

REQUEST FOR PROPOSALS

**Kern Energy Watch
Code Compliance Point of Sale Campaign**

**Kern Council of Governments
1401 19th Street, Suite 300
Bakersfield, CA 93301
(661) 861-2191**

Additional background information on this proposal can be found on the Kern COG website:

www.kerncog.org

Refer to tab:

“Working with Kern COG”

REQUEST FOR PROPOSALS

Kern Energy Watch Code Compliance Point of Sale Campaign

December 23, 2011

INTRODUCTION AND BACKGROUND

Kern Council of Governments (Kern COG) is soliciting proposals from marketing/advertising firms for the County of Kern and the communities of Arvin, Bakersfield, California City, Delano, Maricopa, McFarland, Shafter, Taft, Tehachapi, and Wasco. The objective is to create a Point of Sale Campaign that will educate community residents and local building professionals about the importance of obtaining certain permits for home improvement projects. Kern COG will hire a consultant to carry out the program of work, including all components of marketing the program effectively.

Background:

Kern COG coordinates the work of the Kern Energy Watch Partnership. The Kern Energy Watch Partnership is a collaboration between the County of Kern, Pacific Gas and Electric Company, Southern California Edison, Southern California Gas Company and the participating municipalities listed above to reduce energy use, better manage energy costs and promote sustainable communities. The Partnership works closely to support the enhancement and enforcement of energy codes.

The California Long-Term Energy Efficiency Strategic Plan (CEESP) is a process to assist local governments in becoming leaders in energy efficiency and the reduction of energy use as well as global warming emissions both in their own facilities and in their communities.

PREVIOUS COMPLETED CODE COMPLIANCE OR OUTREACH EFFORTS

- California Building Code Update Workshops for Planners, Inspectors, and Contractors
- May 2011 promoted as Building Safety Month, using materials obtained from the International Code Council
- Kern Energy Watch Partners' Take 5 for Energy Conservation Campaign (ongoing). Take 5 features posters, success stories, and 'Please Save Energy' stickers.
- Kern Energy Watch Partnership Brochures, Tabletop Display, Website: kernenergywatch.com.
- Kern Energy Watch Partnership participation in local community events, summits and conferences
- Kern Energy Watch Partners installed Plug Load Occupancy Sensors in their offices to eliminate the on-going demand for energy from office computers during the off-hours and down-periods during the work day.

PURPOSE AND OBJECTIVES OF THE PROPOSAL

The Kern Energy Watch Partnership is soliciting proposals from marketing/advertising firms to create a marketing plan for a Point of Sale Campaign that encompasses education about and promotion of home improvement permits

and energy savings programs. The final Scope of Work for the contract will be developed in cooperation with the selected consultant from the proposal submitted. It is expected that the project will begin in February 2012 and be completed by June 30, 2012.

SCOPE OF SERVICES

{Please see Attachment C for complete Scope of Work}

Task 1- Project Management

The consultant shall manage project tasks for the design, approval, production and placement of the campaign materials. Reporting tasks include the submission of written monthly progress reports with invoices. Coordination tasks include scheduling of meetings with the Kern Energy Watch project manager, upon her approval, submit program materials and paperwork to the utility partner Program Managers for corporate approval, and work with point of sale locations to secure partnerships in the participating communities.

COORDINATION

Kern COG is solely responsible and will be the sole point of contact for all contractual matters related to this project. The consultant shall take direction only from Kern COG and shall regularly inform Kern COG of project progress, any outstanding issues, and all project related matters.

Participating entities may also offer suggestions and/or recommendations regarding the project or elements of the project. While Kern COG enjoys a close relationship with and has considerable confidence in the capabilities of these other parties, the consultant shall not act on any suggestions, solicited or unsolicited, without obtaining specific direction from Kern COG. Unless otherwise directed, all oral and written communication shall be directed only to Kern COG. Any distribution of project related communication and information will be at the discretion of Kern COG.

The selected consultant will best demonstrate the ability to deliver quality work on schedule and in a cost-effective manner, consistent with the tasks and deliverables in this RFP. Due to acquiring proper approvals from the utility partners, the consultant must be cognizant of deadlines and have products available for review and approval several days prior to a specific deadline.

All materials prepared or collected under this contract will become the property of Kern COG.

