Lyon County School District

RFQ for Energy Services Company

Submitted January 15, 2025
Trane U.S. Inc.

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Letter of Interest

January 15, 2025

Harman Bains
Executive Director of Operations
Lyon County School District
25 East Goldfield Ave.
Yerington, NV 89447

RE: RFQ for Energy Services Company

Trane U. S. Inc. would like to thank you for this opportunity to perform your Energy Services work. We are extremely interested and have assembled the information you have requested.

Experience as a Design Build Contractor

- As an Energy Services Company (ESCO), our mission is clear: to enhance sustainability and comfort through innovative solutions. This past year marked a significant milestone for our contracting business as we surpassed $1 billion in annual contracting project revenue, with the majority of our work being design-build projects.

Five K-12 References for Energy Services in the past 5 years

- Trane has hundreds of references for the K-12 market across the Country. Trane will share several of our references within this response. One of the "marks" of a successful Company you want to work with is seeing how many customers did repeat business with them. You will see that most Trane k-12 customers do multiple phases of work with Trane.

Trane Company Service and Controls Office in Reno, NV

- Trane has a full HVAC and Controls office in Reno, NV, which fully serves your District area.

Accredited NAESCO Energy Services Provider (ESP) and DOE qualified

- Trane is currently Accredited NAESCO Energy Service Provider and on the Department of Energy's (DOE) Qualified List of Energy Service Companies

Active G.C. license in Nevada and Building Code Compliance

- Trane is licensed by the State of Nevada in four different trade categories:
    - 0069808 – B General
    - 0077320 – C-2 Electrical
    - 0033245 – C-21 Refrigeration and Air Conditioning
    - 0077908 – C-21B HVAC

Minimum of $10 Million in Bonding Capacity

- Trane has bonding capacity available for projects more than $100 million.

Financial Capacity

- Trane Technologies is a $16Billion public corporation with a strong investment grade rating as indicated by Moody's and S&P (Baa2/BBB). Trane's audited annual report—and other financial documents—can be viewed at the following web address: **https://investors.tranetechnologies.com/financial-information/financialsummary/default.aspx**

Quality Assurance / Quality Control plan: Trane will work closely with Lyon CSD to develop a schedule to perform any work while not disrupting the classroom learning environment. A kickoff meeting will be held prior to onsite labor start date to ensure all parties are on the same page in terms of school access and logistics. We will utilize close coordination with Lyon CSD staff to minimize disruptions and delays to scheduling. We will provide spreadsheet tracking of contingency funds utilization (for maintenance and repair work) and for progress updates. We will utilize Dropbox and Procore for document management of all testing forms and final reports.

Track Record:

- Trane has not ever been terminated or dismissed by a client or replaced by another firm during any educational project.
- Trane has no pending litigation presently or over the past 5 years in Nevada.
- Trane has not defaulted on a contract within the past 5 years, nor have we declared bankruptcy, or been placed in receivership within the past 5 years.

Insurance: Trane is fully compliant with your insurance requirements. Trane has added an example Certificate of Insurance in the Attachments.

Genuinely,

Istiaque Baig

Authorized to Contractually Bind Trane
Istiaque Baig
Regional Controls and Contracting Manager
917-297-5637
istiaque.baig@trane.com

TAB 1 Firm Overview

Trane US, Inc.: **https://www.trane.com**

Trane Technologies (NYSE: TT) is a $16 billion corporation.

