

Azusa Unified School District

Request for Proposals

Energy Services Project Development And Implementation of ESSER Funded Infrastructure And Energy Conservation Project

April 1, 2022



Subject: Azusa Unified School District (AUSD) – RFP Response

Azusa Unified School District (Azusa USD or the District) is seeking an experienced partner to provide turnkey design build energy solutions and leverage ESSER funding to fund potential scopes such as HVAC upgrades and window and door replacements. Our team brings the expertise to develop HVAC and building envelope scopes of work, as well as a comprehensive approach to evaluate all potential opportunities of facility and energy upgrades such as lighting, water measures, building controls, backup power generation, renewable generation and more. We have the track record and expertise to help the District leverage ESSER funding, AB841 funding, bond funding, low interest financing, and other utility incentives and grants. To assist in assessing the District's 6 closing schools, our lead Project Director Colton Gorman brings 10+ years of building conditions inspection experience to this project.

We meet all of Azusa Unified School District's minimum requirements in this RFP and offers the district the following unique advantages:

WILLDAN ADVANTAGE

- **A REVOLUTIONARY MASTER PLANNING APPROACH.** We are a California-grown design-build energy company with an approach to turn-key design-build energy contracting that is very different from the "traditional" energy company or mechanical contractor. Prior to entering into a contract, we complete a full design and engineering package for each scope **in-house**. This process reduces the district's project risk and **guarantees ZERO change orders after contract**. This is in contrast with the typical energy company and mechanical contract approach, which utilizes conceptual designs before contract, which causes price inflation and creates room for change orders after contract. **By choosing Willdan as your partner, you will know exactly what is being installed before the contract is signed.**
- **PROJECT FUNDING EXPERTS.** Willdan's Financial Services group has over 60 in-house financial experts to help access all available funding sources such as ESSER funding, AB841, grants, utility on-bill financing, bonds, incentives, low interest financing and power purchase agreements (PPAs) for our customers. **Lou Jacobson, former Director of Fiscal Services, understands all requirements for ESSER 1,2 and 3 dollars and has the experience to help the District determine how to best leverage the funding for a variety of energy and facility projects.** See page 7 and page 21 for a summary of our funding expertise and its specific benefits for Azusa USD.
- **OPEN-BOOK PRICING, LOCAL TRADES & COMPETITIVE PROCUREMENT.** Willdan will run a transparent, open-book pricing process to give the District the opportunity to review our pricing and contractor bids. We run a competitive procurement process for the equipment and labor of each scope to get the best value for the District. We also have the ability to hire qualified local trades to stimulate the Azusa local economy. We can obtain pricing from the District's preferred vendors and also competitively source new qualified vendors.
- **IN-HOUSE HVAC & DESIGN CAPABILITIES.** We stamp our own drawings and keep all of our mechanical, electrical, plumbing, solar, civil, utility and energy engineering in house; as well as our construction management, financing, measurement & verification, and commissioning to reduce cost and risk while increasing overall guaranteed performance on our projects.
- **REDUCING THE DISTRICT'S RISK.** To reduce the District's risk we will offer an investment grade audit at no upfront cost. In addition, due to the level of upfront development and engineering we perform; we are able to provide measurement and verification services that yield the most accurate guaranteed utility savings for our customers. We have yet to have a utility savings shortfall on our projects in over 50 years. See page 21 for more details about our savings guarantee.

Our project team reports from our local Industry, CA office located just 10 miles from the District Office, and is excited to work in partnership with the District. For questions regarding our response, please contact Colton Gorman, Project Director, at 858-951-2195 or CGorman@willdan.com.

Sincerely,

WILLDAN ENERGY SOLUTIONS



David Daniel, AIA, LEED AP

Vice President, Authorized to Sign on Behalf of Willdan



Proposal to: Azusa Unified School District
Request for Proposals
Energy Services Project Development and Implementation
of ESSER Funded Infrastructure and Energy Conservation Project

April 1, 2022

Table of Contents

Company Information 1
 Project Experience 4
 Project Approach 9
 Implementation Approach 16
 Cost and Pricing 20
 Value Added Elements 21

Minimum Requirement	Compliance
Three (3) public sector design-build energy services retrofit customer references where the respondent provided in-house services for pre-construction design, in-house engineering services for project development, and in-house tradesmen for project implementation	✓
Have a minimum of \$50 Million in bonding capacity for a single project	✓
Hold an active General Contractor Class-B license in California for a minimum of 24 months, and provide its CSLB license number if requested	✓
Be licensed or registered as a professional architect or engineer, respectively, and will provide the respective professional license or registration number	✓
Be registered as a public works contractor with the Department of Industrial Relations, and will provide its DIR registration number	✓
No license or registration required herein shall have been revoked, suspended, or disciplined at any time in the last five (5) years, including licenses held in the name of any currently licensed individual or Responsible Managing Person	✓
Respondent has not been terminated for cause or defaulted on a project during the last ten (10) years	✓
Respondent shall not have been disbarred by any Federal or California contracting authority within the last ten (10) years	✓
Respondent is able to meet insurance requirements of \$2 million dollars per claim/\$4 million dollars aggregate	✓



Company Information

Founded in 1964, Willdan Group, Inc. (a publicly traded company) has successfully delivered projects and services for K-12 school districts and public sector agencies. Our team of 1,500+ employees has performed energy services including facility and energy audits, planning, design, engineering, and other energy services for 30+ years, completing more than \$550 million worth of successful projects with state and local governments. **Willdan has an extensive, successful track record performing engineering services and funding K-12 districts focused on energy efficiency, deferred maintenance, infrastructure upgrades, and indoor air quality solutions.**

Local to Azusa Unified School District

Willdan is headquartered Anaheim, and this project will be serviced by our Industry office located just 10 miles from the District. We have 6 offices within 75 miles of Azusa; and 14 offices total strategically located throughout California. With 470+ staff members in Southern California we maintain local, full-service support with trained technicians, engineers, construction managers, and project managers. Our local reach will increase our response time and decrease project costs.

Financial Capacity & Capability to Perform

Willdan has no litigation, mediation, arbitration, or termination of contract within the last seven years with respect to Energy Savings Performance Contracts, Performance Guarantees, Design Build Construction, and/or Measurement and Verification. In addition, we have a \$300M aggregate bonding limit, and a consortium of five banks that includes a \$50M line of credit, which is currently unused. Our current insurance levels are listed below, and meet the district's minimum insurance requirements.

POLICY TYPE	LIMITS	CARRIER	RATING
WORKERS COMPENSATION	STATUTORY	TRAVELERS	A+/15
EMPLOYER'S LIABILITY	\$1,000,000	TRAVELERS	A+/15
AUTOMOBILE LIABILITY	\$1,000,000 CSL	TRAVELERS	A+/15
GENERAL LIABILITY	\$1,000,000 PER OCCURRENCE	TRAVELERS	A+/15
	\$2,000,000 GENERAL AGG	TRAVELERS	A+/15
PROFESSIONAL LIABILITY	\$10,000,000 CLAIM	LEXINGTON INS.	A+/15

Credentials

LICENSE #1065713	LICENSE #967101	LICENSE #922232
<ul style="list-style-type: none"> Issue Date: 05/07/2020 Classifications: C10 – Electrical, A-General Engineering Contractor 	<ul style="list-style-type: none"> Issue Date: 10/26/2011 Classification: B General Building Contractor 	<ul style="list-style-type: none"> Issue Date: 01/08/2003 Classification: B General Building Contractor

Willdan has saved **350,000** clients:

- 7,800+ GWh** of electricity
- 1,600+ MW** of electricity
- 110M therms** of natural gas
- 2.6B gallons** of water

