

Syserco Energy Solutions

Response To: Santa Rosa City Schools
Prop 39 Energy Efficiency Projects



Syserco Energy Solutions

California Offices:
Petaluma
Fremont

Gabe Johnson
g.johnson@syserco.com
Cell: (707) 227-6377



Table of Contents

1. Cover Letter.....	1
2. Executive Summary.....	2
3. Technical Capabilities, Experience, and Qualifications	4
4. Project Management	14
5. Competitive Bidding Requirement	17
6. Local Support	18
7. Potential Scopes of Work	20
8. Cost Structure	20

1. Cover Letter

Dear Mr. Braff,

Syserco is pleased to present the enclosed proposal in response to Santa Rosa City School's RFQ for Prop 39 Energy Efficiency Improvements.

Syserco is a locally owned Energy Solutions and Services company located in Petaluma, CA. We have served clients and the community for over 40 years. Our dedicated team of over 150 energy professionals provide vast experience serving the K-12 marketplace. We have completed hundreds of successful energy-savings projects that have led to long term client relationships with over 70 school districts across Northern California.

Given our extensive experience developing and delivering energy efficiency and infrastructure improvements projects within the K-12 market, we are keenly aware of the importance of working closely with the DSA for compliance issues as well as project timelines. We are driven to exceed our client's expectations as it pertains to the design, development and execution of projects where we are often working within existing and sometimes occupied facilities, under constrained timelines.

Our team is practiced, efficient and collaborative in all Proposition 39 energy planning and implementation activities, as required by the California Energy Commission. When it comes to Prop 39, we are subject-matter experts and it is our intention to bring this expertise to your project.

SYSERCO HAS THE SOLUTION

By upgrading existing building infrastructure with new, reliable, and efficient technologies, Santa Rosa City Schools will greatly reduce utility expenses that will drive operational savings for the District. Our goal is to deliver clean, sustainable, and energy efficient options that will allow you to maximize your savings and return on investment while addressing safety, reliability, comfort and maintenance issues. We look forward to partnering with your team to make this project a success.

WE ASK FOR YOUR BUSINESS

We are eager to expand our existing, collaborative working relationship with Santa Rosa City Schools in the development and delivery of innovative energy saving solutions. Should you require any clarifications concerning this RFQ response, please do not hesitate to contact me at 707-227-6377. Thank you for this opportunity.

Sincerely,

Gabe Johnson

Account Executive, Syserco Inc., Energy Solutions

2. Executive Summary

APPROACH

Syserco's Energy Solutions team assists clients with identifying energy saving opportunities and developing innovative solutions that help address infrastructure needs. Through this process, it is our goal to provide more reliable, energy efficient, safe and healthy physical environments for students and teachers.

Our approach is simple:

- **We listen intently to our client's needs & wants**
- **We're innovative in our solution development**
- **We take responsibility and guarantee project performance**
- **We are passionate about the work we are engaged in**

Our Energy Solutions team provides a comprehensive and turnkey Design-Construct-Optimize-Support approach utilizing an Integrated Design-Build Energy Services methodology. Our Prop 39 process is all-inclusive, and our delivery model ensures that we will not only develop and implement successful Energy projects, but we will also do all the "heavy lifting" along the way. As experts in navigating and understanding the requirements of the Prop 39 program, you will feel confident knowing that Syserco, as your partner, will ensure that your District is in full compliance and well on the way toward a successfully completed project.

Our project development and implementation approach is collaborative, highly integrated, and local. With a team of over 150 employees that include design engineers, energy engineers, commissioning engineers, and project managers, we approach each project aiming to be cost-effective and efficient.

Our turnkey offering includes:

- **Energy/Utility Auditing and Master Planning**
- **Comprehensive Energy Management Strategies**
- **Project Development, Design and Construction**
- **Prop 39 Energy Expenditure Plan Submission**
- **DSA Submission, Reporting and Coordination**
- **Construction Cost and Utility Savings Development**
- **Building Systems Commissioning**
- **Project Finance Sourcing**
- **Operations Staff Training and Development**
- **Remote Monitoring and Control**
- **Predictive Analytics**
- **Utility Measurement and Verification Reporting**

THE SYSERCO ADVANTAGE

When taking on complicated energy efficiency upgrade projects that fall within the guidelines of Prop 39, it is imperative for your District to work with a collaborative partner that you know and trust. You know us – we are local: Our office is 13 miles from your District Office, so we are always

minutes away. We have experience working on your campus – we are familiar with your buildings and your systems and we are experts in understanding and troubleshooting your existing Alerton Controls systems.

