

GENERAL SERVICES ADMINISTRATION

Federal Supply Service

Authorized Federal Supply Schedule Price List

On-line access to contract ordering information, terms and conditions, up-to- date pricing, and the option to create an electronic delivery order are available through GSA Advantage!, a menu-driven database system. The INTERNET address for GSA Advantage! is: <http://www.GSAAdvantage.gov>.

For more information on ordering from Federal Supply Schedules click on the FSS Schedules button at www.fss.gsa.gov

Schedule Title: Facilities Maintenance and Management

Contract Number GS-21F-164AA

Contract period: is July 31, 2013 through July 30, 2018



Contractor: ***Lincus, Inc.***
8727 S. Priest Dr. Suite 103
Tempe, AZ 85284
Tel: 602-457-5005
Fax: 480-598-8485

Web Site: <http://www.lincusenergy.com/>

Contract Administrator: Jorj Nofal, President

Business size: ***Small business; Small Woman-owned business***

CUSTOMER INFORMATION:

- 1a. Table of awarded special item number(s) with appropriate cross- reference to item descriptions and awarded price(s).

871 202 Energy Management Planning and Strategies
871 203 Training on Energy Management,
871 204 Metering Services
871 205 Energy Program Support Services
871 207 Energy Audit Services
871 208 Resource Efficiency Management
871 209 Innovations in Renewable Energy
871 211 Energy Consulting Services

- 1b. Identification of the lowest priced model number and lowest unit price for that model for each special item number awarded in the contract. This price is the Government price based on a unit of one, exclusive of any quantity/dollar volume, prompt payment, or any other concession affecting price.. Those contracts that have unit prices based on the geographic location of the customer, should show the range of the lowest price, and cite the areas to which the prices apply.

See Appendix A

- 1c. If the Contractor is proposing hourly rates, a description of all corresponding commercial job titles, experience, functional responsibility and education for those types of employees or subcontractors who will perform services shall be provided. If hourly rates are not applicable, indicate “Not applicable” for this item.

See Appendix B

2. Maximum order: **\$1,000,000**
3. Minimum order: **\$100.00**
4. Geographic coverage (delivery area): **Domestic and Overseas**
5. Point(s) of production (city, county, and State or foreign country): **Not Applicable**
6. Discount from list, prices or statement of net price: **All prices are net.**
7. Quantity discounts: **None**
8. Prompt payment terms: **1% 10 days, NET 30 days**
- 9a. Government purchase cards **are** accepted at or below the micro-purchase threshold.
- 9b. Government purchase cards **are not** accepted above the micro-purchase threshold.
10. Foreign items (list items by country of origin): **None.**
- 11a. Time of delivery: **Per Task Order**
- 11b. Expedited Delivery: **Per Task Order**
- 11c. Overnight and 2-day delivery: **Not Applicable**
- 11d. Urgent Requirements: **Per Task Order**
12. F.O.B. point(s): **Destination.**

- 13a. Ordering address: **Lincus, Inc.**
8727 S. Priest Dr. Suite 103
Tempe, AZ 85284
Tel: 602-457-5005
Fax: 480-598-8485
- 13b. Ordering procedures: For supplies and services, the ordering procedures, information on Blanket Purchase Agreements (BPAs), and a sample BPA can be found at the GSA/FSS Schedule homepage (www.fss.gsa.gov/schedules).
14. Payment address: **Lincus, Inc.**
8727 S. Priest Dr. Suite 103
Tempe, AZ 85284
Tel: 602-457-5005
Fax: 480-598-8485
15. Warranty provision: **Not Applicable**
16. Export packing charges, if applicable: **Not Applicable**
17. Terms and conditions of Government purchase card acceptance (any thresholds above the micro-purchase level): **Not Applicable**
18. Terms and conditions of rental, maintenance, and repair (if applicable): **Not Applicable**
19. Terms and conditions of installation (if applicable): **Not Applicable**
20. Terms and conditions of repair parts indicating date of parts price lists and any discounts from list prices (if applicable): **Not Applicable**
- 20a. Terms and conditions for any other services (if applicable): **See Appendix C**
21. List of service and distribution points (if applicable): **Not Applicable**
22. List of participating dealers (if applicable): **None**
23. Preventive maintenance (if applicable): **Not Applicable**
- 24a. Special attributes such as environmental attributes (e.g., recycled content, energy efficiency, and/or reduced pollutants): **None**
- 24b. If applicable, indicate that Section 508 compliance information is available on Electronic and Information Technology (EIT) supplies and services and show where full details can be found (e.g. contractor's website or other location.) The EIT standards can be found at www.Section508.gov/: **Not Applicable**
25. Data Universal Number System (DUNS) number: **140677241**
26. Notification regarding registration in Central Contractor Registration (CCR) database: **Registration is current.**

