April 29, 2024

Ms. Christen Miller
County of San Bernardino
385 N. Arrowhead Avenue
San Bernardino, CA 92415

SUBJECT: **Revised Letter for County of San Bernardino Proposal to Provide a Feasibility Study and Technical Assessment of Forming a CCA**

Dear Ms. Miller:

Thank you for the request for an updated proposal from EES Consulting ("EES"), a GDS Associates company, to provide a comprehensive Feasibility Study and Technical Assessment (Study) of Forming a Community Choice Aggregation ("CCA") within San Bernardino County ("County") and to include all cities located within the County. No changes in the Proposed Scope of Work technical section provided on March 7, 2024 are necessary.

This updated proposal is similar to the proposal provided to you dated earlier which included Study scope of work for unincorporated County only. An additional cost to include all cities in the County in the Study is described below. For added clarity, we also provide below examples of support work the County may consider, for which we provided estimates earlier, based on our experience in other jurisdictions.

Proposal Estimate

EES will provide the complete scope of work and Study requirements you have requested including all deliverables. We can provide this for the following costs:

- **Feasibility Study and all deliverables now including analyses for the County and all cities within the County: $65,000.**
- **Costs to manage additional data for all cities in the County and provide various County plus other city/cities' analyses in the final report: $15,000.**
- **Support on developing strategy for coordination with other regional efforts (communications with the County and other jurisdictions): Billed at hourly rates and estimated at $20,000.**
  - Meetings with County electeds and staff to discuss status of other CCA efforts in the region and options/impacts of combining efforts.
  - Meetings in each Supervisorial district to provide County intent/objectives with cities and constituents.
  - Meetings with County electeds, staff and other cities on the results of the Feasibility Study.

16701 NE 80th Street ▪ Suite 102 ▪ Redmond, WA 98052 ▪ 425-889-2700 ▪ Fax 866-611-3791 ▪ www.eesconsulting.com
Georgia ▪ Texas ▪ Alabama ▪ New Hampshire ▪ Wisconsin ▪ Florida ▪ Maine ▪ Washington ▪ California

- **Support on developing CCA governance options and operating principles (based on interest of other jurisdictions): Billed at hourly rates and estimated at $15,000.**
  - Document describing governance options for one or multiple CCAs in the region: pros, cons, risks, risk mitigation, fiscal impacts.
  - Document describing CCA operational options for one or multiple CCAs in the region.
  - Meetings with County electeds, staff and other cities describing these options.

EES's experience is that the additional support listed above is typical when jurisdictions evaluating CCAs have options for different operating models and governance structures. We include the support costs which usually cover presentations to staff and electeds, other public meetings, meetings with other jurisdictions. This is especially relevant to the County given that EES has been active in the region promoting CCA, is currently responding to several solicitations, and has already met with most cities within the County.

Alternative Proposal Estimate

The Turnkey CCA Team proposal described in our earlier letter to you dated March 7, 2024 is unchanged. The Feasibility Study costs would be zero if the GDS Turnkey CCA Team is ultimately chosen to implement and operate a CCA involving the County. No Feasibility Study costs will be collected regardless of the County's decision on moving forward or not with a CCA.

We look forward to working with the County on this effort. Please reach out to Howard Choy, whom you have previously contacted, with any questions.

Howard Choy, Executive Consultant
850 Iron Point Road, Suite 154
Folsom, California 95630
(323) 204-6134 / howard.choy@gdsassociates.com

Sincerely,

Kevin J. Mara, P.E.
Executive Vice President

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PREPARED BY EES CONSULTING

County of San Bernardino

Proposal to Provide a Feasibility Study and Technical Assessment of Forming a Community Choice Aggregation

March 7, 2024

EES Consulting
a GDS Associates Company

March 7, 2024

Ms. Christen Miller
County of San Bernardino
385 N. Arrowhead Avenue
San Bernardino, CA 92415

Ms. Miller:

Thank you for the request for a proposal from EES Consulting ("EES"), a GDS Associates company, to provide a comprehensive Feasibility Study and Technical Assessment of Forming a Community Choice Aggregation ("CCA") within San Bernardino County ("County").