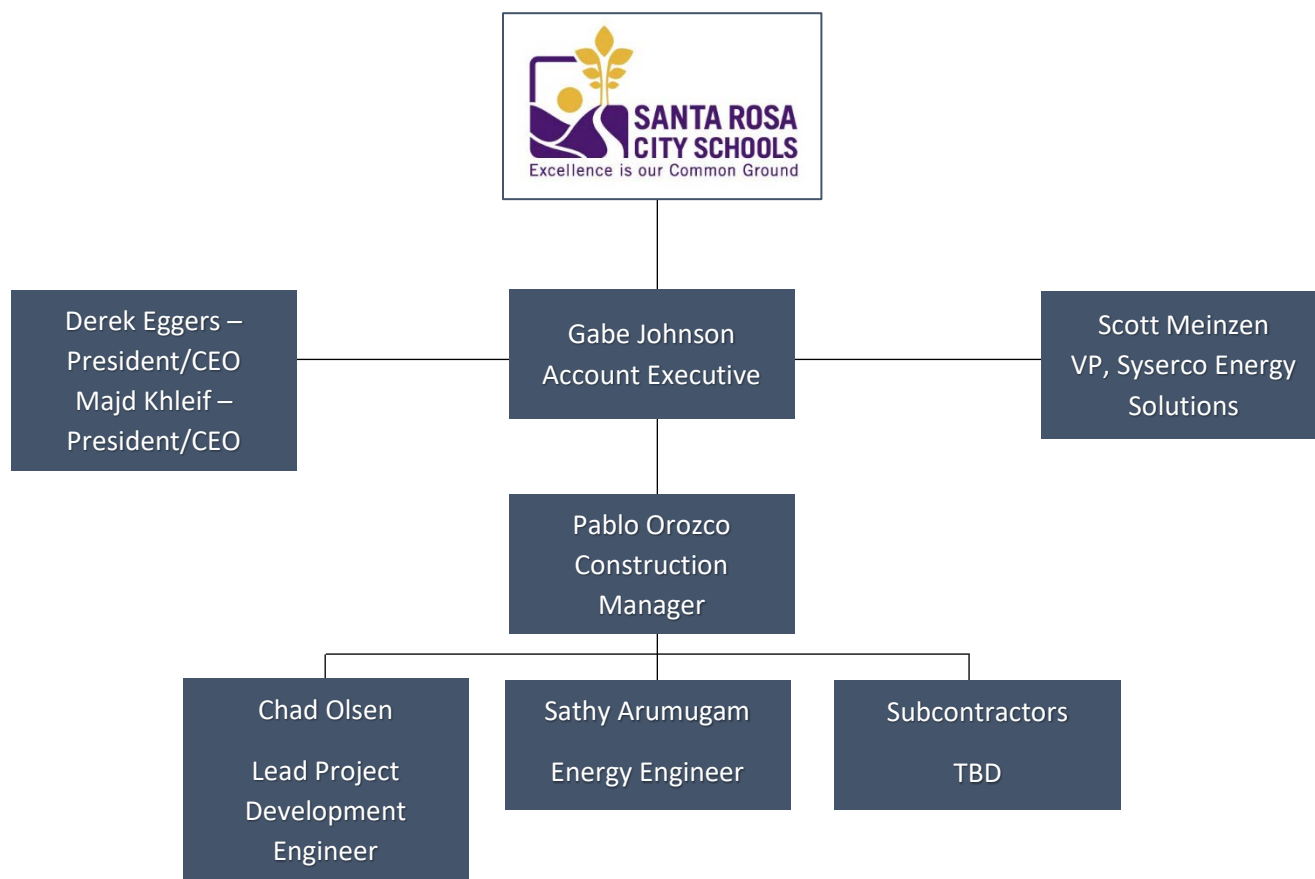
Finally, we support Sonoma County! We currently work with numerous educational agencies throughout the county, including Sonoma County Office of Education, Petaluma District Schools, Piner-Olivet USD, Sonoma State University, Santa Rosa Junior College, Sebastopol USD, Healdsburg USD, and others. Many of the Syserco employees working with you on your projects live with their families and children in Sonoma County. We are here to serve you!

Please see the following information as required by the RFQ solicitation:

Firm's Legal Name:	Syserco, Inc.
Type of Business Entity:	Corporation, #CO684438
License:	DIR #1000010773 CSLB - B, C10 #483939
Ownership:	Majd Khleif, President Derek Eggers, CEO
Location of Headquarters and Branch Offices:	<u>California Headquarters</u> 215 Fourier Ave. Fremont, CA 94539 Ph: (510) 498-1171 <u>California Branch Office</u> 1425 N. McDowell Blvd. Petaluma, CA 94954 Ph: (707) 664-8443
Main Contact:	Gabe Johnson - Account Executive 1425 N. McDowell Blvd #115 Petaluma, CA 94954 Ph: 707-227-6377 Email: g.johnson@syserco.com
Number of Years Engaged with CA K-12 School District Energy Projects:	40 Years

3. Technical Capabilities, Experience, and Qualifications

- a. **Identify the Proposed team who will be working with Santa Rosa City Schools on the project. Include an Organizational Chart and indicate the roles and responsibilities of each individual, including each individual's qualifications and experience with similar projects.**



Gabe Johnson

Account Executive

Role in SRCS Project:

Gabe will act as the Primary Point of Contact between Syserco and SRCS for this and all future Projects. Gabe's primary responsibilities will focus on establishing clear and consistent communication between Syserco and SRCS throughout the project. Gabe will lead the overall management of Syserco's project development and implementation to ensure the project remains on schedule, expectations are being met, and the project is delivered with excellence. Gabe has been in the energy industry for 17 years and has worked on numerous energy efficiency projects from the North Bay of California to Portland, OR. Gabe received his BS in Mechanical Engineering at UCSB and his MBA from the University of Phoenix. Gabe is also a Certified Energy Manager (CEM).

Derek Eggers & Majd Khleif

President & CEO of Syserco, Inc.

Role in SRCS Project:

Derek and Majd are co-owners and active President and CEO of Syserco, Inc. Derek and Majd are passionate leaders and have developed a culture within Syserco that has brought Syserco recognition as one of the “Bay Area’s Best Places to Work” for the last 8 straight years. Derek and Majd pledge their support of SRCS and are determined to ensure that SRCS receives excellent customer service for this project. They will both be available to be contacted by SRCS for any questions or concerns.

Scott Meinzen

VP & General Manager Syserco Energy Solutions

Role in SRCS Project:

As the VP of Syserco Energy Solutions, Scott is responsible for managing the operations, business development, and success of Syserco’s Energy Solutions Team. Scott will remain active with Syserco’s project development and delivery team to ensure the project is delivered with excellence, and on time. Scott will be closely involved with the overall management of this project from start to finish.