APPENDIX A

GSA Pricing

BASE PERIOD							
SIN(s)	Labor Category	UOI	<u>Year 1</u> 7/31/13- 7/30/14	<u>Year 2</u> 7/31/14- 7/30/15	<u>Year 3</u> 7/31/15- 7/30/16	<u>Year 4</u> 7/31/16- 7/31-17	<u>Year 5</u> 7/31/17- 7/30/18)
871 202 871 203 871 204 871 205 871 207 871 208 871 209 871 211	Administrative Assistant/ Clerical Support	hour	\$48.82	\$50.28	\$51.79	\$53.34	\$54.94
871 202 871 203 871 204 871 205 871 207 871 208 871 209 871 211	Director	hour	\$174.94	\$180.19	\$185.60	\$191.16	\$196.90
871 202 871 203 871 204 871 205 871 207 871 208 871 209 871 211	Engineer I	hour	\$93.36	\$96.16	\$99.05	\$102.02	\$105.08
871 202 871 203 871 204 871 205 871 207 871 208 871 209 871 211	Engineer II	hour	\$108.92	\$112.18	\$115.55	\$119.02	\$122.59
871 202 871 203 871 204 871 205 871 207 871 208 871 209 871 211	Engineer III	hour	\$118.65	\$122.21	\$125.88	\$129.65	\$133.54

BASE PERIOD							
SIN(s)	Labor Category	UOI	Year 1 7/31/13- 7/30/14	Year 2 7/31/14- 7/30/15	Year 3 7/31/15- 7/30/16	Year 4 7/31/16- 7/31-17	Year 5 7/31/17- 7/30/18)
871 202 871 203 871 204 871 205 871 207 871 208 871 209 871 211	Engineering Manager	hour	\$146.45	\$150.84	\$155.37	\$160.03	\$164.83
871 202 871 203 871 204 871 205 871 207 871 208 871 209 871 211	Officer/Principal	hour	\$158.69	\$163.45	\$168.35	\$173.41	\$178.61
871 202 871 203 871 204 871 205 871 207 871 208 871 209 871 211	Sr. Project/ Program Manager	hour	\$171.03	\$176.16	\$181.45	\$186.89	\$192.50
871 202 871 203 871 204 871 205 871 207 871 208 871 209 871 211	Project/Program Manager	hour	\$144.91	\$149.25	\$153.73	\$158.34	\$163.09
871 202 871 203 871 204 871 205 871 207 871 208 871 209 871 211	Sr. Consultant	hour	\$160.28	\$165.09	\$170.04	\$175.14	\$180.40

APPENDIX B

Labor Category Descriptions

1. Administrative Assistant/Clerical Support

Reports To: Office Manager
Related Experience (Years): 1 Year
Degree: High School /Associate Degree
FLSA Status: NON-EXEMPT

Summary: Primarily responsible for general clerical and administrative tasks as directed by the office manager.

Essential Duties and Responsibilities:

- Performs various admin duties for the office such as filing, answering phones and taking messages, arranging conference calls, scheduling meetings, handling information requests, making travel arrangements and other similar tasks.
- Performs clerical duties including typing, copying, and taking minutes at meetings.
- Distributes daily mail and maintains filing system to include databases.
- Answers telephone and assists the general public with information about the office.
- Prepares summaries and reports.
- Completes special projects and related duties as assigned.
- Maintains flexibility to take on new and different tasks as directed.
- Incorporates safe work practices in job performance.
- Attends staff meetings.
- Manage inventory records and surplus equipment.
- Incorporates safe work practices in job performance.

Supervisory Responsibilities: Has no supervisory responsibilities.

Qualifications: Minimum high school graduate with at least one (1) year of administrative / clerical experience. Computer proficiency required including Windows, Microsoft Outlook, Microsoft Word, Microsoft Access and Microsoft Excel. Ability to read and write English.

Education and/or Experience: High school graduate or associates degree with minimal office experience. Prefer 1+ years of experience in an office environment.

2. Director

Reports To: President or Vice President
Related Experience (Years): 10 Years
Degree: Bachelors or Master's Degree
FLSA Status: EXEMPT

Summary: This position has in-depth knowledge, experience and track record in business management, strategic planning, management reviews, business development, business management of all products and services currently offered and will be offered. Has the ability to establish and expand client relationships. Works at the lead technical and business management level.

Essential Duties and Responsibilities:

- Manage existing program, project and implementation managers for 100% billability while meeting with customers KPIs.
- Develop business as requested by the senior management.

- Manage day-to-day office activities.
- Coordinate Technical Support Services.
- Weekly, monthly and quarterly updates with Lincus management.
- Communicate and establish meetings within clients Sr. Managers' assistance in sales activities
- Develop and maintain business plan.
- Expand program administrative and consulting services to existing and new clients.
- Develops new DSM programs as requested for specific DSM cycles or transition period.
- Incorporates safe work practices in job performance.

In addition to specific business management and development goals other duties and responsibilities include:

- Coordination with various levels of client's departments.
- Participate in customer project meetings.
- Review and confirm eligibility of submitted applications. Provide a report for confirmed applications.
- Enter and maintain project information in client's database. Provide reports as needed to Contract Manager.
- Assign and manage Technical Reviewer. Provide assigned name and other information as requested by the client's Contract Manager.
- Assure compliance with all program guidelines, policies and procedures.
- Develop and maintain strong relationships with clients.
- Provide other project management duties and reports as assigned.

Manage the technical work to be performed by Lincus IMs by:

- Review of energy efficiency equipment and building system energy savings and electric demand reduction.
- Ensure Title 24 and other industry standards for baseline electric and gas systems and equipment is applied.
- Use of understanding of electric and gas process systems and equipment.
- Verification of incremental cost for energy efficiency equipment and building systems compared to standard equipment and building system.
- Use of client's energy efficiency program policies, procedures and processing.
- Use of client's database.

Supervisory Responsibilities: Provide high level management and supervisory responsibilities. May oversee employees to train, coordinate and supervise.

