

APPENDIX F: Chapter 6 – Program Staffing

Appendix F-1: Program Manager Job Announcement with Task List

Appendix F-2: Administrative Program Assistant Job Announcement with Task List

APPENDIX F-1: Program Manager Job Announcement with Task List

This job announcement for a Program Manager includes academic requirements, required experience and capabilities, and a detailed list of responsibilities. Fill in the highlighted fields and customize this job announcement to suit your needs.

Advertisement

Program Manager for state government program. Focus on energy efficiency in buildings. Full-time position, flexible schedule and location, \$[minimum] to \$[maximum] annual salary, government benefits.

Job Announcement

Name of State Energy Office
Address & Contact Information

Job Title: PROGRAM MANAGER – Energy Savings Performance Contracting in Commercial/Institutional Buildings

General Information: Full-time position, state government benefits, flexible schedule.

Salary Range: Personnel Salary Category Listing; \$[minimum] to \$[maximum] starting year.

Academic Background:

4-year college degree or higher preferred. Preferred degree in energy engineering, buildings-related field (engineering, architecture, and/or project management), business, financing, or energy/environment.

Description:

The program manager is a management and energy efficiency professional who will design, develop, and manage a government program to promote energy savings performance contracting (ESPC) for commercial/institutional buildings throughout the state. The program manager will lead a multi-faceted effort involving program marketing, technical assistance for target market sectors, procurement and legal applications, and education/outreach, working with public- and private-sector stakeholders and functioning as the state's advocate and trouble-shooter for ESPC.

Required Experience/Capabilities:

Desired experience includes management, technical, and outreach skills. Specifically, the applicant should have:

1. Program management/administration capability for strategic planning, program trouble-shooting, program design/development, marketing, and overseeing independent consultants or staff members;
2. Experience/knowledge of energy-efficient technologies and implementation strategies to retrofit existing buildings, and a working knowledge of ESPC applications in commercial/institutional buildings (understanding/experience of ESPC includes related procurement/contracting processes, financing approaches, technologies to improve energy

- efficiency, auditing practices, commissioning approach, monitoring and verification approaches, and project management); and
3. People-related skills; public speaking experience for workshops and trainings; meeting facilitation experience, motivational skills to influence people to move forward on projects, and experience working with government procurement and legal professionals to establish agreed-upon processes.

Employment experience directly involving energy savings ESPC is desired but not required. More than five years of experience in management or ESPC, familiarity with energy efficiency in buildings, and a degree in energy engineering are preferred. Added expertise in any of the following areas is a plus: team leadership, program management, advanced public speaking skills, data management, renewables applications, energy auditing, facilities/energy management, LEED, commissioning, government decision-making practices, and financing. Professional characteristics demanded of this position include: self-starter, independent worker, creative thinker, and good administrator. General skills include: public speaking, writing, data management, and spreadsheet/word-processing.

Other Experience Desired (any combination): Prior employment involving ESPC; conducting or reviewing energy audits to assess cost and savings of energy-saving measures; knowledge of financing mechanisms; familiarity with government procurement/contracting practices or decision-making practices; professional involvement with state or local governments or non-profits; expertise in Leadership in Energy & Environmental Design (LEED), ENERGY STAR, energy management, or sustainability; knowledge of renewables or water applications/design/assessment; project management related to building construction.

Definition: Energy Savings Performance Contracting (ESPC) is a way to pay for energy-saving equipment through subsequent efficiency savings that are achieved by using the equipment. An energy service company (ESCO) will assess, purchase, install and finance the equipment and then guarantee performance; the annual efficiency cost savings are structured to pay for the annual lease-purchase of the equipment, which is typically financed over a 15-year period.

Task List: Specific activities include:

Management Tasks

Strategic Planning, Design, Development

- Expand the role of ESPC in the state to advance energy-efficient technologies and practices.
- Design, develop, and manage a government program to promote ESPC for commercial/institutional buildings throughout the state, with measurable objectives and milestones.
- Develop the identified Best Practices for successful ESPC programs (see Guidelines, Section 2.4)
- Encourage and maintain high standards for projects to help ensure effective and successful results.

Process Development

- Streamline ESPC procurement processes through requests for proposals (RFP) to pre-screen ESCOs and establish a fee to reimburse services (develop RFP, oversee ESCO review process,

refine audit and performance contracts, establish a fee schedule, develop customer outreach materials, and identify and arrange for available financing options).

- Coordinate ESPC practices with purchasing, legal, finance, and administrative professionals to ensure consensus.

Overall Management

- Lead a multi-faceted effort involving program design and delivery, technical assistance for state and local governments, procurement and legal applications, financing, and education/outreach, working with public- and private-sector stakeholders and functioning as the state's advocate and trouble-shooter for ESPC.
- Interact in a team approach with fellow staff members to leverage strategies and contact opportunities.
- Manage all aspects of the program from administration to outreach to customer services

Program Monitoring

- Monitor, evaluate, and report program effectiveness.
- Help develop and design effective program strategies, and implement improvements.
- Track program progress and ensure milestones are met on schedule.
- Collect and update data on energy efficiency projects related to program services.
- Document project results regularly.
- Provide information for press releases, news articles, or websites.