Map of Willdan's California Offices

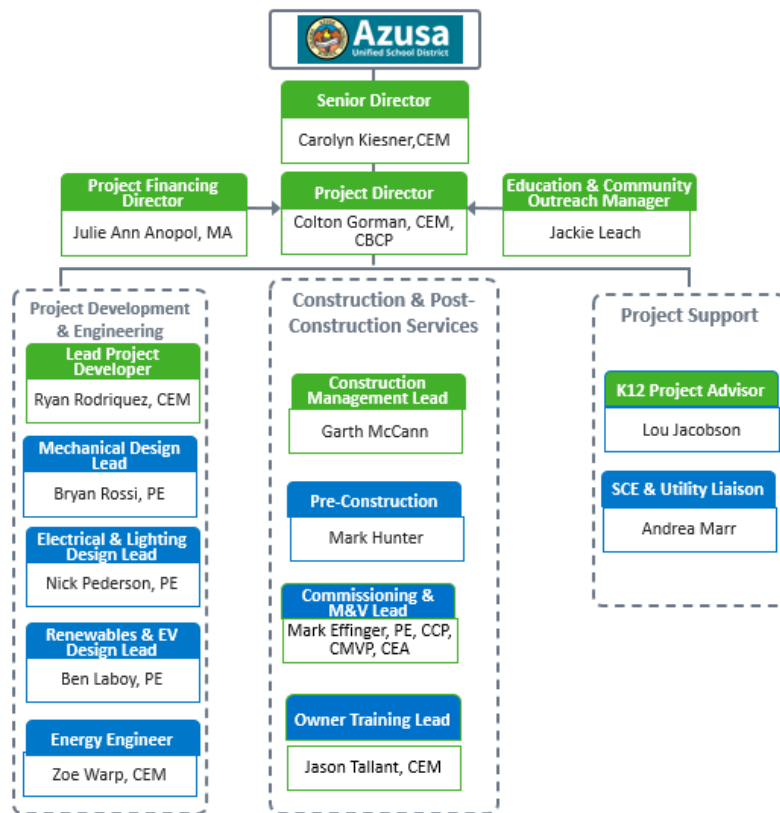


Willdan is licensed as a Class B General Building Contractor and holds licenses in the following classifications: C10 – Electrical, A – General Engineering Contractor. Willdan is accredited by the National Association of Energy Services Companies (NAESCO) and is included on the U.S. Department of Energy’s Qualified List of Energy Service Companies.

Project Team

Willdan’s Senior Director, Carolyn Kiesner, has reviewed the District’s scope and created a team with the optimum balance of expertise, skills, knowledge and proven capability to deliver excellent performance that can bring valuable facility and funding solutions to the District. Her philosophy is evident in the selection of team members such as Colton Gorman, Ryan Rodriguez, Garth McCann, Bryan Rossi and Nick Pederson who will work together to develop the scopes, finalize designs and analyze energy savings. The team also includes Project Financing Director Julie Ann Anopol to leverage multiple funding sources, and **Lou Jacobson former Director of Fiscal services will advise and support on ESSER eligibility, ESSER requirements and ESSER reporting to the DOE.** Education & Community Outreach Manager Jackie Leach will assist with providing educational learning opportunities and community outreach.

Our org chart outlines our plan to use our in-house professionals for all energy and building improvements the District may require. At this time, with the scopes of services yet to be developed, we have included on the organization chart our most qualified team to deliver the District’s scope. These professionals are available and committed to working on your project should we be selected to develop the scopes of work. In addition, we have included a list of seven of our key team members’ qualifications who will be committed to the District’s project, 100% from Day 1. **To satisfy the 25 page limit of this response, we have included and project team organizational chart and concise resume descriptions for lead project members. Full resumes are available upon request.**



COLTON GORMAN



To help assess the District’s building and HVAC conditions on the 6 schools that will be closing, our lead Project

Director Colton Gorman brings over 10 years of design-build and building condition assessment, inspection, and reporting expertise.

LOU JACOBSON



Lou Jacobson, former Director of Fiscal Services, has creatively leveraged ESSER funding to fund a variety of facility

measures and he will support this project for ESSER eligibility, ESSER requirements and ESSER reporting/application to the DOE.



Willdan's Azusa USD Key Team Resumes (Qualifications & Relevance)

Staff	Qualifications
<p>Carolyn Kiesner, CEM <i>Executive Director</i> <i>B.S in Mechanical Engineering</i></p>	<ul style="list-style-type: none"> ▪ Carolyn will work closely with Colton Gorman to oversee all aspects of the project from engineering, implementation, contracting and project funding. ▪ 13+ years of experience developing energy, facility and deferred maintenance projects with K-12 Districts across California ▪ Successfully implemented over \$225M in energy and facility upgrades for over 20 California school districts and public agencies ▪ K12 scope experience includes HVAC, building controls, windows, roofs, lighting, transformers, campus safety, solar PV, back-up generation, EV chargers, etc.
<p>Colton Gorman, CEM, CBCP <i>Program Director</i> <i>B.S in Mechanical Engineering</i></p>	<ul style="list-style-type: none"> ▪ Colton will be the District's main point of contact and will coordinate all aspects of the project including, development, funding, contracting and educational offerings. ▪ 10+ years turn-key contracting as an Engineer, Construction Manager, and Program Manager ▪ 10+ years of experience in building conditions assessment, inspection and reporting ▪ Specializing in existing building retrofits, indoor air quality, building envelope & commissioning ▪ Designed, managed & commissioned over \$60 million of HVAC retrofits
<p>Ryan Rodriguez, CEM <i>Lead Project Developer</i> <i>B.S in Engineering Technology (ME)</i></p>	<ul style="list-style-type: none"> ▪ Ryan will be the projects lead developer and will oversee all of the in-house engineering and design efforts. He will coordinate with the lead mechanical, electrical and energy engineers to develop the project. ▪ 11+ years of experience in developing K-12 energy and facility projects with DSA including HVAC, lighting, building controls, roofing, solar PV, electrification, back-up generation and utility program incentive opportunities. ▪ Successfully completed \$22 million in projects (\$2 -\$10M) ▪ Identified and implemented EE projects for 100+ facilities ▪ Conducted 50+ ASHRAE Level 1, 2, & 3 investment grade energy & facility audits
<p>Garth McCann <i>Construction Management Lead</i> <i>B.S Construction Science</i></p>	<ul style="list-style-type: none"> ▪ Garth will work coordinate with Ryan Rodriguez and oversee all preconstruction, construction, and post-construction services (commissioning, training and M&V.) ▪ 27+ years of experience in construction and has implemented 100+ turnkey energy efficiency contracts totaling over \$270M on projects valued from \$100,000 to \$92M. ▪ An expert in construction management of energy and facility projects, he has completed \$33.5M in energy upgrades for municipal government agencies. ▪ Certification & Training ICC General Building Certification Class A, OSHA 30, Asbestos Awareness, First Aid and CPR ▪ Managed an array of financial consulting projects for over 25 government entities to fund infrastructure improvement projects throughout California, Arizona, Texas, Colorado, and Florida
<p>Lou Jacobson <i>K-12 ESSER Funding Project Advisor (Former Director of Fiscal Services)</i></p>	<ul style="list-style-type: none"> ▪ 14+ years managing utility energy programs, public sector procurement and K12 energy projects ▪ 2+ years of experience in school finance ▪ Direct experience managing ESSER I, II and III dollars used for facility upgrades and capital projects ▪ M.A in Public Sociology with a focus on survey methodology and multivariate statistical analysis
<p>Julie Ann Anopol, MA <i>Project Financing Director</i></p>	<ul style="list-style-type: none"> ▪ 10+ Years of experience as a local government consultant ▪ Series 50, Series 54 certifications ▪ Recently provided municipal advisory services for multiple public sector customers in LA County



Project Experience

References

Willdan has provided energy-related services to over 80+ K-12 school Districts nationwide, including assisting over **92 California K-12 school Districts** with financial services and energy-related projects with diverse levels of scope and size, in each case coordinating with previous and future energy-related programs and customizing projects to fit the District’s needs. We have included 4 project references, which include the detailed audit and study of the facility to identify viable projects, engineering design, construction management, financial and risk analysis, and measurement and verification (M&V) services.