Pablo Orozco

Construction Manager

Role in SRCS Project:

Pablo will act as the Lead Construction Manager for this project. Pablo will be responsible for managing the project on a daily basis from Syserco employees to all subcontractors involved with the project. Pablo will run all progress meetings and interact with SRCS throughout the project. Pablo has a strong Construction Management background with 30 years of experience in the industry.

Chad Olsen

Lead Project Development Engineer

Role in SRCS Project:

Chad is a licensed Professional Engineer, a Certified Energy Manager (CEM) and has received his PG&E OBF ICP Certification. Chad has been developing energy efficiency projects for 10 years and his primary role for this project will be to ensure satisfactory compliance with Prop 39 requirements. Chad has worked with the CEC on numerous Prop 39 projects and is well-versed in all aspects of the program. Chad worked closely with CleaResult in providing oversight for energy savings calculations that were submitted and approved in the District’s Energy Expenditure Plans (EEPs). Chad will ensure that the project is closed out according to all CEC / Prop 39 requirements.

Sathy Arumugam

Energy Engineer

Role in SRCS Project:

Sathy is the lead Energy Engineer for the project. Sathy’s primary role will be to support Chad with energy calculations and project development to meet Prop 39 requirements.

- b. Provide (2) Educational or Institutional references of Projects that are similar in nature to the proposed project that occurred in the last 3 years in Northern California. Include project details and contact information for primary Point of Contact for the project who can attest to the Firm's performance on described projects.**

Piner-Olivet Union School District Prop 39 Energy Efficiency Improvements



Location: Santa Rosa, CA	Project Date: 2016 – 2017
Project Type: Prop 39 - Campus-Wide Energy Efficiency Improvements	Project Value: \$2.3M
References: Becky Leffew - Chief Business Official Piner-Olivet Union School District Phone: 707-522-3008	

Piner Olivet USD embarked on a large solar project approximately 6 years ago. This project resulted in the installation of solar panels at each of their 5 sites. Collectively, these solar arrays offset approximately 80% of the District's energy usage. Piner Olivet USD was also beginning to experience challenges with outdated HVAC equipment that was failing, poor lighting, and systems that were difficult to diagnose and control. The District selected Syserco to implement campus-wide Prop 39 energy efficiency upgrades. This project resulted in new LED lighting technology, new lighting controls, new HVAC equipment, and new EMS programmable thermostat controls. These improvements have saved money, reduced staff time for repairs, and improved conditions in classrooms. These upgrades have improved comfort and given the District access to valuable data that can be monitored, viewed, reported, and then acted upon. This project was a success by all accounts. Following its completion, the District is now working with Syserco to develop an additional phase of the project that will targeting Zero Net Energy for the entire campus.

Fremont Union High School District Prop 39 Energy Services Retrofit



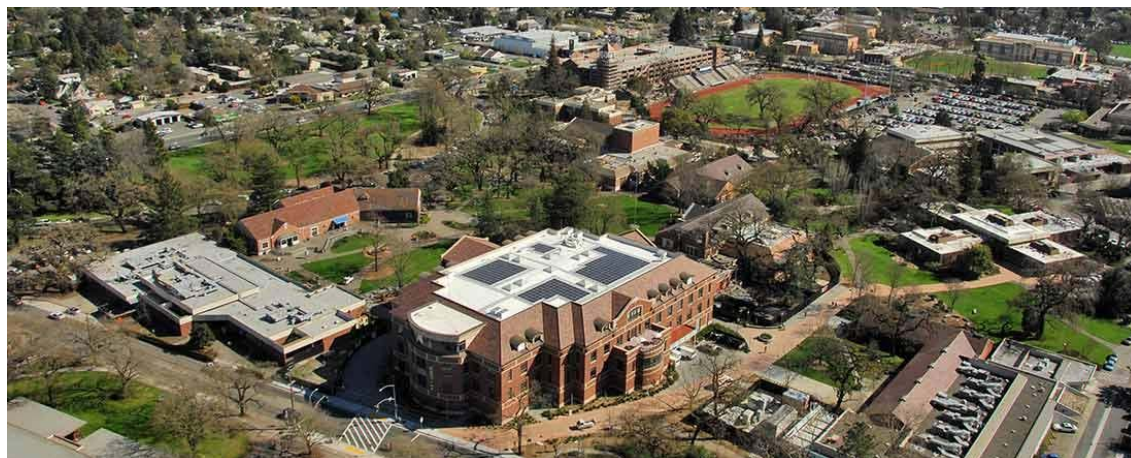
Location: Cupertino, CA	Project Date: 2016-2017
Project Type: Comprehensive Prop 39 Energy Services Project	Project Value: \$3M
References: Erik Walukiewicz Fremont Union High School District Phone: 408-242-4575	

Syserco Energy Solutions developed, designed, and implemented Prop39-funded Energy Services work at 5 Fremont Union High School District campuses. Primary scope included upgrades of mechanical HVAC, electrical/lighting, and plumbing systems at all sites.

For this project, Syserco took a holistic strategy and approach in order to maximize and secure all available Proposition 39 energy grant funding. This approach allowed the project to supplement existing capital and operating budgets in the pursuit of improved facility operations and performance. The completion of the project resulted in lower energy usage, increased building system performance, reduced utility spending, and an improved learning environment.

- c. Provide (2) Educational or institutional references of Projects that are similar in nature to the proposed project that occurred in the last 3 years in Sonoma County. Include project details and contact information for primary Point of Contact for the project who can attest to the Firm's performance on described projects.

