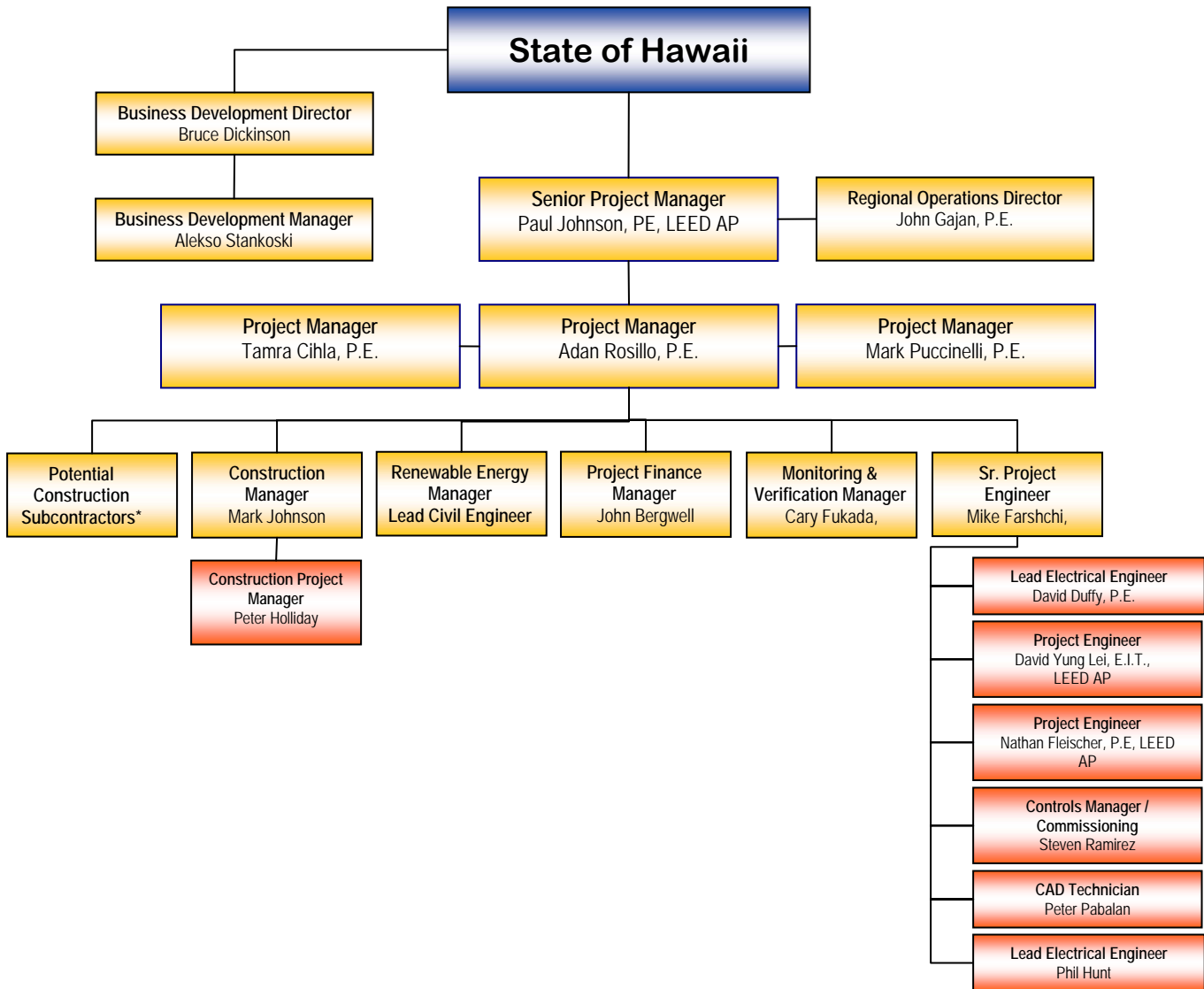




5.1 Project Management and Coordination

5.1.1 Organizational Structure

Show a typical/generic organization chart for implementing and managing a project.