EES is the State's leading resource in developing CCA feasibility and technical assessments and start-up plans, having provided these services on behalf of roughly half of the CCAs operating throughout the three major investor-owned utility territories in California. In addition, EES has provided similar technical consulting services for decades for many municipal utilities in California and the Pacific Northwest.

Proposal Estimate

EES will provide the complete scope of work and study requirements you have requested including all deliverables. We can provide this for the following costs:

- Feasibility Study and all deliverables: $65,000.
- Support on developing strategy for coordination with other regional efforts (communications with the County and other jurisdictions): Billed at hourly rates and estimated at $20,000.
- Support on developing CCA governance options and operating principles (based on interest of other jurisdictions): Billed at hourly rates and estimated at $15,000.

EES's experience is that the additional support listed above is typical when jurisdictions evaluating CCAs have options for different operating models and governance structures. We include the support costs which usually cover presentations to staff and electeds, other public meetings, meetings with other jurisdictions. This is especially relevant to the County given that EES has been active in the region promoting CCA, is currently responding to several solicitations, and has already met with most cities within the County.

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Alternative Proposal Estimate

EES is also proposing an alternative to the above study costs – a Turnkey CCA Team proposal whereby EES's team of CCA service providers would provide all of the services above at no cost to the County should the County decide to move forward with implementing a CCA, and selects the EES Team to be your CCA implementation and operations team.

Our experience in developing CCAs is the basis for this proposal and reflects:

- the experiences, viability, and financial success of nearly all CCA efforts throughout the State;
- the development of a CCA service team that currently works for most of, and the largest, CCAs and has a strong municipal utility industry focus;
- the ability for the County to maintain no financial obligation while continuing to evaluate CCA after the feasibility and technical assessments; and
- an option for more quickly and easily assembling a qualified CCA services team that can provide all services to the County, or as many CCA services as requested.

Our scope and cost along with EES's most recently updated qualifications is included in the attached proposal. Also included is a description of how the Turnkey CCA effort would operate along with a description of the Turnkey CCA Team and their qualifications and experience in the CCA industry.

We look forward to working with the County on this effort. Please reach out to Howard Choy, whom you have previously contacted, with any questions.

Howard Choy, Executive Consultant
850 Iron Point Road, Suite 154
Folsom, California 95630
(323) 204-6134 / howard.choy@gdsassociates.com

Sincerely,

Kevin J. Mara, P.E.
Executive Vice

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1 Proposed Scope of Work

EES works with agencies in the CCA space to conduct financial feasibility studies, start-up services, public outreach, regulatory support, energy efficiency funding assistance, and cost of service and rate setting. EES has also presented at CCA trade events on formation process, governance, and strategic planning. EES has assisted dozens of agencies in evaluating, studying, implementing and operating CCAs in California as shown in our list of CCA clients at the end of this section.

EES prepares the studies such that the assumptions are consistent with the jurisdiction's goals, past examples include:

- Rate parity or better with IOU, with lower rates over the study period.
- Energy portfolio content that has lower overall carbon content compared with the IOU portfolio.
- Meet or exceed California Renewable Portfolio Standard (RPS) mandates.
- Differentiated energy options as identified by the County for default service including a voluntary 100% renewable option.
- Define and create project development and ownership strategies that increase opportunities for full service, local ownership and investment in energy assets to include local/regional renewable generation, implementation of distributed energy resources, and development of customer programs.
- Identify local economic and regional benefits of the CCA program from customer rate savings, investment into the local economy of customer rate savings, and increase in revenue in local businesses from these investments using established economic development model.
- Investigation of local jobs growth through development of regional renewable energy projects.
- Compliance with County Climate Action planning and goals.

EES works closely with CCA clients to account for the priorities and concerns in the analysis. Our approach prioritizes the key aspects of program feasibility and implementation while providing consulting services to meet the clients' specific requests and would be organized based on streamlining the project according to timeline constraints.

EES will prepare a technical report detailing the feasibility assessment. The report will first be delivered in draft form followed by a final version that incorporates County feedback. The CCA study activities and scope of work are summarized below.

