



Statement of Qualifications in Response to RFQ-4702-22-GJ

Energy Performance Contracting for Citywide Use within the City of Hollywood

Prepared for

City of Hollywood
Hollywood, Florida

January 13, 2022

Electronic

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Energy Performance Contracting for Citywide Use within the City of Hollywood

Presented by

Ameresco, Inc.

333 S.E. 2nd Avenue, Suite 2000

Miami, Florida 33131

T: 407 595 5488

AMERESCO 

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January 13, 2022
City of Hollywood
2600 Hollywood Boulevard, Room 221
Hollywood, Florida 33021
Attn: Ginah Joseph, Senior Purchasing Agent

Re: RFQ-4702-22-GJ, Energy Performance Contracting for Citywide Use within the City of Hollywood

Dear Ms. Joseph and City of Hollywood Selection Committee:

On behalf of the Ameresco team, thank you for the opportunity to participate in the City of Hollywood's Request for Qualifications (RFQ-4702-22-GJ) for Energy Performance Contracting for Citywide use within the City of Hollywood.

Ameresco, Inc. (NYSE: AMRC) is a leading, independent full-service provider of comprehensive asset and energy services including asset planning, energy efficiency and infrastructure upgrades, renewable energy solutions and energy information strategies with over 1,100 employees and over \$1 billion in annual revenue.

Ameresco has engineered, constructed, and/or provided guaranteed services **for over \$10 billion in energy projects** and over 600 MW of renewable energy projects, with an average annual energy cost savings ranging from 20% to over 40% of total utility expenses for our clients.

The following proposal outlines why partnering with Ameresco will allow the City to **achieve its goals for the project, while also advancing its mission to provide the citizens with efficient and effective services that meet their needs**. Some Ameresco key differentiators include:

- **Local Presence** – Ameresco is an American-owned company with a local presence in Florida. Our close proximity to the City allows us to be **responsive to the needs of the City of Hollywood** and keep costs low throughout the life of the contract. **We are committed to utilizing the maximum amount of local labor and vendors to bring the greatest value to the wider community.**
- **Independence** – While many Energy Services Companies manufacture products and technologies, **Ameresco is not a manufacturer and is vendor neutral**. Ameresco will provide the City with **non-biased** information on the best equipment for each application ensuring the decision is made for the right products at the right price.
- **Climate Resiliency** –Ameresco is the City of Hollywood's long-term sustainability partner. As your partner we will evaluate all assigned facilities against the risk assessment analysis provided by the City of Hollywood. By using the provided analysis, Ameresco has identified an initial list of facilities that are both high risk and are critical to City operation during and after a climate event and targeted for energy efficiency and infrastructure upgrades.
- **Financial Strength & Stability** - Ameresco has sourced and raised over \$3 billion of project financing for projects ranging from as small as \$350,000 to as large as \$889,000,000. Ameresco has implemented over 1,000 guaranteed energy savings performance contracts.

- **Flat Business Structure** - Ameresco has a very flat, low overhead business structure. Our flat organization is nimble, allowing us to have nearly all our employees directly benefitting our projects. In addition, we integrate local labor and contracting pools to ensure we are minimizing project cost increases from travel costs, per diem, etc.
- **Ameresco Can Deliver More Projects for Your Investment Dollar** - Ameresco doesn't carry the overhead of a large corporate structure. We bid out all components of a project rather than using all-in design-build subcontracting. **Our competitive bidding creates greater transparency in pricing, allowing us to pass the savings along directly to you.**

Should you have any questions or wish to discuss elements of this Statement of Qualifications further, please do not hesitate to contact me directly at 407.595.5488 or via email at kkwan@ameresco.com.

Respectfully Submitted,

Kalvin Kwan, PE, CEM
Account Executive
Ameresco, Inc.

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4.2.2

Executive Summary

Executive Summary

Each Respondent must submit an executive summary that identifies the business entity, its background, main office(s), and office location that will service the contract. Identify the officers, principals, supervisory staff and key individuals who will be directly involved with the work and their office locations. The executive summary should also summarize the key elements of the SOQ.

Ameresco, Inc. (NYSE: AMRC) is a leading, independent, full-service provider of comprehensive, high-performance, design/build energy services including energy efficiency solutions, renewable energy, utility infrastructure upgrades, and energy information strategies. Our projects range from traditional guaranteed energy performance contracts to landfill gas power production facilities, and every conceivable energy-based solution in between. Ameresco's proven track record has demonstrated our ability to provide our clients with best value energy projects at the lowest possible cost.

In the subsequent pages we aim to demonstrate why Ameresco earned our status as the largest independent provider of energy services in North America. We believe this proposal reflects our commitment to partner with the City of Hollywood (City) to deliver a city-wide energy conservation program that is comprehensive, collaborative, and customized. Some key elements of our proposal include:

- **Ameresco's Unique Qualifications and Capabilities:** Ameresco's only business is energy and water projects, and the execution of performance-based solutions is the core function supported by our dedicated company of professionals. As a product neutral, independent organization, we have no pull-through product or service goals influencing our offering. Technology and products are recommended based on their ability to best meet the needs of the City.
- **Guaranteed and Verified Energy Savings:** Baseline utility consumption is established through thorough analysis of 3-years of historical billing data. **Instead of estimating most of the variables used to disaggregate total usage into the individual system loads, as many energy service companies do, Ameresco uses metered performance data obtained during the detailed energy audit.** Savings calculation methodology for each ECM is presented clearly to the City in the investment grade audit. **With Ameresco's savings guarantee the City can feel secure in the value of your investment and long term satisfaction.**
- **Local Talent & Presence:** Ameresco is an American-owned company with a local presence in Florida. Our close proximity to the City allows us to be responsive to the needs of the City of Hollywood and keep costs low throughout the life of the contract. With experienced development and implementation professionals located in Orlando, FL, Tampa, FL, Miami, FL, Charlotte, NC, Dallas, TX, Phoenix, AZ, Atlanta, GA, and in conjunction with staff throughout the region, Ameresco is positioned to deliver a timely and successful energy efficiency project to City.

Company Highlights

- ✓ **\$10 Billion+** in energy solution projects, 269 MWe of Owned Assets in Operation
- ✓ **1,000+ Employees** throughout North America and the United Kingdom
- ✓ **70+ Offices** providing local expertise in markets served
- ✓ **8,000+Customers** benefitting from energy efficiency measures and renewable energy generation

Ameresco has the following branch offices, which will be assisting on the City project.

Location	Address	No. of Staff/Positions
South Florida Office	333 SE 2 nd Ave, Ste 2000 Miami, FL 33131	4 , engineering, project management, and account management
Central Florida Office	2202 N West Shore Blvd, Ste 200 Tampa, FL 33607	4 , engineering and account management
South Office	2375 E. Camelback Rd, Suite 400, Phoenix, AZ 85016	72 engineering, project management, operations, and general management
Headquarters	111 Speen Street, Ste 410 Framingham, MA 01701	100+ , engineering, project management, operations, and general management

- **Industry Leading Team of Experts:** Ameresco's experienced team of developers, engineers, and project managers will partner with the City to develop and implement a high quality, comprehensive utility conservation program for the City.

I, **Kalvin Kwan**, will serve as your primary contact throughout the project, facilitating effective, collaborative, and clear communication amongst all parties to ensure all expectations of the City are met or exceeded.

- **Project Management Approach:** Ameresco's general approach to delivering a comprehensive utility conservation project is centered upon working closely with all project stakeholders to collaboratively develop solutions that meet the client's unique operational and financial goals. Our project development process is thorough and innovative, helping ensure the best, highest value energy savings opportunities are identified. Financial analysis and modelling occur in tandem with project development to produce a financial scenario that supports the required investment and debt service.
- **Commitment to Local Labor Utilization:** in addition to disadvantaged businesses including small, women-owned, minority-owned, HUBZone, veteran-owned, and service-disabled veteran owned businesses enterprises. Ameresco takes great pride in working with local businesses and suppliers in maximizing project capital construction investments in the communities we serve.

Ultimately, Ameresco's happy customers are our most prized qualification. **Ameresco's Southern region holds a 60% repeat business rate which speaks volumes to the level of service our clients receive and the expertise of our people.** We encourage the City of Hollywood to connect with our provided references.

4.2.3

Firm Qualifications and Experience

Firm Qualifications and Experience

Respondents are to submit a complete information package and documentation that demonstrates their ability to satisfy all of the minimum qualifications and scope of service requirements. Indicate the firm's number of years of experience in providing the professional services as it relates to the work and services contemplated. Provide details of past projects for agencies of similar size and scope, including information on your firm's ability to meet time and budget/cost saving requirements. Indicate business structure, i.e.: Corporation, Partnership, or LLC. Firm should be registered as a legal entity in the State of Florida and you shall include the firm address, phone number, fax number, email address, web site, contact person(s), etc. Relative size of the firm, including management, technical and support staff; licenses, certifications, credentials, and any other pertinent information shall be submitted.

Respondent shall submit proof of experience for a minimum of three projects of similar scope and scale (or larger) and shall, for each project listed, identify location; key dates; project name and overall scope; scope of work that was self-performed by Respondent; and client's name, address, telephone number and email address.

Founded in 2000, Ameresco, Inc. (NYSE:AMRC) is a leading cleantech integrator and renewable energy asset developer, owner, and operator. Our comprehensive portfolio includes asset sustainability, energy efficiency, infrastructure upgrades, and renewable energy solutions delivered to clients throughout North America and the United Kingdom. As an American-owned energy service company, Ameresco has successfully completed over \$10 billion in energy projects for [cities, counties](#), state agencies, the [federal government](#), [higher education institutions](#), [K-12 schools](#), [healthcare facilities](#), commercial and industrial clients, and non-profit organizations throughout North America.

In over 21 years of experience in energy services, **Ameresco has constructed over \$10 billion in successful, custom-tailored energy projects**. Ameresco has developed and implemented over 800 ESPC solutions and currently manages over **\$3 Billion of guaranteed energy savings generated** by these ESPC solutions.

Company website: <https://www.ameresco.com/>

About/history: <https://www.ameresco.com/company/>

Investor relations: <https://ir.ameresco.com/>

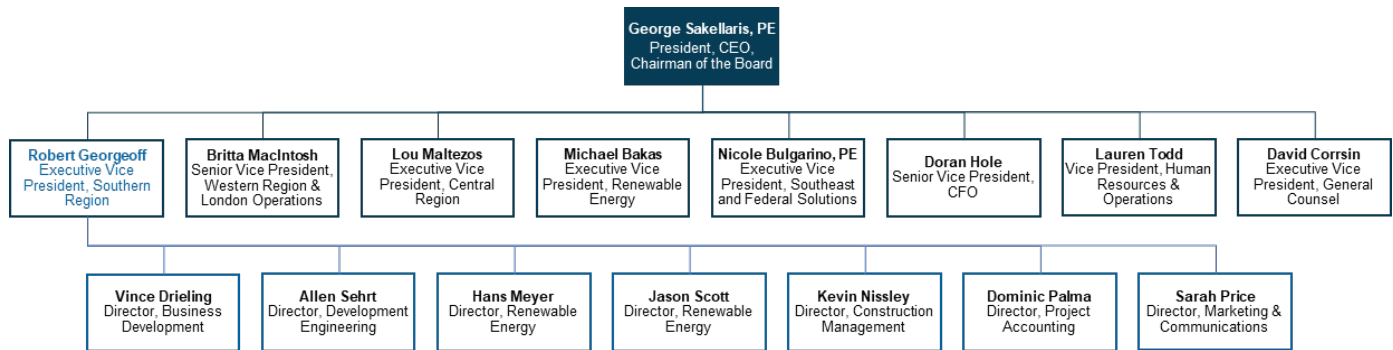
Company Locations: <https://www.ameresco.com/ameresco-office-locations/>



Business Structure

Ameresco has more than 1,100 employees providing local expertise throughout the United States, Canada, and the United Kingdom. Ameresco's Southern Region, led by Robert Georgeoff, will be primarily responsible for successfully working with the City.

An organizational chart representing Ameresco's Officers that will assume a leadership position on a resultant project with the City follows.



Contact Information

Contact for Negotiations	Contact for Contract Signing
Calvin Kwan, PE Senior Account Executive 333 SE 2nd Ave, Ste 2000 Miami, FL 33131 M: 407.595.5488 E: KKwan@ameresco.com	Robert Georgeoff Executive Vice President 2375 E Camelback Road, Suite 400 Phoenix, AZ 85016 O: 480.499.9200 E: RGeorgeoff@ameresco.com

Corporate Office or Partners

Office Responsible	Regional Headquarters	Corporate Headquarters
333 SE 2nd Ave, Ste 2000 Miami, FL 33131	2375 E Camelback Rd Suite 400 Phoenix, AZ 85016	111 Speen Street Framingham, MA 01701

Best Value

Clients who select Ameresco as their energy partner can be certain they are dealing with a company who recognizes the importance of delivering high-quality projects, systems, and services. Our experience has taught us that the long-term success of any project or relationship requires adherence to the quality process as a number-one priority and must be recognized as such at all levels in the organization. All Ameresco projects, regardless of size or scope, receive the same level quality and dedication.