Budget Management

- Plan budgets.
- Track budget(s) and forecast needs.
- Identify grant opportunities and develop proposal strategies.

Staff/Contractor Management

- Oversee professional engineering staff members or consultants who provide direct technical services to help building owners implement projects.
- Determine appropriate strategies and associated level of technical effort needed for staff/consultant tasks and authorize tasks accordingly.
- Develop contractor task orders and approve monthly payment requests from contractors.
- Review engineering reports and products and assess services to ensure quality.

Outreach & Owner Services Tasks

Education/Training/Marketing

- Design and coordinate an outreach campaign to inform targeted building owners about ESPC and lead them to implement projects.

- Provide training and/or develop training materials as needed for targeted audiences and staff members/consultants.
- Give presentations to small and large groups on program services and make the case for implementing ESPC projects.
- Interview potential owners to identify needs and pre-qualify them for program participation, and/or oversee staff/consultants in this role.

Owner Facilitation & Technical Services

- Provide one-on-one, on-site consultation with owners, from initial educational discussions to follow-up implementation of ESPC projects, and/or oversee staff/consultants in this role.
- Educate decision-makers and facilities or administrative staff members to recognize the value and cost-savings that could result from an ESPC project.
- Facilitate the procurement and selection of an Energy Service Company (ESCO) following state procedures and requirements.
- Advise on contract issues, provide negotiating tips, and approve final contracts.
- Participate as a customer's representative in meetings with the ESCO.
- Review ESCO's engineering audit to ensure reasonableness of calculations, cost estimates, and proposed measures.
- Identify funding options and advise owners on ways to leverage ESPC with a variety of funding sources (grants, planned bond projects, available budget, annual funds, etc.)
- Review monitoring and verification scenarios.
- Review the performance contract and advise on technical and financial issues.
- Serve as a trouble-shooter and communications facilitator throughout the process to ensure customers' expectations are appropriate and met by contractor.
- Review follow-up savings reports for reasonableness and conduct low-level monitoring and verification.
- Follow-up with owners to ensure savings are achieved as expected and conduct monitoring and verification as needed.
- Travel as needed throughout the state to work with state and local governments and other Program owners as assigned.

Establish Stakeholder Partnerships

- Develop a formal working relationship with the local energy service company (ESCO) industry and finance industry to implement successful projects, represent the program appropriately to end-users, abide by state/local regulations and program standards, and achieve measurable results.
- Initiate and participate in a public/private partnership to bring public- and private-sector stakeholders and supporters together to leverage outreach and strategic planning efforts.

APPENDIX F-2: Administrative Program Assistant Job Announcement with Task List

This is a job announcement for an Administrative Program Assistant, including an announcement, job description, required capabilities, and a detailed task list. Fill in the highlighted fields and customize this job announcement to suit your needs.

ADVERTISEMENT

Administrative Program Assistant for government office. Full-time position, flexible schedule and location, \$[minimum] to \$[maximum] annual salary, government benefits.

JOB ANNOUNCEMENT

Name of State Energy Office
Address & Contact Information

Job Title: PROGRAM ASSISTANT – Energy Savings Performance Contracting Program

General Information: Full-time position, state government benefits, downtown city location, flexible schedule.

Salary Range: Personnel Salary Category Listing; \$[minimum] to \$[maximum] starting year.

Academic Background:
Four-year college degree preferred or comparable experience.

Description:
Aid the Program Manager of the Energy Savings Performance Contracting (ESPC) Program in all administrative tasks involving procurement, contracting, budget monitoring, coordinating contractors, event logistics, program data collection, and program reporting. Additional tasks may include monitoring facility-owner agreements, coordinating contractor services, and managing the process to pre-qualify energy service companies to participate in the program.

Required Experience/Capabilities:
Administration, government processes, coordination, program reporting, people skills.

- Task List:**
- Provide general assistance to the Program Manager.
 - Pre-qualification of ESCOs: Assist with the procurement and contracting process to pre-qualify ESCOs and maintain annual contracts with ESCOs.
 - Owner facilitation: Process facility-owner agreements and help coordinate technical assistance services with ESCOs.
 - Technical Assistance Oversight: If contract consultants are involved, handle administration of consultant contracts, invoicing, and payment. Work with accounting, legal, and procurement specialists as needed.
 - Education/Outreach: Coordinate educational and outreach event logistics. Coordinate press announcements of events. Maintain website updates.

- Program Budget: Monitor budget status, forecast needs. When a fee-based self-funded program is developed, manage collection of fees and the escrow account, and monitor the cash flow with respect to commitments to fund technical assistance.
- Program Results: Collect project data regularly from ESCOs and maintain a spreadsheet on project results. Help prepare quarterly and annual reports as needed.