Willdan’s California K-12 Financial Services, Energy and Design-Build Experience

- 
- Alameda School District
 - Antioch Unified School District
 - Bellflower Unified School District
 - Benicia Unified School District
 - Buckeye Unified School District
 - Cajon Valley Union School District
 - Carlsbad Unified School District
 - Coachella Valley Unified School District
 - Colton Joint Unified School District
 - Coronado Unified School District
 - Country Montessori School
 - Cucamonga School District
 - Del Mar Union School District
 - Desert Sands Unified School District
 - East Side Union High School District
 - East Whittier City School District
 - El Dorado Schools Financing Authority
 - El Monte Unified School District
 - Elk Grove Unified School District
 - Escondido Union School District
 - Franklin Middle School
 - Franklin-Mckinley School District
 - Fremont Unified School District
 - Fresno Unified School District
 - Greenfield Union School District
 - Hemet Unified School District
 - Huntington Beach City School District
 - International School of Peninsula
 - Irvine Unified School District
 - Jurupa Unified School District
 - Kings Canyon Unified School District
 - Lafayette School District
 - Laguna Beach School District
 - Las Virgenes Unified School District
 - Lawndale Elementary School District
 - Lincoln Unified School District
 - Los Angeles Unified School District
 - Los Gatos Union School District
 - Lovejoy Independent School District
 - Lynwood School District
 - Mariners Christian School
 - Milken Community School
 - Mill Valley School District
 - Monrovia Unified School District
 - Mount Diablo Unified School District
 - Mountain View School District
 - Murrieta Valley Unified School District
 - Natomas Unified School District
 - Newport Mesa Unified School District
 - Newport-Mesa Unified School District
 - North City West School Facilities
 - Oakland Unity High School
 - Oakwood School
 - Ocean View Junior High School
 - Ocean View School District
 - Ocean View School District
 - Oceanside Unified School District
 - Ontario-Montclair School District
 - Orange Unified School District
 - Oxnard School District
 - Oxnard Union High School District
 - Pacifica School District
 - Palm Springs Unified School District
 - Palmdale School District
 - Paramount Unified School District
 - Perris Elementary School District
 - Perris Union High School District
 - Pomona Unified School District
 - Ravenswood City School District
 - Redlands Unified School District
 - Redwood City School District
 - Sacramento City Unified School District
 - San Juan Unified School District
 - Santa Ana Unified School District
 - Saugus Union School District
 - Savanna School District
 - Serendipity School
 - Simi Valley Unified School District
 - Solana Beach School District
 - Sulphur Springs Union School District
 - Sylvan Union School District
 - The Waverly School
 - Tracy Joint Unified School District
 - Tracy Unified School District
 - Tustin Unified School District
 - Twin Rivers Unified School District
 - Val Verde Unified School District
 - Victor Elementary School District
 - Vista Unified School District
 - Westminster School District
 - Whittier City School District
 - William S Hart Unified School District



ESCONDIDO UNION SCHOOL DISTRICT, CALIFORNIA

Phase 1 Role: Owners Rep

Phase 1 Project Amount: \$15.4 Million

Phase 1 Funding: Power Purchase Agreement

Willdan has been a partner to Escondido Union School District for over 5 years and through multiple phases of work.

In Phase 2, Willdan has been selected as the turnkey design build general contractor to design and construct multiple scopes of work including HVAC replacements at the District Office, transformer replacements, plug load controllers, EV chargers, solar PV and battery storage across 12 sites. Willdan is providing the expertise to leverage multiple sources of funding, including ESSER funds, low interest financing, SDG&E grants and incentives.

In Phase 1, Willdan was selected as the owners representative which included design, subcontractor procurement and project management oversight. The first phase included the installation of 2.79 MW of solar over 13 school sites.

Phase 2 Role: Prime General Contractor

Phase 2 Project Amount: \$20 Million (TBD)

Phase 2 Funding: ESSER, Grants/Incentive, Financing



LOS ANGELES UNIFIED SCHOOL DISTRICT, CALIFORNIA

Role: Prime General Contractor

Project Amount: \$44 Million to-date

Funding: Utility Incentives & LAUSD Capital Funding

Willdan was selected by Los Angeles Department of Water & Power (LADWP) as the prime energy program administrator and lighting installer for Los Angeles Unified School District (LAUSD).

We have completed all audits, design, engineering, and installation of interior and exterior LED lighting retrofits at over 62 school sites since May 2019. We are in contract through a memorandum of understand (MOU) between LADWP and LAUSD to complete ongoing lighting upgrades throughout all of the District's sites.

Project benefits include:

- Over 17 million kWh and nearly 4 MW saved
- 15-25% reduction energy consumption
- Improved lighting quality and light levels

Reduced maintenance costs with long lasting LED bulbs



TRINIDAD SCHOOL DISTRICT 1, COLORADO

Role: Prime General Contractor

Project Amount: \$15.5 Million

Funding: General Bonds & Capital

The Willdan Team worked alongside the administration and community stakeholders of Trinidad School District 1 for 3 years to develop and secure the BEST Grant and voter-approved bond issues used to fund the complete renovation of Trinidad Middle School. The project began with collaborative development of a holistic strategic plan to address maintenance, comfort, and infrastructure. We combined its civil, mechanical, electrical, and energy-efficiency engineering capabilities to develop the projects. This \$15.5M upgrade project has made the school more energy efficient, upgrade the building infrastructure, and enhance the educational environments with improved air and light quality and new smart classroom technologies.



“Willdan developed a long-term infrastructure strategy to guide our facility upgrade recommendations, including design and construction oversight. They helped us get to the root of our issues instead of offering a temporary fix that would cost more money in the long-run.”

Dr. Bonnie Aaron, Superintendent of Trinidad School District No. 1

PUEBLO SCHOOL DISTRICT D70, CLORADO

Role: Prime General Contractor

Project Amount: \$14.6 Million

Funding: General Bond

Pueblo County School District 70 has worked with Willdan since 2016 to develop and implement comprehensive infrastructure projects across the district. We conducted an investment grade audit (IGA) and facilities master plan for energy-efficient and core infrastructure facility improvements across 23 buildings, including 19 K-12 schools. **Our project team led all aspects of the projects, including the development of a holistic 15-year master plan, design, bidding, construction management, commissioning, M&V, and funding procurement.** We collaboratively developed projects with stakeholders at the District that strategically leveraged energy-saving project scopes to fund extensive and all-encompassing capital improvements in the district. These projects included districtwide measures such as LED lighting, controls expansion and optimization, and retro-commissioning to improve performance of existing equipment. We continue to work with D70 on the district’s next phase of work, projects that we helped the district prioritize using the developed master plan.



Agencies and Funding

Division of the State Architect (DSA) Experience & Approach

Our team is highly experienced in working with DSA. We will work collaboratively with DSA to identify scopes that will require DSA review and approval, coordinating timelines and deliverables. Our in-house engineers will ensure compliance with DSA code requirements. With codes constantly changing, we will schedule a DSA project review meeting with the local LA Regional DSA Director, Doug Humphrey, to review all aspects of the project to ensure compliance. This meeting will be scheduled with the District and Willdan present.

“(Willdan’s) team of professionals and project managers worked closely with our facilities staff and district administrators to truly understand the district’s short-term and long-term goals ... As we confidently moved in the Investment Grade Audit and design, the project continued to reflect our feedback and goals, down to the equipment preferences, system selections, and inclusion of local-based contractors for project implementation.”