Santa Rosa Junior College



Location: Santa Rosa, CA	Project Date: 2016-2017
Type: Campus Wide Customer Profile	Project Value: \$5M+ (multiple projects)
References: David Lieberman Director of Sustainability & Energy Efficiency Phone: 310-430-2063	

Santa Rosa Junior College has adopted a state of the art Alerton Energy Management System that has enabled the college to fulfill its vision of becoming an inclusive, diverse and sustainable community that engages the whole person. The college has undergone numerous projects to enhance building automation controls while increasing efficiency and sustainability. Syserco recently completed an energy project at their Petaluma campus that utilized Prop 39 funding and included the installation of sub-metering throughout the campus, along with other mechanical and lighting energy conservation measures.

These updates have designated SRJC as a premier college in its efforts to embody a culture of environmental stewardship. Along with these projects, and the replacement antiquated systems at the Petaluma Campus, SRJC now features a sophisticated control design for the central plants, lighting and various other systems. The goal of these projects is to not only consider the campus from a HVAC standpoint, but to look at the campus as an entity striving to be the gold standard of energy conservation.

Sebastopol USD Prop 39 Project



Location: Sebastopol, CA	Project Date: 2017-2018
Project Type: Prop 39 Energy Services Project	Project Value: \$265,000
References: Linda Irving – Superintendent Phone: 707-829-4570	

Seeking a local, knowledgeable, and experienced firm to manage their Prop 39 Construction Project, Sebastopol Union Schools chose Syserco Energy Solutions. The District partnered with Syserco to implement HVAC, Lighting, and Energy Management System upgrades across the District. Syserco is fully responsible for all aspects of the Prop 39 implementation process, including project closeout and reporting.

d. Describe your Firm's financial capability to handle the project. Include company bond rating, bond limits, and evidence of insurability.

Syserco is a well-managed and financially stable firm. As you may expect, it starts with our stable leadership team. Our CEO and president, and nearly all of our senior leadership team have been in the energy and construction industry for over 25 years. We also have a seasoned financial management team that is led by Svetlana Yepanechnikova, VP of Finance, who has an advanced degree in accounting and economics.

Our banking relationships are very strong. In addition to a strong balance sheet and cash position, Syserco has a bonding capacity in excess of \$30M (\$10M single job/\$40M aggregate) and maintains an additional \$5M credit facility. Our bonding rates are tiered and calculated based on contract value. This tier ranges from 1.20% to .55%. Due to our strong financial position, Syserco can readily establish project specific lines of credit as needed. This allows Syserco to carry projects that require us to finance them through the construction period.

Syserco has a history of financial stability and will continue to be stable for the duration of your project, including warranty and the ongoing measurement and verification periods that typically follow the construction period.

Please feel free to contact either of our executive leadership team if you would like to discuss Syserco's financial stability further.

Derek Eggers, CEO

510-498-1499

d.eggers@syserco.com

Majd Khleif, President

510-498-1498

m.khleif@syserco.com

e. Provide a letter from Bonding Agent stating Firm's bonding capacity.

CNA SURETY

*San Francisco Branch
555 Mission Street, Suite 200, San Francisco CA 94105*

November 28, 2018

Santa Rosa City Schools
Attention: Michael Braff, Director of Facilities
211 Ridgway Avenue
Santa Rosa, CA 95401

Re: Request for Qualifications - Syserco, Inc.
Design/Build Implementation of Proposition 39 Energy Efficiency Projects

Dear Michael Braff:

Syserco, Inc. is a highly regarded and valued client of Western Surety Company, a member of CNA Insurance Companies. At their request we are providing this information for the above Prequalification. Western Surety Company is an admitted surety (approved by the California Department of Insurance) and authorized to issue surety bonds in the State of California. Western Surety Company is rated "A XIV" by A.M. Best and is an approved surety on Federal bonds under Title 31 of the United States Code per U.S. Treasury Department Circular 570. Syserco, Inc.'s surety agent is Woodruff-Sawyer & Co., 50 California St., 12th Fl., San Francisco, CA 94111 (415) 391-2141.

We are confident in Syserco, Inc.'s ability to perform and we recommend them for your favorable consideration. Syserco, Inc. has a single bonding limit of \$10,000,000 and a potential aggregate work program of \$40,000,000.

This letter is not to be construed as an agreement to provide surety bonds for any particular project, but it is offered as an indication of our past experience and confidence in this firm. Any specific request for bonds is a matter between Syserco, Inc. and ourselves and we assume no liability to third parties if for any reason we do not execute said bond(s).





If we can provide any further assistance, please do not hesitate to call upon us.

Western Surety Company

By: 

Alicia Dass, Attorney-in-Fact

f. Provide a Certificate of Insurance

	CERTIFICATE OF LIABILITY INSURANCE	SYNERCO-01	SPRIOR DATE (MM/DD/YYYY) 03/01/2018																															
THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.																																		
IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).																																		
PRODUCER License # 0G66614 One Risk Group, LLC DBA: One Risk Management & Insurance Services 5976 W. Las Positas Blvd., Suite 100 Pleasanton, CA 94588		CONTACT NAME: Shannon Prior PHONE (A/C, No, Ext): (925) 226-7360 FAX (A/C, No): (925) 226-7389 E-MAIL: sprior@oneriskgroup.com																																
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C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / <input checked="" type="checkbox"/> N If yes, describe under DESCRIPTION OF OPERATIONS below	SYWC923468 - CA, OR 03/01/2018 03/01/2019 <input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000																																
D	Installation Floater	6012450485 03/01/2018 03/01/2019 Per Occurrence \$ 1,200,000																																
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks: Schedule, may be attached if more space is required) Re: Evidence of Coverage																																		
CERTIFICATE HOLDER Evidence of Coverage		CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE 																																

g. Provide California General Contractor's license number.