Qualifications: Bachelors or Master's Degree required. Preferred for majors in Mechanical, Electrical, Industrial, or Civil Engineering; Finance or Business Administration. Desired coursework in energy related subjects, marketing, and business analysis.

- Demonstrated senior-level consulting experience; analytical, and research skills required.
- Responsible, organized, detail oriented, and motivated.
- Strong preference for those with specific experience in the energy efficiency industry.
- Demonstrated strong technical writing and editing abilities.
- Strong communication and leadership skills as well as demonstrated client development skills.
- Computer aptitude and familiarity with Microsoft Office (Word, Excel, Access, PowerPoint) and Windows operating system.
- Minimum of 10 years experience in the energy industry or the business research industry.
- Travel is required.

Education and/or Experience: At a minimum has at least a Bachelor's or Master's degree with at least 10 years of directly relevant experience in Energy Efficiency field.

3. Engineer I

Reports To: Engineering Manager, Team Leader

Related Experience (Years): 1 Year

Degree: Bachelor's or Master's Degree

FLSA Status: EXEMPT

Summary: Good working knowledge and proficiency in at least one field. Works under general supervision performing tasks that require basic management skills for day-to-day project activities or considerable judgment or problem-solving capabilities. This position conducts energy analysis, performs preliminary and detailed energy surveys, monitors and verifies energy savings, project management, energy simulation modeling using eQuest, DOE2, EnergyPro and other similar programs. The position must also be able to perform spreadsheet analysis of energy and demand savings, evaluate utility company incentives and project economics, and write scope of work for energy efficiency projects. This position will also conduct research and analysis for energy efficiency program studies and energy research projects, providing support for principal consultants via project analysis, reporting, and proposal writing tasks. This position must be self-directed and able to manage specific project tasks independently.

Essential Duties and Responsibilities: Responsibilities involve directing the overall energy engineering projects, analysis, program design, evaluation, metering and verification of installations including site inspections. Ensures that Energy Efficiency (EE) or Demand response (DR) program objectives, goals, targets and implementation strategies are achieved and executed within budget and in accordance with company and regulatory standards, policies and procedures, audit recommendations and as directed by management or the regulator.

Regular communications with Program Manager is expected. This position is also responsible for all aspects of technology evaluation, market studies and analysis, program management support and representation of company in technical conferences. In addition to the above responsibilities, this position is expected to:

- Have a thorough engineering and technical knowledge of various program and technical areas and at any given time be able to provide an accurate status on EE and DR project performance (planned, pending, paid, and projected), such as: Number of units (i.e., EE measures, customers, rebate applications and, or rebate dollar amount in process, energy surveys
- Comply with company values, standards and laws, rules, regulations and other legal requirements that apply to our business, including ethical, safety, regulatory and environmental standards.
- Perform other tasks as required by management.
- Incorporates safe work practices in job performance.

Supervisory Responsibilities: No supervisory responsibilities.

Qualifications: Bachelor's or Master's Degree; consideration preferred for majors in mechanical, electrical, industrial, or civil engineering; desired coursework in thermal systems, energy efficiency, sustainable building design, and marketing

- Must specifically have at least three (3) years of energy engineering experience, analytical and research skills in the energy engineering field including energy auditing for C&I customers, re-commissioning, detailed energy engineering analysis, and experience with utility energy efficiency and demand response programs
- Responsible, organized, detail oriented, motivated, and strong work ethic
- Strong preference for those with specific experience in the energy efficiency industry
- Demonstrated strong technical writing and editing abilities
- Demonstrated communication and leadership skills
- Computer aptitude and familiarity with Microsoft Office (Word, Excel, Access, PowerPoint) and Windows operating system; familiarity with building energy simulation software such as eQuest, DOE 2, Trane Tracer, Energy Pro or similar

- Travel required.

Education and/or Experience: Typically has at least a Bachelor's or Master's degree with 1+ year of experience. May consider Associates degree with 3+years of Energy Efficiency experience.

4. Engineer II

Reports To: Engineering Manager, Team Leader

Related Experience (Years): 3+ Years

Degree: Bachelor's or Master's Degree

FLSA Status: EXEMPT

Summary: Proficiency in the energy engineering field. Auditing and modeling of all types of buildings. Works under general guidance performing tasks that require an understanding of the projects objectives.

This position conducts energy analysis, performs preliminary and detailed energy surveys, monitors and verifies energy savings, project management, energy simulation modeling using eQuest, DOE2, EnergyPro, Trane Tracer, DOE 2.2R and other similar programs. The position must also be able to perform spreadsheet analysis of energy and demand savings, evaluate utility company incentives and project economics, and write scope of work for energy efficiency projects. This position will also conduct research and analysis for energy efficiency program studies and energy research projects, providing support for principal consultants via project analysis, reporting, and proposal writing tasks. This position must be self-directed and able to manage specific project tasks independently.

Essential Duties and Responsibilities: Responsibilities involve directing the overall energy engineering projects, analysis, program design, evaluation, metering and verification of installations including site inspections. Ensures that Energy Efficiency (EE) or Demand Response (DR) program objectives, goals, targets and implementation strategies are achieved and executed within budget and in accordance with company and regulatory standards, policies and procedures, audit recommendations and as directed by management or the regulator.

Regular communications with Program Manager is expected. This position is responsible for all aspects of technology evaluation, market studies and analysis, program management support and representation of company in technical conferences.