Monte Montez, former Director of Facilities & Special Projects for Pueblo County School District 70

Energy Funding Experience

Through our Willdan Financial Services group, we have extensive experience in financing energy efficiency projects through multiple vehicles including internal funding, bonding, debt financing, lease or lease-purchase agreements, energy performance contracts, utility incentives and government grants, and others. We provides financial planning services including financing and revenue optimization, risk assessment, program management, urban planning, and policy services. Willdan Financial Services is one of the largest public sector financial consulting firms in the United States and has worked with more than 800 government, private agencies, and special districts to address a wide range of financial challenges. With a staff of over 60 full-time consultants, We support clients by conducting year-round workshops and on-site training to offer updates on the latest developments impacting public utility systems.

- Utility rate and cost-of-service studies
- Economic and fiscal impact studies
- Benchmarking studies
- Public utility debt issuance support
- Long-term financial plans and cash flow modeling
- Utility system and company valuations
- Cost allocation plans and user fee studies
- Infrastructure planning for economic development
- Economic development plans and strategies
- Litigation support and regulatory representation
- Real estate economic analysis
- Arbitrage and continuing disclosure reporting





Approach to Financing

K-12 Funding Focused

We have been tracking the investments from the federal government for use by School Districts to mitigate economic and health and safety impacts of COVID-19. The CARES Act and COVID-19 Relief Acts passed last year provide funding that may be applicable to effectively maintain the health and safety of students, educators, and staff.

We will work with Azusa SD to identify the scopes that qualify for the District’s remaining ESSER funding and assist with the application to the Department of Education. We believe scopes such as lighting, HVAC, and other infrastructure upgrades are eligible for the federal COVID relief funding.



<p>FEDERAL CARES Act</p>  <ul style="list-style-type: none"> ▪ Space Transformation ▪ Mechanical + BAS ▪ Comfort Stations + Locker Rooms 	<p>FEDERAL COVID-19 Relief</p>  <ul style="list-style-type: none"> ▪ Space Transformation ▪ Mechanical + BAS ▪ Comfort Stations + Locker Rooms 	<p>FEDERAL Biden American Rescue Plan</p>  <p>We are following the president's proposed \$1.9T budget for potential funding for such projects</p>	<p>CALIFORNIA AB 841</p>  <ul style="list-style-type: none"> ▪ The School Energy Efficiency Stimulus (SEES) Program ▪ HVAC ▪ Water Efficiency
---	---	---	--

California Assembly Bill 841 (AB-841)

We have researched AB-841 (CalSHAPE), a state government program through the California Energy Commission that subsidizes HVAC assessment and reporting. AB-841 will provide schools with hundreds of thousands of dollars in grant money to implement full-scale HVAC assessments. These HVAC assessments include filtration capacity testing (i.e. MERV 13), airflow velocity verifications, air balancing, system deficiency repairs, CO2 sensor installation, and overall system performance reports.



With the use of this funding, the District will enjoy a high level of clarity in defining the highest and best use of capital when replacing, repairing, and optimizing HVAC systems within the District. This allows the District to incorporate a custom-tailored life-cycle analysis far beyond a simple age-based replacement strategy. In practice, this will serve to identify opportunities to increase Indoor Air Quality (IAQ), energy efficiency, and resiliency. Furthermore, through the intelligent use of the contingency funds granted within the program, repairs, adjustments, and modifications can be made to existing systems that extend the life of the HVAC infrastructure and provide added additional savings to the District.

The first round of AB-841 funding has been prioritized for sites located in disadvantage communities or sites serving over 75% free and reduced lunch. We are confident that the District can receive immediate eligibility for the following schools that are located on the disadvantaged communities map.

Experience Procuring Utility Incentives with SCE and Azusa Light & Water

Willdan has managed utility incentive programs on behalf of our utility customers in California since 2005 and currently runs over a dozen utility programs in California alone. We work with the four largest IOUs in California - Southern California Edison (SCE), Southern California Gas (SoCal Gas), Pacific Gas & Electric (PG&E), and San Diego Gas & Electric (SDG&E). We have obtained over \$250 million in utility incentives and rebates. Our staff understands the unique and complex requirements that must be met to successfully reserve and obtain utility incentives and rebates. **Willdan administers programs on behalf of SCE and is familiar with available incentives for the District. We will also work with Azusa Light & Water to ensure all available incentives are reserved by the project.**



Experience with California Energy Commission (CEC)

We regularly participate in a side variety of public meetings and events held by the California Energy Commission and the California Public Utilities Commission to ensure that we are up-to-date on the most recent policy developments. Examples of recent changes that affect the calculation of utility incentives and rebates include the passage of AB802, which required that the baseline used to calculate incentives be changed from the “code baseline” to the “actual baseline” of the equipment currently installed, the definition of “Industry Standard Practice,” and how it is applied to specific measures installed based on building type.



Project Approach

Approach to Project Design/Engineering/Development:

We do not take shortcuts and conduct a detailed 8 step process that thoroughly evaluates the District’s needs. We deliver a concrete plan and design for on-time and on-budget construction. Our 8 step process is pictured below. You will see our full design approach prior to contract, which other energy companies do not offer. Our dull design process means that the District will know exactly what they are getting prior to contract.



Licensed, In-House Engineers

We complete all design, engineering, construction, training, commissioning, and measurement & verification in-house. Our designs are stamped by our in-house MEP design team.

Willdan has more than 80 California-licensed professional engineers and architects in 14 offices in the state, all with proven professional records on simple to complex energy savings projects. While our competitors are busy engaging third parties for engineering expertise on an as-needed basis, our approach is built upon the belief that there is a direct correlation between the amount of up-front engineering investment that is made and the successful outcome of a project. The table below shows our multi-disciplined resources available to the District.

California-Registered Engineers and Architects

Engineers

- Mechanical: 15
- Electrical: 5
- Structural: 5
- Civil: 50

Architects

- 5

Approach to Performing Site Assessments and Identifying Infrastructure Improvement

Developing an Energy Program for the Azusa School District

We know from experience that taking shortcuts just doesn't work. That's why we've created a project development approach that is both systematic and thorough – reducing the risks for our customers and delivering the lowest long-term cost.


We will complete our Two-Part Investment Grade Audit at NO UPFRONT COST to the District!




Planning & Analysis

The first step to any energy program is the upfront planning and analysis to understand the District's facility needs and establish an energy baseline.

Approach to Identifying Facility Needs and Establishing Energy Baselines

	Planning & Analysis
Stakeholder Interviews	<ul style="list-style-type: none"> ▪ Engage administration and stakeholders in discussion to understand future capital plans and long-term goals ▪ Engage site operating personnel in discussion to help identify major issues or potential capital improvements meriting further study
Utility & Maintenance Analysis	<ul style="list-style-type: none"> ▪ Collect 2-3 years of electric, gas and water usage at all District facilities ▪ Analyze each building's energy usage in relation to its square footage, benchmarking the results from other buildings of similar size and function ▪ Review maintenance expenditures to identify major issues, regardless of energy index