SUMMARY OF CCA STUDY ACTIVITIES

CCA Study Input	Scope of Work	Comments
CCA Load Analysis, Study and Forecast	▪ Historic load request and analysis by customer class: residential, commercial, industrial, other. ▪ Forecast load growth scenarios. ▪ Develop energy and peak demand forecasts to inform power supply cost estimates and revenue projections.	Analysis is done with SCE provided data which is monthly. The energy and peak demand forecasts are conducted in lieu of having hourly customer load data from SCE.
Rate Analysis	▪ Develop retail rate forecasts for CCA program, delivery/distribution costs for SCE facilities, and generation cost stranding. SCE retail rate scenarios will be developed based on expected, low and high forecasts. A discussion of how rate structure impacts CCA customer savings will also be included in the analysis. Unique to EES, our staff are rate experts in the public utility arena completing cost of service and rate design analyses for dozens of public electric utilities and CCAs every year.	We will also provide a current assessment of CCA rates compared to SCE territory rates.
CCA Energy	▪ The CCA power portfolio will consider options for meeting CA RPS requirements and other objectives identified by the County; e.g. per any Climate Action goals. ▪ Power supply costs are expenses making up to 90% of the final retail rate charged to CCA customers.	A range of forecast costs will be analyzed.
CCA Feasibility Sensitivity Analysis	The sensitivity analysis will be performed for the following key variables: ▪ Range of market prices for conventional and renewable energy including impacts of tax credit changes. ▪ Ranges of SCE generation rates, exit fees, and customer surcharges. ▪ Rate sensitivity to the inclusion of renewable energy resources at levels that exceed the state RPS. ▪ Rate sensitivity to the inclusion of local renewable. ▪ Generation and demand-side management. ▪ Extent to which rates may change depending on varying levels of participation and resulting lowest feasible participation rate. ▪ Opt-out or opt-in rate impact on base level of renewable resource mix offered. ▪ Identification of any anomalies, either challenges or opportunities, in the service area related to geographic, demographic, COVID-19, or economic circumstances.	Our Team will examine each portfolio option under a range of conditions to ensure that the recommended resource plan is appropriate under unexpected market and regulatory conditions.

CCA Study Input	Scope of Work	Comments
CCA Proforma Analysis	▪ Develop a 10-year financial model pro-forma with cash flow analysis. These costs will include start-up costs, any required, CCA surety bonds, cost of capital, data management, staffing, customer service, legal services uncollected accounts, payments to TEC for stranded generation costs, marketing accounting and all power procurement costs such as scheduling, transmission and surcharges. ▪ We will detail collection of reserves to provide emergency rate stabilization of the CCA in the future. ▪ Based on these expenses our project team will estimate the total CCA revenue requirement and resulting unit costs for 10 years of operation.	These operating costs will be based on the operating costs of existing CCAs and scaled for the size of the County's programs.
CCA Risk Analysis	▪ EES will evaluate and report on a range of risks and risk mitigation strategies associated with CCA formation and operation. ▪ The analysis will address challenges faced by existing CCAs, as well as those anticipated for new CCAs over the next 10 years. For each risk category, our study will describe causes, effects, potential impact, likelihood of occurrence, and strategies to mitigate them. ▪ Based on the results of this analysis, risks can then be anticipated and addressed through changes in program policy, contract terms, insurance, financing, and modification of management practices.	The County may also advise on specific risks to be addressed.
Public Benefits Program	▪ EES will provide an assessment of the status of CCA Energy Efficiency funded by the CA Public Utilities Commission, and other programs implemented by CCAs in the State.	CCAs offer a variety of customer programs from multiple funding sources including net operating revenues from CCA core operations.
CCA Community Engagement	▪ EES routinely offers public workshops and meetings to explain CCA development, benefits, costs, risks and outcomes, and to assess the level of community support. ▪ For past clients, EES has presented CCA feasibility study results in city council districts, county supervisorial districts and to specialized audiences; e.g. workforce development stakeholders, chambers of commerce, higher education, public environmental organizations, business interests, and community development organizations.	EES recognizes that garnering public feedback is critical to supporting investigation and potential implementation of a CCA. We will support engagement requests as directed by the County. This activity is part of the Support Services identified in the Cost Proposal.