Our local Trane office: Trane Reno, 5595 Equity Ave., Ste 100, Reno, NV, 89502

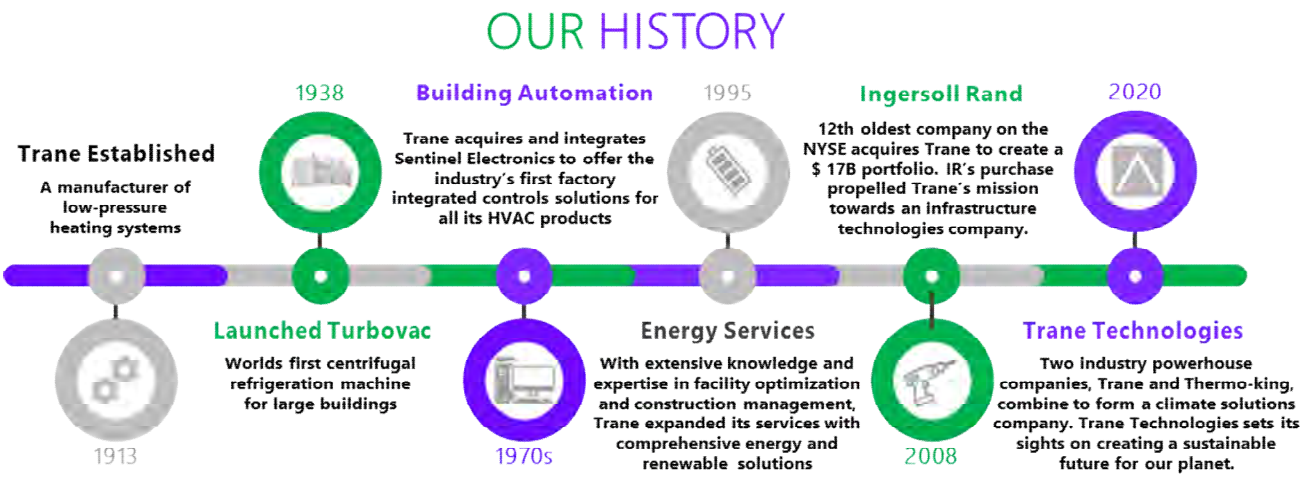
Our Trane Corporate office: 1 Centennial Avenue Suite 101 Piscataway, NJ 08854

Our Trane Technologies Corporate office: 170/175 Lakeview Drive, Airside Business Park, Swords, Co. Dublin, Ireland

28 Years as an Energy Services Company

Federal Tax ID 25-0900465

Trane's Background



As an American Manufacturing company for over 100 years, Trane has contributed greatly towards the technological modernization of skyscrapers, campuses, data centers, and other various types of infrastructure. Throughout this long history, Trane supported the engineering, construction, operations, and property management sectors and educated the market on emerging technologies. Naturally, Trane developed the most efficient building systems for the market and pushed for the digital transformation of the industry. As the construction market became complicated and expensive, there grew a need to modernize existing assets cost effectively. The Energy Services division, now known as Comprehensive Solutions, filled that gap ever since. As of 2020, Trane Technologies, dba Trane U.S. Inc., is listed in the NYSE as TT. Previous operating name (2008 to 2019), Trane U.S. Inc. was under the parent company Ingersoll Rand but dba Trane U.S. Inc.

NAESCO Energy Services Provider (ESP)

Trane earned its NAESCO accreditation in 2004. As of 2020, Trane is a NAESCO **Energy Services Provider**. NAESCO accreditation is a thorough examination of a business's core capabilities and professional processes. The NASECO committee gives accreditation based on the following criteria: the precise nature of the applicant's business; the range measures and services offered to customers; the availability of a performance-based project approach; ethical business practice commitment; project engineering and design, financing, project management, operations, and maintenance capabilities; and the capability of verifying and monitoring energy cost savings. An ESP provider has to meet the additional requirements in order to be accredited: Development and implementation of build/own/operate distributed generation, cogeneration or combined heat and power (CHP) projects and arrangement of firm contracting of energy supply.

Department of Energy Qualified

Trane is a qualified U.S. Department of Energy ESCO. We have managed energy services performance contracting (ESPC) programs for several federal government agencies, including the Department of Energy, Department of State, Navy, Army, Air Force, and the General Services Administration. Trane's Federal ESPC portfolio includes $641 million in DOE ESPC projects. We are delivering more than $47 million in annual guaranteed savings – $882 million in guaranteed savings over the life of all 22 contracts.

Under the scope of these projects, we have saved the federal government more than 1.9 trillion BTU/year in energy, with an average reduction of 30.4% from the baseline. Our projects have received multiple awards, including the Federal Energy Management Program Award of the Year and the Presidential Award for Leadership in Federal Energy Management.

Bonding Capacity

Trane has bonding capacity available for projects more than $100 million.

Local Office and Support

Trane brings you a large Company with many resources, all brought to you by your local Trane office in Reno. Reno has 10 employees, which includes our HVAC service department. This is important to your District as we are local and there to support you now, during the project and after the project with local warranty and service support. When needed our Sacramento office is the backup to support the Reno office. There you will find another 70 employees. These offices are supported by our Region and then our National teams. Trane has over 26,000 employees across the USA.