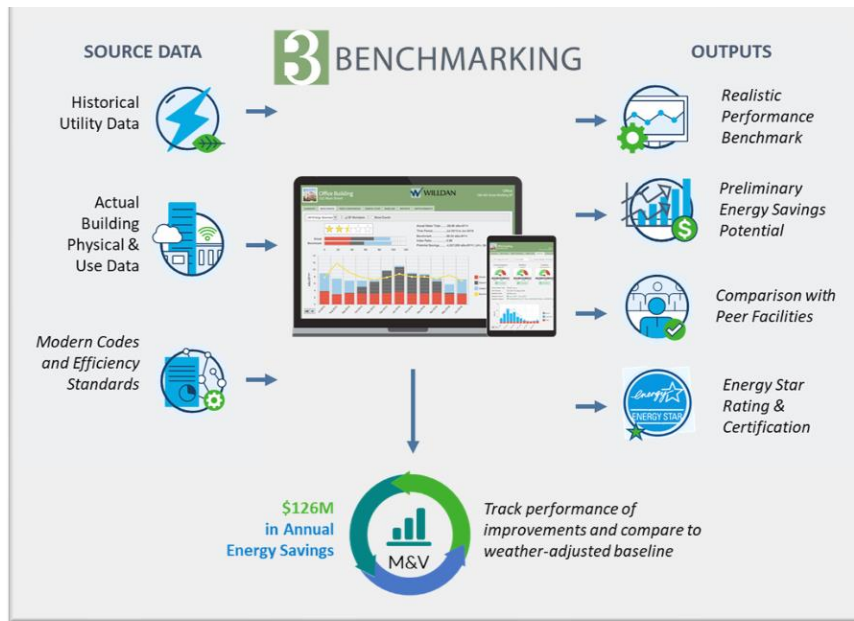


	Planning & Analysis
Site Operation & Schedule	<ul style="list-style-type: none"> Complete site walk-throughs to gather additional specific information on mechanical, electrical, plumbing, lighting, building envelope, and technology systems, and operation Conduct as-built drawing and specification reviews, as needed
B3 Benchmarking	<ul style="list-style-type: none"> Buildings, Benchmarks, and Beyond (B3) is a custom online tool that quickly and accurately identifies buildings with the greatest potential for energy improvement – and maximum return on investment
Decision-Making Matrix	<ul style="list-style-type: none"> Evaluate each facility with the following key inputs: opportunities for reduced energy and maintenance expenditures, B3 Benchmarking, capital priorities, and site/infrastructure imminent need
Building Prioritization	<ul style="list-style-type: none"> Discuss matrix results and develop priorities and future project phasing, in collaboration with Azusa SD stakeholders

B3 Benchmarking (B3) Enhancement

During the Planning and Analysis phase we will complete a thorough energy benchmark of all sites. We have developed our own benchmarking software, B3 Benchmarking which is a smarter energy analysis tool that allows customers to quickly understand how buildings are performing, and how they could – and should – be performing given the unique combination of size, use, and location. B3 is a cost-effective and accurate tool that prioritizes efficiently and ensures the most benefit from the Technical Energy Audit. **B3 typically identifies that 70%+ of energy savings is in 20% - 30% of buildings.** B3 has user-friendly tools for independent verification of savings achieved.

How B3 Benchmarking Compiles Data from Sites to Prioritize Buildings for Improvement.



Standards of Comfort

Standards of comfort are developed in collaboration with District staff and building occupants and are approved by the District. Typical examples for project standards of comfort are shown below.

- **Light Levels:** In all areas where lighting is changed, final light levels will meet or exceed minimum levels as established by the IESNA Lighting Handbook, 9th Edition, for the space affected.




- **Space Temperatures:** Occupied: 70°F or below in heating and 74°F or above in cooling; Unoccupied: 60°F in heating and 80°F or above in cooling
- **Ventilation Rates:** The required outdoor air and ventilation rates vary by building type and space use. We follow American Society for Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) requirements.

Evaluate & Advise – Part 1 of Investment Grade Audit (IGA)

As a part of our IGA phase, we provide a detailed energy survey and engineering analysis of the buildings, identifying facility needs and savings opportunities, as well as proposed changes to operation and maintenance procedures. Initial cost and savings analyses will provide needed information for the District to collaboratively determine specific project scope.

IGA Approach & Scope prioritization

	EVALUATE & ADVISE
ASHRAE Level 2 Audit	<ul style="list-style-type: none"> ▪ Establish existing equipment conditions and facility operations ▪ Complete a detailed review of as-built drawings, data logging, and building automation controls trend analysis ▪ Conduct additional staff interviews and comprehensive building walkthroughs
Comprehensive Energy Modeling	<ul style="list-style-type: none"> ▪ Detailed building energy simulation based on exact building geometry, construction, and operation, utilizing the enhanced mode of eQuest ▪ Energy models are calibrated to existing utility consumption and weather to ensure a highly accurate model
Schematic Design	<ul style="list-style-type: none"> ▪ Preliminary sizing and layout of concepts ▪ Used as the basis for cost estimates and energy savings estimates through energy modeling
Life-Cycle Costing	<ul style="list-style-type: none"> ▪ Evaluate multiple equipment and system options to provide unbiased recommendations for informed decision-making ▪ Include details of utility rate impact and the total cost over the system’s lifetime
Recommend Solutions	<ul style="list-style-type: none"> ▪ District staff and our design engineers collaborate to refine scope and confirm project intent leading into detailed project design ▪ Scope review ensures our intensive engineering process in Phase II focuses on Azusa SD’s highest priorities, while still completing the audit in a timely manner

Developing a List of Priority Projects

During the Investment Grade Audit (IGA), our team will evaluate and analyze a range of buildings and systems, identifying opportunity for energy and operation savings, as well as infrastructure improvements. We will work with the District to create a scope priority matrix that will prioritize the by their life cycle cost payback, energy savings, maintenance savings, District budgets, funding mechanisms and, most importantly, priority based on staff and community feedback. We will help analyze the cost and benefits of phasing projects and can create a long-term plan to advance the District’s project goals over time.

Based on our extensive experience with Districts in California, we are confident the measures listed below will provide a solid foundation upon which we build a project specifically for Azusa SD. The list is not exhaustive and will be tailored in a collaborative effort between the District and Willdan.



Range of Offerings

HEATING & COOLING SYSTEMS	ENERGY MANAGEMENT & CONTROLS	LIGHTING	DISTRIBUTED ENERGY SOURCES
<p>Airside HVAC</p> <ul style="list-style-type: none"> HVAC unit replacement & retrofit Demand ventilation Efficient fume exhaust hoods Heat reclamation Heat recovery units Outside air economizers Radiant heating <p>Central plant (CHW & HHW)</p> <ul style="list-style-type: none"> Energy recovery Energy efficiency boilers & chillers Tower free cooling Waste heat recovery Water treatment systems Motor replacement Variable-speed drives <p>Other</p> <ul style="list-style-type: none"> Building envelope improvements Efficient monitor conversion & network upgrades Facility maintenance (re-training) Operating practices Power factor correction Water conservation & efficiency 	<p>Building Controls</p> <ul style="list-style-type: none"> Building automation controls Energy management systems VAC set-point optimization Smart sensors & devices Variable-frequency drives Smart utility metering <p>Commissioning</p> <ul style="list-style-type: none"> Continuous commissioning HVAC tuning Operations & maintenance Monitoring-based commissioning Retro-commissioning Testing & balancing Remote energy monitoring <p>Safety & Security Measures</p> <ul style="list-style-type: none"> Electronic access locks Motion sensors Network video surveillance system Security motion lighting & alarms 	<p>Lighting Systems</p> <ul style="list-style-type: none"> Human-centric lighting LED lighting retrofits of fluorescent lights Natural lighting systems Replacing exit sign lamps with LED Replacing exterior/parking structure lighting with energy efficient lighting systems such as T8, induction or LED Replacing incandescent & halogen lamps with LED Sports & ballfield lighting <p>Lighting Controls</p> <ul style="list-style-type: none"> Advance controls with programmable ballast, integration with HVAC controls By-level switching Daylight harvesting Dimming Lighting schedule through programmable controllers Motion sensors Occupancy sensors 	<p>Power Generation & Storage</p> <ul style="list-style-type: none"> Cogeneration/CHP Geothermal Ground source heat pump Solar photovoltaic (PV) Solar thermal Vehicle electrification & EV charging Waste-to-energy/biogas Wind Energy storage/batteries Microgrids & resiliency Thermal energy storage
			SERVICES
			<ul style="list-style-type: none"> Building information modeling (BIM) Education & engagement Engineering Facilities management Measurement & verification Operations & maintenance Preventative maintenance Project & construction management Utility monitoring