The table below summarizes the breadth of CCA feasibility and related services provided by EES.

OVERVIEW OF EES' RECENT EXPERIENCE ON SIMILAR CCA PROJECTS

Client/Location	Services Provided
Loudon County, VA	CCA Feasibility Study
Los Angeles County (CA) - (County of Los Angeles and All Eligible Cities within the County)	Technical Feasibility Study, Additional Services Under Clean Power Alliance (Below)
County of San Diego, CA	Technical Feasibility Study, Renewable Resource Supply Assessment
City of San Diego, Solana Energy Alliance, and King City (CA)	Peer Review of Technical Feasibility Studies
Cities of Chula Vista, Encinitas, La Mesa, Santee, Escondido, Vista, San Marcos, Oceanside, Carlsbad, Del Mar (CA)	Three Separate Technical Feasibility Studies for Various City Groups
Nevada Irrigation District (CA)	Technical Feasibility Study
South San Joaquin Irrigation District (CA)	Technical Feasibility Study
Western Riverside Council of Governments, San Bernadino Association of Governments, Coachella Valley Association of Governments (CA)	Technical Feasibility Study
Orange County Poer Authority (CA) – (Cities of Irvine, Huntington Beach, Fullerton and Buena Park, County of Orange)	Technical Feasibility Study (City of Irvine), Implementation Plan, Implementation Plan Amendment, Regulatory Filings, Start-Up Support
Central Coast Community Energy (CA) - (Counties of San Benito, Santa Cruz, Monterey, Santa Barbara and cities within the Counties, and cities within the County of San Luis Obispo)	Cost of Service and Rate Design
Butte Choice Energy (CA) – (County of Butte, Cities of Chico, Oroville)	Technical Feasibility Study, Implementation Plan, Start-Up Support
Clean Power Alliance (CA) – (Counties of Los Angeles and Ventura, Multiple Cities Within the Counties	Technical Feasibility Study, Implementation Plan, Start-Up Activities, Public Outreach
San Jose Clean Energy (CA) – (City of San Jose)	Technical Feasibility Study, GHG Reductions Analysis, Governance and Partnership Options
Silicon Valley Clean Energy (CA) – (County of Santa Clara and Cities Within the County)	Rate Setting Analysis
East Bay Community Energy (CA) – (County of Alameda, City of Oakland)	Technical Feasibility Study, Implementation Plan, Start-Up Services
Western Community Energy (CA) – (County of Riverside and Cities Within the County)	Start-Up Services, Rate Setting, Regulatory Assistance, Integrated Resource Plan
City of Pueblo (CO)	Public Power Municipalization Study and Assessment of CCA in the State Legislature

2 Turnkey CCA Team Proposal

EES's experience with developing CCAs and California's experience show that there are economy of scale benefits in operating a CCA; that is, we believe there is a minimum threshold for number of meters (or number of customers or size of energy load) to maximize risk mitigation. As such, our support work with the County and other interested jurisdictions in the region is highlighted and reinforces the benefits of a Turnkey CCA Team offering.

The graphic at the end of this section shows a sample timeline for initiating a process for investigating and potentially moving forward with creating a CCA. This timeline reflects the benefits of the Turnkey CCA Team approach. Typically, after a CCA feasibility study, jurisdictions would evaluate the results, seek more information, and eventually present results and request governing board direction on next steps (e.g., Go or No Go). Under a non-Turnkey approach, the County would then issue a series of additional solicitations to identify and select CCA start-up, implementation and operation service providers. Our assembled Team of industry experts already works (has worked) for many/most CCAs and obviates the challenges and time requirements of selecting individual Team members. Highlights of this timeline and key features of the timeline with our Team as the County's Turnkey CCA Partner include the following:

- Our Team will conduct a feasibility study for the County at no charge and we will leverage our work in the region to bring other cities on board as part of the feasibility study. The feasibility study will be at no cost to the County as long as our Turnkey CCA Team is utilized to implement and operate a CCA for the County.