5.1.2 Local Staffing and Support

List the office location (city and state) for personnel proposed for projects under this RFP. Describe the extent of local staffing and support for the each phase of a typical project.

| Chevron Office Location | Discipline | Number of Professionals |
|-------------------------|--|-------------------------|
| San Francisco | General Engineering, General Design, Energy Engineering and Design, CAD, Project Management, Construction Management, Monitoring and Verification, Commissioning, Program Oversight and Administration, Rebate/Grant Administration, Legal | 82 |
| Sacramento | Engineering, Energy Engineering, Construction Management, Project Management, Commissioning, Program Administration, Rebate/Grant Administration | 5 |
| San Jose | Engineering, Energy Engineering, Construction Management, Commissioning, Program Administration, Rebate/Grant Administration | 5 |
| Pasadena | General Engineering, General Design, Energy Engineering and Design, CAD, Project Management, Construction Management, Monitoring and Verification, Commissioning, Program Oversight and Administration, Rebate/Grant Administration, | 34 |
| Hawaii | General Engineering, Project Manager | 2 |

5.1.3 Approach to Subcontracting

Describe the types of services (both professional and construction services) that your company offers in-house and the services typically offered through subcontractors.

Chevron Energy Solutions utilizes local subcontractors for installation because of specific background knowledge of the mechanical systems and/or specific knowledge of applications. Chevron ES personnel have been managing subcontractors on worksites since our legacy companies inception over 30 years ago. The Chevron ES Team will work with the County and State's User Agencies in the selection of the subcontractors and will have a construction manager onsite to manage subcontracted activities. It is standard operating procedure for our CMs to have weekly progress meetings with subcontractors to ensure project schedules are being met as well as the communication of project goals and priorities.

Chevron Energy Solutions and the designated site project personnel will jointly approve all subcontractors for the performance contracting project. Although subcontractors are used for the installation of the equipment, Chevron Energy Solutions retains all responsibility for the project success. Chevron Energy Solutions utilizes subcontractors to purchase equipment and material and complete installation. Chevron Energy Solutions utilizes local resources because of specific background knowledge of the mechanical systems and/or specific knowledge of applications.

The table on the following page shows which services can be performed with in-house personnel and which services can be performed through subcontractors.





| CHEVRON ENERGY SOLUTIONS IN HOUSE VS SUBCONTRACTED SERVICES | | | | | | |
|---|----------|----------------|----------|----------------|--------------|----------------|
| TECHNICAL CAPABILITY | STUDIES | | DESIGN | | Construction | |
| | In-house | Sub-contracted | In-house | Sub-contracted | In-house | Sub-contracted |
| Auditing | ✓ | | ✓ | | ✓ | |
| Equipment Procurement | | | | | ✓ | |
| Construction Management | | | | | ✓ | |
| Monitoring and Verification | ✓ | | ✓ | | | ✓ |
| Lighting | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Electrical | | | | | | |
| Medium Voltage Distribution up to 69 KV | | ✓ | | ✓ | | ✓ |
| Building Electrical Systems | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Power Factor Correction | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Demand Limiting | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Security and Fire Detection | ✓ | ✓ | ✓ | ✓ | | ✓ |
| HVAC | | | | | | |
| Energy Management Systems | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Chillers | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Steam Heating | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Heat Pumps | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Heat Recovery | ✓ | ✓ | ✓ | ✓ | | ✓ |
| VFDs | ✓ | ✓ | ✓ | ✓ | | ✓ |
| VAVs | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Hot Water Heating | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Central Plants | | | | | | |
| Central Chiller Plants | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Cogeneration | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Coal Fired/Stoker Fired | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Gas/Oil Fired | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Steam to Hot Water Conversions | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Package Boilers | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Water Conservation | | | | | | |
| Toilet/Shower Replacements | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Laundry Equipment Upgrades | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Pool Equipment Improvements | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Kitchen Equipment Replacement | | ✓ | | ✓ | | ✓ |
| Water Treatment | | ✓ | | ✓ | | ✓ |
| Sewage Treatment | | ✓ | | ✓ | | ✓ |
| Sewage Collection | | ✓ | | ✓ | | ✓ |
| Building Envelope | | | | | | |
| Windows | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Roofing | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Renewable Generation | | | | | | |
| Solar | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Fuel Cell | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Wind | ✓ | ✓ | ✓ | ✓ | | ✓ |
| Telecommunications | | ✓ | | ✓ | | ✓ |
| Solid Waste Management | ✓ | ✓ | ✓ | ✓ | | ✓ |





The use of Small and Minority Businesses is engrained in the Chevron way of doing business and manifests itself in the form of the Supplier Diversity/Small Business Program. This philosophy and business process has become part of the culture at Chevron Energy Solutions.

