



## Attachment A: Tasks

The Consultant shall provide the services and deliverables set forth in this **Attachment A**. The Consultant shall provide all services and deliverables required by this **Attachment A** to the satisfaction of the City's contract manager.

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**General Description of Project for which Consultant will Provide Services:** Consultant shall provide Owner's Advisor services to the City of San Jose ("CSJ") necessary to develop construction standards for San Jose Electric Service ("Project") to the Downtown West Mixed-Use Development ("Development"). The key role of an Owner's Advisor is to support the Project by representing CSJ during design, development, and construction to confirm that the work is done well and within legal standards. Owner's Advisor is not involved in the design and construction project directly, but rather acts as an advocate for the owner to apply due diligence. This will allow the City to cooperate with the Development developer ("Developer") with the preliminary engineering, final design, and construction of electric infrastructure that will serve the Development.

Consultant shall perform the Project under the direction of the City Director of Community Energy or Designee ("Director"). Consultant will have significant interaction, collaboration, and coordination with City staff from the Community Energy Department ("CED"), Public Works ("PW") and the Office of Economic Development ("OED") (collectively, "City staff"); the Developer; Pacific Gas and Electric Company ("PG&E"), and others as needed to complete the Project.

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**Task No. 1:** Consultant will perform the necessary evaluations, studies and analysis needed to develop a scope/schedule/budget to prepare construction standards for the Project. Developing construction standards is not part of the scope for Task No. 1.

**A. Services:** In collaboration with City staff and Developer, Consultant shall prepare engineering reports that compile and analyze information regarding the Developer's proposed electrical distribution system, energy generation and storage solutions, and interconnection configurations with enough specificity to allow benchmarking as described below:

1. The Consultant will evaluate the physical ability of the Developer's proposed system to function as intended in normal operation with as much of the project load as practical being dispatchable out of California Independent System Operator ("CAISO") Availability Assessment Hours and report if there is sufficient metering and telemetry to allow participation in CAISO energy/ancillary service markets as a Non-Generation Resource.
  - i. Determine the type of generating resources, the quantity of energy produced, and the ability to be dispatched out of CAISO Availability Assessment Hours ("AAH"). Standard RA AAH are the five (5) hours from 4PM to 9PM. The Flexible AAH differ and vary depending on the Flexible Category (1, 2, or 3) and the month.
  - ii. Research CAISO rules on Metered Subsystems and generating resources.
  - iii. Determine if all the equipment and operations meet the CAISO definition of a Non-Generating Resource.
  - iv. Define the CAISO metering and telemetry requirements for the project.
  - v. Work concurrently with Developer on the equipment and operations.
  - vi. Determine if relay schemes are used in system operations as part of normal operations and islanded operations.
2. The Consultant will evaluate the conformance of Developer's design to existing Institute of Electrical and Electronics Engineers ("IEEE") and Underwriters Laboratory ("UL") plus other relevant standards for equipment with commercially available warranties and performance

guarantees.

- i. Validate that Developer design, equipment, and installation methodology meets these requirements.
    - ii. Warranties for workmanship covering the installation of the equipment needs to be included – typically 10 years.
  3. The Consultant will identify the level of load capable of islanded operation, including the rated capacity of islanded operation as a percentage of maximum load.
    - i. Define island mode operation.
      - a) Determine which loads will be/can be reduced or turned off and what loads are “critical”.
      - b) Identify locations of “critical” loads within the Development.
      - c) Provide clarity on process for disconnecting and reconnecting to the grid.
      - d) Identify potential syncing issues at reconnection and possible mitigation.
    - ii. Document Generation capabilities.
      - a) Document maximum density of renewable energy resources, solar, wind, etc., and their locations within the Development.
      - b) Develop a generation profile, peak demand, minimum load, and the time at which they occur.
      - c) Backup diesel generation is the only other backup generation source. Define operating profile in islanded mode to meet safety requirements for the Project
    - iii. Document base case energy storage and load shifting capabilities plus opportunities to expand.
      - a) Thermal, from ground source heat pumps.
      - b) Thermal resources for heating and cooling and locations.
      - c) Battery storage capabilities and locations.
      - d) Electric Vehicle Charging Stations
  4. Consultant will Benchmark Developer’s system design against PG&E “Greenbook” construction standards as well as other relevant existing or evolving utility standards for high Distributed Energy Resources (“DER”) two-way grids such as Hawaii Electric Company (HECO), Los Angeles Department of Water and Power (“LADWP”), Consolidated Edison (“ConEd”) and other relevant utility standards at Consultant discretion.
  5. Consultant will Research and document evolving, new, or proposed IEEE, UL and other standards and evaluate Developer’s design against emerging trends.
    - i. Ensure all equipment that are inverter-based designs (e.g., Solar, Wind, Battery, Fuel Cell, etc.) meets the California Energy Commission (“CEC”) requirements. All equipment in this category will need to be on the approved CEC equipment list meeting the most recent standards.
    - ii. Confirm that Developer understands that the equipment must be on the approved CEC equipment list.