- After the feasibility study is complete and vetted, the County and potentially other cities will decide whether or not to proceed to next steps in CCA formation. The County and other cities are not expected to expend any costs up through the feasibility study.

EES CONSULTING
A GDS Associates Company

Feasibility advisor for over 20 CCAs
Stood up 10 CCAs that are currently operating
Filed over 12 Implementation Plans
Acquisition of operating and start-up financing
In CCA sector for 10 years in California

GDS ASSOCIATES, INC.

- Power supply planning for over 100 utilities
- Extensive experience with CAISO
- Well-versed in California bulk power market
- 180 employees

TENASKA POWER SERVICES CO.

Power marketing and energy management services for numerous generation/ municipal/CCA /CAISO customers
Provides scheduling /marketing /EMA/ dispatch services for customers nationwide, including California
Approximately 180 employees; headquartered in Irving, Texas, origination lead in Southern California

CALPINE ENERGY SOLUTIONS

Currently perform data management for 20 of 23 CA operating CCAs
Industry leader in CCA data management and call center
500 employees

THE ENERGY COALITION

Manages customer energy programs for all SCE territory
Consultant to Inland Regional Energy Network
Outreach for key product offerings
Customer program experts

BEST BEST & KRIEGER

Large local government clientele
Attorneys for several CCAs
Has worked in CA utility area for decades

AADVANTAGE COMMUNICATIONS

Extensive Inland Empire outreach and public affairs experience
Locally connected in key political circles

TURNKEY TEAM GOVERNANCE

GDS Prime
All other firms subcontract with GDS
One contract for CCA to administer

Party	Activity	2024												2025				2026
		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Q1	Q2	Q3	Q4	Q1-4
City	Evaluate, Award Contract, Execute																	
EES	Continue Outreach to RFQ Cities, Other Cities																	
Both	Acquire Signatures for Data, Acquire SCE Data																	
EES	Complete Feasibility Study, Report (GDS Funded)																	
Both	Present Report, Council Meetings																	
City	Study, Cities Determine "Go," "No Go"																	
Both	Negotiate, Execute Turnkey Service Contract(s)																	
Both	Cities Go Forward, Create CCAs by Council Action																	
Both	Execute JPA MOU or Other Governing Document																	
EES	Acquire S/U Capital, Working Capital Line of Credit																	
EES	Start-Up Funding Available																	
Both	Create Governance Structure, Implement																	
Both	CPUC Mandated 1 Calendar Year Waiting Period																	
EES	CCA Regulatory Filings																	
EES	Update Feasibility Study, Operations Analyses																	
EES	Implement Operations Team																	
EES	Mandated Customer Notifications																	
EES	CCA Start Operations, Serve Load, Receive Revenues																	

3 Corporate Profiles of the Turnkey CCA Team

As prescribed throughout this proposal, EES is prepared to perform a CCA feasibility study at no cost to the County if, should the County decide to proceed with a CCA, the Turnkey CCA Team is selected to develop, implement and operate the CCA. Highlights of the Turnkey CCA Team are provided below. Additional corporate information, including financial capacity and resumes may be provided upon request.

EES CONSULTING, A GDS ASSOCIATES, INC. COMPANY

EES has conducted CCA feasibility studies across the state and helped implement multiple CCAs, includes technical resources as described throughout this proposal.

EES Consulting
a GDS Associates Company

Founded in 1986, GDS provides engineering and consulting services to electric utility clients across the country, covering a broad range of services in the areas of wholesale and retail rates, cost of service, demand-side management, power supply planning, financial consulting, transmission planning, access and pricing, generation development and monitoring, operational and management challenges, and many others.

Cooperatives, municipal systems, and regulatory agencies are GDS' target clients, and we gear our business toward being able to provide the multitude of services that those entities need "all under one roof". We serve a diverse client base with a variety of energy consulting services, as well as information technology, market research, and statistical services.