In addition to the above responsibilities, this position is expected to:

- Have a thorough engineering and technical knowledge of various program and technical areas and at any given time be able to provide an accurate status on EE and DR project performance (planned, pending, paid, and projected), such as:
- Number of units (i.e., EE measures, customers, rebate applications and, or rebate dollar amount in process, energy surveys.
- Comply with company values, standards and laws, rules, regulations and other legal requirements that apply to our business, including ethical, safety, regulatory and environmental standards.
- Perform other tasks as required by management.

Supervisory Responsibilities: No supervisory responsibilities.

Qualifications: Bachelor's or Master's Degree; consideration preferred for majors in mechanical, electrical, industrial, or civil engineering; desired coursework in thermal systems, energy efficiency, sustainable building design, and marketing.

- Must specifically have at least three (3) years of energy engineering experience, analytical and research skills in the energy engineering field including energy auditing for C&I customers, re-commissioning, detailed energy engineering analysis, and experience with utility energy efficiency and demand response programs.
- Responsible, organized, detail oriented, motivated, and strong work ethic.

- Strong preference for those with specific experience in the energy efficiency industry.
- Demonstrated strong technical writing and editing abilities as well as verbal communication skills.
- Demonstrated communication and leadership skills.
- Computer aptitude and familiarity with Microsoft Office (Word, Excel, Access, PowerPoint) and Windows operating system; familiarity with building energy simulation software such as eQuest, DOE 2, Trane Tracer, Energy Pro or similar.
- Travel required.

Education and/or Experience: Typically has at least a Bachelor's or Master's degree with 3+ years of experience directly related to energy engineering.

5. **Engineer III**

Reports To: Engineering Manager, Team Leader

Related Experience (Years): 5 years

Degree: Bachelor's or Master's Degree

FLSA Status: EXEMPT

Summary: Highly proficient in broadly technical and relevant fields related to energy engineering, technical research, or project administration.

This position conducts energy analysis, performs preliminary and detailed energy surveys, monitors and verifies energy savings, project management, energy simulation modeling using eQuest, DOE2, EnergyPro, Trane Tracer, DOE 2.2R and other similar programs. The position must also be able to perform spreadsheet analysis of energy and demand savings, evaluate utility company incentives and project economics, and write scope of work for energy efficiency projects. This position will also conduct research and analysis for energy efficiency program studies and energy research projects, providing support for principal consultants via project analysis, reporting, and proposal writing tasks. This position must be self-directed and able to manage specific project tasks independently.

Essential Duties and Responsibilities: Overall responsibilities involve directing the overall energy engineering projects, analysis, program design, evaluation, metering and verification of installations including site inspections. Ensures that EE or DR program objectives, goals, targets and implementation strategies are achieved and executed within budget and in accordance with company and regulatory standards, policies and procedures, audit recommendations and as directed by management or the regulator. Regular communications with Program Manager is expected and this position is also responsible for all aspects of technology evaluation, market studies and analysis, program management support and representation of company in technical conferences. In addition to the above responsibilities, this position is expected to:

- Have a thorough engineering and technical knowledge of various program and technical areas and at any given time be able to provide an accurate status on EE and DR project performance (planned, pending, paid, and projected), such as Number of units (i.e., EE measures, customers, rebate applications and, or rebate dollar amount in process, energy surveys.
- Comply with company values, standards and laws, rules, regulations and other legal requirements that apply to our business, including ethical, safety, regulatory and environmental standards.
- Perform other tasks as required by management.
- Incorporates safe work practices in job performance.

Supervisory Responsibilities: Provide supervisory responsibilities. May have employees to train, coordinate and supervise.

Qualifications: Bachelor's or Master's Degree; consideration preferred for majors in mechanical, electrical, industrial, or civil engineering; desired coursework in thermal systems, energy efficiency, sustainable building design, and marketing.

- Must specifically have at least five (5) years of energy engineering experience, analytical and research skills in the energy engineering field including energy auditing for C&I customers, re-commissioning, detailed energy engineering analysis, and experience with utility energy efficiency and demand response programs.
- Responsible, organized, detail oriented, motivated, and strong work ethic.
- Strong preference for those with specific experience in the energy efficiency industry.
- Demonstrated strong technical writing and editing abilities.
- Demonstrated communication and leadership skills.
- Computer aptitude and familiarity with Microsoft Office (Word, Excel, Access, PowerPoint) and Windows operating system; familiarity with building energy simulation software such as eQuest, DOE 2, Trane Tracer, Energy Pro or similar.
- Travel required.

Education and/or Experience: Typically has at least a Bachelor's or Master's degree with 5 years of experience.

6. **Engineering Manager**

Reports To: President and /or Vice President

Related Experience (Years): 10 years

Degree: Bachelors or Master's Degree

FLSA Status: EXEMPT

Summary: This position has In-depth knowledge, experience and track record in the energy engineering consulting services, engineering management, strategic planning, management reviews, develop new engineering services and assess and implement training of engineers reporting to this position. Works at the lead technical and business management level.

Essential Duties and Responsibilities:

- Confer with management, business development, and marketing staff to discuss project specifications and procedures
- Coordinate and direct projects, making detailed plans to accomplish goals and directing the integration of technical activities
- Analyze technology, resource needs, and market demand, to plan and assess the feasibility of projects
- Plan and direct the pre and post installation engineering, testing and verification, operation of measures and projects
- Direct, review, and approve service offering and changes
- Along with Lincus Management recruit employees; assign, direct, and evaluate their work; and oversee the development and maintenance of staff competence.
- Incorporates safe work practices in job performance.