SCHEDULE

Activity	Date
Request for Proposals Released	December 23, 2011 (Friday)
Last Day to Submit Written Questions	January 11, 2012 (Wednesday)
Deadline for Proposal Submittal	January 24, 2012 (Tuesday) 5:00 pm PDT
Selection Process/Interviews Set	January 25, 2012 (Wednesday)
Final Cost Proposal & Scope Due	February 6, 2012 (Monday)
Kern COG Board Approval	February 16, 2012 (Thursday)
Notice to Proceed	February 17, 2012 (Friday)

These dates are subject to change. Interviews may be held, if deemed necessary. Schedule updates will be posted on the Kern COG website: www.kerncog.org refer to tab: "Working with Kern COG."

PROPOSAL REQUIREMENTS

Clarity and conciseness are essential and will be considered in assessing the proposer's capabilities. Proposal content and completeness are important. Clarity and succinctness are essential and will be considered in assessing the consultant's capabilities. A review committee will screen all consultant proposals submitted in response to this request.

One reproducible, three copies, and one electronic copy of the proposal must be received at Kern Council of Governments by January 24, 2012, 5:00 pm PDT. Proposals not received by that date and time will not be considered.

1. Provide contact and email address

Proposers shall provide a contact person and email address to be used in responding to questions and for notification of updated RFP information.

2. Proposal Organization

In order to simplify the review process and maximize the degree of comparative analysis, the proposal should be organized in the following manner:

A. Transmittal letter

The transmittal letter should be signed by an official authorized to bind the consultant contractually and will contain a statement to the effect that the proposal is a firm offer for 90 days. The letter accompanying the proposal will also provide the following: name, title, address, and telephone number of individuals with the authority to negotiate and contractually bind the company. The transmittal shall contain a statement of understanding of the RFP.

B. Table of Contents

Include identification of the material by section and page number.

C. Overview

This section should clearly convey the consultant understands of the nature of the work and the general approach to be taken to its performance. This section should include, but not be limited to, a discussion of the purpose of the project, the organization of the project effort, and a summary of the proposed approach.

D. Detailed Work Plan

The prospective contractor shall provide a schedule for completing the project, within the schedule set forth in this RFP. The schedule shall identify the major tasks to be undertaken and the time frame for each task.

This section should include the following components:

i. Task Description

Include a full description of each step to be followed in carrying out the project. The work description should be presented in sufficient detail (tasks, subtasks, etc.) to show a clear understanding of the work and the proposed approach.

ii. Deliverables

Provide a description of the format, content, and level of detail that can be expected for each deliverable.

iii. Schedule

A schedule showing the expected sequence of tasks, subtasks, etc. should accompany the work description. Important milestones should be identified on the schedule.

E. Management Approach

This section should describe the firm's management approach. If the proposal is a team effort, the distribution of work among the team members should be indicated. Describe the organization of the management, the structure of the work assignments, and any specific features of the management approach that require special explanation. Designate by name the project manager to be employed who will oversee the project. No substitutions of the identified project manager will be allowed without prior approval of Kern Energy Watch Project Manager.

Include the name and qualifications of all professional personnel to be employed, a resume for each professional (included in an appendix), a statement indicating how many hours each professional will be assigned to the contract and what tasks each professional will perform. Staffing assignments should be specific enough to demonstrate understanding of skills required and commitment of proper resources. The selected consultant will not substitute members of the project team without prior approval of the Kern Energy Watch Project Manager.

F. Budget and Billing Format

Under various circumstances the budget could be subject to pre-audit and/or the final cost subject to post-audit by Kern COG, Caltrans division of Audits and Investigations, Kern Economic Development Corporation, PG&E, Southern California Edison, Southern California Gas Company, or the California Public Utilities Commission. Whether individual items of cost will be allowed will be determined by 48 CFR, Federal Acquisition Regulations System, Chapter 1, Part 31 et. Seq. The Contractor will also be required to comply with 49 CFR, Part 18, and Uniform Administrative Requirement for Grants and Cooperative Agreements to State and Local Governments and the Allowable Costs that are the only costs that can be claimed for ratepayer-funded energy efficiency work per Attachment D. The contractor should have an accounting system capable of segregating direct cost from indirect costs per the above cited regulations. The Contractor and Subcontractors will comply with all applicable laws and maintain books, documents, papers, and accounting records for a period of three years from the date of the final payment.

i. Method of Payment

The cost proposal must be prepared consistent with the method of services provided under this agreement and will be reimbursed, by one of, or a combination of the methods below. The proposer must clearly state the method used to prepare the cost proposal.