GDS offers a broad array of services with direct, current experience with valuation, and mergers and acquisitions, all of which are relevant to the City's requested scope of work, including:

Utility Municipalization & Privatization	Community Choice Aggregation (CCA) Services
Renewable Resource Procurement & Advisement	Microgrid
Mergers and Acquisitions	Regulatory
Cost of Service, Financial Analysis and Rate Design	System & Plant Valuations
Proforma Business Plan and Forecast Retail Rates	Engineering Design Services/Construction Management
Expert Witness and Regulatory Support Services	Strategic Planning
Resource Development and Assessment	Energy Purchase and Risk Management

GDS has assisted clients in meeting the challenges of evolving competitive, regulatory and technical environments. We have a proven track record of success in arenas where the results of a particular project may have far-reaching effects on the viability of an organization and the local community.

Because of the size of our firm and our highly qualified staff, we are able to deliver results in less time and with less expense to our clients. We are responsive and focused on cost-effective solutions for our clients' needs, and always recommend the most direct and efficient means of carrying out a project. The success of our project approach has resulted in the large volume of repeat business that the firm enjoys.

GDS places the needs of our clients first and foremost. The size and depth of our firm permits us to offer clients multiple sources of assistance, ensuring complete, competent, and timely service on a very cost-effective basis. GDS' long history of meeting or exceeding client needs has established our reputation within the industry. In fact, most of our project assignments are derived from repeat work for existing clients or from client referrals. GDS recognizes that no two clients or problems are exactly alike, so we strive to deliver "right-fit" solutions for each client's particular situation. GDS conducts its business in accordance with stated core values which we follow steadfastly in providing services to our clients.

TENASKA POWER SERVICES COMPANY (TPS)

Established in 1997, TPS is a FERC-certified power marketing company engaged in the buying and selling of wholesale and retail power and the provision of power marketing and energy management services throughout the United States. With a 200+-person staff headquartered in Irving, Texas, TPS focuses on providing energy management solutions to third-party customer generation assets and retail and wholesale load in CAISO, WECC, ERCOT, SERC, MISO, SPP, PJM, NYISO, and ISONE.

As one of the first energy managers in the U.S., TPS has grown alongside the electric power industry, adapting to the ever-changing market landscape and developing cross-functional expertise in its employees. TPS employs a team of functional experts to provide energy management services to customers in each U.S. power market. Each member of the energy management team, including both commercial and back-office roles, is fully involved in all aspects of their specific market function, including participating in stakeholder meetings, market design, and market training. This integrated approach enables each energy management customer to benefit from TPS's extensive market knowledge, deep understanding of the regional energy markets, and ability to execute transactions to provide risk management services and create incremental value.

TPS has managed assets for over 300 energy management customers, comprised of independent power producers, municipal electric utilities, electric cooperatives, renewable generation facilities, large industrial and cogeneration facilities, retail loads, demand response participants, and energy storage assets. The vast diversity of TPS's customer base has given TPS experience with many different technology types, customer characteristics, and market segments and has well-equipped our team to provide a comprehensive set of energy management services.

TPS's solid reputation as a top-tier energy management firm is also demonstrated by the fact that over twenty-five years ago, TPS entered the energy management business with an agreement to provide services to the Brownsville Public Utilities Board (BPUB). TPS performs an extensive array of energy management services for BPUB, including energy procurement, risk management, facility optimization, market interface, scheduling, settlement services, and transmission revenue rights optimization. This relationship has evolved and expanded, and we are proud that we continue to serve BPUB today.

While TPS is acutely attuned to reliability issues and is extremely sensitive to risk management concerns, TPS's business focus is adding value for its customers. TPS's talented energy management team has a proven record of successfully managing risk and optimizing revenues for generation and load customers.

As a demonstration of TPS's strong focus on providing energy management services, TPS maintains a dedicated Energy Management group staffed with experienced energy managers and support personnel. This enables TPS to assign a dedicated energy manager to each customer to provide a single point of contact for any customer request.

Each Energy Manager is responsible for working with the customer to develop long and short-term optimization strategies, utilizing information provided by TPS's trading and market analysis groups as well as customer specific parameters to recommend optimization strategies. Upon determination of an optimization strategy with each customer, the Energy Manager will oversee execution of the strategy and monitor its performance. The Energy Manager actively seeks opportunities to improve each customer's economic performance through extracting maximum value from their assets and positions.