General Contractor's License Number: 483939

h. Describe your Firm's approach to safety.

Syserco engages in a safety-first approach to guarantee that safety trumps all other issues on a project. All management and supervision staff members participate in mandatory safety training and are empowered to make on-site adjustments to the project safety plan. All subcontractors are held to Syserco's safety standards and are required to participate in safety orientation, conduct weekly safety meetings, and participate in pre-selection safety meetings. Subcontractors participate in pre-installation meetings where we collectively identify hazardous materials, confined spaces, and various other job hazards before work begins.

i. Describe your Firm's ability to service and support the District's existing Energy Management and Control systems with products, solutions and technical support.

Syserco brings expertise in multiple EMS systems. The diverse and experienced background of our technicians and programmers allows us to design, install, commission, service, and train District employees on multiple EMS systems. We have been the District's partner for these services for over (10) years. This direct-service will provide cost savings to the District, and communication between the "Controls" team and our "Energy" team will be efficient and seamless. We have direct access to existing District EMS functions and when it is necessary to gather data from the Alerton EMS system, Syserco has a direct path to this information that will not slow down the project or incur additional cost to the District.

j. Describe your Firm's ability to remotely monitor, diagnose, and troubleshoot potential issues associated with existing and future Energy Management systems.

REMOTE ONLINE TECHNICAL SUPPORT

Syserco's Fremont office provides our clients an around the clock remote monitoring customer support center to help answer technical questions and solve problems. The Service Response Center is staffed with factory trained Alerton service technicians that can answer questions as well as remotely login to a client's building automation system to help resolve issues and provide instruction on the system's features and operation.

The remote online technical support provides Syserco clients with a direct line to skilled technicians who can provide immediate assistance in analyzing problems and recommending solutions via telephone, modem or internet connection, or building DDC controls; by checking system operations and foreseeing potential problems, or providing system operations adjustments remotely.

k. Describe your Firm's ability to provide training and support of existing Energy Management system, including type of training offered, location of training, etc.

DELIVERING THE BEST VALUE FOR THE DISTRICT'S INVESTMENT IN ENERGY PERFORMANCE

Syserco's guarantee of system performance allows us to commit to our clients that the equipment and systems installed will meet or exceed established performance standards. We offer our clients in-house expertise when it comes to the engineering design, installation as well as the ongoing service and support of their Alerton building automation systems. These will orchestrate enhanced equipment operation to help achieve the desired energy and operational cost savings.

OPTIMIZING ENERGY USAGE WITH EDUCATION, TECHNICAL SUPPORT AND SYSTEM ANALYSIS

The more your building's Operators, Occupants, and Visitors know about energy consumption and how their behavior affects it, the more they will participate in conservation. Syserco makes that knowledge possible. Our priority is to make certain that all newly installed equipment and systems operate to ensure occupant safety, health, and comfort. Our second priority is to make sure the client's Facilities Team that is responsible for the ongoing operation and maintenance of the building automation system is educated and trained on the system to feel comfortable and confident with its operation.

ON-SITE TRAINING SESSIONS

As the Bay Area authorized Alerton Energy Management and Control System representative, Syserco offers detailed onsite training during the commissioning phase of our energy saving infrastructure improvement projects as well as factory certified classroom training hosted from our local Fremont headquarters facility.

To supplement detailed onsite and classroom training, Syserco offers online training courses to assist building operators and Facility Engineers in getting the most out of the operation and control of their major building systems.

I. Describe your Firm's ability to work with multiple campus EMS systems and integrate such systems into a single front-end platform including the integration of stand-alone programmable thermostats into campus Energy Management systems.

Syserco is considered one of the leaders of EMS system integration in the Bay Area. Over the past 10 years, Syserco has helped numerous customers successfully integrate multiple EMS systems into a single front-end control system that is intuitive and easy to use. The following are a few examples of recent projects where Syserco successfully integrated multiple EMS systems:

- **Menlo Park City School District** – Integrated a Trane system and an Alerton system into a unified Tridium front-end.
- **Moffet Towers** – Hewlett Packard – ACL Core, Alerton TI. Single Alerton GUI.
- **City of San Mateo Police Headquarters** – Legacy proprietary Siemens System integrated into new Alerton Front end.
- **Embarcadero Center -1,2,3,4** – Alerton Core, Alerton and Delta TI. Single Alerton GUI.
- **Kaiser Oakland Medical Center** – Multiple Legacy JCI Systems in multiple Buildings. Multiple Alerton Buildings. Single Alerton GUI.
- **Community Hospital of the Monterey Peninsula** – Multiple JCI, Siemens, Delta Systems in multiple Buildings. 2 Alerton Buildings. In progress to integrate to a single Alerton GUI.
- **Santa Rosa Junior College** – In progress. Integrating Delta into EMS.

- **Cal State Monterey Bay**– integrated Alerton BAS into a JCI front-end.
 - Majority of Campus– integrate disparate mechanical systems into Alerton front-end (VRF, VFDs, Boilers, Packaged Units with factory controls, ceiling fans, etc.), integrate lighting controls, submeters, and electrical equipment.
- **City of Menlo Park** – Integrated a Siemens System into an Alerton front-end.
- **Kaiser Hospital** - Integrated JCI and Alerton into an Alerton front-end.

m. Describe why your Firm would be the best choice for this project for Santa Rosa City Schools.