Trane the ESCO

About 60 years ago, Trane saw the need to provide service on all the Trane products in the marketplace. Over the years, customers trusted Trane and asked Trane to perform the replacement of equipment as it reached its end of life. This finally evolved into the Energy Services Business as a ESCO provider back in 1996. Trane's ESCO business is the leading business channel responsible for taking Trane over the $1 Billion in design build contracting services.

ORGANIZATIONAL CHART

Johnny Brown
VP & Regional GM

Keit Tan
Area GM
Nor Cal

Istiaque Baig
Regional Director
Controls & Contracting Sales

Scott Krebs
Regional Contracting Operations Leader

Alec Lyons
Systems Account Manger

Primary Contact
Ian Leisle
Senior Account Manager
HVAC Project Development

Doug Walker
Energy Services
Sr. Sales Executive

Dean Perry
Project Development Manager

Connor Secrest
Executive Project Manager

Greg Lisk
Energy Services
Project Developer

Omar Hattab
Energy Engineer

Natasha Vassallo
Measurement and Verification

Proposed Project Team

Name and Title		Qualifications and Experience	Relevant Experience
	• **Johnny Brown** VP & Regional GM Trane Pacific Southwest	• 22 years industry experience • 15 years with Trane • Navy Nuclear Power School • B.S. Chemical Engineering • University of South Florida	Johnny served in the Navy as a nuclear power officer. He spent 7 years with GE Power Systems negotiating performance contracts in the energy supply market. He has 15 years at Trane as sales and as GM. He is managing the second largest region for Trane in the USA.
Function			
Johnny has responsibility for the Trane Pacific Southwest Region, which includes Hawaii, California, Arizona, Nevada, New Mexico. Johnny will be involved in negotiations, contracts, overall performance.			

Name and Title		Qualifications and Experience	Relevant Experience
	**Keit Tan** Area General Manager Trane Northern California	• 20 years industry experience • 20 years with Trane • B.S. in Mechanical Engineering – Western Michigan University	Area General Manager for the Northern CA and NV Trane commercial business. His current responsibilities include leading three Business Segments; Contracting, Equipment and Services.
Function			
Keit will be part of ensuring overall customer experience to include handling high level customer issues and ensuring effective and timely customer engagement to deliver the proposed business outcomes			

Name and Title		Qualifications and Experience	Relevant Experience
	**Istiaque Baig** Area Sales Manager Controls & Contracting	• 14 years industry experience • 14 years with Trane • Bachelor of Engineering, Engineering Mgmt. & Materials Engineering	Istiaque's career has been focused on sales and sales leadership within the Energy Services and Controls sector. His extensive experience in this field brings a wealth of innovation and opens up infinite possibilities for the project.
Function			
Istiaque will be there to support the sales team as they work with the project development team to assemble the best project for your District.			

Name and Title		Qualifications and Experience	Relevant Experience
	**Ian Leisle** **Primary Contact** & Sr. Account Manager: Turnkey & Energy Services	• 20 years of experience • 3 years with Trane • B.S. in Construction Management California State University Fresno • 18 Years as Project Developer and Project Manager for MEP trades	Ian's entire career has been developing and managing complex HVAC, Electrical and Plumbing design build projects with a focus on owner involvement and coordination between all trades.
Function			
From this RFQ response through to the end of the project, Ian is your **direct contact for this project**. Your District has very specific needs for this project. Ian's experience and hands on attendance will enhance the Trane team finding the best solutions for comfort, as well as equipment delivery timelines. Ian advocates for his clients and ensures the project meets your goals.			

Name and Title		Qualifications and Experience	Relevant Experience
	**Doug Walker** Energy Services Sr. Sales Executive	• 38 years Industry experience • 27 years with Trane • B.S. in Marketing, CSU Fullerton • Irvine Public Schools Foundation, Recent Board Member • SYR Municipal Water District, Board Member	Doug has been delivering ESCO projects to his clients for 38 years. He is experienced and dedicated to achieving client goals. He has a sweet spot for working with the Education marketplace, as his parents were both Teachers. He relies on his experience to deliver the best options to match the required outcomes for the District
Function			
From this RFQ response all the way through extended M&V, Doug will always stay engaged. He works closely with the Development team to ensure right timing, best solutions and financial options are available. Doug takes pride in being the client advocate, to ensure the project brings value and exceeds client expectations.			