Ameresco's approach to developing a performance contract project can be summed up in three words: **comprehensive**, **collaborative**, and **customized**. With a guiding objective of becoming a long-term, trusted partner to our clients.

Ameresco has **guaranteed more savings per investment dollar** than any other federal energy services provider

Per the U.S. Department of Energy data, **Ameresco has guaranteed more savings to the federal government per dollar invested than any other energy services company**. We have successfully analyzed, recommended and installed energy conservation projects ranging in size from a single building to more than 160 buildings and ranging in value from \$1 million to \$195 million, with financing terms of 7 to 23 years. Our in-house team of engineers, construction managers, technicians and measurement and verification specialists reduce facility energy intensity and revitalize aging infrastructure with long-term operations and maintenance benefits, maximizing returns on investment (ROI).

Accreditations and Pre-Qualifications

NAESCO



As the first energy service provider accredited by the National Association of Energy Service Companies (NAESCO), Ameresco is a recognized leader in the performance contracting industry. With experience in every corner of North America, we understand the unique regulatory requirements of each locality and market in which we work.

Prequalifications



Ameresco is recognized by both the U.S. Department of Defense (DOD) and Department of Energy (DOE) as a federal qualified ESCO, a designation that Ameresco has held each year that these federal agencies have pre-qualified candidate firms. Like the NAESCO accreditation process, these federal qualifications are based on independent evaluations of Ameresco's capabilities and

ability to successfully develop, finance, implement, and perform long-term performance services on behalf of its clients.

Ameresco holds multiple Super ESPC indefinite delivery/indefinite quantity (ID/IQ) contracts under both the DOD and DOE programs. In the latest ID/IQ contract award (October 2013), Ameresco was selected as part of a \$600 million shared capacity contract for the design and construction of supply- and demand-side utility conservation projects by the U.S. Army Corp of Engineers.

In [El Paso, Texas](#), Ameresco recently completed a 2.5 MW solar system comprised of two ground-mount solar PV arrays on the site of the Drug Enforcement Agency's (DEA) El Paso Intelligence Center (EPIC). The PV system is designed to produce up to 85 percent of EPIC's electricity usage. Onsite clean energy generation via the PV system also supports energy security and resiliency, which is critical to the around-the-clock operations at EPIC that supports DEA's overall mission.



Under a \$795 million ESPC – the largest renewable-energy ESPC in U.S. history – Ameresco replaced coal-fired cogeneration facilities at the U.S. DOE's Savannah River

Certifications

Ameresco has been registered with The State of Florida Secretary of State since 2000 and our firm's **Professional Engineering registration number is 27435**. Our construction manager holds an active General Contractors License (License Number CGC1524610).

Licensee

Name:	AMERESCO, INC.	License Number:	27435
Rank:	Registry	License Expiration Date:	
Primary Status:	Current	Original License Date:	04/23/2007

Related License Information

License Number	Status	Related Party	Relationship Type	Relation Effective Date	Rank	Expiration Date
77025	Current, Active	KWAN, KALVIN J	Registry		Professional Engineer	02/28/2023

State of Florida Department of State

I certify from the records of this office that AMERESCO, INC. is a Delaware corporation authorized to transact business in the State of Florida, qualified on October 4, 2000.

The document number of this corporation is F00000005646.

I further certify that said corporation has paid all fees due this office through December 31, 2021, that its most recent annual report/uniform business report was filed on April 22, 2021, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

*Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this
the Twentieth day of October,
2021*

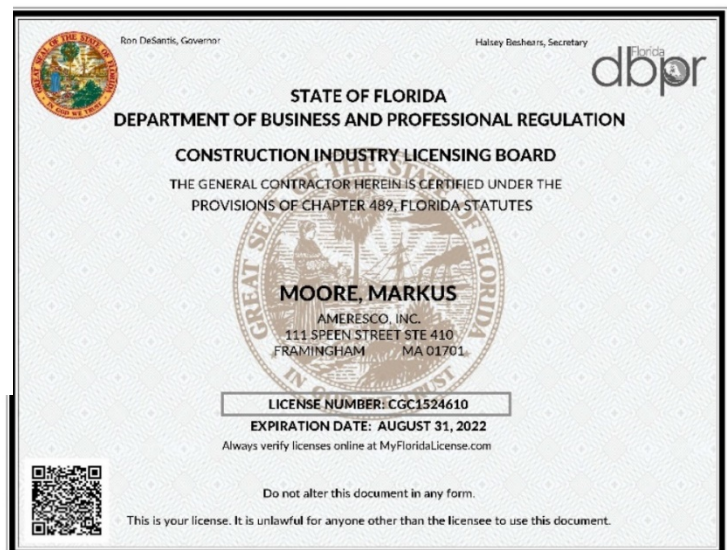
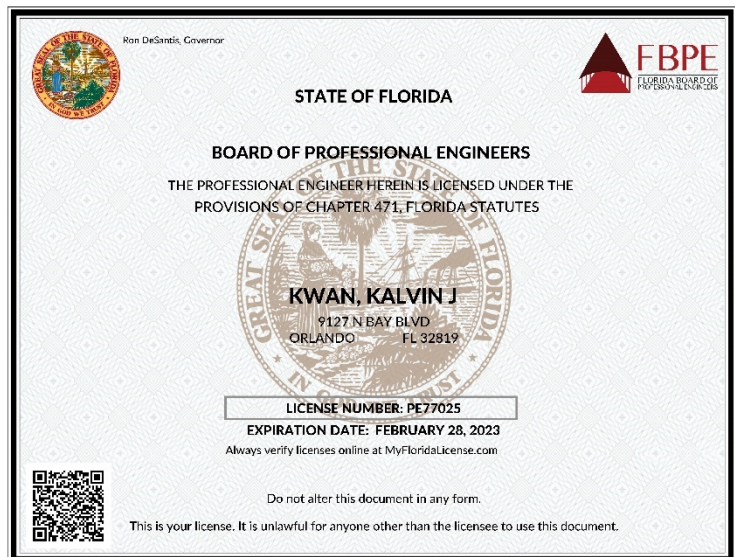


Randy Be
Secretary of State

Tracking Number: 1512924194CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

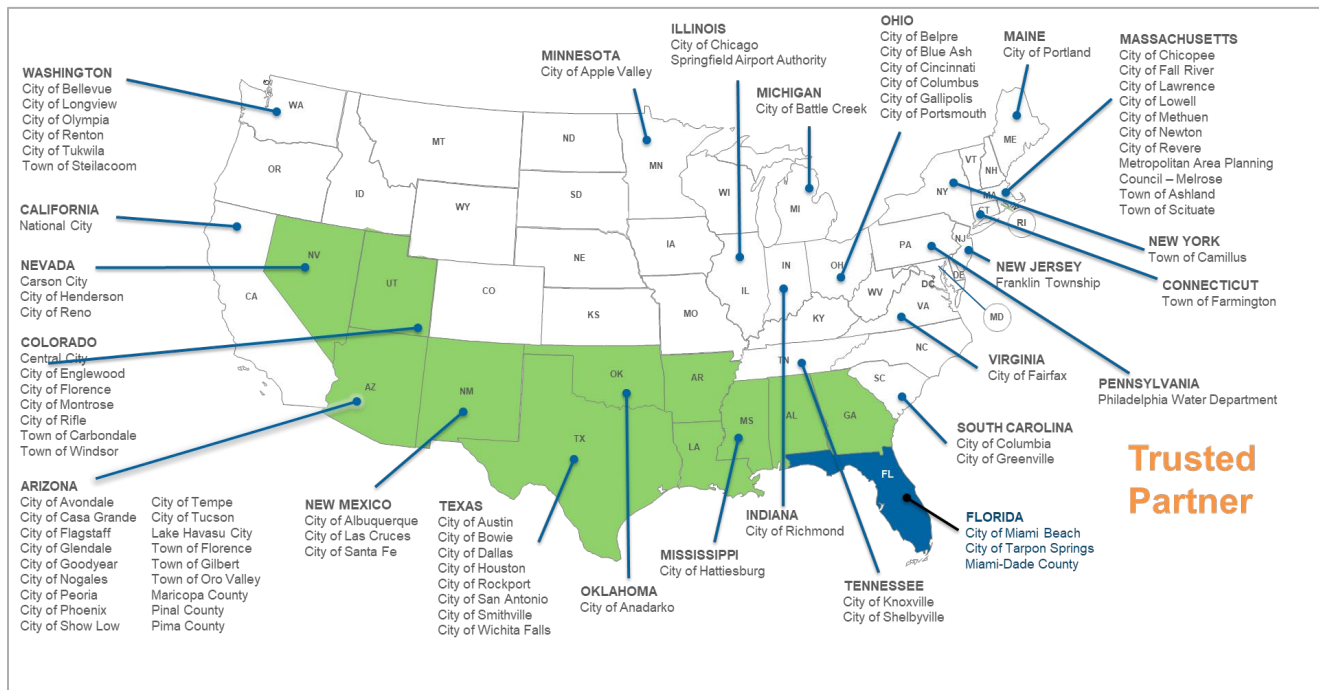
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Experience Working with Cities

Ameresco is a trusted energy and resiliency partner to some of the largest cities and counties in the nation. Our customized solutions help Cities uncover areas for cost savings from energy efficiency, renewable energy and energy management, including assisting our customers to secure financing through an Energy Savings Performance Contract (ESPC), or Solar Service Agreements (SSAs). We advise municipalities on how they can use energy cost savings to implement energy efficiency and renewable energy projects and outline a timetable for return on investment.

To date, Ameresco has partnered with over 125 cities and counties – including the Cities of Phoenix, Austin, Chicago, Dallas, Knoxville, Columbus, Miami-Dade County, and the District of Columbia – amounting to nearly \$850 million in energy projects.



Project Highlights

City of Tarpon Springs, FL

The City of Tarpon Springs located in Pinellas County Florida and supports a population of 23,484 people. The City of Tarpon Springs, FL contracted with Ameresco to replace aging or inoperable energy infrastructure and to improve the efficiency of these systems at several facilities. The services that the City provides to the community include cultural centers, water service, parking, engineering, traffic department, street and sewers, and parks and recreation.



Scopes of Services: Lighting System Improvements, Outdoor Lighting, Energy Management System and Controls, Re-Commissioning, HVAC Equipment Replacement and/or Modification, Building Envelope Improvements, Influent Pump Addition.

Total Compensation for Services: \$1.2M

Project Start/End Date: April 2013 – December 2026

Contact: Tom Funcheon
324 East Pine Street
Tarpon Springs FL, 34688
P: 727.942.5610
E: tfuncheon@ctsfl.us

Wichita Falls, TX

In June 2018, Ameresco deployed a turnkey fixed-based AMI system for the City. The new AMI system is the Sensus FlexNet system that uses its own licensed radio frequency for wireless communication. Installation of the network infrastructure consisted of the installation of four Sensus M400 Base Transceiver Stations at the City's existing water towers. For the communication backhaul to the remote host, the system uses the cellular backhaul via AT&T wireless service. Ameresco installed four Sierra Wireless GX450 cellular modems for the backhaul. The Sensus FlexNet system was ultimately selected by the City based on its unique compatibility with the City's existing infrastructure and licensed frequency to mitigate the risk of potential RF interference.

Phase II included the streetlighting replacement of approximately 5,500 existing fixtures with energy efficient LED fixtures with optional savings through energy savings guarantee and maintenance program. Due to the nature of the photocells installed, this project positions the City as "smart city ready" in the event that the City desires to incorporate smart city applications in the future by connecting to these new photocells. Further, with the 3000K and 4000K fixtures installed as part of this project, the City adheres to International Dark-Sky Association recommendations, as well as American Medical Association (AMA) recommendations for appropriate lighting levels in a municipality; thus, bringing additional value to Wichita Falls residents for years to come. Phase I was completed in June of 2018 and Phase II was completed in July 2019.

Scopes of Services: The scope of the Phase I project included a replacement of 33,249 water meters, rebuilding of 189 existing Sensus Omni T2 water meters, and the installation of a fixed-based Sensus FlexNet AMI (Advanced Metering Infrastructure) system. Phase II included the streetlighting replacement of

approximately 5,500 existing fixtures with energy efficient LED fixtures with optional savings through energy savings guarantee and maintenance program.