- Lump Sum payment
- Actual Cost plus Fixed Fee
- Specific Rates of Compensation

Lump Sum proposals will be paid per milestone of completed work or at the end of the contract upon acceptance of the final product. Actual Cost plus Fixed Fee agreements shall be billed at actual payroll costs and include a fixed fee for profit. In agreements reimbursed by Specific Rates of Compensation, billing rates containing a component for profit will be negotiated that will not change during the term of the contract.

ii. Project Budget

A budget of \$ 7,500 has been established for this project, all-inclusive.

iii. Task Budget

A schedule of estimated costs to complete each task should add down to the total cost of the project (see Attachment B). The task budget should include a subsidiary breakdown by task of hours and billing rate charges. To ensure a full understanding of the resources committed to the project the schedule should clearly indicate the amount of hours key personnel will be used in each task.

iv. Budget and Cost Breakdown

The prospective consultant will prepare a detailed cost breakdown for the work to be performed during the project regardless of the method of reimbursement chosen. This will include all tasks required to complete the project including final reports and presentation.

- a. Direct Labor Costs** – A schedule of billing rates and hours worked by employee or category of employee is required of the prime contractor and all subcontractors. Billing rates shall be based on actual pay rates and should cover all costs associated with the employee (salary, benefits, and anticipated cost of living and/or merit increases during the term of the contract). Depending on the individual cost structure, overhead may be applied as a component of the billing rate or applied separately. The proposer should be prepared to validate billing rates with payroll registers, wage agreements, or other payroll documentation.
- b. Overhead Rates** – The overhead rate should include all indirect cost not readily assignable to cost objectives specifically benefited. Typically an overhead rate is calculated on a company or division wide basis by segregating expenses into direct cost and indirect cost categories and then dividing the indirect costs by a direct cost base such as direct labor to arrive at an overhead rate. The overhead rate

is then applied on a contract by contract basis to recapture the indirect costs that are not chargeable directly to a final objective such as general and administrative, facilities, equipment, supplies, accounting, maintenance, materials, etc. Some cost structures may be broken into various overhead rates that are applied to different bases. The proposer should be prepared to provide supporting documentation such as prior agreements with government agencies or audits of prior year activities to validate overhead rates structures.

- c. **Direct Cost** – Direct costs are those incremental costs that can be identified specifically with a particular final cost objective. Although in some instances direct cost and indirect cost may include similar categories, incremental direct cost attributable to final objectives must be separated and not included in the overhead calculation. All direct cost specifically attributed to the project and not included in the billing rates must be itemized by budget category to be eligible for reimbursement. Once contractually authorized, direct cost budgets may not be substituted without prior written consent of COFCG.
- d. **Sub-Consultant Fees** – Sub-Consultants must provide the same cost data detail as the prime contractor (see Table I and Table 2).
- e. **Fixed Fee** – A fixed fee is calculated as a basis of total direct and indirect costs. The State of California allows a 10% maximum fee.

G. Insurance Requirements

Without limiting Kern COG's right to obtain indemnification from the consultant or any third parties, the consultant, at its sole expense, shall maintain in full force and affect the following insurance policies throughout the term of the contract:

1. Comprehensive general liability insurance with coverage of not less than \$2,000,000 combined single limit per occurrence for bodily injury, personal injury, and property damage. Comprehensive general liability insurance policies shall name Kern COG, its officers, agents, and employees, individually and collectively, as additional insured, but only insofar as the operations under the terms of the contract are concerned. Such coverage for additional insured shall apply as primary insurance or self-insurance and any other insurance, maintained by Kern COG, its officers, agents, and employees, shall be given excess only and not contributing with insurance provided under the consultant's policies herein.
2. Comprehensive automobile liability insurance with limits for bodily injury of not less than \$25,000 per person, \$250,000 per accident, and for property damages of not less than \$50,000, or such coverage with a combined single limit of \$250,000.
3. Professional liability insurance of at least \$1,000,000.
4. Worker's compensation insurance as required by law.