CSJ personnel monitoring and overseeing this Task will include multiple City departments with various priorities/needs. CED will be the lead for this service order, but consultant must also communicate and coordinate with PW and the OED as it relates to the design of district

systems and preparation for processing of permit packages in early 2023.

**B. Deliverable:** A written report containing detailed scope and schedule for Standards Development, review of third-party documents, meeting minutes, and any other information gathered from the tasks above.

**C. Completion Time:** Consultant must complete the services and deliverable for this task in accordance with whichever one of the following time is marked:

- On or before the following date: August 31, 2022
- On or before TBD Business Days from the execution of this service order.

## Attachment B: Terms and Conditions

1. **City's Contract Manager:** The City's contract manager for this Approved Service Order is:

Name: Jim Caldwell	Phone No.: (408) 535-4880
Department: Community Energy	E-mail: Jim.Caldwell@sanjoseca.gov
Address: 200 E. Santa Clara St., San José, CA 95113	

2. **Consultant's Contract Manager and Other Staffing:** Identified below are the following: (a) the Consultant's contract manager for this Approved Service Order, and (b) the Consultant(s) and/or employee(s) of the Consultant who will be principally responsible for providing the services and deliverables. *If an individual identified below does not have a current Form 700 on file with the City Clerk for a separate agreement with the City, and is required to file a Form 700, the Consultant must comply with the requirements of Subsection 17.2 of the Master Agreement, entitled "Filing Form 700."*

		<u>Required to File Form 700?</u>		
		Yes Already Filed (Date Filed)	Yes Need to File	No
<b><u>Consultant's Contract Manager</u></b>				
Name: Kenneth Barrentine	Phone No.: 916-817-3946			<u>X</u>
Address: 2330 East Bidwell St, Suite 120, Folsom CA 95630	E-mail: Ken.Barrentine@advisian.com			
<b><u>Other Staffing</u></b>				
<u>Name:</u>	<u>Assignment:</u>	<u>Email</u>		
1. Benjamin Hwang	Task 1	Benjamin.hwang@advisian.com		X
2. Kenneth Barrentine	Task 1	Ken.Barrentine@advisian.com		X
3. Paul Sarnsen	Task 1	Paul.sarnsen@advisian.com		X

**3. Subconsultants:** Whichever of the following is marked applies to this Approved Service Order:

- The Consultant can **not** use any subconsultants.
- The Consultant can use the following subconsultants to assist in providing the required services and deliverables:

<u>Subconsultant's Name</u>	<u>Area of Work</u>
1.	
2.	
3.	

**4. Reimbursable Expenses:** If the Compensation Table set forth in **Attachment C** of this Approved Service Order states that the City will reimburse the Consultant for expenses, then only the expenses identified in Subsection 10.5.3 of the Master Agreement are Reimbursable Expenses unless the following box is marked and additional reimbursable expenses are set forth:

- In addition to the expenses identified in Subsection 10.5.3 of the Master Agreement, the following expenses are Reimbursable Expenses:

<u>Additional Reimbursable Expense(s)</u>	<u>Mark-up</u>
1. _____	_____
2. _____	_____
3. _____	_____

**Notwithstanding the foregoing, any additional reimbursable expense(s) set forth in the above table will be disregarded if the Compensation Table states that the City will *not* reimburse the Consultant for any expenses.**

**5. Contract Management:**

- a) Consultant and the City will meet and confer in the first week of each month to review previous month's work, agree on a plan for current month's work including a budgetary estimate of expenses.
- b) Invoice for previous month's work shall be provided within 10 business days of meeting described above and shall include a written explanation of variance from budgetary estimate.

## Attachment C: Compensation Table

The City will compensate the Consultant for providing the services and deliverables set forth in **Attachment A** in accordance with this Compensation Table. This Compensation Table is subject to the terms and conditions set forth in the Master Agreement, including without limitation Section 10 of the Master Agreement.

Part 1 – Compensation for Services and Deliverables			
Column 1	Column 2	Column 3	Column 4
<b>Task Nos. from Attachment A</b>	<b>Basis of Compensation</b>	<b>Invoice Period</b>	<b>Compensation</b>
1	<input checked="" type="checkbox"/> Time & Materials <input type="checkbox"/> Fixed Fee	<input checked="" type="checkbox"/> Monthly <input type="checkbox"/> Completion of Task(s) <input type="checkbox"/> Completion of Work	\$58,880
Part 2 – Reimbursable Expenses			
<input checked="" type="checkbox"/> No expenses are separately reimbursable. The amount(s) in Column 4 of Part 1 include(s) payment for all expenses.			
<input type="checkbox"/> Expenses are separately reimbursable in the maximum amount of:			
Part 3 – Subconsultant Costs			
<input checked="" type="checkbox"/> Subconsultant costs are <b>not</b> separately compensable. The amount(s) in Column 4 of Part 1 include(s) subconsultant costs.			
<input type="checkbox"/> Subconsultant costs are separately compensable in the maximum amount of:			
<b>Maximum Service Order Compensation (sum of Parts 1 through 3):</b>			
			\$58,880