Total Compensation for Services: Phase I, Water Meter Retrofit: \$15.8M Phase II, Streetlighting Retrofit: \$2.8M

Project Start/End Date: February 2016 – December 2019

Contact:

Phase I:

Russell Schreiber, PE
Director of Public Works
City of Wichita Falls
P: 940.761.7477
E: russell.schreiber@wichitafallstx.gov

Phase II:

John Burrus
Director of Traffic
City of Wichita Falls
P: 940.761.7640
E: john.burrus@wichitafallstx.gov

El Campo, TX

The city of El Campo partnered with Ameresco in 2020 to provide a turnkey water meter replacement and AMI system to optimize operations, achieve efficiencies and improve the water infrastructure. Ameresco installed an automatic metering infrastructure (AMI) project consisting of over 4,800 smart water meters. The “turnkey” solution includes identifying, designing, and installing a comprehensive meter reading system as well as a customer portal. This upgrade provided the City with many benefits including the ability to provide enhanced customer service to its citizens; accurately capture metered water consumption; reduce overall operational costs; and provide the IT infrastructure necessary to manage water consumption and distribution at a more advanced level.

Scopes of Services: AMI, Water Meter upgrades and Customer Portal

Total Compensation for Services: \$3.3M

Project Start/End Date: March 2020 – December 2021

Contact:

Ms. Courtney Sladek
City Manager
csladek@cityofelcampo.org
979.541.5009

In addition to the project references above Ameresco has provided the following project profiles to show the City of Hollywood the depth and breadth of our experience.

Norfolk Naval Base, VA

Norfolk Naval Shipyard in Portsmouth, Virginia, is one of the largest shipyards in the world specializing in repairing, overhauling and modernizing ships and submarines. It's the oldest and largest industrial facility that belongs to the U.S. Navy and it's also the most multifaceted.

Ameresco was selected for the development, audit, design, construction management, financing, commissioning, training, and measurement and verification of a multi-phase Energy Savings Performance Contract (ESPC) with the Shipyard. Spanning over 400 buildings, totaling 6.5 million square feet, energy improvements included lighting retrofit and controls upgrades, DDC upgrades, water conservation, compressed air system repairs, and steam system improvement.

Miami-Dade County Public Schools, FL

Ameresco contracted with Miami-Dade County Public Schools for a Guaranteed Energy Performance Contract (GEPC) program to provide energy efficiency and infrastructure upgrades to school facilities. The GEPC is a phased approach with Ameresco getting the award to perform an Investment Grade Audit for a historic high school in downtown Miami, which began in January 2021 and is currently underway. Subsequent phases of GEPC schools will be awarded in 2021 and 2022.



Douglas County, GA

Ameresco contracted with Douglas County for a \$2.2 million Guaranteed Energy Savings Performance Contract (GESPC) to provide energy efficiency and infrastructure upgrades to 38 County-owned buildings totaling 667,000 square feet of space.

The GESPC consisted of Energy Conservation Measures that are expected to be entirely self-funded and reduce energy use by 1,588,002 kWh annually. Funded through annual energy and operations cost savings of \$164,064, this project upgrades the County's energy infrastructure while also addressing critical capital improvement needs without any capital cost.



City of Atlanta, GA (98% Complete)

The City of Atlanta selected Ameresco in 2020 to fulfill a Guaranteed Energy Savings Performance Contract. This comprehensive project consisted of 19 building facilities. Measures installed include lighting system improvements, exterior lighting, new energy management systems, water conservation, pool/aquatic on-site hypochlorite generation, cooler tower sub-metering, water cooled chiller replacements, green clean chiller replacements, high efficiency transformers, and premium efficiency motors.





4.2.4

Organizational Profile and Project Team Qualifications

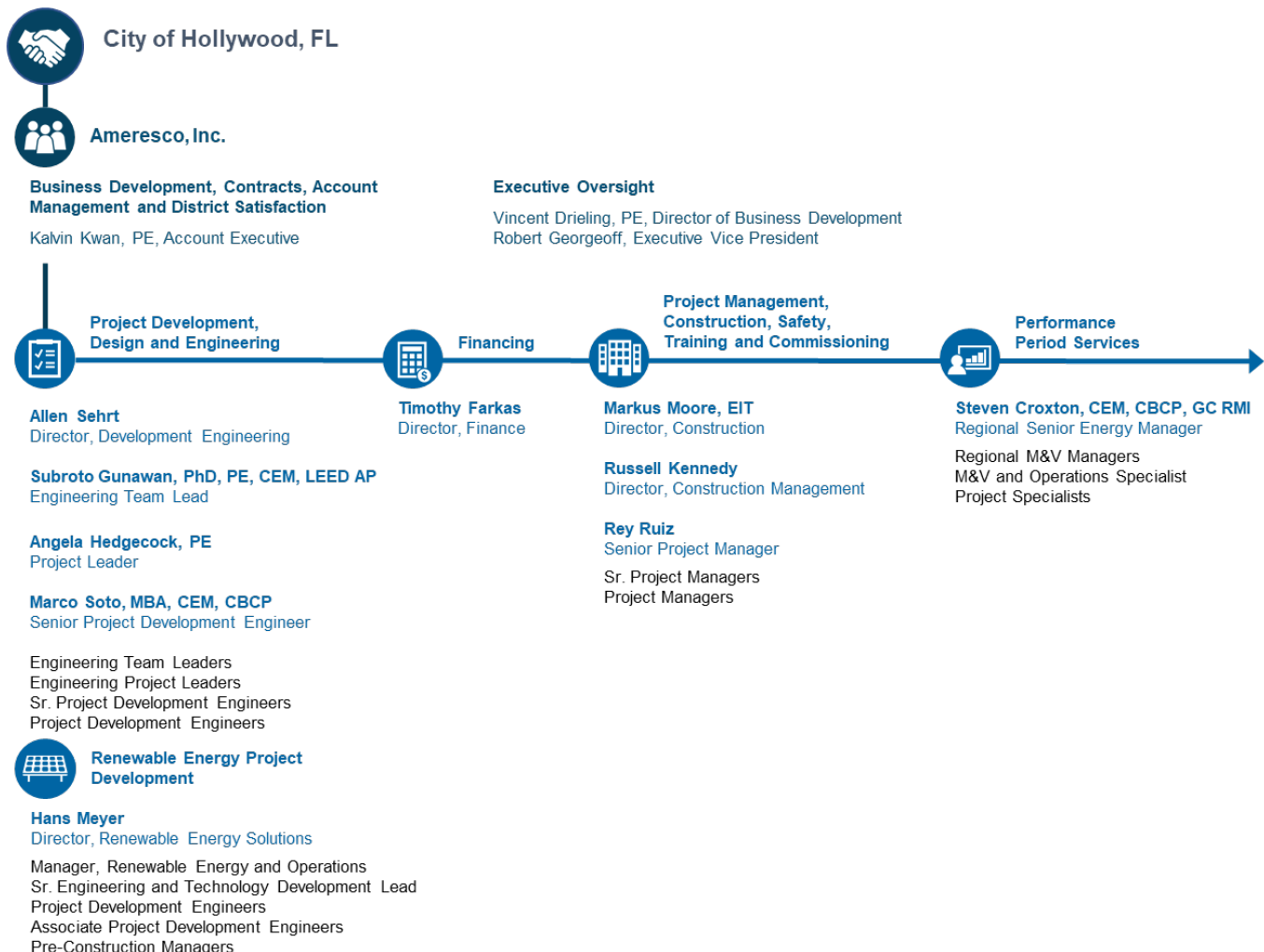
Organizational Profile and Project Team Qualifications

This section shall include a detailed profile of the organization and identify the project team. Providing this information on an organizational chart is recommended. This section shall also include resumes and credentials of the project team. Lastly include details of how each project team member will contribute to the project, in what capacity, and the level of involvement and their expertise. Provide a comprehensive summary of the experience and qualifications of the individual(s) who will be selected to serve as the project manager(s) and/or team members for the City.

The following organizational chart provides a listing of the key personnel responsible for each phase of the City's comprehensive energy conservation program. They have been selected based on their:

- Technical knowledge and expertise
- Familiarity with applicable market conditions
- Administrative, management, and communication skills
- Existing workload

As necessitated by project scope, we will draw upon the experience and expertise of the over 1,100 Ameresco energy professionals across our organization. The selected personnel resumes can be found in the following pages.



Due to page restrictions, the following table and abridged resumes for each of the Key Personnel shown in the organizational chart have been provided. Full resumes will gladly be furnished upon request.

Key Personnel Resume Details

Name, Certifications, and Title	Area(s) of Expertise/Project Role	Academic/ Professional Qualifications	Years of Experience
Business Development, Account Management, Contracts, Financing and City of Hollywood Satisfaction			
Kalvin Kwan, PE, CEM Account Executive	Account Management, Project Finance, City Satisfaction	BS, Mechanical Engineering, University of Florida	12
Overall Management			
Vincent Drieling, Director, Business Development	Business Development, Contracts, Overall Management	MBA, Southern Methodist, Cox School of Business BS, Civil Engineering, University of Nebraska	14
Robert Georgeoff Executive Vice President	Regional Leader, Management Oversight	BS, Business, University of Arizona	31
Timothy Farkas, MBA Finance Director	Account Management, Project Finance, Client Satisfaction	MBA, University of Nevada, Las Vegas BS, Finance, University of Oregon	22
Project Development, Design and Engineering			
Allen Sehrt, PE, CEM, CDSM, CEA Director, Development Engineering	Management/Quality Control/ Engineering review/financial modeling	BS, Mechanical Engineering, University of Missouri - Rolla	30
Subroto Gunawan, PhD, PE, CEM, LEED AP Engineering Team Leader	Audit Development/Technical Analysis/Engineering Design	PhD, Mechanical Engineering, University of Maryland, College Park MS, Mechanical Engineering, University of Maryland, College Park BS, Mechanical Engineering, University of Maryland, College Park	24
Angela Hedgecock, PE Project Leader	Audit Development/ Technical Analysis/ Engineering Design	MS, Engineering Management BS, Chemical Engineering	22
Marco Soto, MBA, CEM, CBCP	Audit Development/ Technical Analysis/ Engineering Design	MBA, Indiana University, Kelley School of Business BS, Mechanical Engineering, Florida Atlantic University	23
Hans Meyer Director, Renewable Energy Solutions	Renewable Energy and Resiliency Development, Engineering/Design	BS, Finance, Arizona State University, WP Carey School of Business	12

Key Personnel Resume Details

Name, Certifications, and Title	Area(s) of Expertise/Project Role	Academic/ Professional Qualifications	Years of Experience
Project Management, Construction, Safety, Training and Commissioning			
Markus Moore, EIT Director of Construction	Construction Project Management/Safety/ Overall Management	Masters, Project Management, Western Carolina University BS, Electrical Engineering, Clemson University	30
Russell Kennedy Director, Construction Management	Construction Project Management/Safety/ Overall Management	BS, Construction Management, Arizona State University	15
Rey Ruiz Senior Project Manager	Construction Project Management/Safety/Training/ Commissioning	BA, Communications, University of Houston	14
Performance Period Services			
Steve Croxton, CEM, GC RMI Director, Operations	M&V, O&M, Warranty Administration	MBA, University of Nevada Las Vegas, Lee Business School BS, Business Administration, University of Phoenix	30

Kalvin Kwan, PE, CEM | Mr. Kwan is an experienced technical and financial account executive with 12 years of experience in the HVAC and energy industries. Mr. Kwan has led project teams, from initial project identification through implementation, on numerous energy projects throughout Florida. His area of expertise is in the development of energy contracts with municipal government, K-12 school systems, and higher education agencies.

Ameresco Project Experience

Miami Dade County Public Schools Energy and Water Savings Project	Under Development
Miami Dade County Government Solar PV Project	Under Development
Medical University of South Carolina-Phase II, SC Energy and Water Conservation	\$2.2M
Douglas County Energy and Water Conservation Project	\$2.5M
City of Atlanta Energy and Water Conservation Project	\$7.8M

Project Experience Prior to Ameresco

Florida State College at Jacksonville, FL
 City of Pompano Beach (2 Phases)
 Florida Department of Management Services
 Osceola County Public Schools, FL
 Florida Memorial University, FL

Vincent Drieling, PE | Mr. Drieling has over 14 years of professional experience, serving in a variety of engineering and leadership positions. As Director of Business Development, Mr. Drieling provides a functional oversight role, providing technical or business support as needed. Mr. Drieling has a successful history in working with clients to develop self-funded energy and water solutions under both the ESCO contract and design-build construction model. He is a licensed Professional Engineer and joined Ameresco in 2016.