This program ensures all businesses are considered on the basis of merit, regardless of size and strength. The Supplier Diversity/Small Business Program seeks to provide a competitive advantage for Chevron by introducing value-added small, minority- and women-owned businesses to the supply chain. Small, diverse businesses can often add value by performing services

with attractive cost savings and excellent service. These companies provide innovative solutions that fuel mutual growth for the businesses and for the Chevron family of companies.

The Supplier Diversity/Small Business Program evaluates vendors for a variety of services needed. When our parent company, Chevron, recently looked for new printing suppliers, more than 100 companies were considered. Of the final seven chosen, two were small minority owned firms.

Chevron's procurement processes for small and minority businesses are consistent with a wider commitment to diversity that characterizes the company's employee policies and practices. Employee diversity—embracing myriad ethnicities, ideas, talents and experiences—adds value to customers, shareholders, industry peers and communities.

Small and Minority Subcontractor Selection

Chevron ES uses a very extensive pre-qualification process to select subcontractors and suppliers for our projects. Our pre-qualification process is based on our significant experience identifying subcontractor's qualities, which assure optimal contract completion, quality performance, service, and products. It is Chevron ES' preference to use local subcontractors with outstanding track records to implement projects.

This creates a win-win situation for everybody. The customer wins because their facility receives significant capital improvements paid for by guaranteed energy and operational savings. The local economy wins because

Chevron ES consistently uses local contractors for the renovations and construction.

The environment benefits because there are fewer emissions from more efficient equipment. Chevron ES wins because we gain additional business.

The local economy wins because Chevron ES consistently uses local contractors for the renovations and construction.

Once the Chevron ES Operations Team has audited the facilities, a list of qualified subcontractors will be put together in conjunction with the client. Contractors and suppliers selected in the pre-qualification process competitively bid that portion of the project they are to work on. Additionally, Chevron ES has extensive experience managing a competitive bid process for our customers. In this way, costs are kept as low as possible and we have the opportunity to evaluate their probable quality of performance.

The only time non-competitive selection of subcontractors or suppliers will be proposed is when timing is critical, a particular supplier is desired to match an existing system, when a supplier has a proprietary feature that is compelling or if the customer requests





that a particular subcontractor be used based on a history of successful service and value. Those situations will be discussed with the customer and approval will be obtained prior to contract award.

Small and Minority Business Participation

Chevron ES will make every attempt to utilize local contractors and Small, Minority Owned and Women Business Enterprise (S/M/WBE) Companies. Chevron ES' proposal may include any or all of the following procurement initiatives:

- Identify and include available S/M/WBEs in all solicitations for supplies, equipment, other commodities and construction;
- Where the number of available S/M/WBEs provides competition, limit solicitations to S/M/WBEs;
- Where applicable, provide monetary incentives in contracts to the extent reasonably necessary to encourage employment of S/M/WBEs subcontractors and suppliers;
- Partner with other public agencies or private firms to jointly implement or coordinate the implementation of the procurement initiatives set forth in this narrative;
- Require non-S/M/WBE sub-contractors to follow the same guidelines as Chevron ES in an effort to include S/M/WBEs in any commodities they purchase to perform their work or other labor they may subcontract.

Further actions by Chevron ES to foster S/M/WBE participation are as follows:

- If a S/M/WBE contractor should default or fail to perform and must be removed from the project, Chevron ES will provide written notice to other Certified S/M/WBEs who perform that type of work in the geographic area of the project. Chevron ES will advise them of the work desired to subcontract and soliciting their interest and response.
- If Chevron ES cannot find a S/M/WBE subcontractor for the type of work the defaulting subcontractor was performing, Chevron ES will attempt to identify other economically feasible portions of the work that can be performed by S/M/WBEs. Chevron ES will then solicit responses from certified S/M/WBEs who perform that type of work in the geographic area of the project.
- If all efforts to replace the S/M/WBE subcontractor with another S/M/WBE fail, Chevron ES will provide documentation of these efforts to the customer and request approval to engage other qualified subcontractors.
- If, during the course of the contract, changes in the scope of work necessitate a supplemental agreement, Chevron ES will attempt to identify portions of the supplemental work, which are economically feasible to subcontract. Chevron ES will then solicit responses from certified S/M/WBEs who perform that type of work in the geographic area of the project.