Syserco is the best choice for Santa Rosa City Schools for the following reasons:

- **Syserco is local.** Our office is just a few miles from the District and we work with several other K-12 Districts in Sonoma County including: Piner Olivet USD, Santa Rosa Junior College, Petaluma District Schools, Sebastopol USD, Healdsburg USD, Sonoma State University, Sebastopol Charter School, and Sonoma County Office of Education.
- **Syserco Energy Solutions is familiar with your project.** We worked closely with ClearResult to help the District develop comprehensive Prop 39 Energy Expenditure Plans that were successfully submitted and approved by the California Energy Commission ahead of all deadlines.
- **We provide strong, local Account Management support.** Your dedicated Account Manager – Gabe Johnson – lives in Sonoma County and has been in the energy business for 15+ years. Gabe has extensive experience helping K-12 Districts with Prop 39 and other energy projects.
- **Syserco has been working with Santa Rosa City Schools for over (10) years.** Our team of Project Managers, Technicians, and Electricians are extremely familiar with the facilities at both the Elementary and High School Districts.
- **We are well connected with local subcontractors.** With more than 10 active projects in Sonoma County, we work closely with a number of qualified local contractors.
- **A significant portion of the District is still controlled by Syserco-installed EMS systems.** An existing Service Contract keeps Syserco engaged with the District at multiple levels and provides remote support for the District.

4. Project Management

Syserco will partner with local contractors to create a team that will collectively be able to execute all implementation aspects of this project. All Prop 39 administrative work shall be performed in-house by Syserco. Additionally, Syserco will perform all Energy Engineering, Project Development, Construction Management, Site Supervision, Training, and Warranty Management in-house. Syserco will manage and work closely with local subcontractors for all mechanical services work and in a similar fashion, Syserco will take the same approach for all lighting services work. **Syserco commits to work closely with PG&E and their local LED lighting program administrator (TEAA, located in Santa Rosa)** for the lighting retrofit work. Simply stated, this

project will be managed by a team with great pride in the work they do and carefully chosen partners. Your satisfaction, and **willingness to provide a positive reference of your experience is what matters most to us.**

- a. **Describe your Firm's approach to creating projects that include meeting requirements of Prop 39, PG&E's OBF_NI program and additional/alternative forms of funding, including your understanding of both program Prop 39 and PG&E's OBF requirements.**

Syserco Energy Solutions has extensive experience in working with both Prop 39 and PG&E OBF programs. By understanding the requirements of each program, and the District's need for comprehensive system upgrades, our team is able to help the District develop and prioritize Scopes of Work that will not only meet eligibility requirements of both programs, but will also maximize the benefits to the District by directing certain scopes to "feed into" each of the various programs. For example, Prop 39 has an SIR requirement. OBF does not have an SIR requirement, but there are limitations regarding acceptable paybacks for energy conservation measures. Additionally, the submittal and approval processes are vastly different for both programs. Prop 39 requires the completion, submission, and approval of Energy Expenditure Plans, whereas PG&E's OBF program requires a comprehensive energy audit to be submitted to ARUP (PG&E's 3rd Party Program Administrator) for review and approval. The review processes are significantly different, with Prop 39 being more "formulaic" and OBF requiring additional time from assigned Project Engineers to validate all energy savings calculations. The time requirement involved for each program is also different and should be planned for accordingly.

Syserco has had great success in working with both programs. To demonstrate this success, please see the following excerpts from reference letters that were written by our customers to validate their success and satisfaction with Syserco Energy Solutions on their Prop 39 and/or PG&E OBF projects:

Prop 39 Reference:

"For your project, I would strongly consider choosing Syserco. Through our RFQ response, Syserco proved that they are well qualified to do the work, which we would expect, but it is the PEOPLE that shape our experience. Syserco provides an experienced, well qualified, friendly team that works well together and install confidence in their ability to deliver." – Linda Irving, Superintendent, Sebastopol Union Schools

PG&E OBF Reference:

"The Syserco Energy Solutions engineering and project management team has worked with a high level of integrity and has earned the trust of City staff. The level of communication, schedule coordination, knowledge and professionalism with which SES has performed their work and has met the District's expectations." – Rich Payne, Public Works Manager, City of Walnut Creek

b. Describe your Firm's eligibility to participate in PG&E OBF_NI program, including your Firm's level of ICP certification. Provide the name of Lead Project Development Engineer who is ICP certified along with details associated with this credential.

One of the **key requirements by PG&E's OBF program is that the contractor must be ICP certified.** The Investor Confidence Protocol (ICP) training program ensures that all contractors working on OBF projects meet a certain level of competence, as required by PG&E. If the contractor is not ICP certified, they are not eligible to submit an application on behalf of the District. For your project, the Lead Project Development Engineer is Chad Olsen. **Chad has completed his ICP certification and is currently working with PG&E and ARUP on numerous OBF projects including Walnut Creek, Town of Los Gatos, City of Campbell and Livermore Area Recreation and Parks District.** All projects that Chad has submitted for OBF have been approved and the program has been successfully navigated.

c. Describe your Firm's experience in working with PG&E under the OBF_NI program.

Syserco is the leader in submitting and gaining approval for OBF_NI projects. Specifically, see the following examples:

- **City of Walnut Creek:** This project was one of PG&E's first successfully completed projects under this new program. Syserco helped the District secure approximately \$1.2M dollars. Our team worked closely with PG&E's review team to get the project approved and submitted on time. This project recently achieved final closeout and PG&E/ARUP have provided letters stating the project is fully approved and funded.
- **Town of Los Gatos:** Syserco recently submitted and received approval for OBF_NI funding of approximately \$1.3M for the Town of Los Gatos. Syserco worked closely with PG&E to have the project reviewed and approved in a timely basis. The project is currently moving forward and the OBF_NI funding accounts for approximately 90% of the overall project cost.
- **Livermore Area Recreation and Parks District:** As part of a comprehensive Zero Net Energy project that combines solar with energy efficiency, Syserco recently received approval from PG&E for approximately \$1.4M of funding for LARPD. Syserco worked closely with the review team to gain approval. This project is currently under construction and will result in Zero Net Energy for the District.

d. Explain your Firm's understanding of District goals associated with Prop 39 implementation, PG&E OBF_NI funding approval and implementation, and related bond projects.