Representative experience includes:

City of Peoria Renewable Energy and Lighting Efficiency Project	\$5.8 M
City of Santa Fe Energy Efficiency Project	\$4.9 M
City of Rockport Infrastructure Modernization and Energy Conservation Project	\$9.3 M
City of Wichita Falls Multi-Phased LED Streetlighting and Water Projects	\$18.8 M
Texas A&M University – Corpus Christi Multi-Phased ESPC & Infrastructure Upgrades	\$12.0 M

Robert Georgeoff | As Executive Vice President, Mr. Georgeoff provides executive management of Ameresco's South Region. Mr. Georgeoff has over 30 years of industry experience in a variety of origination, management, and executive roles in the energy services, risk management, and renewable business. Mr. Georgeoff provides oversight for all sales and operational activities and is responsible for developing and executing the company's growth strategies. My Georgeoff has been with Ameresco since 2007. In addition to those projects that have been selected for Key Personnel herein, the following is a representative sampling of projects implemented under Mr. Georgeoff's oversight within the South Region:

City of Flagstaff Multi-Phase ESPC and Solar Projects	\$17.5 M
City of Phoenix 91 st Avenue WWTP Renewable Natural Gas Project	\$25.0 M
Kaiser Permanente Solar Portfolio (54 MW across 95 sites)	\$200.5 M
National City Energy and Water Conservation	\$5.4 M
Woodlands Water Infrastructure Upgrades	\$19.9 M

Allen Sehrt, PE, CEM, GBE, CEA | As Director of Project Development Engineering, Mr. Sehrt provides quality control and engineering review. He is adept at guiding the team when technical challenges arise, as well as assisting in financial modeling to maximize project value if technical variables are driving costs up during the development stages. Mr. Sehrt is proficient in conducting lighting, HVAC, and central plant surveys, identifying cost-effective energy and water conservation measures, quantifying savings potential, determining retrofit costs, and ultimately writing comprehensive energy reports and specifications for construction, as well as providing construction management and commissioning. Mr. Sehrt has been with Ameresco for 14 years.

Brief representative experience during this time includes:

Carson City Energy Modernization Project	\$4.2 M
City of Henderson Multi-Phase Energy Conservation and Renewable Project	\$23.1 M
Clark County Water Reclamation District Energy Savings Performance Contract	\$9.7 M
City of Casa Grande Multi-Phased Energy and Renewable Project	\$8.6 M
City of Phoenix LED Streetlighting Project	\$26.8 M

Subroto Gunawan, PhD, PE, CEM, LEED AP | Mr. Gunawan is an expert in building energy systems with emphasis on system-wide optimization for energy efficiency improvements. In his role as Engineering Team Lead, Mr. Gunawan is responsible for developing energy-efficiency projects from initial audit to energy service performance contract execution. This includes conducting overall building audits and simulations, identifying and quantifying energy savings opportunities, developing measurement and verification plans, and coordinating with project managers during construction. Mr. Gunawan has been with Ameresco for 13 years. Brief representative experience during this time includes:

City of Mesquite AMI Smart Metering Project	\$33.8M
City of Navasota Energy Savings Performance Project	\$3.8 M
Texas A&M University – ESPC & Infrastructure Upgrades	\$9.8M
City of Austin Energy and Water Conservation	\$7.7M

Angela Hedgecock, PE | Ms. Hedgecock has over two decades of energy and water conservation experience and has developed projects in the K-12, higher education, healthcare, state and local government, LEED green buildings and municipal metering, water and wastewater markets. As Project Leader, Ms. Hedgecock is responsible for identifying and developing energy efficiency and process optimization project opportunities within the municipal water and wastewater market. She handles the project development activities of water meter AMR/AMI, water and wastewater treatment plant projects including data collection, field audits, cost and savings analysis and developing scopes of work. Angela joined Ameresco in 2019. Brief representative experience during this time includes:

Woodlands Water Infrastructure Upgrades	\$19.9 M
City of Bonham Energy Conservation and Smart Metering Project	\$2.9 M
City of El Campo Smart Metering Project	\$3.4 M
City of Gatesville Smart Metering Project	\$2.6 M
City of Shiner Smart Metering Project	\$1.4 M

Marco Soto, MBA, CEM, CBCP | As Senior Project Development Engineer, Mr. Soto serves a key role at Ameresco. His responsibilities include project development in all segments of the Energy Savings Performance Contracting (ESPC) industry, as well as performing other functions, including field energy audits and measurement and verification after implementation. Mr. Soto has over 24 years of experience in field energy audits and possesses in-depth knowledge of energy modeling software applicable to energy conservations measures (ECMs) and energy savings guarantees. Mr. Soto joined Ameresco in 2017. Brief representative experience during this time includes:

City of Rockport Infrastructure Modernization and Energy Conservation Project	\$9.3 M
City of Seabrook Smart Metering Project	\$2.9 M
City of Yoakum Infrastructure Modernization and Energy Conservation Project	\$3.5 M
Texas A&M University – Corpus Christi Multi-Phased Infrastructure Upgrades	\$5.2 M
West Texas A&M University Energy Reduction and Modernization Project	\$14.7 M

Timothy Farkas, MBA | Based in Las Vegas, Mr. Farkas initiates and leads client relationship and business development efforts for comprehensive energy projects that enhance the client's system infrastructure, reduce energy and/or water consumption, increase utility bill savings, generate onsite energy from traditional or renewable sources and provide financial solutions backed by performance guarantees. As the Director of Finance and a former public finance banker, Mr. Farkas is responsible for providing structured financing for new projects and is experienced at managing financing processes for energy efficiency and renewable energy projects for municipal, higher education, school districts, healthcare, and commercial clients. Mr. Farkas joined Ameresco in 2012. Brief representative experience includes:

Carson City Energy Modernization Project	\$4.2 M
City of Santa Fe Energy Efficiency Project	\$4.9 M
Knox County 5 MW Parking and Rooftop Solar ESPC	\$12.5 M
<u>Metropolitan Airports Commission Solar, Lighting and EV Charging Phase I & Phase II</u>	\$37.0 M
Prairie View A&M University Energy Conservation Project	\$14.5 M

Markus Moore, EIT | Mr. Moore has 30 years of experience in building construction and maintenance. He has overall, on-site responsibility for energy project construction management, contract development and negotiation, equipment installation, maintenance, and commissioning. His responsibilities span all types of facilities; industrial, institutional, educational and federal clients. Over his tenure with Ameresco he has managed construction of projects totaling in excess of \$200 million. Mr. Moore has been with Ameresco for 19 years. Brief representative experience during this time includes:

City of Miami Beach Energy Conservation Project	\$14.5 M
City of Tarpon Springs Energy Conservation Project	\$1.2 M
Glynn County	\$7M
Medical University of South Carolina Energy and Water Conservation PH II	\$2.2 M
University of North Carolina	\$8.2 M

Russell Kennedy | Mr. Kennedy is responsible for the planning, development and implementation of AMI & Energy Efficiency construction projects, including safety, scheduling, budgeting, managing client expectations, and providing technical and administrative support. Mr. Kennedy facilitates training for all Ameresco project and construction managers on management policies and procedures, including OSHA compliance. Additionally, he ensures that an adequate project measurement, control systems, and project status reporting systems are established to monitor and control safety, scope, quality, cost, and schedule.

Representative project experience includes:

Arizona State University - Phase II ESPC Project, AZ	\$40.0 M
City of Casa Grande Multi-Phased Energy and Renewable Project	\$8.6 M
City of Phoenix - LED Streetlights, AZ	\$26.8 M
City of Flagstaff Energy and Renewable Project	\$17.5 M
Woodlands Water Infrastructure Upgrades	\$19.9 M

Rey Ruiz | Mr. Ruiz has well over a decade of project management experience in a combination of commercial and public works construction, EV charging stations, streetlighting, traffic control devices, energy efficiency, and AMR/AMI projects. As Senior Project Manager, Mr. Ruiz is responsible for all aspects of the execution of the construction, including bidding, material procurement, subcontract execution, project scheduling and cost, risk, and safety management. He is responsible for managing subcontractors, assisting engineering and sales with performance contract execution, and ensuring field-engineering standards for the development and implementation of energy and water measures. Mr. Ruiz joined Ameresco in 2020. Representative experience includes:

Woodlands Water Infrastructure Upgrades	\$19.9 M
City of Mesquite AMI Smart Metering Project	\$33.8M
City of Seabrook Smart Metering Project	\$2.9 M
City of Conroe Smart Metering Project	\$17.5 M
City of Bonham Energy Conservation and Smart Metering Project	\$2.9 M

Steve Croxton, CEM, GC RMI | As Director of Operations for the Southern Region, Mr. Croxton has three decades of experience in the energy services industry, from developing energy conservation projects to measurement and verification of guaranteed savings to the operations and maintenance of energy and renewable energy installations. Mr. Croxton's responsibilities include managing the post construction activities of energy and water conservation projects and renewable installations and performing energy consultative duties for clients seeking information on the efficient purchase of energy commodity. He works to measure, troubleshoot, and correct energy savings or energy production shortfalls to ensure program compliance, as well as maintains responsibility for the region's operations and maintenance contracts. Mr. Croxton has been with Ameresco for over 18 years. Brief representative project experience includes:

Carson City, NV Energy Modernization Project	\$4.2 M
City of Henderson, NV Multi-Phase Energy Conservation and Renewable Project	\$23.1 M
City of Reno, NV Multi-Phase Energy Conservation and Renewable Generation Project	\$18.6 M
Clark County Water Reclamation District Energy Savings Performance Contract	\$9.7 M
University Medical Center of Southern Nevada	\$4.7 M



4.2.5

Approach to Scope of Work

Approach to Scope of Work

Provide in concise narrative form, your understanding of the City's needs, goals and objectives as they relate to the project as described in the scope of services, and your overall approach to accomplishing the project. Give an overview on your proposed vision, ideas and methodology. Describe your proposed approach to the project. As part of the project approach, the firm shall propose a scheduling methodology (time line) for effectively managing and executing the work in the optimum time. Also provide information on your firm's current workload and how this project will fit into your workload. Describe available facilities, technological capabilities and other available resources you offer for the project.

Provide an overview of your understanding of the City's vulnerability to the effects of climate change and sea level rise and your goal to address resiliency through projects assigned to your firm.

Ameresco understands for the City of Hollywood, the focus will primarily be energy auditing of City facilities and developing a comprehensive energy savings project. Our Company has specialists that have previously designed upgrade programs for all types of facilities. Ameresco will tailor our approach based on the immediate needs and desires of the City, the project economics, and the long-term goals of the City's sustainability goals.

Our core services include the development, design, arrangement of financing, construction, and installation of solutions that deliver measurable cost and energy savings while enhancing the operations, energy security, infrastructure, and resiliency of a facility. As a trusted sustainability partner, we are always on a mission to help customers lower their overall carbon footprint and reduce their environmental impact.

Our projects incorporate innovative technology and techniques, customized to improve the efficiency of major building systems. Energy efficiency measures and upgrades often include lighting, water conservation, ventilation, cooling, building envelope, smart meters, and advanced building automation and control. We first implement efficiency gains in order to establish a strong baseline for renewable energy generation needs.

Energy Efficiency

- Smart Building Automation & Controls
- Water / Wastewater Efficiency & Recovery
- Interior Lighting and Controls
- HVAC & Ventilation
- Boiler & Chiller System
- Industrial Optimization
- Building Envelope
- Advanced Metering
- LED Street & Area Lighting
- Smart Cities

Distributed Energy Generation, Storage & Microgrids

- Cogeneration Plants
- Solar (On-Grid & Off-Grid)
- Batteries and Energy Storage
- Biomass, Biogas, Landfill Gas to Energy, RNG
- Geothermal
- Microgrid
- Wind
- EV Charging

Energy Analytics and Supply Management

- Energy Analytics
 - AssetPlanner
 - Measurement & Verification
 - Advanced Metering
 - VisionDSM (AEG)
- Energy Supply Management



With our preliminary site visit that occurred on December 13, 2021, Ameresco has identified some potential opportunities at the City's pre-selected sites. Further investigation in the Investment Grade Audit phase is needed to determine its viability for installation in an energy project.