This insurance shall not be canceled or changed without a minimum of thirty (30) days advance written notice given to Kern COG. The consultant shall provide certification of said insurance to Kern COG within twenty-one (21)

days of the date of the execution of the contract. Such certification shall show, to Kern COG's satisfaction, that such insurance coverages have been obtained and are in full force; that Kern COG, its officers, agents, and employees will not be responsible for any premiums on the policies; that as and if required such insurance names Kern COG, its officers agents, and employees individually and collectively as additional insured (comprehensive and general liability only), but only insofar as the operations under the contract are concerned; that such coverage for additional insured shall apply as primary insurance and any other insurance, or self-insurance, maintained by Kern COG, its officers, agents, and employees, shall be excess only and not contributing with insurance provided under the consultant's policies herein; and that this insurance shall not be canceled or changed without a minimum of thirty (days) advance, written notice given to Kern COG.

In the event the consultant fails to keep in effect at all times insurance coverage as herein provided, Kern COG may, in addition to other remedies it may have, suspend or terminate the contract upon the occurrence of such event.

H. Disadvantaged Business Enterprise (DBE) Certification

It is the policy of Kern COG, the California State Department of Transportation and the U.S. Department of Transportation, that Disadvantaged Business Enterprises (DBEs), as defined in 49 CFR Part 23, shall have the maximum opportunity to participate in the performance of contracts financed in whole or in part with local, state or federal funds.

Consultant shall ensure that DBEs, as defined in 49 CFR Part 23, have the maximum opportunity to participate in the performance of this contract. In this regard, Consultant shall take all necessary and reasonable steps to ensure that DBEs have the maximum opportunity to compete for and to perform subcontracts arising out of this contract. Failure to carry out the requirements of this paragraph shall constitute a breach of contract and may result in termination of this contract or such other remedy Kern COG may deem appropriate.

During the period of this contract, the Consultant shall maintain records of all applicable subcontracts advertised and entered into germane to this contract, documenting the opportunity given to DBEs to participate in this contract, actual DBE participation, and records of materials purchased from DBE suppliers. Such documentation shall show the name and business address of each DBE subcontractor or vendor, and the total dollar amount actually paid each DBE subcontractor or vendor. Upon completion of the contract, a summary of these records shall be prepared and certified correct by the Consultant, and shall be furnished to Kern COG.

I. Conflicts of Interest

The prospective contractor shall disclose any financial, business, or other relationship with Kern COG, or other entities such as Southern California Edison involved in this project, that may have an outcome on the selection.

J. SUMMARY OF QUALIFICATIONS

Proposals shall include a summary of the firm's qualifications, including resumes of assigned staff.

K. Signing of Proposal/Authorization to Negotiate

The proposal shall be signed by an official authorized to bind the proposer and shall contain a statement to the effect that the proposal is a firm offer for a 90-day period. The proposal shall also provide the following: name, title, address, and telephone number of individuals with authority to negotiate and contractually bind the company.

L. Attachments

Attachments to be included at the end of the proposal are as follows (as attached herein):

- Attachment A: Title VI Assurance
- Attachment B: Budget and Cost Breakdown
- Attachment C: Detailed Scope of Work
- Attachment D: Allowable Costs

PROPOSAL SUBMITTAL

1. Preparation of Proposal

The proposal shall be formatted in accordance with the requirements specified on Page 4 in the Section titled "Proposal Requirements" of this RFP. Proposal forms shall be executed by an authorized signatory as described herein. All proposals shall be prepared by and at the expense of the proposer.

2. Examination of RFP Document

Robert R. Ball
Executive Director
Kern Council of Governments
1401 19th Street, Suite 300
Bakersfield, CA 93301

All proposals will remain firm for a period of ninety (90) days following the final date for submission. All proposals will become the sole property of Kern COG and a part of its official records without obligation on the part of Kern COG.

This RFP is not to be construed as a contract of commitment on the part of Kern COG. Kern COG reserves the right to reject all proposals, to seek additional information from each proposer, or to issue another RFP, if deemed appropriate.

3. Modification or Withdrawal of Proposals

Any proposal received before the date and time specified above for receipt of proposals may be withdrawn or modified by written request of the proposer. To be considered, however, the modified proposal must be received by the proposal due date and time specified previously.

All verbal modifications to these conditions or provisions are ineffective for proposal evaluation purposes. Only written changes issued by proposers to Kern COG are authorized and binding.

4. Rejection of Proposals

Failure to meet the requirements for the request for proposals will be cause for rejection of the proposal. Kern COG may reject any proposal if it is conditional, incomplete, or contains irregularities or inordinately high cost rates. Kern COG may waive an immaterial deviation in a proposal. Waiver of an immaterial deviation shall in no way modify the Request for Proposals document or excuse the proposer from full compliance with the contract requirements if the proposer is awarded the contract.

