

Commercial Packaged Roof-Tops

Phase 2: Develop Work Plan and Budget for Implementation in possible Phase 3

Version of 9 December 2005

Prepare for, and conduct, a series of meetings with interested regional parties to collaboratively develop a scope of work to develop program specifications and evaluation or verification protocols for improving the energy efficiency and performance of packaged rooftop HVAC systems (RTU) in the 5 to 20-ton size range. This is a continuation of initial work performed in 2004 (phase 1) that assessed the extent of operational, control and set-up problems of commercial-sector roof-top HVAC units. Upon completion of the work plan, a request for proposals may be issued to conduct and manage the work identified, if funding and participation can be secured.

1. Meeting 1 (Kick-Off)

a. Prepare for Meeting 1 (50 hours)

- i. Collect and collate existing information from around the country that will inform next steps or provide additional information with which to evaluate programmatic approach, savings, cost-effectiveness or other issues
 1. Market and delivery infrastructure research
 2. Technology development
 3. Proposed (2004) Alliance research action plan
 4. Service protocols
 5. Pilot & operational programs
 - a. Puget Sound Energy: Premium Service program
 - b. Avista Utilities: AirCarePlus program
 - c. Southern California Edison: AirCarePlus program
 - d. Eugene Water and Electric Board: Western Premium Economizer program
 - e. Other relevant RTU programs nationwide
 6. Programmatic and impact evaluations, including a summary of planned impact evaluations
 7. Summarize emerging best-practices for commercial RTUs
- ii. Develop a preliminary assessment of any needed research and evaluation
- iii. Develop a preliminary list of technical, market, programmatic and evaluative issues identified to date
- iv. Schedule Meeting 1 (10 hours)
 1. Contact interested participants and poll for meeting date
 2. Find a date and invite participants
 3. Prepare and send out a pre-meeting agenda & package of background info

b. Facilitate Meeting 1, prepare and distribute minutes (10 hours)

2. Meeting 2 (Discuss and develop potential work plan elements)

a. Prepare (30 hours)

- i. What research, if any, is needed to resolve issues identified to date

1. Technical
 2. Market
 3. Programmatic
 - ii. Estimate cost, scope and timing of research needed
 - iii. Discuss what is needed to develop specifications and evaluation and protocols for cost-effective regional or local programs
 - b. Facilitate Meeting 2 (10 hours)
3. Meeting 3 (Review draft scope of work)
 - a. Prepare draft scope of work based on Meetings 1 and 2 (60 hours)
 - i. Detailed scope of work and implementation plan. Describe the research needed in sufficient detail to craft a request for proposals (RFP) to perform the work
 - ii. Detailed project schedule
 - iii. Detailed project budget
 - iv. Key deliverables
 - v. Potential sources of funding
 - b. Facilitate Meeting 3, prepare and distribute minutes (10 hours)
4. Meeting 4 (Finalize Scope of Work)
 - a. Prepare (20 hours)
 - i. Incorporate viable comments and recommendations from Meeting 3
 - ii. Finalize work plan, schedule and budget
 - b. Facilitate Meeting 4, prepare and distribute minutes (10 hours)
5. Present to Regional Technical Forum (RTF) (8 hours)
6. Draft key elements of a request for proposals (RFP) for contractor to manage implementation of the work plan

Total roughly 200 hours or ~\$20K