Police Headquarters

- Lighting Retrofits
- Water Conservation
- Alerton - Building Automation System Upgrades
 - Demand control ventilation
 - 3-way to 2-way chilled water valve conversion
 - Remote thermostats to feed into existing zone control system for better occupancy comfort
- Air Handling Unit Replacements
 - Pathogen mitigation technologies
- Air Cooled Chiller Replacements
 - Constant primary to variable primary flow conversion

City Hall and Annex

- Lighting Retrofits
- Water Conservation
- Alerton - Building Automation System Upgrades
 - Demand control ventilation
 - Critical valve reset
- Chiller Replacement
 - York Chiller is broken and out of service
- Condenser Water System Improvements
 - Installation of variable frequency drives on condenser water pumps
 - Verify variable frequency drives are functional on cooling tower fans
 - Clean the Evapco cooling towers
- COVID-19 Mitigation Technologies
- Re-commission Solar Photovoltaic System on City Hall Roof
 - System is reportedly not functional
- Water Source Heat Pumps (Annex)
 - System re-commissioning
 - Cooling tower cleaning and service

Wastewater Treatment Plant

- Lighting Retrofits
- Water Conservation
- Process Optimization working with City's Engineer of Record to Reduce Energy Consumption of Operations
 - Potential for anaerobic digester installation, if not already installed
 - Cogeneration
 - Renewable Natural Gas production and sale
- Solar Photovoltaic Array Installations

We promote resiliency and sustainability by developing and building Distributed Energy Generation, Storage Systems, and Microgrids. Examples of these DEG resources include Solar PV, CHP and Cogen plants, geothermal, and green gas – all of which can all be paired with microgrid and battery storage technologies. We can build, operate, and maintain these plants for our customers, or can build plants under our ownership to mitigate customer risk while providing the localized benefit of on-site energy generation.

Our holistic approach to energy solutions ensures end-to-end technical guidance, from project inception to continued operations and maintenance (O&M) of systems. Ameresco understands that a well-designed and properly executed O&M program is a crucial element in the equipment performance and maintenance required to realize all possible energy savings.



Infrastructure

- Utility Distribution System
- Retrofits/Expansion
- Modernization
- New Construction
- Monetization / Ownership & Operation



Operations and Maintenance

- Plant O&M
- Solar O&M
- Facility Management Services
- System Repair & Restoration
- Lighting System Maintenance
- Control System Predictive Maintenance

City of Hollywood Environmental Responsibility and Resiliency

Southeast Florida is considered one of the most vulnerable geographic regions to the impacts of climate change and City of Hollywood is specifically vulnerable to four threat categories: sea level rise (SLR), storm surge (SS), extreme precipitation (EP), and extreme heat (EH).

As thoroughly detailed in [the 2020 City of Hollywood Citywide Vulnerability Assessment and Adaptation Plan](#), these four climate threat categories are not anticipated to impact City assets and the broader community consistently or equally, but rather require distinct, targeted intervention strategies, tuned to the appropriate planning horizon. Sea level rise, storm surge, and extreme precipitation pose threats directly to city assets and infrastructure, compromising the City's capacity to withstand and recover from a climate event, in turn impacting the City's ability to serve the community during and after events. Extreme

heat impacts the community directly, with disproportionate impacts concentrated in vulnerable, low income, and elderly populations. Not only do City of Hollywood's facilities and public spaces play a key role in the cultural cohesion of the community, but they will also continue to serve as shelter and hubs of essential services during the hurricanes, floods, and other anticipated climate events.



Comprehensive energy management and efficiency investments provide the foundation of any portfolio resilience strategy. Most directly, energy efficiency decreases the critical load of a facility, leading to right sizing of required investments in back up power. Reducing back up power requirements reduces dependence on outside fuel sources that may not be readily available in a climate event or opens up the potential for self-sustaining microgrids powered by renewable energy. Energy efficiency helps minimize ongoing utility expenditures, freeing budget for investments in non-energy infrastructure hardening and other parallel priorities.

The 2020 assessment evaluated and ranked risk to City assets with consideration of likelihood of impact from the four climate risk threats over a planning horizon of 2035 to 2100, with greater weight on critical infrastructure - acknowledging the essential role these facilities play in resilience and recovery from climate

events. This analysis is a priceless resource for comprehensive planning of energy and infrastructure investments and a resource Ameresco will leverage extensively in our development of a comprehensive energy efficiency performance contract scope for the City of Hollywood.

As part of our investment grade audit, Ameresco will evaluate all assigned facilities against the risk assessment analysis provided in the 2020 Assessment and Adaptation Plan, with the goal of identifying retrofit opportunities that will reduce facility load, maximize energy cost savings potential, and provide a detailed analysis of resilient back up power options including solar plus storage microgrid options for critical facilities. By cross referencing the 2020 assessment rankings with the facilities identified for investment grade audits and comprehensive energy efficiency upgrades Ameresco identified an initial list of facilities that are at high risk, and are critical to City operation during and after a climate event and targeted for energy efficiency and infrastructure upgrades. This list includes Fire Station #40, Lift Stations 1, 2, 3, 6, and the Wastewater Treatment Plant on 14th Avenue.

Approach to Workload

Ameresco is equipped to handle surges in workload. Ameresco has extensive experience at multi-site, high-profile, and highly active sites including municipalities, schools, financial institutions, and healthcare clients. We create teams dedicated to these multi-site accounts and use proven techniques and constant communication to ensure project success. Furthermore, being a national company, we are extremely pliant and can pull on national resources if needed.

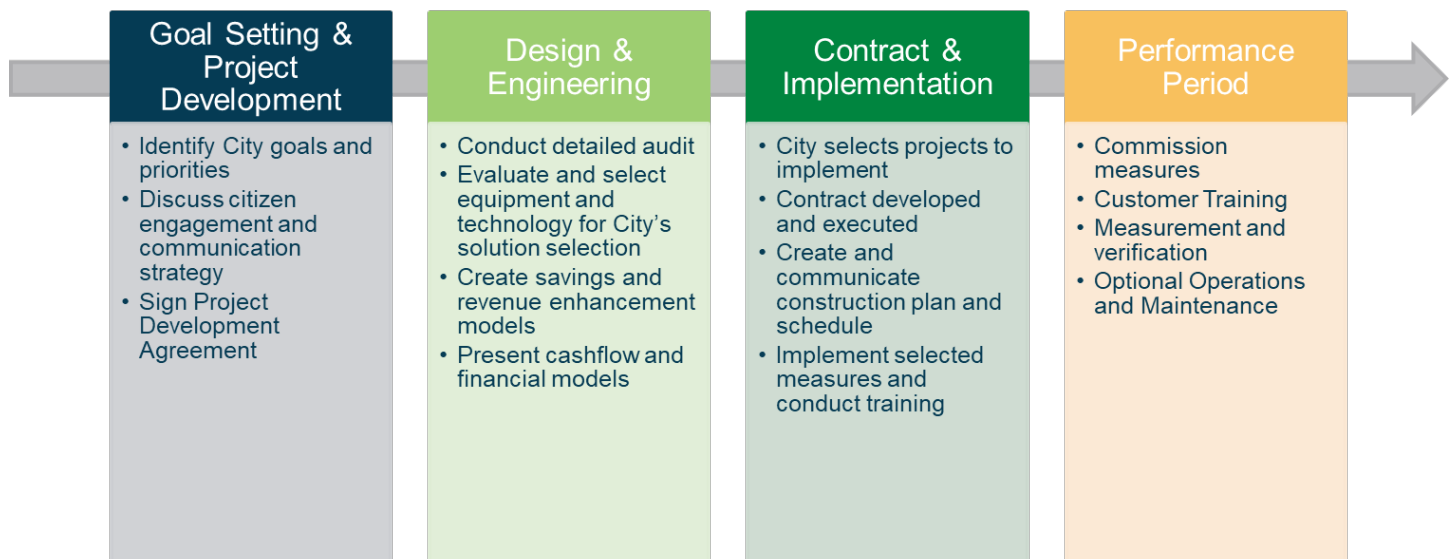
Key Personnel will be supported by employees throughout Ameresco's South Region, as well as draw from Ameresco's pool of nearly 1,100 talented energy professionals as needed. This team has a strong history and reputation and will co-author solutions that meet the fiscal, operational, and sustainability goals of the City.

At all stages of the project, a direct Ameresco employee will be responsible for management and oversight of:

- Preliminary and Comprehensive Audit
- Financial Grade Operational Audit
- Engineering and design
- Project and construction management
- Finance
- Training and commissioning
- Measurement and verification
- Operations and maintenance

A key component of managing workload and resources is a well-defined schedule. The Ameresco personnel assigned to this project have worked together on numerous projects. Their strong proven track record in managing work volume, team members, and subcontractors will ensure that work is completed quickly, safely, cost-effectively, and on schedule for the City. Key milestone events from the project will be combined with major activities of all active projects and consolidated on a single schedule. This summary schedule provides senior management of a clear picture of all significant project events and deadlines.

Ameresco's Project Approach



Engineering Approach

Ameresco's general approach to delivering a comprehensive utility conservation project is centered upon working closely with all project stakeholders to collaboratively develop solutions that meet the client's unique operational and financial goals. Ameresco's comprehensive approach to managing an energy conservation project is designed to ensure that we deliver the maximum value for the lowest possible cost. Our approach ensures that the City will be able to identify and prioritize the full list of potential conservation measures and existing necessary building and systems improvements; and that the City will have access to information that will demonstrate future infrastructure renewal and budget requirements. In turn, this process ensures that Ameresco delivers a targeted and cost-effective project.

Engineering Evaluation Phase

At the engineering evaluation or audit phase, Ameresco spends considerable time working with our customers to assess their needs and understand how resources are used in their facilities. The audit is a very interactive process and requires experienced professionals to assess all of the opportunities available with the varied systems used by our customers. This task is always performed with Ameresco staff. Specialized contracting support may be added to the team during this phase depending on the project scope. During this stage of the project, baseline measurements are often taken to establish the energy consumption with existing equipment.

Contract Negotiation Phase

Ameresco will assist the City in developing an energy services agreement that incorporates the construction phase of the project as well as the performance period requirements. Ameresco will work with the City to structure a contract that meets its requirements with the maximum amount of infrastructure improvements covering both operational and energy efficiency. The final Investment Grade Audit and included financial analysis will become a part of the final contract. Contract negotiations and decisions are made directly with the local staff and representative Senior Vice President. Ameresco has a very flat business model and does not have a large hierarchy that can slow down decision making.

Implementation Plan

Project Management

Phase I – Project Development (Investment Grade Audit/Preliminary Design & Development (IGA))

Customer Needs Identification	In this stage, analysis is reviewed, and other items are considered. A final path forward is determined through a collaborative effort between facilitates staff and management representatives.
Field Data Acquisition	Utility rates, historical utility consumption records, and facility data will be further reviewed, missing data compiled and requested, and energy and cost savings opportunities identified. Site inspections of the remaining facilities with be coordinated with City staff and feasibility of various Energy Conservation Measures will be evaluated.
Energy Analysis, Costing, ECM Definition	Information gathered during the field inspections will be analyzed for the ECMs specified in the investment grade audit and conceptual designs, firm savings and implementation prices for final project will be selected.
Financial Modeling	Produce a financial scenario that supports the required investment and debt service from the savings stream through our financial modeling system.
Contract Execution	Execution of an Energy Services Agreement occurs after all deliverables and guaranteed energy savings are defined and agreed to by both parties.

Phase II – Design and Engineering

Detailed ECM Design	Required intermediate design submittals are prepared for the City. The team will meet regularly with City representatives and consultants to receive input on the development of the project, ensuring the maximum value for the lowest possible cost.
Equipment Specification	Equipment identified in the initial proposal will be confirmed and more effective alternatives will be specified. Ameresco will complete a thorough check of references for all equipment, including site inspections and discussions with facilities that utilize the same equipment.
Energy Rebate Application and Program Management	All energy rebate applications will be finalized, and with the City approval, submitted to Program Administrators (Utility/Government) for processing. Our team will manage the entire application and approval process.

Submittals, Construction Schedule and Customer Approval	All submittal documents will be prepared by our engineering staff, including a detailed project construction schedule. Upon acceptance by the City, the project will proceed into project implementation and construction.
Phase III - Implementation	
Implementation, Customer Coordination, Pre-Construction Meetings	The Project Manager will retain ultimate responsibility for all implementation period activities. These activities include, but are not limited to, oversight of procurement and subcontracting, construction budgets/cost control, installation progress and final completion and commissioning.
Equipment Procurement	Equipment and materials will be purchased in a timely manner to coordinate with the construction timeline.
Subcontractor Solicitations and Executions	Ameresco typically relies on a network of local quality-focused contractors, and has active, working relationships with mechanical, electrical, plumbing, window, and other trades contractors in the area.
ECM Construction	Ensure that equipment and materials meet the contract specifications and that all work is accomplished in a neat and professional manner.
Commissioning, Testing and Customer Acceptance	When the installation of an ECM is completed satisfactorily, the Project Manager will oversee Ameresco staff and the installing contractor who commissions and tests the systems at start-up in accordance with the detailed plan developed during the IGA.
Phase IV – Performance Period Services	
Customer Training	Careful attention is paid to the abilities and experience of the City staff who will be involved in the training and long-term operation of the new equipment and systems. A strong focus on energy savings strategies and maintenance schedules will be provided to those individuals participating in this process
Optional O&M Services	At the customer's request, a comprehensive O&M service plan can be offered in the audit and would be described in detail for each of the ECMs. This plan would help to ensure that energy savings are maintained over the term of the contract and to extend the useful life of new equipment.
Permanent Financing	Ameresco will work on behalf of the City to secure the most favorable funding for the project. Ameresco personnel have financed Performance Contracts using a

	variety of different financial vehicles.
Long Term M&V, Annual Reconciliation	Long-term M&V services and annual reconciliation of performance and savings will be carried out in accordance with the site specific M&V plan. This plan presented in the proposal will be written based on the International Performance Measurement and Verification Protocol.