Name and Title		Qualifications and Experience	Relevant Experience
	**Scott Krebs** Regional Contracting Operations Leader	• 39 years in the industry • B.S. in Industrial Engineering – UCLA • PMP Certified	Broad expertise in master planning, program scheduling, contract negotiations, cost budgeting, MEP systems, and overall Operations Management. Scott Krebs has been leading the operations team for many years, managing all aspects of the construction for design-build contracts.
Function			
Scott will be responsible for overseeing the Construction team. He will make sure that resources are available to fulfill the project for an on-time and on-budget project.			

Name and Title		Qualifications and Experience	Relevant Experience
	**Alec Lyons** Systems Account Manger	• 10 yrs Industry experience • 6 yrs with Trane • B.S. in Mechanical Engineering, from University of Nevada, Reno • Northern Nevada ASHRAE Past President and current Board Member, Volunteer Involvement through AGC	Alec's primary role is working with owners (School Districts, Colleges, etc.), contractors, and engineering firms. Alec has full knowledge of all Trane equipment and ensures the right equipment is chosen for the application.
Function			
Alec will stay in contact throughout the project, and is a local Carson City Resident. He has direct factory lines of communication, which will ensure best equipment for the application and the delivery timelines meet installation schedules. He, along with Ian, will be in continuous contact throughout the project.			

Name and Title		Qualifications and Experience	Relevant Experience
	**Connor Secrest** Contracting Project Manager	• CA Contractors B License • 14 years industry experience • BS of Sciences in Construction Management – Cal State Chico • Cal OSHA 30	Connor worked as a civil superintendent as well as a commercial building superintendent prior to becoming a project manager. This experience brings efficiency, safety, and an ability to bring projects in on time and on budget.
Function			
Connor will be responsible for the on-site project management of the construction. He will ensure all day-to-day activities are communicated and completed as scheduled.			

Name and Title		Qualifications and Experience	Relevant Experience
	**Dean Perry** Project Development Manager	• 10 years Industry experience, all with Trane • B.S. in Mechanical Engineering – California Polytechnic University • Professional Engineer (PE) • Certified M&V Professional (CMVP) • Project Management Pro (PMP)	Dean has held the roles of Energy Engineer, as well as Project Developer. He now leads the development team across the Region. He applies resources based on potential scope and best resources to match the scope.

Function
Dean will ensure his team has the right resources to match the opportunity. Those resources will be properly scheduled and capable of fulfilling the project development and Energy Engineering requirements for the project on time

Name and Title		Qualifications and Experience	Relevant Experience
	**Greg Lisk** Energy Services Project Developer	• 16 years Industry experience • 7 years with Trane • Associates of Applied Science Degree – Computer-Aided Drafting • PMP (Project Mngmt Professional) Certification	Greg has significant expertise providing energy and utility base strategies that create impactful asset improvements. Greg has developed scope involving HVAC, Lighting, Controls, Water, Renewables, Utility Grid solutions

Function
Greg will be responsible for site walks, coordination with any outside resources, project scope development, and costing for Energy Services projects. He would work in coordination with Ian.

Name and Title		Qualifications and Experience	Relevant Experience
	**Natasha Vassallo** Measurement and Verification Analyst	• 25+ years of industry experience, 15 with Trane • MBA, from Lawrence Technological University • B.S. in Facility Mgmt – E. Michigan University • Certified Energy Manager (CEM®) • Certified M&V Professional (CMVP®)	Natasha Vassallo has more than 25 years in energy engineering — focusing on the science of Measurement and Verification for the last 15 years.
Function			
Natasha will be the lead M&V Engineer for this project. She will analyze and prepare construction period savings reports, as well as ongoing annual reports.			

Name and Title		Qualifications and Experience	Relevant Experience
	**Omar Hattab** Energy Engineer	• 6 years Industry experience • 3 years with Trane • B.S. Energy Engineering, Westphalian University of Applied Sciences, Gelsenkirchen Germany • Certified Energy Manager and Auditor (CEM) (CEA)	Omar has been modelling buildings and performing Energy Engineering analysis for several years now. He has an extensive knowledge CA utility rates and programs which enhance the accuracy of her modelling.
Function			
Omar will collaborate with Greg to understand the existing operations and projected operations, then create the energy analysis to determine Trane's Guaranteed Savings.			