CONSULTANT SELECTION

The actual award of the contract will be by the Kern COG Board of Directors at the February 16, 2012 regularly scheduled meeting. Proposal opening does not constitute the awarding of a contract. The contract is not in force until it is awarded by Kern COG and executed by the Kern COG designees. A subcommittee of Kern Energy Watch may evaluate, interview and recommend the selected consultant to the Kern COG Board of Directors for approval.

PROPOSER OBJECTIONS

A proposer may object to any of the terms or provisions set forth in the RFP's Scope of Work or to the selection of a particular proposer on the grounds that Kern COG's procedures, the provisions of this RFP, or applicable provisions of federal, state, or local law have been violated or inaccurately or inappropriately applied by submitting Kern COG a written explanation of the basis for the objection. Deadlines for submittal of objections are:

- No later than two weeks prior to the date proposals are due, for objections to RFP provisions; or
- Within three working days after the date on which contract award is authorized or the date the proposer is notified that it was not selected, whichever is later, for objections to proposer selection.

If the proposer does not state any objections, Kern COG will assume that the RFP Scope of Work is acceptable to the proposer and have been fully factored into its response. If the proposer intends to negotiate with Kern COG concerning any part of the Scope of Work the proposer finds objectionable, the proposer must provide specific language in its response that will address or cure its objections.

KERN COG RIGHTS

Kern COG may investigate the qualifications of any proposer under consideration, require confirmation of information furnished by a proposer, and require additional evidence of qualifications to perform the work described in this RFP.

Kern COG reserves the right to:

- Reject any or all of the proposals if it deems such action is in the public interest;

- Issue subsequent Requests for Proposals;
- Cancel the entire Request for Proposal;
- Remedy technical errors in the Request for Proposals process;
- Appoint an evaluation committee to review the proposals and make the selection based upon the written proposal only;
- Seek the assistance of outside technical experts in proposal evaluation;
- Approve or disapprove the use of particular subcontractors;
- Establish a short list of proposers eligible for interviews after review of written proposals;
- Negotiate with some, all, or none of the respondents to the RFP;
- Solicit best and final offers from all or some of the proposers;
- Award a contract to one or more proposers;
- Accept an offer other than the lowest price offer; and
- Waive informalities and irregularities in proposals and the bid process.

This RFP does not commit Kern COG to enter into a contract, nor does it obligate Kern COG to pay for any costs incurred in preparation and submission of proposals or in anticipation of a contract. All proposals will be subject to public disclosure as required by the California Public Records Act.

Kern COG reserves the right to investigate the qualifications of all firms under consideration to confirm any part of the information furnished by a proposer, or to require other evidence of managerial, financial, or other capabilities which are considered necessary for the successful performance of the contract.

RFP QUESTIONS

All questions on the RFP should be submitted in writing via email to:

lurata@kerncog.org

Linda Urata, Project Manager
 Kern Council of Governments
 1401 19th Street, Suite 300
 Bakersfield, CA 93301

A sample of Kern COG's standard contract can be found at <http://kerncog.org/cms/working-with-kern-cog/request-for-proposals>. All questions shall be submitted in writing no later than January 11, 2012. Questions will be answered and posted at <http://www.kerncog.org> refer to tab: "Working with Kern COG."

Attachment A

TITLE VI ASSURANCE

Kern Council of Governments, in accordance with Title VI of the Civil Rights Act of 1964, 78 Stat. 252, 42 U.S.C. 2000d-4 and Title 49, Code of Federal Regulations, department of Transportation, Subtitle A, Office of the Secretary, Part 21 Nondiscrimination in Federally Assisted Programs of the Department of Transportation issued pursuant to such Act, hereby notifies all bidders that it will affirmatively insure that in any contract entered into pursuant to this advertisement, minority businesses enterprises will be afforded full opportunity to submit bids in response to this invitation and will not be discriminated against on the grounds of race, color, or nation origin in consideration of an award.

