

Project Management: Scope of Work Example

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About: This document outlines the Request for Proposal (RFP) and Scope of Work (SOW) for design and engineering services related to the development of The Loft Community Center and Clean Energy Resilience Hub. It details the tasks and deliverables required to implement an integrated Distributed Energy Resources (DERs) system that aligns with sustainability goals, such as achieving carbon net-zero and supporting 72-hour grid-islanded operations. The SOW includes feasibility studies, system design, and interconnection support, aimed at enhancing energy efficiency, reducing costs, and improving resilience.

Usage Description: The SOW document is intended to guide the procurement and execution of engineering services for The Loft CCRH project. It serves several key purposes:

- **Project Planning and Management:** Assists in defining the engineering tasks required to meet the project's energy and sustainability goals.
- **Vendor Selection and Contracting:** Provides a framework for potential contractors to understand the project scope and submit proposals that meet the specified requirements.
- **Compliance and Standards:** Ensures that all engineering designs and installations comply with local, state, and national codes and standards.
- **Performance and Evaluation:** Sets expectations for the performance and evaluation of installed systems, aligning with financial and operational goals.

Scope of Work Example

Request for Proposal (RFP) and Scope of Work (SOW) for The Loft Community Center and Clean Energy Resilience Hub (CCRH)

Project Title:

The Loft Community Center and Clean Energy Resilience Hub (CCRH) - Design and Engineering Services for Integrated Distributed Energy Resources (DERs)

Project Location:

321 and 323 Bay St, Taunton, MA

Project Overview:

The Loft is a planned Community Center and Clean Energy Resilience Hub (CCRH) designed to serve Taunton's Whittenton neighborhood. This redevelopment project aims to transform a previously vacant 6,000 sq ft building into a vibrant community resource with a focus on sustainability and energy resilience. The facility will feature an Urban Room community & event space, afterschool programming, and a Green Energy Training Center.

Project Goals:

- Achieve annual carbon net zero.
- Install EV charging infrastructure for a school bus and passenger vehicle.
- Implement heat pump HVAC and water heating systems.
- Ensure 72-hour grid-islanded critical service operations.
- Develop interactive, revenue-generating or cost-reducing demand response resources with Battery Energy Storage System paired with Solar PV (PV+BESS) for Taunton Municipal Light Plant (TMLP).
- Serve as a demonstration and learning model for the neighborhood and City of Taunton.
- Achieve annual energy costs that are X% or less compared to conventional buildings of similar size and usage.
- Ensure payback on DER investments within 10 years.

This effort shall be coordinated with the other aspects of facility design, construction, funding, community engagement and programming. The ability of engineering service providers to support apprenticeships, local workforce development and LIDAC engagement in this effort is highly regarded in the evaluation process.

PROJECT PLAN

The awarded contractor shall provide necessary design and engineering services to implement a stretch code-compliant clean energy system at The Loft CCRH Project. The Project shall consist of the Tasks and Deliverables identified below.

Scope of Work (SOW):

Task 1. Feasibility Study and Initial Assessment

- **Site Assessment:** Evaluate the suitability of the site for DER installation configured to provide, including environmental, structural, and logistical factors. The system will include capabilities for Peak shaving, Demand charge management, Load shifting, Black start and Microgrid functionalities. This integrated solution will enhance energy efficiency, reduce costs, and provide reliable backup power.
- **Energy Analysis:** Conduct a comprehensive analysis of current and projected energy needs and load profiles.
- **Technology Assessment:** Review and recommend appropriate DER technologies (e.g., solar PV, battery storage) based on site conditions and use cases.
- **Facility Assessment:** Assess existing and planned facility design in the context of its operational economics, energy performance, environmental footprint, resilience, and local economic development.
- **Cost Modeling:** Estimate initial costs for equipment, installation, and commissioning.
- **Operational Costs:** Project ongoing maintenance, operation, and energy costs.
- **Financing Options:** Explore and recommend financing options, including grants, incentives, and tax benefits.
- **Payback ROI Analysis:** Calculate ROI based on projected savings, tax benefits, and system performance.

Deliverables:

- **Feasibility Analysis Report**
- **Technology Assessment** A detailed report outlining findings from the site assessment, energy analysis, technology recommendations, and facility assessment. Review and recommend appropriate DER technologies (e.g. solar PV and battery energy storage) based on site conditions and use case
- **Cost Modeling and Payback ROI Analysis** - Detailed calculations for load, DER sizing, cost estimates, and payback/ROI analysis.

Task 2. Design Development

- **System Design:** Develop detailed electrical, mechanical, and control system designs for DER components.
- **Interconnection Design:** Plan for interconnection with the utility grid or existing infrastructure, including protection and safety measures.
- **Compliance:** Ensure all designs meet relevant local, state, and national codes and standards.

Deliverables:

- **Electrical Permit Drawing Set:** Provide complete stamped engineering drawings and schematics for electrical interconnection design package.
- **Technical Specifications:** Specifications for all equipment and materials

Task 3. Interconnection Support

- **Utility Interconnection Application Support.** Provide response to utility request for information.
- **Implement Utility Recommendations.** Update electrical design based on utility feedback.

Deliverable:

- **Approved Interconnection Application.** Confirmation from utility on interconnection approval. Handover to General/Electrical contractor(s).

Payment Terms:

Payments will be made based on the completion of specific milestones and deliverables as outlined in Table 1 below. The contractor shall provide a written invoice detailing the work performed for each milestone.

Milestone	Deliverables	Payment Percentage
Project Kick Off	Signed agreement with initial project scope and objectives	20%
Completion of Feasibility Analysis	Feasibility analysis report: Site assessment, energy analysis, and technology recommendations and financial modeling	30%

Completion of Design Development	Electrical Design & Permit Set: Complete design reports and technical specifications.	30%
Completion of Interconnection Support.	Approved Interconnection application.	20%

Submission Requirements:

Proposals should include:

- Company profile and relevant experience.
- Detailed approach and methodology for each task.
- Project timeline and key milestones.
- Cost proposal including breakdown of fees.
- Evidence of experience in supporting apprenticeships, local workforce development, and LIDAC engagement.
- References from similar projects.