and the Austin Trade Association on our development of the Procurement Process for the Austin Energy HEAP, CMD and SMBR is providing a final update.

Procurement Objective

Provide a contracting model that:

- Meets savings to investment ratio of 1 or greater defined by National Energy Audit Tool (NEAT)
- Maximizes the opportunity for participation of interested contractors of all sizes
- Manages the equity and parity concerns realized from lessons learned with ARRA contracts
- Facilitates the monitoring and tracking of assignments, contractor utilization, and work progress

Obtaining Objectives

- Meets savings to investment ratio of 1 or greater defined by National Energy Audit Tool (NEAT)
 - Utilization of RS Means table to base line price list
 - CMD and AE collaboratively developed the inclusion of a coefficient for all weatherization measures (1.24)
 - Developed price list for maximum allowable material and labor cost

Obtaining Objectives cont'd

- Maximizes the opportunity for participation of interested contractors of all sizes
 - Responders accepted into program was not pre-defined
 - Panel of Subject Matter Experts reviewed all Submittals
 - Submittals scored based on Evaluation Criteria
- Firms being recommended to Council for both Tier 1 and Tier 2 provided sufficient experience and met the requirements as outlined in the evaluation criteria.

Obtaining Objectives cont'd

- Manages the equity and parity concerns realized from lessons learned with ARRA contracts
 - CMD will oversee assignment process in coordination with AE

Obtaining Objectives cont'd

- Facilitates the monitoring and tracking of assignments, contractor utilization, and work progress
 - Developed comprehensive Assignment of work process
 - Ensure equity of work
 - Completion of Assignments
- Utilization of AE's HEAP database
 - Provide information on assignment order, permitting, work progress, inspections, completion, close-out and payment
 - Consultant Performance Evaluation Form (CPEF)
 - Administered at completion of each bundle assignment
 - Track and Report on CPEF information provided

No Goal Determination

- Tier 1 – Basic Weatherization
 - No Goals
 - Based on identified trade summary of weatherization and plumbing
 - The trades of main scope (Weatherization) and one subcontracting opportunity (Plumbing) did not lend itself to the establishment of goals
 - Subconsultant Forms will still be administered with each assignment
- Tier 2 – Basic Weatherization plus HVAC
 - No Goals
 - Based on identified trade summary of weatherization, HVAC and plumbing
 - The trades of main scope (Weatherization) and two subcontracting opportunity (HVAC and Plumbing) does not lend itself to the establishment of goals
 - Subconsultant Forms will still be administered with each assignment

No Goal Outcome

- **Tier 1 – Basic Weatherization**
 - 2 of 3 Contractors recommended for Council authorization elected to use subconsultants.
 - Valdez Remodeling & Weatherization, Austin, TX
 - Conservation Specialists of Austin, LLC, Austin, TX
- **Tier 2 – Basic Weatherization plus HVAC**
 - 1 of 6 Contractors recommended for Council action, elected to use subconsultants
 - McCullough Heating & Air Conditioning, Inc., Austin, TX

Evaluation Process – Comparable Experience

- Weatherization Program of similar size, scope and complexity
 - Air infiltration reduction
 - Attic insulation installation
 - Appliance evaluation including water saving options
 - Combustion appliance evaluation
- Installation of Carbon Monoxide detector and emission testing
- Repair or replacement of heating, ventilation, and cooling (HVAC) system (Tier 2)

Evaluation Process – Comparable Experience

- Technical Plan
 - Plan for accomplishing assignments
 - Work plan broken out by task
 - Steps to Finalize task
- Quality
 - Ability to perform work as directed in documents
 - Previous Quality Control Plans
- Sustainable Practices
 - Business practices and internal policies on sustainable practices
 - Practices encouraging identification of sustainable opportunities
- Local Business Presence
 - Award points based on location of firms within Austin Corporate City Limits

Evaluation Process – Reference Checks

- As a external representative of City reference checks performed
- Ability to Confirm weatherization projects
 - Timely completion of projects
 - Cooperative working relationships with prior entities
 - Compliance with prevailing wage provisions and history of violations
 - Compliance with other Contract terms
 - Prompt payment of subcontractors when applicable

Status Tier 1 – Basic Weatherization

- No Contact Period in Effect
- Issued: December 3, 2012
- Pre-Response: December 19, Council Chambers, 10:00 AM
- Submittals due on February 15, 2013
 - 5 Firms Responded
 - 3 Firms Recommended to Council
 - 1 Firm Non-Responsive

Status Tier 2 – Basic Weatherization plus HVAC

- No Contact Period in Effect
- Issued: December 3, 2012
- Pre-Response: December 19, Council Chambers, 1:30 PM
- Submittals due by February 14, 2013
 - 9 Firms Responded
 - 2 Firms Non-Responsive
 - 6 Firms Recommended

Next Steps

- Commission Review
 - WWW – Wednesday, April 10, 2013
 - EUC – Monday, April 15, 2013
 - RMC – Tuesday, April 16, 2013
- RCA – Council agenda Thursday, April 25, 2013
- Contract Kick-off Friday, April 26, 2013
- Contract Execution April/May 2013
- First Assignment May 2013



Evaluation Panel Final Rankings Contractors for Tier 1

1. American Youthworks Non M/WBE
2. Valdez Remodeling and Weatherization WBE
1 FH subcontractor for insulation
3. Conservation Specialist of Austin Non M/WBE
1 MH and 1 FW subcontractors for plumbing





Evaluation Panel Final Rankings Contractors Tier 2

1. Go Green Squads WBE
2. McCullough Heating and AC Non M/WBE
2 Non M/WBE subcontractors for electrical
3. Climate Mechanical Non M/WBE
4. Airtech Energy Systems Non M/WBE
5. City Conservation Non M/WBE
6. American Conservation & Air Non M/WBE





Austin Energy Weatherization Programs

Implementation Status Tier 1:

7 bundles comprised of 30 homes ready for assignment.

Value of work is \$37420

Implementation Status Tier 2:

15 bundles comprised of 67 homes ready for assignment. Value of work is \$206,125

Bundles contain AE WX units and CAP units

No LWRAP units ready for assignment





Austin Energy Weatherization Programs

Weatherization service process:

- Customer enrollment
- Assessment homes and develop work orders
- AE will bundle units based on ZIP Code and value
- AE will transmit bundles to Contract Management Department (CMD)
- CMD will assign bundles to contractors
- Contractor performs WX work
- CMD will verify all required SMBR documentation
- 3rd party will conduct final inspections
- CMD and AE will coordinate payment
- AE and CMD will maintain database(s) of all work assigned





Austin Energy Weatherization Programs

One Customer's Feedback

- “I was contacted by Darlene to inform me my application had been accepted and it was time for my appointment. I was pleasantly surprised by the professional and friendly way that Darlene answered my questions, shared my enthusiasm , and scheduled my appointment. ”
- “Jim and Everett arrived at my home on time and were great with my rescue dog who is sometimes very afraid of men. By the end of their inspection, my rescue dog was following them around wagging her tail. “
- “These two gentlemen explained what they were doing and inspected my entire home.”
- “Looking forward to having the weatherization done.”





Austin Energy Weatherization Programs

Questions?

Contact information:

Joseph (Joe) Guerrero

Weatherization Program Coordinator

Austin Energy

(512) 482-5394

Joe.guerrero@austinenergy.com