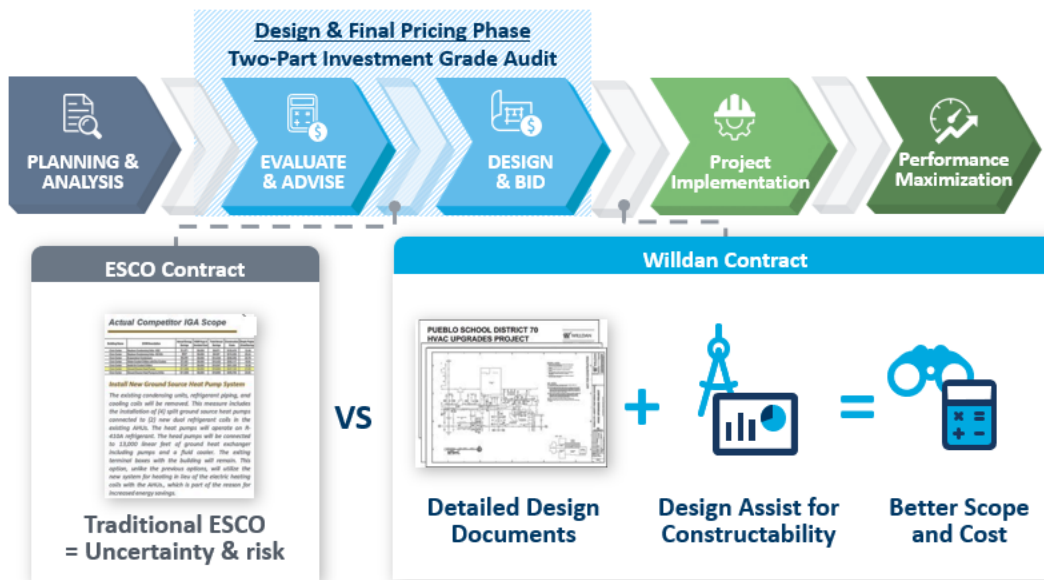
Design & Bid – Part 2 of Investment Grade Audit (IGA)

Once projects have been identified and prioritized, the second part of our IGA phase is to complete a full design and competitive bidding process with qualified, local subcontractors.

Full Design & Bidding Process - Prior to Contract

Full upfront design is the only way to secure accurate pricing. The figure below details the benefits of our design documents – **we are the only ESCO in the industry to complete a full design as a part of our IGA**. Completing a full design prior to contract results in better scope, lower risk, and the best project cost for the District. We complete our designs by our in-house engineering team and all drawings are stamp by our internal staff.


Our Approach to Design Versus Our Competition



Approach to Full Design and Competitive Procurement

Local, Qualified, Union Labor & Prevailing Wage Work

Willdan will run a transparent, open-book pricing process to give the District the opportunity to review our pricing and contractor bids. We run a competitive procurement process for the equipment and labor of each scope to get the best value for the District. We also have the ability to hire qualified local trades to stimulate the Azusa local economy. We can obtain pricing from the District’s preferred vendors and also competitively source new qualified vendors.

	Design & Bid
Full Design Drawings	<ul style="list-style-type: none"> ▪ Once priority projects have been approved, full designs of each scope will be completed in-house ▪ Drawings sets will be completed prior to competitive bidding
Subcontractor Outreach & Requirements	<ul style="list-style-type: none"> ▪ Qualified local subcontractor outreach lists will be created with District’s input ▪ Create bidding requirements based on District’s needs
Competitive Bidding & Procurement	<ul style="list-style-type: none"> ▪ Solicit bids through a comprehensive RFP process that leverages the full design drawings ▪ Each RFP will be issued to a minimum of 3 qualified contractors ▪ Coordinate the bidding process, including site walk
Final Pricing and Transparency	<ul style="list-style-type: none"> ▪ Bidders will be selected based on best value and predetermined scoring criteria ▪ All bids and final pricing documents will be review with the District ▪ Finalize project costs and guarantee a maximum price to ensure zero change orders to the District after contract

Pre-Construction Services & Estimating

All of the projects are tabulated by building and by project type for the audit report. The economics are presented, including potential utility incentives, possible financing costs, total benefits and payback (simple payback, savings-to-investment ratio, whatever metric the decision makers need to approve a project). The magnitude of the investment required to meet the efficiency goals is determined. Cost estimates are developed in the audit using industry standard practice references, typically RS Means, to identify base project costs (materials plus labor), ancillary costs, and additional markups that are appropriate for the project type, geographic location, and city. Willdan has a cost estimating template spreadsheet that develops projects costs and includes costs such as engineering, permitting, contingency, and other costs, as appropriate. Our cost estimates for each measure are compiled into one bundle and included in the audit report. The audit results, analysis, costs, and recommendations are presented in a draft audit report.

Minimizing Disruption

Our dedicated project team has worked across multiple facility types with strict access requirements, such as secured lockdown facilities, emergency services facilities, and offices. To minimize disruption, work schedules are defined through a careful collaboration and engagement between the Willdan project team and District Staff.

We have completed over 100 campus construction projects at 70 districts in California.



We take pride in our ability to complete work on time, on budget, and with minimal disruption to the public, District staff, and others, while on-site. We accomplish this through detailed pre-planning for all aspects of the site work, including identification of potential hazards, development of mitigation plans to prevent these hazards from occurring, and open communication with the District's O&M personnel.

We will develop site-specific construction schedules based on the underlying principle that less time on-site not only reduces the cost of the project, but also helps ensure that the savings are coming in faster. Furthermore, we will manage the project according to individual site schedules, based on collaboration with key stakeholders.

Additionally, we look for portions of work that can be done with minimal disruptions to occupants during normal business hours. Scopes of a project that may be more disruptive like HVAC lift schedules can be scheduled during off-hours. Communication is key in creating a smooth implementation plan.

In cases where building occupants will be impacted, the work will be scheduled in coordination with the District's facilities maintenance staff. Work that occurs in non-occupied areas and outside the building will be appropriately scheduled to assure that the District is aware of all work activities being performed by Willdan.

Turnover Process

Closeout

Construction close-out inspections, punch lists, operation and management documents, owner training, commissioning, and warranty information are all important to the successful completion of any project. Willdan takes this process one step further with its comprehensive commissioning process described below.

Systems Commissioning

Commissioning (Cx) is the systematic process of ensuring that all facility systems perform interactively and acceptable to the owner's operational needs and our design intent. This process requires the preparation of facility operations personnel, as all HVAC, controls, and lighting systems will be commissioned. Our commissioning process begins in the pre-design phase and ends one year after construction. At the commencement of construction, system functional testing is conducted. Subsequent testing of HVAC systems and controls continues to capture performance in all four seasons. A comprehensive commissioning plan, extensive documentation, and a complete issues checklist is maintained through project management software. This rigorous process ensures every issue is corrected before the project is considered complete.

Provision of Record Drawings

Accurate as-built drawings are as important to future facility operation as the O&M manuals delivered at the end of the construction process. Up-to-date documentation makes the generation of record drawings seamless at the end of construction and provide an accurate basis for discussion of field changes with all project stakeholders when they occur. Documents are provided in both hard copy and electronic form (AutoCAD and PDF format) to our clients, or as requested.

Provision of Records

- As-Built Construction Drawings
- Commissioning Plan/Issues Log
- Pre-Functional Checklist
- Scope Change Documentation
- Operations & Maintenance Manuals
- Manufacturers Testing/Inspection Report
- Design Clarifications
- Design Change Documentation
- Final Measurement & Verification Plan
- Equipment Start-Up Report
- Plan Review Changes

Post-Implementation Reporting

We will provide the District a full description of the energy baseline(s) corresponding with the M&V plan at the end of the construction period during a dedicated M&V kickoff meeting. This report details parameters that describe both the energy and water consumed in the baseline year and the conditions that caused that consumption to occur to facilitate accurate M&V of guaranteed savings. Factors including utility consumption and demand data; weather; building physical and thermal properties; energy consuming equipment and system parameters; space temperature setpoints and schedules; facility use and occupancy schedules; and other key information describing base-year conditions are outlined in this report. We do not adjust our baseline or savings for changes necessary for project implementation. Only District-initiated scope changes during construction are subject to adjustment.