In addition to the above responsibilities, Engineering Manager duties and responsibilities include :

- Have a thorough technical knowledge of utility energy efficiency programs, measures, technologies, implementation methodology, verification and metering of the savings and at any given time be able to provide an accurate status on employee billability, statistics on technical review projects, training of engineers and analysts. Reporting on engineering project performance (planned, pending, paid, and projected), such as:
 - Number of units (i.e., Energy Efficiency (EE) measures, customers, rebate applications and, or rebate dollar amount in process, energy surveys conducted, outreach events, workshops, etc.)
 - Energy savings and demand reduction installed, committed, and in the pipeline
 - Program budget, including all budget categories, subcategories, and fund shifts

- Types of measures (i.e., appliances, equipment, projects), including program requirements, specifications, standards, unit energy savings and related DEER and EM&V data used for workbooks and E-3 calculators
- Program elements or implementation strategies identified in program plans or as directed by management, PUC, Utility’s Energy Efficiency Task Force Groups.
- Terms and conditions of agreements, contracts, purchase orders, change orders
- Approval of invoices for payment
- Performance of vendors, contractors, and implementers
- Program support activities and cross-functional teams
- Statewide teams, meetings, and utility activities
- Local government meetings and utility/partner activities
- PUC and internal audit and program verification results and activities
- Internal and external market research, EM&V studies, and best practices
- Have a thorough knowledge of client’s and regulatory standards, policies and procedures.
- Complete program planning process prior to target date for program roll-out. Develop comprehensive program plans, which involve soliciting input from all applicable resources (i.e., engineering, EM&V, regulatory, marketing, vendors, retailers, contractors, local governments, IOUs, etc.). Program design and implementation strategies must incorporate data from engineering, market research, EM&V studies and best practices and address recommendations or issues raised by the PUC, Utility’s Energy Efficiency Task Force Groups.
- Submit quality work, timely program write-ups and written documents that are thorough, clear and concise to management for approval.
- Develop program requirements, processes, policies and procedures that include controls for quality assurance and submit them to management for approval prior to scheduled program roll-out.
- Manage day-to-day operations to ensure all program components are on track. Ensure tasks delegated to appropriate personnel are monitored for proper and timely completion. Follow, monitor and enforce compliance with program policies and procedures.
- Develop a project tracking and reporting system (i.e., Excel-based spreadsheets) to effectively monitor all aspects of program results, expenditures, invoice payments and customer participation to avoid “surprises” or impacts to program goals and market actors.
- Ensure Special Payment Requests and invoices from vendors, contractors, retailers or implementers are accurate, and that appropriate back-up documentation is provided and charges are consistent with the Purchase Order and/or agreement prior to submitting the request for payment to management for approval.
- Review monthly program budget reports and ensure corrections are made.
- Provide weekly, monthly and quarterly reporting to the supervising manager, and as required by management, on the status of program results, activities, expenditures, customer and market participation and challenges or issues.
- Conduct regular vendor/contractor monitoring and verification activities, document observations and findings and implement corrective actions.
- Accurately interpret and evaluate information and situations to identify and manage timely resolution of problems and issues. Keep management abreast of problems and issues. Conduct comprehensive analysis and present recommendations to management for review and approval.
- Actively participate on statewide teams, partnerships, EM&V teams and working groups.
- Support the EE Division competitive bidding process.
- Support the client’s quality assurance program and maintain updates to Program Policies and Procedures Manual, program documentation binders and PM desk procedures.
- Comply with company values, standards and laws, rules, regulations and other legal requirements that apply to our business, including ethical, safety, regulatory and environmental standards.
- Perform other tasks as required by management.

Supervisory Responsibilities: Provide high level management and supervisory responsibilities. May have employees to train, coordinate and supervise.

Qualifications: Bachelors or Master's Degree required. Preferred for majors in mechanical, electrical, industrial, or civil engineering; finance or business administration. Desired coursework in energy related subjects, marketing, and business analysis.

- Demonstrated senior-level consulting experience; analytical, and research skills required.
- Responsible, organized, detail oriented, and motivated.
- Strong preference for those with specific experience in the energy efficiency industry.
- Demonstrated strong technical writing and editing abilities.
- Strong communication and leadership skills as well as demonstrated client development skills.
- Computer aptitude and familiarity with Microsoft Office (Word, Excel, Access, PowerPoint) and Windows operating system.
- Minimum of 10 years experience in the energy industry or the business research industry.
- Travel is required.

Education and/or Experience: At a minimum has at least a Bachelor's or Master's degree with at least 10 years of directly relevant experience.

7. Officer/Principal

Reports To: Board of Directors

Related Experience (Years): 15 Years

Degree: Bachelors or Master's Degree

FLSA Status: EXEMPT

Summary: This position holds an equity position in the company. This position has in-depth and highly specialized knowledge of industry sectors, policy and environmental issues as well as knowledge, experience and track record in business management, working with regulatory groups, strategic planning, management reviews, business development, business management of all products and services currently offered and will be offered. Has the ability to establish and expand client relationships. Works at the business management level.