Attachment B

BUDGET AND COST SCHEDULE TEMPLATE

TASKS	<i>(Name)</i>		<i>(Name)</i>		<i>(Name)</i>		Total Task Hours	Total Task Cost
	<i>(Role)</i>		<i>(Role)</i>		<i>(Role)</i>			
	<i>(Hourly Billing Rate)</i>		<i>(Hourly Billing Rate)</i>		<i>(Hourly Billing Rate)</i>			
Task	Hours	Cost	Hours	Cost	Hours	Cost		
Tasks Subtotal								

Direct Costs

Direct Cost		Amount
Direct Costs Subtotal		

Subconsultants

Subconsultants		Total Cost
Subconsultants Subtotal		

PROPOSAL GRAND TOTAL		
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ATTACHMENT C

Scope of Work Kern Energy Watch Code Compliance Point of Sale Campaign

The Kern Energy Watch subcommittee California Long-Term Energy Efficiency Strategic Plan (CEESP) Goal 2 Workgroup desires to conduct a Point of Sale (POS) campaign to improve energy efficiency throughout the community by improving code compliance. The primary goal of the POS campaign is to inform the community of the importance of obtaining building permits so that appliances and home structures are installed correctly and efficiently. The campaign must result in greater community awareness for energy efficiency, health and safety, and online permit services. Kern Energy Watch and the selected proposer may revise the scope of work if determined necessary. The budget for this project is seven thousand five hundred dollars (\$7,500).

California Long-Term Energy Efficiency Strategic Plan Goal 2

Strategic Plan Goal 2: Strong support from local governments for energy code compliance enforcement.

- ◆ The current rate of non-compliance with codes and standards is halved by 2012, halved again by 2016, and there is full compliance by 2020.

Proposers that successfully demonstrate their ability to also meet the desirable features listed below will be ranked higher in the evaluation.

The successful candidate will provide a POS campaign encouraging consumers to obtain building permits when replacing appliances or doing construction projects. The POS campaign should encompass:

- ✓ Specific target areas for permits, specifically:
 - water heaters
 - electrical work
 - Heating Ventilation and Air Conditioning (HVAC) systems
 - any appliance that is “hardwired”
- ✓ Marketing through retailers and wholesalers in each community to public, contractors, and retail employees.
- ✓ Permit information such as:
 - what services require a permit
 - the importance of the permit
 - how to obtain a permit
 - where to acquire a permit, especially online services where available
- ✓ Promotional ideas to increase awareness for contractors and consumers alike.
- ✓ Education services regarding energy efficiency and safety issues for residents.
- ✓ Evaluation of the campaign by tracking the number of permits issued for each target community.

Since Kern Energy Watch is a partnership with not only the local utility companies, but also the county of Kern, and the cities of Arvin, Bakersfield, California City, Delano, Maricopa, McFarland, Taft, Tehachapi, Shafter, and Wasco, this POS campaign will need to be flexible to meet the needs of each market. Printed

materials must contain an official funding statement which will be provided by Kern COG to the successful bidder during the contract process.

The following is a suggested schedule for the Code Compliance POS Campaign.

Campaign Description/Details	February 22, 2012
Draft Materials to send to Program Mgrs.	March 7, 2012
Campaign Runs	May 1, 2012 to May 31, 2012
Monthly report of tracked	Monthly with Invoices
Performance Indicators Requirements	
Final Report	Depends on length of campaign, no later than October 15, 2012

Task 1: Project Management

The consultant shall manage project tasks, submit written monthly progress reports with invoices, and schedule meetings with the Kern COG project manager. The monthly progress report shall document specific accomplishments of each task, identify percent completion by task, difficulties encountered, and any adjustments recommended in the project schedule.

The consultant shall maintain all electronic and hard copy files pertaining to the project and shall provide Kern COG with an electronic version of all materials developed under this agreement. This shall include a PDF version of the final report. The consultant and sub-consultants shall maintain consistent quality control procedures.

Task 2: Design and obtain approval on all marketing materials

Materials will be reviewed by the Kern Energy Watch Coordinator and may also be reviewed by CEESP Goal 2 Workgroup Members and Kern COG staff.

Please note that the utility partners (PG&E, Southern California Edison, and Southern California Gas Company) may have specific co-marketing paperwork to be completed. The consultant will provide all necessary documentation and photo release paperwork in order to complete the paperwork for submission to the utility Program Managers. Please allow time (up to three weeks) for the approval process.

Task 3: Identify, contact and confirm Point of Sale partners in each community

Task 4: Produce and Place the campaign materials

Kern COG must receive electronic files of all materials for the POS campaign.