Syserco Energy Solutions has spent extensive time on the campuses of SRCS. We understand your buildings and we understand the goals of the District. There are several contributing factors that the District is utilizing to achieve its goals:

- **Bond Work:** The District has been working tirelessly to implement bond projects that focus on roofing replacements, IT upgrades, HVAC unit replacements, and associated controls upgrades. While this is great work, it will not accomplish all of the needs the District has.

- Prop 39:** Prop 39 is a funding mechanism that the District will take advantage of to focus on comprehensive lighting solutions at approximately 50% of the District. The scope of work that will be funded under Prop 39 includes interior and exterior LED lighting retrofits, lighting occupancy controls, and HVAC/controls upgrades at (4) charter schools. There is not enough Prop 39 funding for the District to complete all of the lighting work.

PG&E OBF: This program will fund the remaining LED lighting retrofit work that is not funded under the Prop 39 program. At the completion of the Prop 39 and OBF programs, the District will have all lighting (interior and exterior) upgraded to LED fixtures, with occupancy controls.

At the conclusion of the bond work, Prop 39 work, and OBF work, the District will be in a much better position with the majority of HVAC and lighting work completed throughout the District. Additional Energy Conservation Measures will remain in the form of water conservation, solar PV power generation, battery storage, and miscellaneous building envelope and HVAC opportunities. **By developing and implementing these remaining measures as part of a Phase-2 strategy, the District will be positioned to achieve Zero-Net-Energy status throughout all campuses.**

5. Competitive Bidding Requirement

Syserco Energy Solutions believes that successful projects include a combination of the right people, trusted partners, timely and coordinated project execution, and fair and reasonable pricing. Syserco will bring all of these aspects to this project. As the Prime Contractor for this project, we will carry the role of “trusted advisor” for the District as well as “project implementor”. We will work closely with local-subcontractors to ensure that pricing is developed in a competitive manner by qualified contractors. We understand that “low bid” does not always mean “best qualified”. In order to develop the best team for the District that can deliver a successful project on time, and within budget.

a. Detail the process your Firm will take to ensure a competitive bidding process throughout this project.

Our intention for this project is to identify and partner with the most qualified and cost competitive subcontractors in the local geographic area. We understand that the current market is extremely demanding of mechanical, electrical, and lighting contractors so if it is necessary to branch further out to find the best partners, we will consider that approach. Ultimately, our goal is to develop and implement the Prop 39 project (that has been submitted and approved by the CEC) on time and within the budget provided under the District’s Prop 39 allocation. We will allow subcontractors that are pre-qualified and financially stable to compete for all aspects of the work. In order to drive toward quality and reasonable pricing for the District, we use a detailed bidding process to create the best project at the most competitive price for the District.

6. Local Support

a. Provide physical address of your Firm's nearest branch office that will be supporting this project for Santa Rosa City Schools.

Santa Rosa City School's Prop 39 Energy Efficiency Projects will be supported by our branch office in Petaluma. The office is located at **1425 N. McDowell Blvd. Ste 135, Petaluma, CA 94954**

b. Provide a list of support capabilities, including staff, and roles of individuals that will support this project from local branch office.

Syserco is staffed to provide all support capabilities that are needed to deliver this project on time and within budget. In combination with our subcontractors, all aspects of the project will be accounted for. Our local team (listed below) will be available to support the project and we will draw additional resources from our Fremont office, as needed.

c. Provide a list of employees that reside in Sonoma County.

Graton	Gabe Johnson
Petaluma	Erik Eskes Rafael Medina, Jr. Edgar Sandoval
Santa Rosa	Scott Meinzen Brett Terry Augustin Martinez Sandra Lockwood Danny Galvez Bill Weidman Noel Breiling
Rohnert Park	Rogelio Diaz

d. Provide a list of Sonoma-County based institutions that your Firm currently works with for similar-type projects.

Sebastopol Union Schools	Currently under contract for Prop 39 project implementation. Syserco Energy Solutions is working with Linda Irving (Superintendent) and her staff to maximize Prop 39 funding and make energy efficiency improvements at the following sites: Parkside Elementary School, Brookhaven School, District Office
Santa Rosa Junior College	Syserco Energy Solutions has been prequalified (through a competitive RFQ process) to design and build Prop 39 and various campus-wide energy efficiency projects. We currently are under contract to identify energy efficiency improvements at (8) facilities across both campuses (Santa Rosa and Petaluma). Syserco is also SRJC's preferred provider for their campus-wide Energy Management System which includes the majority of the buildings on both campuses
Piner-Olivet Union School District	Currently under contract for Prop 39 project implementation. Implementing HVAC unit replacements at (5) schools and performing LED lighting upgrades (interior and exterior) at (5) schools
Santa Rosa City Schools	District chose Syserco to implement a District-wide Energy Management System which monitors and controls HVAC equipment at the majority of the District's schools
Sonoma County Office of Education	SCOE chose Syserco to implement Energy Management System at SCOE headquarters facility
Healdsburg USD	District chose Syserco to implement Energy Management System at multiple schools
Sebastopol Charter School	Implemented the District's Prop 39 Project: Lighting and HVAC improvements
Petaluma District Schools	Existing Energy Management system throughout the campus
Sonoma State University	Existing Energy Management system in portions of the campus

e. Provide name, and contact information of Primary POINT OF CONTACT for your Firm that will service as Santa Rosa City Schools primary point of contact for all project related services. Describe how this individual will be able to support Santa Rosa City Schools.