Special Talent, Experience & Technical Expertise regarding schedule, planning, budgets, management, and quality control. Also the strengths and project continuity Trane can bring

Trane brings a strong team together for your project(s), so that we have the best of the best all working toward your common goal. We have Industry expertise, as bring access to our Factory Experts. We have Innovation, as one of our local team members holds 10 different patents. And he is only one of many across our Company. We have Financial options covered, as one of our team members has been bringing financial options to our Energy Services projects for over 35 years. We have Process covered through the great experience learned over thousands of projects. We have Financial Guarantees to help minimize the Risk of the District. We have Local Service to see your projects all the way through their life of operation. And most important, we have local people who care about the work we do in their home communities.

These strengths mentioned above are continuously brought to the District and process are followed. Following process means a consistent delivery. Delivery of Audits, customer communication, project options, contracts, project management, and project closeout. We mirror all the things that go right over and over again.

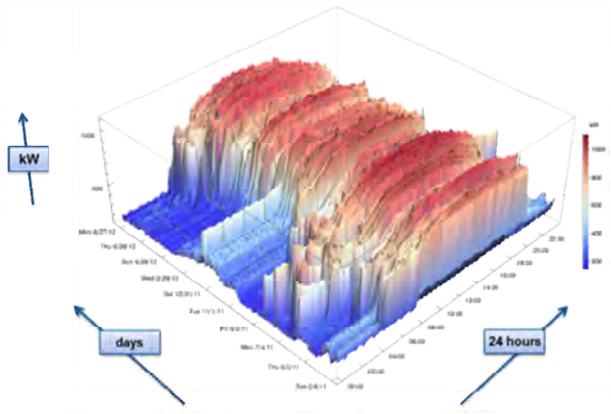
Let us share with you the processes we use to provide you the best projects:

Preliminary Audit

Before auditing a single building, our team members will interview management and building operations staff to fully understand your objectives for this major undertaking. This is the first of many meetings and workshops that we'll conduct so that we don't miss the big picture amid a mountain of details. With all of the funding mechanism's available right now, we must be on the same page and understanding of the District goals, as they will direct how we approach the project to best achieve every one of those goals.

A Preliminary Audit allows our team to determine potential cost savings related to energy and water, as well as the operations and maintenance of your building systems. We study energy use, comfort requirements, operating efficiency, and environmental impact. The information gathered during this initial phase should provide enough data for both of our teams to make an informed decision regarding which energy conservation measures (ECMs) should be researched further in a more detailed audit.

Trane's Energy Optics tool generates a 3-D view of a building's existing energy use, which allows our team to identify trends and inconsistencies, as well as potential savings opportunities.



The auditing process involves **frequent team meetings and communications** to accurately define and confirm the project's scope and direction. Your team's input will help us verify and reach agreement in these key areas:

- General direction and goals for the project
- Scope of ECMs and savings strategies
- Baseline utility and operating cost profiles
- Project funding and financial approach

Based on the audit findings, we will provide documentation for your team to review and offer suggestions that will be more fully explored in the Investment Grade Audit phase. This is an important step in ensuring the program objectives are being met.

Investment Grade Audit

The next step is to drill deeper and either validate or modify the recommendations presented in the Preliminary Audit report. Our team will next perform an Investment Grade Audit (IGA). With your team's assistance, we will conduct a more detailed examination of all mechanical, electrical, and plumbing systems – as well as the building envelope. We will identify the current condition of each facility, the urgency of any necessary improvements, potential for structural envelope changes, financial viability of each improvement measure and potential operational efficiencies that can be captured. The final IGA report will incorporate feedback from your management team and facility staff so that the project will fully achieve your operational and financial goals.

During the IGA, Trane relies on our customers to provide the following:

- Assist in gathering necessary information as detailed in the table below, including, but not limited to, copies of current utility bills, Engineering drawings of the sites being studied.
- Access to contracts in place with utilities for evaluating whether to pursue more favorable terms
- Access to all facilities and escorts, if necessary
- Access to building automation and energy management systems
- Time for interviews with building occupants, maintenance personnel and janitorial personnel to better understand your facilities, how they operate, inherent issues with operation, hours of operation, etc.
- Availability of personnel for strategic meetings