Tenaska currently is under contract with the State's two largest CCAs, Clean Power Alliance (Los Angeles and Ventura counties and cities within those counties) and San Diego Community Power (city of San Diego, county of San Diego and additional cities within the County) to provide these services.

CALPINE ENERGY SOLUTIONS

Calpine is the premier provider of Billing, Data Management, and Customer Service for Community Choice Aggregators (CCA) across California. For more than a decade, our team has helped over 170 local governments bring lower bills, energy choice, and economic development to their communities. We help launch California's first CCA, MCE Clean Energy, in 2010, and since then helped 22 additional CCAs start-up operations. Calpine boasts the high billing accuracy of any provider in the nation, with over 99.999% accurate billing, measured across over half a billion bills. As of January 2024, Calpine supports over 5 million meters covering over 20 CCAs nationwide.

Headquartered in San Diego, California, Calpine has over 300 full-time employees with a management team averaging more than 20 years of energy experience. Our company has served California commercial and industrial customers since the market deregulated in 1998. We have over 12 years of experience in billing and data management with California's CCAs and over twenty years of experience exchanging customer data with California's utilities in support of this industry. Working with all three investor-owned electric utilities in California has honed our craft; we have built highly sophisticated systems and processes to account for innumerable nuances and brought these hard-earned benefits to all our CCA partners.

Additionally, Calpine maintains our best-in-class status by working with industry leading partners to provide new tools and intelligence to our clients. We are the only provider in the market that offers advanced data analytics, targeting, forecasting, and grid flexibility as-a-service through our partnership with Recurve Analytics. Calpine also brings a wealth of experience in customer behavior and research through our research team and we are the only provider actively working with CCAs to utilize behavioral science to maximize customer participation and engagement.

Our seasoned background and tenacious drive to improve is how we achieve the highest billing accuracy in the industry, and we firmly believe there is no other vendor in this space as prepared, well-staffed, or as experienced that can also provide the level of technological sophistication and service support to enhance every aspect of a CCA's operations.

THE ENERGY COALITION (TEC)

For almost fifty years, TEC has been deeply immersed in the complex and ever-changing energy landscape, helping to shape the solutions of tomorrow while addressing the needs of today. Working with the public sector, TEC designs and delivers projects that create shared social, environmental, and economic benefits. We identify and help partners access funding, removing barriers to smart energy strategies. We help cities, counties, school districts, water agencies, Regional Energy Networks (RENs), and Community Choice Aggregators (CCAs) with projects that transform energy use and generate much-needed capital. To date, TEC has successfully supported public agencies in securing approximately over $170M in funding from a variety of federal, state, and local agencies.

- The Inflation Reduction Act (IRA) recently created a new program: the Greenhouse Gas Reduction Fund. This first-of-its-kind program will provide $27 billion in competitive grants for clean energy and climate projects that reduce greenhouse gas emissions—with an emphasis on projects that benefit low-income and disadvantaged communities.
- The Infrastructure and Investment Jobs Act (IIJA) will provide $550 million through the Department of Energy (DOE's) Energy Efficiency and Conservation Block Grants (EECBG) to help states, local governments, and tribes reduce energy use, reduce fossil fuel emissions, and improve energy efficiency.

- IIJA will also provide $500 million through the Department of Energy (DOE's) Renew America's Schools program to fund energy improvements at public K-12 school facilities. Improvements cover energy efficiency, ventilation, renewable energy, alternative vehicles, and alternative fuel vehicle infrastructure at one or more school sites located in an areas of high needs.
- The California Governor's Office of Planning and Research (OPR) Integrated Climate Adaptation and Resiliency Program (ICARP) is offering $250 million under their Regional Resilience Planning and Implementation Grant Program (RRGP) to help address local, regional, and tribal climate resilience needs at the regional scale.
- The California Strategic Growth Council's (SGC) Community Resilience Centers (CRC) program will offer $270 million to fund new construction and upgrades of neighborhood-level resilience centers to provide shelter and resources during climate and other emergencies. The program will also fund year-round services and ongoing programming that build overall community resilience.