Your Account Manager and Primary Point of Contact for this project, and any future projects with Syserco Energy Solutions, is Gabe Johnson. By way of background, Gabe grew up in Sonoma County and attended both elementary and high school at public schools in Sonoma County. Gabe received a Bachelor of Science in Mechanical Engineering at UC Santa Barbara and went on to complete an MBA program at University of Phoenix. Gabe lives with his 2 daughters and wife in Graton, CA. Gabe has a passion for helping school districts in Sonoma County, as his father worked in finance for SCOE for most of his career. Gabe brings over 15 years of experience in the Energy field and he has worked with dozens of school districts over the years to help with similar type energy efficiency projects.

Gabe Johnson (Sonoma County Resident)
p: 707-227-6377
email: g.johnson@syserco.com

7. Potential Scopes of Work

Syserco Energy Solutions understands that the District may consider multiple and various Scopes of Work. We have reviewed the list that was provided by the District in the RFQ. We have experience and understanding in identifying, developing, and implementing ALL SCOPES OF WORK that have been identified as “potential” as part of this RFQ solicitation.

8. Cost Structure

DESIGN & CONSTRUCTION

To arrive at final costs, all sub-contractor work is competitively bid, and shown in the attached “Project Cost Summary”. Syserco fees are applied to the total sub-contractor costs of the project.

Below is an example of our Cost Estimating worksheet that will be used for this project. This Cost Estimate shows all sub-contractor costs and applied fees. The District can expect to see pricing submitted in this format, so it is easy to see how all costs add up to form the complete project. We will be happy to sit down with the District to review these Cost Breakouts in details and answer any questions that may arise. Our goal is that the District clearly understands how all costs are developed and to deliver the Prop 39 scope as approved by the CEC on time and within the allocated budget.

<div><div><div>SYSERCO</div><div>ENERGY SOLUTIONS</div></div><div><div></div><div></div><div></div></div></div>		PROJECT COST SUMMARY					Date:	29-Nov-18
Project:	Santa Rosa City Schools - Prop 39 Energy Efficiency						Budget Phase	1
Scope:	Prop 39 Energy Efficiency Upgrades at High School District, ES/MS District, and (4) Charter Schools						Scenario	Summary
A. PROJECT CONSTRUCTION COSTS		Mechanical	Electrical / Solar	EMCS	Lighting	General	TOTAL	
1	Interior LED Lighting Retrofit at Sites A,B,C, etc.	\$0	\$0	\$0	\$0	\$0	\$ -	
2	Interior Lighting Occupancy Controls at Sites A,B,C, etc.	\$0	\$0	\$0	\$0	\$0	\$ -	
3	Exterior LED Lighting Retrofit at Sites A,B,C, etc.	\$0	\$0	\$0	\$0	\$0	\$ -	
4	Exterior Lighting Occupancy Controls at Sites A,B,C, etc.	\$0	\$0	\$0	\$0	\$0	\$ -	
5	HVAC Mechanical @ Charter School Sites A,B,C, etc.	\$0	\$0	\$0	\$0	\$0	\$ -	
6	EMS / Thermostats @ Charter School Sites A,B,C	\$0	\$0	\$0	\$0	\$0	\$ -	
7	Additional Energy Conservation Measures – If applicable	\$0	\$0	\$0	\$0	\$0	\$ -	
8	General Contracting	\$0	\$0	\$0	\$0	\$0	\$ -	
9	Site Conditions	\$0	\$0	\$0	\$0	\$0	\$ -	
Category Sub-Total:		\$0	\$0	\$0	\$0	\$0	\$ -	
SUB-TOTAL CONST. COST =							\$ -	
Payment and Perf. Bond on Const.		~1.2%	\$0	\$0	\$0	\$0	\$0	
A. TOTAL PROJECT CONSTRUCTION COST =							\$ -	
B. PROFESSIONAL SERVICES								
1	Prop 39 Administrative Services	TBD	Firm Fixed Price				\$0	
2	PG&E O&B Administrative Services	TBD	Firm Fixed Price				\$0	
3	Project Development / Energy Auditing (ASHRAE Level 2)	TBD	Firm Fixed Price				\$0	
4	Project Management	TBD	Firm Fixed Price				\$0	
5	Site Supervision	TBD	Firm Fixed Price				\$0	
6	Safety & Compliance	TBD	Firm Fixed Price				\$0	
7	Design Engineering Services	TBD	Firm Fixed Price				\$0	
8	Legal Contract Administration	TBD	Firm Fixed Price				\$0	
9	Measurement & Verification	TBD	Firm Fixed Price				\$0	
10	Commissioning	TBD	Firm Fixed Price				\$0	
11	Training	TBD	Firm Fixed Price				\$0	
B. TOTAL PROFESSIONAL SERVICES							\$0	
C. OTHER COSTS								
1	Project Contingency	~5.0%	Owner Controlled				\$0	
C. TOTAL OTHER							\$0	
D. OVERHEAD COSTS AND FEE								
1	Overhead	TBD	Firm Fixed Price				\$0	
2	Profit / Fee	TBD	Firm Fixed Price				\$0	
D. TOTAL OVERHEAD AND PROFIT							\$0	
E. TOTAL PROJECT COST							\$0	