Essential Duties and Responsibilities:

- Manage all programs and business units
- Develop business plan and adhere to the plan by delivering results
- Manage day-to-day business activities.
- Coordinate projects at the director and customer levels.
- Communicate and establish meetings within clients Sr. Managers' and assist managing contracts.
- Financial and quality control responsibility for all projects.
- Develops new policy based solutions
- Develops new DSM programs for customers to meet their annual cost reduction and environmental targets
- Responsible for safety requirements and results throughout the company
- In addition to specific business management and development goals other duties and responsibilities include:
- Coordination with various levels of client's departments at executive levels.
- Participate in customer project meetings in project kick offs, budgeting, adherence to customers' requirements.
- Review and confirm eligibility of submitted applications. Provide a report for confirmed applications.
- Assure compliance with all program guidelines, policies and procedures.
- Develop and maintain strong relationships with clients.
- Provide other project management duties and reports as assigned.

Supervisory Responsibilities: Provide high level management and supervisory responsibilities. May oversee employees to train, coordinate and supervise.

Qualifications: Bachelors or Master's Degree required. Preferred for majors in Mechanical, Electrical, Environmental, Industrial, or Civil Engineering; Finance or Business Administration. Desired coursework in energy related subjects, marketing, and business analysis.

- Ability to deliver projects on time and on budget
- Ability to establish and maintain excellent client relationships
- Demonstrated senior-level consulting experience
- Demonstrated relationship skills
- Responsible, organized, detail oriented, and motivated leadership skills.
- Strong preference for those with specific experience in the energy efficiency industry.
- Demonstrated strong technical writing and editing abilities.
- Strong communication and leadership skills as well as demonstrated client development skills.
- Minimum of 15 years experience in the energy industry or the business research industry.
- Travel is required.

Education and/or Experience: At a minimum has at least a Bachelor's or Master's degree with at least 10 years of directly relevant experience in Energy Efficiency field.

8. Sr. Project/Program Manager

Reports To: Engineering Manager or Director

Related Experience (Years): 8 Years

Degree: Bachelor's or Master's Degree

FLSA Status: EXEMPT

Summary: Highly proficient in broadly technical and relevant fields related to energy projects management, administration, energy engineering and conservation with excellent verbal and written communication skills. The Senior Program Manager (PM) position is responsible for managing the development and implementation of energy efficiency programs and is held accountable for achieving annual program objectives, goals and targets and executing implementation strategies as identified in Program Implementation Plan documents that are submitted to, and approved by, the Public Utility Commission (PUC).

The development and implementation of energy efficiency programs must be:

- Established on a planned timetable to meet program target dates and to avoid end-of-year or season changes to program plans.
- Tracked and monitored to avoid discounts to program results and impacts to program budgets, market actors, or marketing and outreach campaigns.
- Executed in accordance with our clients' and regulatory standards, policies and procedures.
- Conduct market and competitor analysis in the energy industry, develop policies, give presentations to clients, plan, organize, and manage specific programs and projects, design and implement new programs or initiatives that promote energy efficiency in electricity and gas markets, develop proposals, manage utility company RFPs selection process, and contract negotiations

Essential Duties and Responsibilities:

Overall Senior Program Manager's responsibilities involve directing the program design, program ramp-up, program implementation, program management and operations, and program verification to ensure program objectives, goals, targets and implementation strategies are achieved and executed within budget and in accordance with company and regulatory standards, policies and procedures, audit recommendations and as directed by management or the regulator.

The Program Manager is also responsible for all aspects of program management and activities identified in the Program Managers' Handbook.

In addition to the above duties and responsibilities, Senior Program Managers are expected to:

- Have a thorough business and technical knowledge of their program and at any given time be able to provide an accurate status on program performance (planned, pending, paid, and projected), such as:
 - Number of units (i.e., EE measures, customers, rebate applications and, or rebate dollar amount in process, energy surveys conducted, outreach events, workshops, etc.).
 - Energy savings and demand reduction installed, committed, and in the pipeline.
 - Program budget, including all budget categories, subcategories, and fund shifts.
 - Types of measures (i.e., appliances, equipment, projects), including program requirements, specifications, standards, unit energy savings and related DEER and EM&V data used for workbooks and E-3 calculators.
 - Program elements or implementation strategies identified in program plans or as directed by management, PUC, Utility's Energy Efficiency Task Force Groups.
 - Marketing and outreach plans and activities.
 - Terms and conditions of agreements, contracts, purchase orders, change orders.
 - Approval of invoices for payment.
 - Performance of vendors, contractors, and implementers.
 - Program support activities and cross-functional teams.
 - Statewide teams, meetings, and utility activities.
 - Local government meetings and utility/partner activities.
 - PUC and internal audit and program verification results and activities.
 - Internal and external market research, EM&V studies, and best practices.
- Have a thorough knowledge of client's and regulatory standards, policies and procedures.
- Complete program planning process prior to target date for program roll-out. Develop comprehensive program plans, which involve soliciting input from all applicable resources (i.e., engineering, EM&V, regulatory, marketing, vendors, retailers, contractors, local governments, IOUs, etc.). Program design and implementation strategies must incorporate data from engineering, market research, EM&V studies and best practices and address recommendations or issues raised by the PUC, Utility's Energy Efficiency Task Force Groups.
- Submit quality work, timely program write-ups and written documents that are thorough, clear and concise to management for approval.
- Develop program requirements, processes, policies and procedures that include controls for quality assurance and submit them to management for approval prior to scheduled program roll-out.
- Manage day-to-day operations to ensure all program components are on track. Ensure tasks delegated to appropriate personnel are monitored for proper and timely completion. Follow, monitor and enforce compliance with program policies and procedures.
- Develop a program tracking and reporting system (i.e., Excel-based spreadsheets) to effectively monitor all aspects of program results, expenditures, invoice payments and customer participation to avoid "surprises" or impacts to program goals and market actors.
- Ensure Special Payment Requests and invoices from vendors, contractors, retailers or implementers are accurate, and that appropriate back-up documentation is provided and charges are consistent with the Purchase Order and/or agreement prior to submitting the request for payment to management for approval.
- Review monthly program budget reports and ensure corrections are made.