Warranty & 24-hour Service and Support

We have the inhouse capabilities to be on-call at all times and respond in a timely manner before, during, and after construction, including warranty support, monitoring, operations, and maintenance. We also provide maintenance staff in-depth training after installation and M&V. We will arrange for clients to receive extended warranties from all manufacturers of equipment provided as part of the project. Each of the warranties shall be for the maximum warranty available from the manufacturer of the equipment - ranging from 1-10 years, and will provide for repair, replacement, installation, and payment for loss of use. We work closely with vendors and local utilities to provide 24/7 service and support to our customers including providing technical training for Owner's facility personnel, developing training manuals for facility staff and start-up manuals, operations manuals and quick reference guides.

Implementation Approach

Once the project is approved by the District, our Lead Project Developer (Ryan Rodriguez) will work directly with our Construction Management Lead (Garth McCann) to begin installation of the project. Our team has years of experience assessing project installation risks, managing site safety, and minimizing disruption to District operations. Our team will complete all commissioning and submit all record documents to the District prior to the project's final close-out.

A well-planned start is essential to managing a project on-time and on-budget. We will coordinate a construction kick-off meeting with District staff and subcontractors to review the schedule, site access, permitting and safety.

Construction, Project Management, Inspection, & Close Out Process

Work Plan Development

We will draft a Program Management Plan (PMP) to capture decisions and document the agreed path forward for all stakeholders. This comprehensive document will include all requirements and procedure for each phase of the program including project definition, design standards, equipment selections, development, procurement guidelines, implementation plans, safety plan, integration, activation, commissioning, and testing procedures. It also will include our communications plan which will detail plans for regularly scheduled stakeholder meetings, reporting. Recognizing the project will span across many systems, the PMP will address mechanical, electrical, and plumbing; security, information, and technology systems; special systems; and utilities.

Coordination of Identified Client Work Requirements

To ensure information will be shared across project lines so that coordination with each separate scope of work, our project team will dedicate their efforts to understanding and coordinating with requirements of other projects and activities throughout the District, from design through commissioning. Coordination with all other CIP projects will be critical through all phases of the process so that the new systems we design and install dovetail with new District infrastructure. Some examples of their responsibilities include:

- Attending all project meetings for construction projects and special events throughout the District and schedule special coordination meetings to avoid costly, timely, or nuisance conflicts during construction.
- Coordinating our design team's efforts with the efforts of other active design teams on adjacent projects, including standards and precedents established on those projects.
- Taking responsibility for coordinating with the District's or school staff on work in occupied areas and associated notification of work and outages to District or school staff and the public.
- Coordinating with all District tenants to ensure their needs are met and our projects work smoothly into their operations.
- Acting as point of contact for public and staff concerns, and immediately remedy the situation.



Construction Progress and Coordination Meetings

To begin the physical construction process, a joint kick-off meeting will be held to discuss the Program Management Plan, including owner's operations, access conditions, working hours, material storage, temporary utilities, sustainability initiatives, cleaning and patching, and hazardous materials processes and procedures. We will hold weekly meetings with all contractors or installers and the District's project management to address any outstanding Requests for Information (RFIs), review three-week look-ahead schedules and manage required decisions. During these meetings, the team will discuss and track decisions required to address barriers hindering contractor project progress. Furthermore, weekly or as-needed meetings, with relevant District stakeholders will be facilitated by our Stakeholder Engagement Liaison to review project activities, progress, and coordinate with their requirements.

Submittal Review and Approval

We generate and maintain a comprehensive submittal log that reflects the requirements in our project specification package. As submittals are ready for approval, they are distributed to the project team, including engineers, commissioning team, and District or school staff for review.

Review comments from all parties are sent to our Engineer of Record, where they are then consolidated into one list for distribution to the vendor or contractor. These comments and responses are tracked in the submittal log for a living and transparent record for all parties.

Support for Client Calendar and Events

Our dedicated project team has worked across multiple facility types with strict working procedures, such as secured lockdown facilities, emergency services facilities, and offices. Work schedules are defined through a careful collaboration and engagement between the Willdan project team and District Staff.

Safety Practices and Procedures

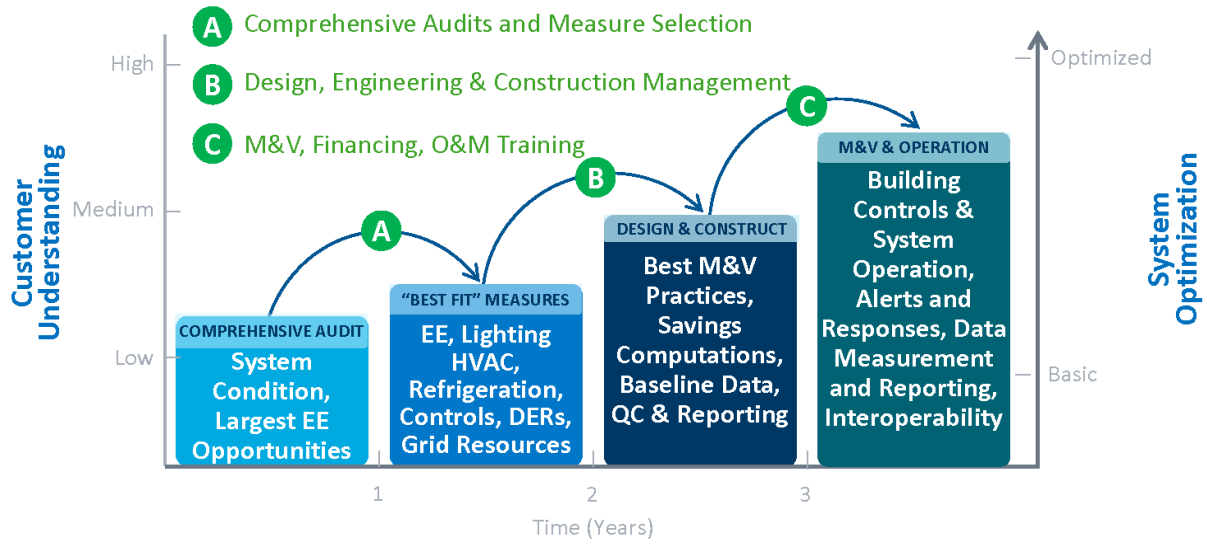
All our employees and managed contractors are required to follow well-defined safety procedures that not only protect themselves, but more importantly, protect the District's patrons and employees. Incident prevention is our highest priority. As such, our Safety Coordinator will perform risk assessments of all projects and develop Site- and Task-Specific Safety Plans to complement the District's current program. Well-marked access restrictions, visible signage, and daily clean-ups all are strictly enforced to ensure the safety of everyone at the facility. Our safety plan and procedures are consistent with the requirements of the State of California and the District. We maintain an impeccable safety record and continue to promote safety as our number one priority.

Training Program

Willdan recognizes that the success – both in terms of performance and client satisfaction – hinges on operators understanding how to properly operate and maintain the systems. We will deliver technical training to the District's and/or school operations personnel on all new equipment and dynamic systems. We will arrange and facilitate these trainings at the District and/or school and we bring in equipment experts to provide advanced technical training and advocate that the District's engineering and facilities staff participate in the functional testing of major systems to gain first-hand knowledge of their design and operation. It is not uncommon for Willdan to support and retrain facilities staff for years after we complete construction. Willdan offers training workshops to be held within the first month of the school year and another mid-year. We can work synergistically with staff and teachers to provide training sessions and ongoing support to help them successfully take care of equipment implement energy conservation behaviors.



Willdan's Training Approach is Focused on Customer Education Throughout the Project Lifecycle



Safety Record

Our culture of safety and our commitment to executing our safety plans ensures the wellbeing of our clients, staff, subcontractors, and any other parties associated with our projects. Incident prevention is our highest priority. Our construction managers perform risk assessments of all projects and develop a site-specific Environmental Health and Safety Plan (EHASP) to complement the District's safety programs and comply with the requirements of the State of California.