Financing Approach & Potential Cost Savings

Ameresco is uniquely positioned to provide financing for any opportunity. We have 21 years of experience with an excellent track record arranging financing for over \$3.5 billion in energy projects across financing models, markets and technologies. Many customers leverage budget-neutral infrastructure upgrades that use energy savings to pay for projects over time. We provide options for clients to implement infrastructure upgrades on- or off-balance sheet. Our team of experts encourages innovative funding with renewable energy certificates, grants, utility rebates and tax credits.

Examples of our business model and financing mechanisms include

- Design-Build
- Energy Savings Performance Contracting (ESPC)
- Design, Build, Own, Operate, Maintain (DBOOM)
- Engineer-Procure-Construct (EPC)
- Energy Service Agreements (ESA)
- Energy-as-a-Service (EaaS)
- Public-Private Partnership (P3)

To further expand on our project financing capabilities, Ameresco has also implemented numerous public-private partnerships (P3), service agreements, and other offerings that facilitate project development without requiring the end user to take on debt.

Ameresco does not make money on financing – our financing approach is agnostic (just like our technical/engineering approach), and the cost of financing services is included in our overhead. Ameresco's finance team works throughout the Utility Assessment Report process to facilitate an easy transition from audit to construction with minimal lag time and disruption. Based on the City's needs and objectives, a selection will be made from a variety of financing options that will be supported by Ameresco's savings guarantee, ensuring that payments will be made from the savings of the project.

Energy Savings Calculations

Per Department of Energy data, Ameresco has guaranteed more savings to the federal government per dollar invested than any other energy services company. We have successfully analyzed, recommended and installed energy conservation measures (ECMs), from the simplest single building project all the way up to multi-campus, multi-building projects over 10 million square feet and ranging in value from \$1 million to \$195 million, with financing terms of 7 to 23 years.

In order to establish baseline utility consumption, Ameresco requests that City supply the three most recent years of utility information, including water and sewer, electricity, natural gas and propane, as applicable. Alternately, the City can provide authorization to allow the utility providers to supply Ameresco with this information. The average use over the three-year period or another consecutive 12-month period that best represents the current operation of the facility will be selected as the "base year." When reviewing the three years of historical billing data, we check and physically identify utility meter numbers at the sites. We also verify account numbers and other information on the bills. Ameresco screens monthly records for inconsistent

readings and missing, erratic, or suspicious entries, and ensures that any major variations in consumption patterns or discrepancies in the monthly charges are explained.

To identify accurately the energy loads that ultimately constitute the baseline, Ameresco apportions the total energy usage appropriately for each different system within a facility (e.g., air conditioning, space heat, domestic hot water, lighting, etc.), and compares it to efficiency information on existing site equipment. This end-use analysis allows Ameresco to identify where the excessive energy consuming areas/systems are with a relatively high degree of accuracy, and to account for 100 percent of the facility's energy consumption. Site data and system performance measurements are used to calibrate the end-use model, and the final analysis is then reconciled to actual metered utility information.

This rigorously derived end-use analysis is then used to establish the actual loads that constitute the baseline(s). **Instead of estimating most of the variables used to disaggregate total usage into the individual system loads, as many energy service companies do, Ameresco uses metered performance data obtained during the detailed energy audit.** An appropriate variety and adequate quantity of short- and long-term metering instruments are employed in the facility's energy consuming equipment/systems to provide an accurate picture of where energy is really being used. The results of these calculations will be presented in the Investment Grade Audit; back-up calculations will be provided for the City's review.

The general approach to determining energy savings in these plans involves comparing the energy use associated with a facility or certain energy consuming systems within a facility before installation of the ECM (baseline) and after installation of the ECM (post-installation).

$$\text{Energy Savings} = (\text{Baseline Energy Use}) - (\text{Post Installation Energy Use})$$

The specific algorithms vary from measure to measure but can all be broken down into baseline and post-installation usage. The IPMVP has four options (A, B, C, and D) which meet the needs of a wide range of ECMs and provide industry-approved procedures for baseline development and post-retrofit M&V. These options are flexible and reflect the considerations previously mentioned.

Grants, Rebates and Incentives

Ameresco is dedicated to continually working with public utilities; local, state, and federal agencies; and other pertinent organizations to keep abreast of the latest incentive program offerings and guidelines to help maximize the amount of additional funding clients can receive in support of their energy projects. Our in-house structured finance team will work closely with project developers to ensure the final solution meets all incentive requirements from local, state and federal sources. Ameresco's specific rebate responsibilities include:

- Assemble the production-based or prescriptive incentive applications
- Submit applications to the pertinent agency on behalf of the City
- Schedule and conduct all pre- and post-construction site inspections required by the utility
- Follow-through with any required reporting and analysis necessary to secure all available rebates, including the processing of rebate-related documents during system installation and commissioning
- Provision of ongoing monitoring and verification services and required documentation to access rebate funds earmarked for the relevant project

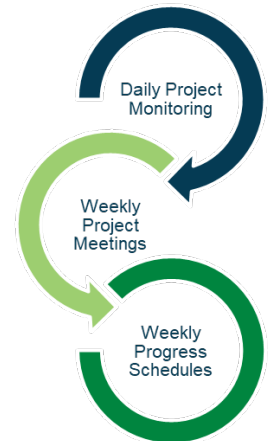
Throughout the course of a project, Ameresco will continue to look for additional rebate and incentive opportunities on behalf of the City. Examples of Ameresco's Southern Region rebate and incentive experience include:

- **Arizona State University:** Procured a total of \$52,000,000 in utility rebates since 1999 which has supported a total project value in excess of \$258.9 million
- **City of Reno:** Funded through a combination of federal grants and bonds and utility rebates, this project was the first instance in the nation where a major municipality successfully integrated American Recovery and Reinvestment Act funds with rebates to create a fully self-funded project. Energy and operational savings exceeding \$1.1 million annually will be used to pay off the bonds, making no impact on the City's general fund.
- **New Mexico State University:** Obtained rebates from 77 separate project items in the amount of \$1,459,216
- **City of Tucson LED Street Lighting Project:** Obtained over \$2.2 Million in Utility Rebates for this \$16 million project.
- **Lynwood Unified School District:** Received \$2,378,863 from Proposition 39, a funding source created by California taxpayers to address deference maintenance issues and improve energy efficiency in California schools
- **University Medical Center of Southern Nevada:** Received \$60,041 from the NV Energy SureBet and \$50,000 from Southwest Gas to fund the Financial Grade Operational Audit
- **Lyon County School District:** Received \$53,578 from the NV Energy SureBet Program and \$50,000 from Southwest Gas to fund the Financial Grade Operational Audit
- **Cave Creek Unified School District:** Secured \$473,785 in utility rebates
- **Marana Unified School District:** Secured \$392,000 in utility rebates
- **Camp Verde Unified School District:** Secured \$102,285 in utility rebates for the energy conservation project and \$121,563 Production Based Incentives (PBI) annually for 15 years in support of the solar PV project
- **Douglas County School District:** Secured \$144,910 in utility rebates

Scheduling Methodology

Ameresco anticipates organizing project meetings during all phases of the project to ensure that there is proper and frequent communication with City staff, and that the goals and expectations are properly communicated and understood by both teams. During all phases, critical issues will be identified, addressed and properly communicated by the Project Manager. Following are examples of such critical issues:

- ✓ Work scheduling
- ✓ Security or escort issues
- ✓ Disruptions to normal operations
- ✓ Shutdown or interruption of utilities, equipment, or systems
- ✓ Housekeeping issues throughout construction
- ✓ Construction safety issues relating to subcontractors, hazardous materials, traffic, construction areas, etc.
- ✓ Location of equipment, tools, temporary workspace, etc.
- ✓ Permits, rules and regulations



Daily Project Monitoring	The project manager will maintain daily contact with the key individuals leading the primary areas of work.
Weekly Project Meetings	The project manager will lead weekly project status meetings with the City of Hollywood staff and the Ameresco team to gauge status, track progress and identify major issues.
Weekly Progress Schedules	Weekly schedule updates will be issued to the City team, subcontractors and Ameresco management. Key milestone events from the project will be combined with major activities of all active projects in the region and consolidated on a single schedule by the Project Scheduler.

Schedule

Please see the following preliminary schedule:

CITY OF HOLLYWOOD, FLORIDA PRELIMINARY INVESTMENT GRADE AUDIT SCHEDULE																																				
ID	Task Mode	Task Name	Duration	Start	Finish	April							May						June						July						August				September	
						3/27	4/3	4/10	4/17	4/24	5/1	5/8	5/15	5/22	5/29	6/5	6/12	6/19	6/26	7/3	7/10	7/17	7/24	7/31	8/7	8/14	8/21	8/28	9/4							
1		Project start	0 days	Mon 4/4/22	Mon 4/4/22			4/4																												
2		Receive site data	0 days	Mon 4/4/22	Mon 4/4/22			4/4																												
3		Utility baseline analysis	20 days	Mon 4/4/22	Fri 4/29/22																															
4		Investment Grade Audit	90 days	Mon 4/4/22	Fri 8/5/22																															
5		Kickoff meeting	0 days	Mon 4/4/22	Mon 4/4/22			4/4																												
6		Building Site survey 1	5 days	Mon 4/4/22	Fri 4/8/22																															
7		Preliminary analysis	5 days	Mon 4/11/22	Fri 4/15/22																															
8		Building Site survey 2	5 days	Mon 4/18/22	Fri 4/22/22																															
9		Preliminary analysis	10 days	Mon 4/25/22	Fri 5/6/22																															
10		Workshop: Baseline	0 days	Fri 5/6/22	Fri 5/6/22							5/6																								
11		ECM development	5 days	Mon 5/9/22	Fri 5/13/22																															
12		30% Project Review & ECM Identification	0 days	Fri 5/13/22	Fri 5/13/22								5/13																							
13		Construction site survey 1	5 days	Mon 5/16/22	Fri 5/20/22																															
14		Develop scope of work	5 days	Mon 5/23/22	Fri 5/27/22																															
15		Contractor site walk throughs	5 days	Mon 5/30/22	Fri 6/3/22																															
16		Workshop: M&V Plan	0 days	Fri 6/3/22	Fri 6/3/22											6/3																				
17		Detailed savings calculations	10 days	Mon 6/6/22	Fri 6/17/22																															
18		60% Project Review & ECM Prioritization	0 days	Fri 6/17/22	Fri 6/17/22													6/17																		
19		Deliver Contract Terms and Conditions	0 days	Fri 6/17/22	Fri 6/17/22														6/17																	
20		Contract T&C Review by the City of Hollywood	10 days	Mon 6/20/22	Fri 7/1/22																															
21		Contract T&C Negotiations	10 days	Mon 7																																

4.2.6

References

References

Provide at least three references, preferably government agencies, for projects with similar scope as listed in this RFQ. References should be provided on the Vendor Reference Verification Form.

Please see herein for the completed Vendor Verification Form.



VENDOR REFERENCE VERIFICATION FORM

It is the responsibility of the contractor/vendor to provide a minimum of three (3) similar type references using this form and to provide this information with your submission. Failure to do so may result in the rejection of your submission.

City of Hollywood Solicitation No. and Title: RFQ-4702-22-GJ, Energy Performance Contracting for Citywide Use within the City of Hollywood

Reference for: Ameresco, Inc.

Organization/Firm Name providing reference: City of Tarpon Springs

Organization/Firm Contact Name: Tom Funcheon Title: Public Works Director

Email: tfuncheon@ctsfl.us Phone: 727-942-5610

Name of Referenced Project: Guaranteed Energy Savings Performance Contract Contract No: 11008-S-JJ

Date Services were provided: December 2011 to date Cost Savings: Approx. \$120,000 annually

Referenced Vendor's role in Project: ☐ Prime Vendor ☒ ~~Subcontractor/ Subconsultant~~

Would you use the Vendor again? ☐ Yes ☐ No. Please specify in additional comments

Description of services provided by Vendor (provide additional sheet if necessary):

Performs energy audit and prepares reports identifying energy improvements and operational changes.