- Provide weekly, monthly and quarterly reporting to the supervising manager, and as required by management, on the status of program results, activities, expenditures, customer and market participation and challenges or issues.
- Conduct regular vendor/contractor monitoring and verification activities, document observations and findings and implement corrective actions.
- Accurately interpret and evaluate information and situations to identify and manage timely resolution of problems and issues. Keep management abreast of problems and issues. Conduct comprehensive analysis and present recommendations to management for review and approval.
- Actively participate on statewide teams, partnerships, EM&V teams and working groups.
- Support the EE Division competitive bidding process
- Support the client's quality assurance program and maintain updates to Program Policies and Procedures Manual, program documentation binders and PM desk procedures.
- Comply with company values, standards and laws, rules, regulations and other legal requirements that apply to our business, including ethical, safety, regulatory and environmental standards.
- Perform other tasks as required by management.
- Incorporates safe work practices in job performance.

Supervisory Responsibilities: Provide supervisory responsibilities.

Qualifications: Bachelor's or Master's degree required. Preferred for majors in mechanical, electrical, industrial, or civil engineering; finance or business administration. Desired coursework in energy related subjects, marketing, and business analysis.

- Demonstrated senior-level consulting experience; analytical, and research skills required.
- Responsible, organized, detail oriented, and motivated.
- Strong preference for those with specific experience in the energy efficiency industry.
- Demonstrated strong technical writing and editing abilities.
- Strong communication and leadership skills as well as demonstrated client development skills.
- Computer aptitude and familiarity with Microsoft Office (Word, Excel, Access, PowerPoint) and Windows operating system.
- Travel is required.

Education and/or Experience: Typically has at least a Bachelor's or Master's degree with 8+ years of experience.

9. Project/Program Manager

Reports To: Engineering Manager or Director or Sr. Program Manager or Team Leader

Related Experience (Years): 5 Years

Degree: Bachelor's or Master's Degree

FLSA Status: EXEMPT

Summary: This position is proficient in broadly technical and relevant fields related to energy projects management, administration, and energy engineering projects and analysis. Program/Project manager must have excellent verbal and written communication, and leadership skills. Proficient in managing projects on time and on budget.

The Program Manager (PM) Position is responsible for managing the development and implementation of energy efficiency programs and is held accountable for achieving annual program objectives, goals and targets and executing implementation strategies as identified in Program Implementation Plan documents that are submitted to, and approved by, the Public Utility Commissions (PUC).

The development and implementation of energy efficiency programs must be:

- Established on a planned timetable to meet program target dates and to avoid end-of-year or season changes to program plans.

- Tracked and monitored to avoid discounts to program results and impacts to program budgets, market actors, or marketing and outreach campaigns.
- Executed in accordance with our clients' and regulatory standards, policies and procedures.
- Conduct market and competitor analysis in the energy industry, develop policies, give presentations to clients, plan, organize, and manage specific programs and projects, design and implement new programs or initiatives that promote energy efficiency in electricity and gas markets, develop proposals, manage utility company RFPs selection process, and contract negotiations.

Essential Duties and Responsibilities: Overall PM responsibilities involve directing the program design, program ramp-up, program implementation, program management and operations, and program verification to ensure program objectives, goals, targets and implementation strategies are achieved and executed within budget and in accordance with company and regulatory standards, policies and procedures, audit recommendations and as directed by management or the regulator.

The Program Manager is also responsible for all aspects of program management and activities identified in the Program Managers' Handbook.

In addition to the above duties and responsibilities, PMs are expected to:

- Have a thorough business and technical knowledge of their program and at any given time be able to provide an accurate status on program performance (planned, pending, paid, and projected), such as:
 - Number of units (i.e., EE measures, customers, rebate applications and, or rebate dollar amount in process, energy surveys conducted, outreach events, workshops, etc.)
 - Energy savings and demand reduction installed, committed, and in the pipeline
 - Program budget, including all budget categories, subcategories, and fund shifts
 - Types of measures (i.e., appliances, equipment, projects), including program requirements, specifications, standards, unit energy savings and related DEER and EM&V data used for workbooks and E-3 calculators
 - Program elements or implementation strategies identified in program plans or as directed by management, PUC, Utility's Energy Efficiency Task Force Groups.
 - Marketing and outreach plans and activities
 - Terms and conditions of agreements, contracts, purchase orders, change orders
 - Approval of invoices for payment
 - Performance of vendors, contractors, and implementers
 - Program support activities and cross-functional teams
 - Statewide teams, meetings, and utility activities
 - Local government meetings and utility/partner activities
 - PUC and internal audit and program verification results and activities
 - Internal and external market research, EM&V studies, and best practices
- Have a thorough knowledge of client's and regulatory standards, policies and procedures.
- Complete program planning process prior to target date for program roll-out. Develop comprehensive program plans, which involve soliciting input from all applicable resources (i.e., engineering, EM&V, regulatory, marketing, PSC, vendors, retailers, contractors, local governments, IOUs, etc.). Program design and implementation strategies must incorporate data from engineering, market research, EM&V studies and best practices and address recommendations or issues raised by the PUC, Utility's Energy Efficiency Task Force Groups.
- Submit quality work, timely program write-ups and written documents that are thorough, clear and concise to management for approval.
- Develop program requirements, processes, policies and procedures that include controls for quality assurance and submit them to management for approval prior to scheduled program roll-out.