The Chevron ES Process for engaging sub-contractors assures that in the areas where the facilities are located that all local area contractors including S/M/WBEs are given equal opportunity to bid on individual installations and products within projects based upon customer procurement guidelines. After bids are received, they are reviewed for conformance to the specification(s), and economic evaluations are made of each bid and





any proposed alternate bids. In addition, the bidder's ability to do the work effectively based upon location /proximity to the project is assessed. After the analysis of the bids is complete, Chevron ES makes a best-buy selection in conjunction with the customer.

Opportunities for S/M/WBE Participation

The following is a list of the typical technologies of energy and water conservation opportunities Chevron ES expects to be part of their proposal. Chevron ES believes there is opportunity for S/M/WBE participation in each of the technology categories below:

- Building Envelope
- Lighting
- HVAC Controls
- HVAC Cooling
- HVAC Air-side
- HVAC Water-side
- HVAC Heating
- Water and Sewer

Chevron ES has consistently met or exceeded S/M/WBE goals on past projects and recognizes the importance of these programs. In the State of Maryland Chevron ES has consistently met or exceeded S/M/WBE goals for our energy performance contracts. At the University of Maryland Baltimore County, Chevron ES met the University's goal of 14% S/M/WBE participation among subcontractors. At the Patuxent Institution project, our use of Maryland MBEs totaled 24% of the total subcontract dollars and 14% of the total project costs.





5.2 Personnel and Staffing

Provide a table to show your personnel pool of individuals who will potentially be assigned responsibility for each task and phase of a project under this RFP. Also include any added expertise and capability of staff available through other branch offices, subcontracts, etc., that you can provide back-up strengths.

| Name | Title | Staff or Subcontractor | Potential Role | Academic Professional Qualifications | Level of Expertise | Base Location |
|------------------|-------------------------------------|------------------------|-------------------------------------|--|--------------------|---------------|
| John Gajan | Regional Operations Director | Staff | Project Overview | P.E (Mech), BS | 21 | San Francisco |
| Bruce Dickinson | Director of Sales | Staff | Project Overview | BS | 20 | San Francisco |
| Alekso Stankoski | Business Development Manager | Staff | Business Development Manager | BS | 13 | San Francisco |
| Paul Johnson | Senior Project Manager | Staff | Project Overview | BSME, LEED AP, P.E. MBA | 27 | San Francisco |
| Adan Rosillo | Project Manager | Staff | Project Manager | BSCHE, MS-Physics, LEED AP, P.E. MBA | 25 | San Francisco |
| Tamra Cihla | Project Manager | Staff | Project Manager | BSME, P.E. | 15 | San Francisco |
| Mark Puccinelli | Project Manager | Staff | Project Manager | BSEE, P.E. | 25 | Hawaii |
| Peter Holliday | Construction Project Manager | Staff | Construction Manager | BS - Construction Management | 36 | San Francisco |
| Robert Redlinger | Renewable Energy Manager | Staff | Renewable Energy Manager | MS- Financial Economics, Environmental Engineering, BSCE | 22 | San Francisco |
| John Bergwell | Project Finance Manager | Staff | Finance Manager | BS | 31 | San Francisco |
| Cary Fukada | Monitoring and Verification Manager | Staff | Monitoring and Verification Manager | BSME | 16 | San Francisco |
| Mike Farshchi | Senior Project Engineer | Staff | Engineering | BSME, MBA | 25 | San Francisco |
| Mark Johnson | Construction Manager | Staff | Construction Manager | BS - Construction Management | 21 | San Francisco |
| Steven Ramirez | Controls Manager | Staff | Controls Manager | BSEE | 13 | San Francisco |
| David Yung Lei | Project Engineer | Staff | Engineering | BSME, LEED AP, EIT, ASHRAE | 2 | San Francisco |
| Nathan Fleischer | Project Engineer | Staff | Engineering | BSME, PE, LEED AP | 4 | San Francisco |
| David Duffy | Lead Project Engineer | Staff | Engineering | BSEE | 21 | San Francisco |
| Phil Hunt | Lead Project Engineer | Staff | Engineering | BSEE | 25 | Hawaii |
| Peter Pabalan | CAD Technician | Staff | Drafting | Degree in Architectural Drafting | 34 | San Francisco |

Potential role: technical analysis, engineering design, construction management, construction, training, post-construction measurement and verification, support, and other services.

Level of expertise: years in industry or other brief description

Base Location: Permanent office in Hawaii; On assignment from other state;

Out-of-state support.