Please rate your experience with the Vendor	Need Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service				
a. Responsive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vendor's Organization:				
a. Staff expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Staff turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Timeliness of:				
a. Project	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Additional Comments (provide additional sheet if necessary):

******THIS SECTION FOR CITY USE ONLY******

Verified via:	Email: <input type="checkbox"/>	Verbal: <input type="checkbox"/>	Mail: <input type="checkbox"/>
Verified by:	Name:		Title:
	Department:		Date:



VENDOR REFERENCE VERIFICATION FORM

It is the responsibility of the contractor/vendor to provide a minimum of three (3) similar type references using this form and to provide this information with your submission. Failure to do so may result in the rejection of your submission.

City of Hollywood Solicitation No. and Title: RFQ-4702-22-GJ, Energy Performance Contracting for Citywide Use within the City of Hollywood

Reference for: Ameresco, Inc.

Organization/Firm Name providing reference: City of Wichita Falls Texas

Organization/Firm Contact Name: Russell Schreiber PE Title: Dir of Public Works

Email: russell.schreiber@wichitafalls.tx.gov Phone: 940-761-7477

Name of Referenced Project: AMI Contract No: _____

Date Services were provided: 2016 Cost Savings: \$1,074,688 / yr \$29,478,392 - 20yr

Referenced Vendor's role in Project: ☒ Prime Vendor ☐ Subcontractor/ Subconsultant

Would you use the Vendor again? ☒ Yes ☐ No. Please specify in additional comments

Description of services provided by Vendor (provide additional sheet if necessary):

replaced 34,000 water meters w/ new Sensus meters and installed AMI system

Please rate your experience with the Vendor	Need Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service				
a. Responsive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vendor's Organization:				
a. Staff expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Staff turnover	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Timeliness of:				
a. Project	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Additional Comments (provide additional sheet if necessary):

Very responsive to our needs, and addressed all issues in a professional manner

****THIS SECTION FOR CITY USE ONLY****

Verified via:	Email:	<input type="checkbox"/>	Verbal:	<input type="checkbox"/>	Mail:	<input type="checkbox"/>
Verified by:	Name:		Title:			
	Department:		Date:			



VENDOR REFERENCE VERIFICATION FORM

It is the responsibility of the contractor/vendor to provide a minimum of three (3) similar type references using this form and to provide this information with your submission. Failure to do so may result in the rejection of your submission.

City of Hollywood Solicitation No. and Title: RFQ-4702-22-GJ, Energy Performance Contracting for Citywide Use within the City of Hollywood
 Reference for: Ameresco, Inc.

Organization/Firm Name providing reference: City of El Campo
 Organization/Firm Contact Name: Courtney Sladek Title: City Manager
 Email: CSladek@cityofelcampo.org Phone: 479 541 5009
 Name of Referenced Project: Water Meter Replacement Contract No: _____
 Date Services were provided: 2020 Cost Savings: TBD
 Referenced Vendor's role in Project: ☒ Prime Vendor ☐ Subcontractor/ Subconsultant
 Would you use the Vendor again? ☒ Yes ☐ No. Please specify in additional comments

Description of services provided by Vendor (provide additional sheet if necessary):

Replaced AME meters with AMI, offered smart software

Please rate your experience with the Vendor	Need Improvement	Satisfactory	Excellent	Not Applicable
Vendor's Quality of Service				
a. Responsive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Vendor's Organization:				
a. Staff expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
c. Staff turnover	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Timeliness of:				
a. Project	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
b. Deliverables	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Additional Comments (provide additional sheet if necessary):

would work with them again - if the opportunity presents itself - extremely responsive

****THIS SECTION FOR CITY USE ONLY****

Verified via:	Email:	<input type="checkbox"/>	Verbal:	<input type="checkbox"/>	Mail:	<input type="checkbox"/>
Verified by:	Name:				Title:	
	Department:				Date:	

4.2.7

Sub-Respondents

Sub-Respondents

Respondents must clearly identify any sub-respondents that may be utilized for the Work in accordance with the Contract.

We collaboratively develop solutions that meet the City's unique operational and financial goals. We will use our expert engineering and technical capabilities to provide co-authored comprehensive solutions that maximize value—ensuring that the maximum reduction in operating costs for the lowest possible cost is delivered.

Our project teams are onsite, local, empowered, and encouraged to make all site-specific decisions on every aspect of project performance. Ameresco manages and conducts the Preliminary and Comprehensive Audit, project development, financing, installation project management, training, commissioning, and measurement and verification (M&V) using in-house resources. Because our experts are best qualified to establish the potential projects for our clients and understand how to mitigate the risks inherent to this industry, project management will never be subcontracted to a third-party firm. [One hundred percent \(100%\) of the construction trades, such as electricians, pipefitters, and sheet metal workers, are utilized to conduct the installation of the energy measures identified and developed by the Ameresco team.](#) In some cases, third-party design firms may be used to develop final construction plans and specifications for complex mechanical and electrical retrofits and building envelope upgrades. [Project subcontractors will be selected in accordance with Ameresco's established subcontractor selection procedure, which includes the City's](#)

Subcontractor Selection

Whenever Ameresco uses a subcontractor to perform a service or supply materials, we insist that the subcontractor perform to the same standards and meet the same requirements that we are required to meet. Ameresco follows a quality assurance and control protocol that we apply to all our projects. Part of that protocol is to ensure that the subcontracting elements of this contract are transparent, and that the City can provide feedback at any stage of the project. If a problem regarding quality occurs, we will resolve it promptly and to the satisfaction of the City.

Each agreement will contain the same flow down clauses and include the requirements that are part of the contract. Ameresco will consider and evaluate all local key suppliers recommended by the City as part of the final project team selection process.

Determining Responsible Bidders

- Have sufficient financial resources
- Meet quoted delivery requirements
- Exhibit integrity and proven performance
- Comply with all terms and conditions
- Been an authorized distributor or vendor
- Provide necessary production, technical equipment and facilities

Ameresco maintains detailed subcontracting procedures that help reduce the financial and legal risks associated with subcontracting. By using standard subcontracting documents, internal review and authorization

procedures, holding retainage through completion (including punch-list), requiring the City review and sign-off on subcontracted work during the construction period, and compensating our subcontractors in a timely manner, Ameresco is well-equipped to manage the inherent risks associated with subcontracting. In this manner, Ameresco assumes all of the performance and liability risks of its subcontractors; thereby, the City is sheltered from those same risks.

Subcontracting Plan

Ameresco's success depends upon timely, professional quality workmanship performed by qualified subcontractors who are proficient in the specific technology. In addition to price and technical proficiency, a premium is placed on the ability of the contractor to work cooperatively in a non-disruptive fashion within occupied City facilities and sites. To this end, it is generally beneficial to engage local subcontractors who have a proven track record of success in similar facilities, and an established relationship with the facility personnel. Ameresco looks favorably to contractors that have had positive experience with the City. During the design phase, Ameresco will establish a prequalified list of local subcontractors and vendors in collaboration with City staff.

Subcontractor Selection Qualifications

Performance of Work

- **Timelines:** Adherence to schedules and response to schedule orders and emergency requests
- **Quality:** Workmanship, task accomplishment and effectiveness of subcontractor's self-inspection
- **Manpower Use:** Work schedule assignments and measurement techniques
- **Materials Use:** Quality, cost-selection and control and care of materials and equipment

Technical Management

- **Management Structure:** Lines of communication between the subcontractor and Ameresco, local autonomy and authority to support by subcontractor corporate headquarters
- **Management Performance:** Subcontractor's performance with respect to supervision, cooperation, responsiveness, initiative, coordination, follow-up, improvements, and economics
- **Planning and Control:** Task accomplishment with respect to planning, estimating resources, schedule control, understanding requirements, and reporting
- **Operations:** Housekeeping, equipment maintenance, training, and safety, including progress standards, education, reporting, and accident investigation

Business Management

- **Overall Business Management:** Effectiveness of subcontractor-to-business management and management response
- **Purchasing:** Effectiveness of, compliance with, and control of purchasing policies and procedures
- **Cost Control:** Cost estimating policies, procedures and practices, control of overtime and absenteeism, cost reduction, and statement of the overall program performance

Committed to Local Labor Utilization

In order to retain and maximize project capital costs within the local communities surrounding our clients, project construction is typically subcontracted to local firms with an emphasis on the client's subcontracting requirements for local subcontracting, in addition to disadvantaged businesses including small, women-owned, minority-owned, HUBZone, veteran-owned, and service-disabled veteran owned businesses enterprises. Ameresco takes great pride in working with local businesses and suppliers in maximizing project capital construction investments in the communities we serve.

Ameresco recognizes that providing competitive opportunities for those in disadvantaged areas supports our national economy and the enterprise system in which we operate. Additionally, broad-based competition

contributes to our goal of providing the highest quality services at competitive prices. In addition to hiring local journeymen/journeywomen and apprentices, Ameresco affords small business concerns ample opportunity to compete for subcontracted work and to supply materials and equipment.

Ameresco will identify and qualify subcontractors through the following outreach processes:

- Maintain a Disadvantaged Business Enterprise (DBE) subcontractor / supplier resource listing.
- Collaborate with disadvantaged business and apprenticeship associations, to identify recruits and potential new businesses.
- Provide advice and assistance to DBE firms seeking to do business with Ameresco.
- Encourage potential new subcontractors to submit a Statement of Qualifications (SOQ) which provides a concise format for review of a company's capabilities, certifications and experiences. The SOQ includes questions on the candidate's DBE business certifications (the subcontractor must provide proof of any qualifying certifications claimed), organizational structure, a financial risk profile, experience and capabilities in selected target markets, contract practices, recent project history and references.
- Invite newly identified contractors to bid on upcoming work. Successful pre-qualified bidders will be selected on the basis of completeness of scope, added value, innovation and price.
- Ameresco will ensure that the subcontractors meet our commitments to safety, quality, schedule, labor standards and cooperation with the City of Hollywood.

4.2.8

Required Forms

Required Forms

The following completed forms have been included herein:

- Vendor Reference Verification Form (Please Refer to Section 4.2.6 above)
- Acknowledgment and Signature Page
- Statement of Qualification Certification
- Drug Free Workplace Program
- Certifications Regarding Debarments, Suspensions and Other Responsibility Matters
- Non-Collusion Affidavit
- Sworn Statement Pursuant to Section 287.133(3)(a)
- Hold Harmless and Indemnity Clause
- Solicitation, Giving and Acceptance of Gifts Policy

ACKNOWLEDGMENT AND SIGNATURE PAGE

This form must be completed and submitted by the date and the time of bid opening.

Legal Company Name (include d/b/a if applicable): Ameresco, Inc. Federal Tax Identification Number: 04-3512838

If Corporation - Date Incorporated/Organized: April 25, 2000

State Incorporated/Organized: Delaware

Company Operating Address: 333 S.E. 2nd Avenue, Suite 2000

City Miami State FL Zip Code 33131

Remittance Address (if different from ordering address): 111 Speen Street

City Framingham State MA Zip Code 01701

Company Contact Person: Kalvin Kwan, PE, CEM Email Address: kkwan@ameresco.com

Phone Number (include area code): 407.595.5488 Fax Number (include area code): 480.499.9150

Company's Internet Web Address: www.ameresco.com

IT IS HEREBY CERTIFIED AND AFFIRMED THAT THE BIDDER/RESPONDENT CERTIFIES ACCEPTANCE OF THE TERMS, CONDITIONS, SPECIFICATIONS, ATTACHMENTS AND ANY ADDENDA. THE BIDDER/RESPONDENT SHALL ACCEPT ANY AWARDS MADE AS A RESULT OF THIS SOLICITATION. BIDDER/RESPONDENT FURTHER AGREES THAT PRICES QUOTED WILL REMAIN FIXED FOR THE PERIOD OF TIME STATED IN THE SOLICITATION.

 11/22/2021
Bidder/Respondent's Authorized Representative's Signature: _____ Date

Type or Print Name: Robert Georgeoff, Executive Vice President

THE EXECUTION OF THIS FORM CONSTITUTES THE UNEQUIVOCAL OFFER OF BIDDER/RESPONDENT TO BE BOUND BY THE TERMS OF ITS PROPOSAL. FAILURE TO SIGN THIS SOLICITATION WHERE INDICATED BY AN AUTHORIZED REPRESENTATIVE SHALL RENDER THE BID/PROPOSAL NON-RESPONSIVE. THE CITY MAY, HOWEVER, IN ITS SOLE DISCRETION, ACCEPT ANY BID/PROPOSAL THAT INCLUDES AN EXECUTED DOCUMENT WHICH UNEQUIVOCALLY BINDS THE BIDDER/RESPONDENT TO THE TERMS OF ITS OFFER.