- Manage day-to-day operations to ensure all program components are on track. Ensure tasks delegated to appropriate personnel are monitored for proper and timely completion. Follow, monitor and enforce compliance with program policies and procedures.
- Develop a program tracking and reporting system (i.e., Excel-based spreadsheets) to effectively monitor all aspects of program results, expenditures, invoice payments and customer participation to avoid “surprises” or impacts to program goals and market actors.
- Ensure Special Payment Requests and invoices from vendors, contractors, retailers or implementers are accurate, and that appropriate back-up documentation is provided and charges are consistent with the Purchase Order and/or agreement prior to submitting the request for payment to management for approval.
- Review monthly program budget reports and ensure corrections are made.
- Provide weekly, monthly and quarterly reporting to the supervising manager, and as required by management, on the status of program results, activities, expenditures, customer and market participation and challenges or issues.
- Conduct regular vendor/contractor monitoring and verification activities, document observations and findings and implement corrective actions.
- Accurately interpret and evaluate information and situations to identify and manage timely resolution of problems and issues. Keep management abreast of problems and issues. Conduct comprehensive analysis and present recommendations to management for review and approval.
- Actively participate on statewide teams, partnerships, EM&V teams and working groups.
- Support the EE Division competitive bidding process
- Support the client’s quality assurance program and maintain updates to Program Policies and Procedures Manual, program documentation binders and PM desk procedures.
- Comply with company values, standards and laws, rules, regulations and other legal requirements that apply to our business, including ethical, safety, regulatory and environmental standards.
- Perform other tasks as required by management.
- Incorporates safe work practices in job performance.

Supervisory Responsibilities: Provide supervisory responsibilities. May have employees to train, coordinate and supervise.

Qualifications: Bachelors or Master’s Degree required. Preferred for majors in mechanical, electrical, industrial, or civil engineering; finance or business administration. Desired coursework in energy related subjects, marketing, and business analysis.

- Demonstrated senior-level consulting experience; analytical, and research skills required.
- Responsible, organized, detail oriented, and motivated.
- Strong preference for those with specific experience in the energy efficiency industry.
- Demonstrated strong technical writing and editing abilities.
- Strong communication and leadership skills as well as demonstrated client development skills.
- Computer aptitude and familiarity with Microsoft Office (Word, Excel, Access, PowerPoint) and Windows operating system.
- At least 5 years’ experience in the energy industry or the business research industry
- Travel is required.

Education and/or Experience: Typically, has at least a Bachelor’s or Master’s degree with 5+ years of experience directly related to Energy efficiency and with at least 10 years of industry experience.

10. Sr. Consultant

Reports To: President or Vice President

Related Experience (Years): 10 Years

Degree: Bachelors or Master’s Degree

FLSA Status: EXEMPT

Summary: This position has in-depth and highly specialized knowledge of industry sectors, policy and environmental issues as well as knowledge, experience and track record in business management, working with regulatory groups, strategic planning, management reviews, business development, business management of all products and services currently offered and will be offered. Has the ability to establish and expand client relationships. Works at the lead technical and business management level.

Essential Duties and Responsibilities:

- Manage existing program managers, project managers, implementation managers while meeting with customers KPIs.
- Develop business as requested by the senior management.
- Manage day-to-day project or program activities.
- Coordinate Technical Support Services.
- Weekly, monthly and quarterly updates with Lincus management.
- Communicate and establish meetings within clients Sr. Managers' assistance in sales activities
- Expand program administrative and consulting services to existing and new clients.
- Develops new DSM programs as requested for specific DSM cycles or transition period.
- Incorporates safe work practices in job performance.

In addition to specific business management and development goals other duties and responsibilities include:

- Coordination with various levels of client's departments.
- Participate in customer project meetings.
- Review and confirm eligibility of submitted applications. Provide a report for confirmed applications.
- Enter and maintain project information in client's database. Provide reports as needed to Contract Manager.
- Assign and manage Technical Reviewer. Provide assigned name and other information as requested by the client's Contract Manager.
- Assure compliance with all program guidelines, policies and procedures.
- Develop and maintain strong relationships with clients.
- Provide other project management duties and reports as assigned.

Supervisory Responsibilities: Provide high level management and supervisory responsibilities. May oversee employees to train, coordinate and supervise.

Qualifications: Bachelors or Master's Degree required. Preferred for majors in Mechanical, Electrical, Industrial, or Civil Engineering; Finance or Business Administration. Desired coursework in energy related subjects, marketing, and business analysis.

- Demonstrated senior-level consulting experience; analytical, and research skills required.
- Demonstrated relationship skills
- Responsible, organized, detail oriented, and motivated.
- Strong preference for those with specific experience in the energy efficiency industry.
- Demonstrated strong technical writing and editing abilities.
- Strong communication and leadership skills as well as demonstrated client development skills.
- Minimum of 10 years experience in the energy industry or the business research industry.
- Travel is required.

Education and/or Experience: At a minimum has at least a Bachelor's or Master's degree with at least 10 years of directly relevant experience in Energy Efficiency field.