Task 5: Provide a campaign summary report

ATTACHMENT D

Allowable Costs Kern Energy Watch Code Compliance Point of Sale Campaign

Per Kern COG's agreement with Southern California Edison the allowable costs are as follows.

Allowable Costs Table	
<p>The cost items listed on the Allowable Costs sheet are the only costs that can be claimed for ratepayer- funded energy efficiency work. The costs reported should be only for costs actually expended. Any financial commitments are to be categorized as commitments. If the reporting entity does not have a cost as listed on the cost reporting sheet, then no cost is to be reported for that item. These Allowable Cost elements are to be used whenever costs are invoiced or reported to the CPM. If there is a desire to include additional Allowable Cost elements, the CPM should be contacted in order to seek approval from the CPUC.</p>	
3/30/2006	
Cost Categories	Allowable Costs
Administrative Cost Category	
	Managerial and Clerical Labor
	Implementer Labor – Clerical
	Implementer Labor - Program Design
	Implementer Labor - Program Development
	Implementer Labor - Program Planning
	Implementer Labor - Program/Project Management
	Implementer Labor - Staff Management
	Implementer Labor - Staff Supervision
	Human Resource Support and Development
	Implementer Labor- Human Resources
	Implementer Labor - Staff Development and Training
	Implementer Benefits - Administrative Labor
	Implementer Benefits - Direct Implementation Labor
	Implementer Benefits - Marketing/Advertising/Outreach Labor
	Implementer Payroll Tax - Administrative Labor
	Implementer Payroll Tax - Direct

Allowable Costs Table

The cost items listed on the Allowable Costs sheet are the only costs that can be claimed for ratepayer- funded energy efficiency work. The costs reported should be only for costs actually expended. Any financial commitments are to be categorized as commitments. If the reporting entity does not have a cost as listed on the cost reporting sheet, then no cost is to be reported for that item. These Allowable Cost elements are to be used whenever costs are invoiced or reported to the CPM. If there is a desire to include additional Allowable Cost elements, the CPM should be contacted in order to seek approval from the CPUC.

	3/30/2006
Cost Categories	Allowable Costs
	Implementation Labor
	Implementer Payroll Tax - Marketing/Advertising/Outreach Labor
	Implementer Pension - Administrative Labor
	Implementer Pension - Direct Implementation Labor
	Implementer Pension - Marketing/Advertising/Outreach Labor
	Travel and Conference Fees
	Implementer - Conference Fees
	Implementer Labor - Conference Attendance
	Implementer - Travel – Airfare
	Implementer - Travel – Lodging
	Implementer - Travel – Meals
	Implementer - Travel – Mileage
	Implementer - Travel – Parking
	Implementer - Travel - Per Diem for Misc. Expenses
	Overhead (General and Administrative) - Labor and Materials
	Implementer Equipment Communications
	Implementer Equipment Computing
	Implementer Equipment Document Reproduction
	Implementer Equipment General Office
	Implementer Equipment Transportation
	Implementer Food Service
	Implementer Office Supplies
	Implementer Postage
	Implementer Labor - Accounting Support
	Implementer Labor - Accounts Payable
	Implementer Labor - Accounts Receivable
	Implementer Labor - Facilities Maintenance
	Implementer Labor - Materials Management

Allowable Costs Table

The cost items listed on the Allowable Costs sheet are the only costs that can be claimed for ratepayer- funded energy efficiency work. The costs reported should be only for costs actually expended. Any financial commitments are to be categorized as commitments. If the reporting entity does not have a cost as listed on the cost reporting sheet, then no cost is to be reported for that item. These Allowable Cost elements are to be used whenever costs are invoiced or reported to the CPM. If there is a desire to include additional Allowable Cost elements, the CPM should be contacted in order to seek approval from the CPUC.

	3/30/2006
Cost Categories	Allowable Costs
	Implementer Labor - Customer Equipment Repair and Servicing
	Implementer Labor - Customer Equipment Repair and Servicing
	Direct Implementation Hardware and Materials
	Implementer - Direct Implementation Literature
	Implementer - Education Materials
	Implementer - Energy Measurement Tools
	Implementer - Installation Hardware
	Implementer - Audit Applications and Forms
	Rebate Processing and Inspection - Labor and Materials
	Implementer Labor - Field Verification
	Implementer Labor - Rebate Processing
	Implementer - Rebate Applications