ANY EXCEPTION, CHANGES OR ALTERATIONS TO THE GENERAL TERMS AND CONDITIONS, HOLD HARMLESS / INDEMNITY DOCUMENT OR OTHER REQUIRED FORMS MAY RESULT IN THE BID/PROPOSAL BE DEEMED NON-RESPONSIVE AND DISQUALIFIED FORM THE AWARD PROCESS

STATEMENT OF QUALIFICATION CERTIFICATION

Please Note: All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state, in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration) Ameresco, Inc.

Name/Principal/Project Manager: Kalvin Kwan, PE, CEM

Address: 333 S.E. 2nd Avenue, Suite 2000

City: Miami State: FL Zip: 33131

Telephone No. 407.595.5488 FEIN/Tax ID No. 04-3512838 Email: kkwan@ameresco.com

Does your firm qualify for MBE or WBE status: No MBE _____ WBE _____

ADDENDUM ACKNOWLEDGEMENT - Respondent acknowledges that the following addenda have been received and are included in the proposal:

<u>Addendum No.</u>	<u>Date Issued</u>	<u>Addendum No.</u>	<u>Date Issued</u>
<u>1</u>	<u>12.02.21</u>	_____	_____
_____	_____	_____	_____

VARIANCES: State any variations to specifications, terms and conditions in the space provided below or reference in the space provided below all variances contained on other pages of bid, attachments or bid pages. No variations or exceptions by the Respondent will be deemed to be part of the bid submitted unless such variation or exception is listed and contained within the bid documents and referenced in the space provided below. If no statement is contained in the below space, it is implied that your bid/proposal complies with the full scope of this solicitation. If this section does not apply to your bid, simply mark "N/A". **If submitting your response electronically through BIDS SYNC you must click the exception link if any variation or exception is taken to the specifications, terms and conditions.**

Please see Attached.

The below signatory agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal I will accept a Contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of \$500.00. This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

Robert Georgeoff

Name (printed)

December 28, 2021

Date: Title


Signature

Executive Vice President

AMERESCO, INC.

City of Hollywood
Request for Qualifications

List of exceptions to contract provisions (December 2021)

General Note: If awarded the project, Ameresco expects to negotiate with the City the terms and conditions of contract entered into in connection with the project. Ameresco respectfully submits the following items for the City's consideration.

<u>Special Terms and Conditions</u>	
Section 2.4.1 – 2.4.3 (also applies to Section 2.22)	Ameresco agrees to indemnification of the City but would like to negotiate more balanced indemnity provisions and customary limitations on liability.
Section 2.13	Ameresco generally accepts the proposed insurance provisions, but intends to provide some industry-standard comments on certain provisions.
<u>General Terms and Conditions</u>	
Section 1.22	Ameresco generally accepts the proposed audit provisions, but intends to provide some industry standard comments on certain provisions.
Section 1.28	Ameresco proposes that the time period for termination following a force majeure event be extended from 14 to 180 days, and that either party have the right to terminate in such event.
Section 1.40	<p>As noted above, Ameresco agrees to indemnification of the City but would like to negotiate more balanced indemnity provisions and customary limitations on liability.</p> <p>In addition, Ameresco agrees to indemnification of the City for third party claims of intellectual property infringement as described in this section, but seeks to clarify that Ameresco's indemnity obligations would not apply to the extent any claim arose because of the unauthorized or improper use by the City of the intellectual property in question.</p>
Section 1.52	Ameresco generally accepts that a reduction in budget may result in a reduction in cost of certain services, but intends to negotiate customary change order provisions regarding reductions in scope arising from budgetary restraints.

DRUG-FREE WORKPLACE PROGRAM

IDENTICAL TIE BIDS - Preference shall be given to businesses with drug-free workplace programs. Whenever two or more bids that are equal with respect to price, quality, and service are received by the state or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie bids will be followed if none of the tied vendors have a drug-free workplace program. In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employee that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program (if such is available in the employee's community) by, any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of these requirements.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.


SIGNATURE

Robert Georgeoff, Executive Vice President

PRINTED NAME

Ameresco, Inc.

NAME OF COMPANY

RFQ/RFP/ITB Number: RFQ-4702-22-GJ

Energy Performance Contracting for Citywide Use
Title: within the City of Hollywood

CERTIFICATIONS REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS

The applicant certifies that it and its principals:

- (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, sentenced to a denial of federal benefits by a state or federal court, or voluntarily excluded from covered transactions by any federal department or agency;
- (b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (federal, state, or local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
- (d) Have not within a three-year period preceding this application had one or more public transactions (federal, state, or local) terminated for cause or default.

Applicant Name and Address:

Ameresco, Inc.

333 S.E. 2nd Avenue, Suite 2000

Miami, FL 33131

Application Number and/or Project Name:

Energy Performance Contracting for Citywide Use within the City of Hollywood

Applicant IRS/Vendor Number: EIN 04-3512838

Type/Print Name and Title of Authorized Representative:

Robert Georgeoff, Executive Vice President

Signature: 

Date: November 22, 2021

RFQ/RFP/ITB Number: RFQ-4702-22-GJ

Energy Performance Contracting for Citywide Use
Title: within the City of Hollywood

NON-COLLUSION AFFIDAVIT

STATE OF: Arizona

COUNTY OF: Maricopa, being first duly sworn, deposes and says that:

- (1) He/she is Executive Vice President of Ameresco, Inc., the Respondent that has submitted the attached Bid.
- (2) He/she has been fully informed regarding the preparation and contents of the attached Bid and of all pertinent circumstances regarding such Bid;
- (3) Such Bid is genuine and is not a collusion or sham Bid;
- (4) Neither the said Respondent nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant has in any way colluded, conspired, connived or agreed, directly or indirectly with any other Respondent, firm or person to submit a collusive or sham Bid in connection with the contractor for which the attached Bid has been submitted or to refrain from bidding in connection with such contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Respondent, firm or person to fix the price or prices, profit or cost element of the Bid price or the Bid price of any other Respondent, or to secure an advantage against the City of Hollywood or any person interested in the proposed Contract; and
- (5) The price or prices quoted in the attached Bid are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Respondent or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

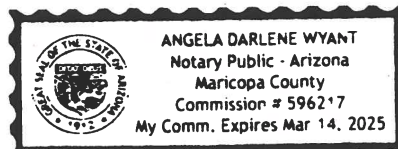
(SIGNED) _____

Title: Robert Georgeoff, Executive Vice President

Subscribed and sworn to before me this

22 day of November, 2021

My commission expires: March 14, 2025



Angela Darlene Wyant

RFQ/RFP/ITB Number: RFQ-4702-22-GJ

Title: Energy Performance Contracting for Citywide Use within the City of Hollywood

SWORN STATEMENT PURSUANT TO SECTION 287.133 (3) (a) FLORIDA STATUTES ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS

1. This form statement is submitted to the City of Hollywood, Florida
By Robert Georgeoff, Executive Vice President for Ameresco, Inc.
(Print individual's name and title) (Print name of entity submitting sworn statement)
whose business address is 333 S.E. 2nd Avenue, Suite 2000; Miami, FL 33131
and if applicable its Federal Employer Identification Number (FEIN) is 04-3512838. If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement.

2. I understand that "public entity crime," as defined in paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid, proposal, reply, or contract for goods or services, any lease for real property, or any contract for the construction or repair of a public building or public work, involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misinterpretation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in an federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that "Affiliate," as defined in paragraph 287.133(1)(a), Florida Statutes, means:

1. A predecessor or successor of a person convicted of a public entity crime, or
2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that "person," as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or any entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and that bids or applies to bid on contracts let by a public entity, or that otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

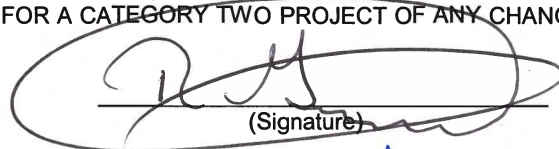
6. Based upon information and belief, the statement that I have marked below is true in relation to the entity submitting this sworn statement. (please indicate which statement applies.)

X Neither the entity submitting sworn statement, nor any of its officers, director, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

_____ The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989..

The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime, but the Final Order entered by the Hearing Officer in a subsequent proceeding before a Hearing Officer of the State of the State of Florida, Division of Administrative Hearings, determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. (attach a copy of the Final Order).

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN THAT IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THAT PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017 FLORIDA STATUTES FOR A CATEGORY TWO PROJECT OF ANY CHANGE IN THE INFORMATION CONTAINED ON THIS FORM.

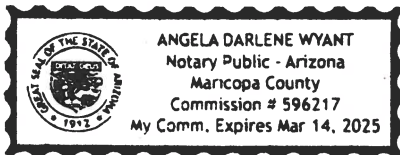

(Signature)

Sworn to and subscribed before me this 22 day of November, 2021.

Personally known Robert Georgeoff

Or produced identification _____ Notary Public-State of Arizona

My commission expires March 14, 2025



Angela Darlene Wyant
(Printed, typed or stamped commissioned name of notary public) Angela Darlene Wyant

RFQ/RFP/ITB Number: RFQ-4702-22-GJ Title: Energy Performance Contracting for Citywide Use within the City of Hollywood

HOLD HARMLESS AND INDEMNITY CLAUSE

Ameresco, Inc. | Robert Georgeoff, Executive Vice President

(Company Name and Authorized Representative's Name)

, the contractor, shall indemnify, defend and hold harmless the City of Hollywood, its elected and appointed officials, employees and agents for any and all suits, actions, legal or administrative proceedings, claims, damage, liabilities, interest, attorney's fees, costs of any kind whether arising prior to the start of activities or following the completion or acceptance and in any manner directly or indirectly caused, occasioned or contributed to in whole or in part by reason of any act, error or omission, fault or negligence whether active or passive by the Contractor, or anyone acting under its direction, control, or on its behalf in connection with or incident to its performance of the Contract.


SIGNATURE

Robert Georgeoff

PRINTED NAME

Ameresco, Inc.

COMPANY OF NAME

November 22, 2021

DATE

Failure to sign or changes to this page shall render your bid non-responsive.

SOLICITATION, GIVING, AND ACCEPTANCE OF GIFTS POLICY

Florida Statute 112.313 prohibits the solicitation or acceptance of Gifts. - "No Public officer, employee of an agency, local government attorney, or candidate for nomination or election shall solicit or accept anything of value to the recipient, including a gift, loan, reward, promise of future employment, favor, or service, based upon any understanding that the vote, official action, or judgment of the public officer, employee, local government attorney, or candidate would be influenced thereby." The term "public officer" includes "any person elected or appointed to hold office in any agency, including any person serving on an advisory body."

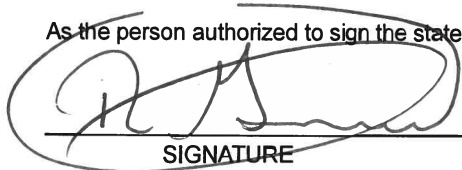
City of Hollywood policy prohibits all public officers, elected or appointed, all employees, and their families from accepting any gifts of any value, either directly or indirectly, from any contractor, respondent, consultant, or business with whom the City does business.

The State of Florida definition of "gifts" includes the following:

- Real property or its use,
- Tangible or intangible personal property, or its use,
- A preferential rate or terms on a debt, loan, goods, or services,
- Forgiveness of indebtedness,
- Transportation, lodging, or parking,
- Food or beverage,
- Membership dues,
- Entrance fees, admission fees, or tickets to events, performances, or facilities,
- Plants, flowers or floral arrangements
- Services provided by persons pursuant to a professional license or certificate.
- Other personal services for which a fee is normally charged by the person providing the services.
- Any other similar service or thing having an attributable value not already provided for in this section. .

Any contractor, Respondent, consultant, or business found to have given a gift to a public officer or employee, or his/her family, will be subject to dismissal or revocation of the Contract.

As the person authorized to sign the statement, I certify that this firm will comply fully with this policy.



SIGNATURE

Robert Georgeoff

PRINTED NAME

Ameresco, Inc.

NAME OF COMPANY

Executive Vice President

TITLE

Failure to sign this page shall render your bid non-responsive.

Ameresco, Inc.

333 S.E. 2nd Avenue, Suite 2000
Miami, Florida 33131

City of Hollywood Point of Contact

Kalvin Kwan, PE, CEM

Account Executive

T: 407 595 5488

E: kkwan@ameresco.com