Facility Solutions Project Responsibilities

REV. 6-4-12

Task	FS-Rep	Date Due	Completed	Eng.	Date Due	Completed	Est.	Date Due	Completed	Renewables	Date Due	Completed	VP	Date Due	Completed	Proj MGR	Date Due	Completed	Field	Date Due	Completed	Branch	Date Due	Completed	Sylv	Date Due	Completed
Begin Process																											
Make client contact	FS-Rep																										
Meet with client to review objectives for project and customer wish-list and priorities.	FS-Rep																										
LOA/FEMP, get VP approval	FS-Rep												VP														
Chose path 4217, PPA, QZAB, PROP39	FS-Rep												VP														
Approve FS-Rep Qualifier with VP	FS-Rep												VP														
Collect utility bills, plans, site maps, operational schedules and other relevant information.	FS-Rep																										
Perform Energy Utilization Analysis (EUA)				ENG																							
Pre- Lim Kick-off meeting with VP	FS-Rep												VP														
Conduct prelim job walk	FS-Rep									DIR																	
FEMP or LOA if possible, get VP approval	FS-Rep												VP														
Renew DIR prelim Google earth solar possibility										DIR																	
Renew DIR to provide budget costs on approved prelim buyin layout										DIR			VP														
VP Approval of CFA model	FS-Rep									DIR			VP														
Obtain buy in from customer on Solar layout and ECM scope, CFA acceptance	FS-Rep									DIR																	
Discuss financing arrangements, TEML,QZAB, ESA	FS-Rep												VP														
LOA or FEMP, get VP approval	FS-Rep												VP														
LOA or FEMP approved and received	FS-Rep																										
Initiate Lender Process													VP														
Kick off	FS-Rep			Eng			Est			DIR			VP			PM									Sylv		
Renew DIR & IES to initiate design and scope of work	FS-Rep			Eng									VP														
Conduct **preliminary** job walk				Eng																					Sylv		
Preliminary objectives, **budgetary pricing** and **preliminary savings**, design issues	FS-Rep			Eng			Est			DIR			VP														
Design review meeting to develop **preliminary** ECM table (incl. any other cost reducing measures) and **preliminary** CFA	FS-Rep			Eng			Est			DIR			VP														
Design Review with Renew DIR										DIR			VP														
VP approval of **preliminary** CFA	FS-Rep												VP														
Preliminary Phase meeting with client to discuss project and **obtain buy-in**	FS-Rep									DIR																	
Contract boiler plate given to district	FS-Rep									DIR			VP														
Perform **detailed** facility audit if needed				Eng																							
Load calculations, preliminary system layout & sizing for estimating and CEC submittals				Eng						DIR																	
Perform ECM saving calculations and deliver to Renew DIR (if applicable)				Eng						DIR			VP														
IES project estimate review	FS-Rep			Eng			Est			DIR			VP														
Review of Renew DIR Scope										DIR			VP														
Write full scope in the selected contract				Eng																							
Write Prop 39 or FSA contract (other than scope), and coordinate ESA if needed	FS-Rep									DIR			VP														
Final design review meeting to review contract, estimates, risk analysis and CEC meetings needed	FS-Rep			Eng			Est			DIR			VP														
In-House Approval by VP				Eng									VP														
VP approval of final CFA	FS-Rep									DIR			VP														
Schedule Board Approval Meeting	FS-Rep																										
Perform all necessary Prop 39 submittals and applications with CEC	FS-Rep			Eng																							
Coordinate Project Kick off	FS-Rep			Eng			Est			DIR			VP			PM											
After Project is Board Approved																											
Project Kick Off	FS-Rep			Eng			Est			DIR			VP			PM			F			B			S		
Prepare invoice and initial disbursement forms in coordination with MFC/Lender													VP			PM											
Have District approve disbursement forms and submit to MFC/Lender or Renew DIR													VP			PM											
Prepare Project Scope & Estimates' Binder for P.M.				Eng																							
Verify Contract Documents													VP														
Introduction of Project Manager to District	FS-Rep															PM											
Final Equipment sizing and selection, Code review				Eng						DIR																	
Final HVAC engineering and drafting, T-24				Eng																							
Structural and electrical engineering (if applicable)				Eng						Renew DIR																	
Sequence of operation (if applicable)				Eng												PM											
Coordination with other trades (if applicable)				Eng												PM											
Drawings review for constructability				Eng												PM											
Plan Check: Permit submittal (if applicable)				Eng												PM											
DSA (if applicable)				Eng												PM											
Directly submitted				Eng												PM											
Interface with detailing and integration of detailing drawings/comments				Eng												PM											
Produce construction drawings				Eng												PM											
Purchase equipment & lighting				Eng												PM											
Produce equipment submittals and issue for review (if needed)				Eng												PM											
Review equipment submittals				Eng												PM											
Finalize all CEC information if needed																											
During Project Construction																											
Project turnover to Field Superintendent				Eng												PM			F								
Take required pre- and post- energy measurements for lighting and HVAC systems, where applicable																PM			F						S		
Engineering closeout w/Lessons Learned				Eng																							
Attending ongoing project meetings													VP			PM			F			B					
Review project revisions and field conflict changes													VP			PM											
Periodic field job walks													VP			PM						B					
Project Close-Out																											
Produce "Record Drawings"				Eng																							
Post project review w/Construction team	FS-Rep			Eng			Est			DIR			VP			PM			F			B					
Prepare M&O Documents																PM											
Review with Customer and Referral Request	FS-Rep												VP			PM											