- The California Strategic Growth Council's (SGC) Transformative Climate Communities (TCC) program will release the 5th round of awards providing over $163 million across planning grants, project development grants and implementation grants to fund development and infrastructure projects that achieve major environmental, health, and economic benefits in California's most disadvantaged communities.

BEST BEST & KRIEGER (BBK)

Established in 1891, Best Best & Krieger, LLP (BBK) is a full-service public agency law firm with over 250 attorneys and 12 offices nationwide, with attorneys licensed and clients in Arizona including the City of Lake Havasu. Our attorneys are especially well qualified to provide the highest quality legal representation.

Our professionals focus on virtually all practices of law that may confront a public agency. We help public clients successfully maneuver through legal complexities and government mandates. Because BBK has a history of extensive involvement in all aspects of public law, we have pioneered methods to deliver advisory, regulatory, transactional and litigation services in a comprehensive, efficient, and cost-effective manner. BBK currently provides legal services to over 700 public agency clients in various capacities.

BBK offers strategic counsel to clients throughout California and the U.S. on utilities regulation, administrative law, environmental law and public agency governance matters. Their energy practice spans regulatory, transactional and business issues in the areas of energy, gas, water quality, air quality, wastewater, solid waste and climate change. They also has extensive experience with project development, entitlement and permitting matters, particularly with respect to large-scale infrastructure. BBK represents clients on utility matters before a number of federal and state agencies as well as on utility transactional, business and governance matters. He represents a number of California community choice aggregators, commonly known as CCAs, and communities exploring CCA on all aspects of formation. This includes governance, implementation, regulatory and procurement matters. BBK advises clients on forming electric municipal owned utilities and acquiring utility assets, including recent efforts in Colorado. They negotiate regularly with utility companies and advise on utility rules and tariffs.

BBK advises community choice aggregators on feasibility, formation and implementation, including creation of enterprise funds and joint powers agencies, consultant contracts, energy and resource adequacy procurement, and CPUC and CEC regulation. Clients include Western Community Energy, Desert Community Energy, Clean Power Alliance, San Jose Clean Energy, San Jacinto Power, the County of San Diego and various cities and counties exploring CCA or joining an existing CCA.

AADVANTAGE COMMUNICATIONS, JOHN VALDIVIA, PRESIDENT/CEO

Founded in 2015, AADVANTAGE COMMUNICATONS is government relations, public policy and research advisory firm based in Southern California (San Bernardino). Established on the core foundation of knowledge, data, and experience, AADVANTAGE COMMUNICATIONS works collaboratively with clients and partners to deliver results.

With passionate strides about the work we do, we are vested in positively impacting people's lives and contributing to the communities in which we work through data guided strategies and lobbying efforts to garner trust and support for our clients desired outcomes.

Our focus and precision approach allows consideration for unique and tailored efforts and an awareness of client and community needs which are steadfast in our dedication to each project and its outcomes.

Our history of proven success and long-lasting relationships with clients and colleagues has yielded the trust and loyalty of these partnerships. Most importantly, AADVANTAGE COMMUNCIATIONS work has always been built on a foundation of relationships with federal, state, county and local government officials.

Our research coupled with a pragmatic approach affords us the ability to offer clients educated and objective guidance based on reliable professional and seasoned experience in these specialty areas such as: Government Relations, Public Policy, Market Research, Sales/Marketing, Sales Targeting/Brand Development, Public Affairs, Crisis Management, Community Engagement and Focus Groups.

We also offer advising in economic and community development along with land use and development, and formation of public private partnership {PPP} efforts through JPA formation (joint powers authority and quasi-government formation) through land annexation.

Our commitment is founded upon objectivity, diligence, care, and profitability for our clients. Our approach is designed to exceed the expectations of our clients and their strategic growth plans. From AADVANTAGE COMMUNICATIONS, our commitment and dedication are centered around:

- Clear communication, strict timelines, and a dedicated team to achieve your goals.
- Integration as part of your team, in a collaborative manner, to facilitate transparency and accountability in all that we do to deliver core objectives.
- Frequent meetings will be scheduled to address successes, concerns, updates, and opportunities to continue to move projects forward towards the end objectives.