All our employees and managed contractors are required to follow well-defined safety procedures that not only protect themselves, but more importantly, protect the District's patrons and employees. Incident prevention is our highest priority. As such, our Safety Coordinator will perform risk assessments of all projects and develop Site- and Task-Specific Safety Plans to complement the District's current program. Well-marked access restrictions, visible signage, and daily clean-ups all are strictly enforced to ensure the safety of everyone at the facility. Our safety plan and procedures are consistent with the requirements of the State of California and the District. We maintain an impeccable safety record and continue to promote safety as our top priority.

As part of a standard Willdan's EHASP, our team takes the following measures:

- ✓ Conducts orientation training for all new employees or contractors working on the project to discuss safety procedures prior to them beginning work.
- ✓ Requires both internal staff and subcontractors to complete a job briefing form intended to identify all potential safety hazards on each site before performing work.
- ✓ Requires signed agreements from all workers acknowledging that they have been given an orientation and that they understand the safety rules of the project.
- ✓ Ensures each installation crew conducts a daily safety check before beginning work, including confirming personal protective equipment and reviewing all equipment required for the job.
- ✓ Construction managers conduct safety inspections and verify that the subcontractor is working safely and following procedures outlined in the EHASP.
- ✓ Well-marked access restrictions, visible signage, construction barriers, and daily clean-ups are all strictly enforced to ensure the safety of everyone accessing the facility.

COVID-19 Risk Mitigation

In response to the global pandemic, we have established procedures to mitigate this specific health concern risk. Willdan's COVID-19 Safety Plan details how we responsibly manage and restrict jobsite access, educate employees on our site policy and preventative behavior, and identify and address any site areas needing special treatment. It also details the response plan should an employee become ill.

To support these efforts, we require everyone accessing the jobsite to fill out an Access Questionnaire and sign an Employee Responsibility Form, indicating they have been provided and understand our COVID-19 Action Plan.

We are also using the latest contact tracing software and social distancing technology to reduce the risk of exposure on the jobsite. These devices provide active feedback to each worker in the form of a visual and audible alarm, so individuals know when to adjust their current distance to a proper social distance

Safety Record

Willdan Performance Engineering has never had an injury reported by an employee, client, or building occupant.

Policy Year	Experience Modification Rating (EMR)
2021	0.88
2020	0.96
2019	0.96
2018	0.95
2017	0.96



Cost and Pricing

Att. A, Sample #	Unit/ Size/ Manufacturer	Cost	Assumptions
1	One (1) 3 Ton and One (1) 3 ½-Ton Unit Brand: Carrier	\$38,118 (Union Labor)	The assumption made is that there are 3 units on the roof that need to be replaced no other equipment or piping will be altered.
2	One (1) 4-Ton Unit Brand: Carrier	\$13,738 (Union Labor)	The pricing is based on replacing one 4-ton unit.
3	One (1) 5-Ton Unit Brand: Carrier	\$14,428 (Union Labor)	The assumption made is that the 5-ton unit on the roof will be replaced without its corresponding fan coil unit/ furnace.

All pricing is all inclusive of profit, overhead, fully burdened labor cost(union), fully burdened equipment costs and permitting. The pricing reflects only the equipment shown in the photographs. Willdan will perform site visits to ensure all necessary equipment will be evaluated for replacement. Willdan can also assess the cost to decarbonize HVAC systems and electrify all heaters. Incentives offered by SCE are available to pay for electrification of HVAC upgrades.



Value Added Elements

School Finance Expertise

- We understand your accounting requirements
 - General accounting procedures as defined by the California School Accounting Manual.
 - Standardized Account Code Structure.
 - Time and effort record keeping.
 - Bond accounting
 - Federal Regulations: 34 CFR 75.616 for energy conservation and 34 CFR 75.609 for safety and health standards.
- At your discretion, and in partnership we will engage with your fiscal auditors and CDE staff to ensure risk exposure of potential claw backs or penalties associated with federal expenditures is minimized.
- We have experience with ESSER I, II and III planning, budgeting, and accounting.
 - Implementation within ESSER I and II assurances.
 - Implementation within ESSER III expenditure plan.
 - ESSER I, II and III quarterly expenditure reporting.
 - Pre-approval for capital expenditures using federal funds, including ESSER.
- We can recommend actions that support the use of ESSER II and III while controlling for other compliance factors such as CEA.

Energy/Utility Savings Guarantee

Willdan has the ability to guarantee utility savings and the performance of the project. This ensures project savings for the District.

Our Energy Savings Guarantee is the most robust guarantee in the industry because we leave nothing to chance when we design and engineer a project. We have not had a savings shortfall on any of our projects in 50 years. Due to the level of upfront development and engineering we perform, we can measure and verify our savings through an annual utility bill analysis comparison, (M&V Option C), which yields the most accurate guaranteed utility savings for our customers.

The District's Measurement & Verification analysis and reporting will be completed by our IPVMP Certified M&V Manager Mark Effinger, who has over 17 years of experience in M&V on projects from \$6-\$85 million.

Willdan is committed to achieving our cost savings guarantees. Each M&V Plan and Report details the savings generated from the implemented energy efficiency measures. Reports are customized and aligned with the M&V Plan; however, common details included in the M&V reports are (1) Electric performance relative to baseline period, (2) Fuel performance relative to baseline period, (3) Water performance relative to baseline period, (4) Dollar expenditures relative to baseline period, (5) Details of M&V methodologies employed, (6) Overview of any baseline adjustments employed, (7) Weather normalization data, and (8) Explanations of any extraordinary factors or anomalies.



Student Engagement & STEAM Education Opportunities



We understand Azusa USD provides career pathways and career tech opportunities for its students. Our Education and Community Outreach manager would be excited to provide project learning opportunities and scholarship opportunities for students in NAF, PLTW and Femineers. We believe in advancing student achievement and providing learning opportunities for students in the communities we work with. **Jackie Leach can work with the education staff to create unique hands-on learning STEAM activities and educational lesson plans for students and teachers.**

Willdan's Clean Energy Academy

We will offer free technical training to high school students at no cost through Willdan's Clean Energy Academy. This training is held several times a year and gives students an opportunity to learn about building and energy systems. Website: <https://www.cleanenergyacademy.org/>



National Energy Foundation Partnership

Jackie will work closely with our educational partner, the National Energy Foundation (NEF), to provide classroom career visits, energy education classroom activities and even provide 100% scholarships for summer education programs.



National Energy Foundation

NEF is a mission driven non-profit and national leader in the development and delivery of energy education programs. NEF creates tailored education programs and materials for elementary and middle school students, designed by former educators, and correlated to state and national learning standards. NEF reached over 500,000 students in all 50 states in its last fiscal year, including nearly 25,000 students.

Central to NEF's success is its "school-to-home" approach where in-school presentations and activities engage students through a STEAM-based curriculum to develop their understanding of energy conservation and sustainability. Students then take what they learn in the classroom, along with provided materials and resources, and participate in additional activities and discussion at home. This approach promotes energy literacy & awareness among students, faculty, and the community.

Educational topics include energy efficiency, renewable energy, environmental awareness and electric vehicles, to name a few. Our NEF partnership and educational offering include:

- Faculty training workshops
- Live in-school presentations
- Curriculum & materials distribution
- Student competitions
- Workforce development Webinars
- Custom, interactive website
- Regular communications to all NPS faculty and administrators

Jackie and the NEF team will consult closely with the District's education staff to ensure that this program is designed and implemented in a manner that meets the District's needs and objectives





13191 Crossroads Parkway North, Suite 405
Industry, CA 91746-3443
909.386.0200 | 800.789.7517 | Fax: 909.888.5107

www.willdan.com