The following information is collected during the Investment Grade Audit…

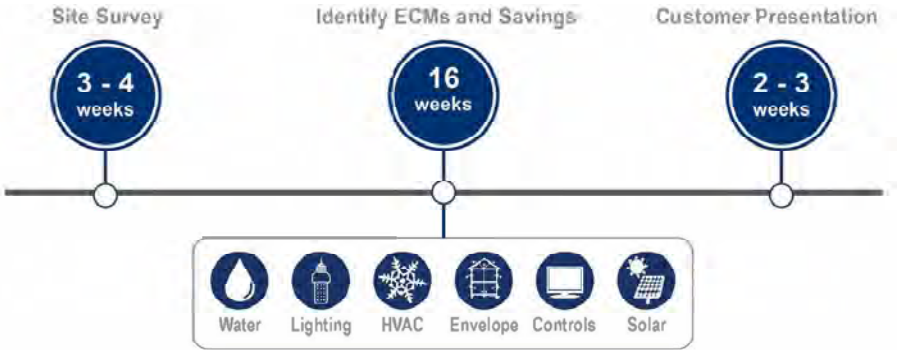
IGA Categories	Examples of Information Collected
General	Obtain copies of building and controls drawings Interview key building personnel Review existing energy savings program
Building Envelope	Collect building floor plans Note window, roof types, conditions, and age Note general, readily observable building condition and/or problems
Lighting and Water Systems	Detailed room-by-room lighting audit with light level measurements Detailed room-by-room audit of all water-consuming devices
HVAC Systems	Inventory all equipment, including nameplate information Investigate existing direct digital controls (DDC) system and available trend data Document existing system set-points Measure power draw from equipment (fans, pumps, etc.) Identify existing performance issues with equipment
General Building Equipment	Inventory all equipment, including nameplate information Document equipment schedules Identify existing performance issues with equipment
Non-Building Equipment Loads	Identify all major loads not associated with the building operation, such as computer equipment, kitchen equipment and heat recovery equipment
Utility Bill Analysis	Acquire all customer utility billing for the past 36 months Acquire utility rate schedules Review utility billing for conformance with rate schedule Identify opportunities to change rate schedule or utility provider Provide comparison of energy usage to similar facilities in the same geographic area

IGA Categories	Examples of Information Collected
Hazardous Materials Assessment	Interview customer staff to identify any known hazmat conditions Collect and review any previously completed assessments or studies conducted for customer Complete assessment of facilities (define/identify areas of potential concern) Create an agreed upon plan to handle situations

Upon acceptance of the IGA results, Trane will finalize the project design in partnership with the customer. We will work closely with your team to prioritize needs and determine areas of concentration. At this point, the engineering and design criteria for all potential facility improvement measures are determined. All engineering and construction drawings, as well as software engineering, will be completed in accordance with standard industry practice.

Anticipated IGA Milestones

The IGA timeline can vary. The reason for this variance is directly associated with the "business model" that will be used when developing the contract documents. The final IGA duration is dependent on the depth and breadth of the IGA final scope, which will be determined in a collaborative effort with the customer as a result of the findings presented from the Preliminary Audit.



The graphic schedule depends on how many buildings are to be involved per year. This example depicts 15 buildings.

Building Modeling

As an HVAC systems manufacturer, we understand the challenges of designing the most efficient, lowest cost HVAC solution for each facility. That's why we developed Trane Air Conditioning Economics, or TRACE™ – a design-and-analysis software program that helps HVAC professionals optimize the design of a building's heating, ventilating and air-conditioning system based on energy utilization and life-cycle cost.

TRACE™ 700 has been a mainstay of the engineering design community for decades. TRACE™ 3D Plus is the newest design tool and produces a three-dimensional image of the building under consideration.

TRACE™ 700 and TRACE™ 3D Plus meet the requirements for simulation software set by ASHRAE Standard 90.1-2004-2010 and the LEED Green Building Rating System. They are among the U.S. Department of Energy's approved building modeling software packages.

Both versions are recognized by the U.S. Internal Revenue Service as a Tax Deduction Qualified Software, which calculates energy and power cost savings that meet federal tax incentive requirements for commercial buildings.

Depending on the project requirements, we use TRACE™3D Plus or TRACE™ 700 for building energy simulation analysis, and the resulting simulation models are the basis for our energy savings guarantee. These building modeling tools provide the power to analyze many different building aspects, systems, controls, and equipment. Building simulation software determines building energy consumption using data such as:

- Building square footage, construction, and orientation
- Climate
- Occupancy rates and schedules
- Lighting fixtures and schedules
- Equipment efficiencies and schedules
- Temperature setpoints
- Utility rate structures

Project Implementation

Trane's long-standing success in implementing performance contracts is tied directly to the expertise of our professionals and the bullet-proof processes that are in place. From managing construction in a fully occupied building to addressing a customer emergency, our project managers, site superintendents and administrators play a vital role in every project. They are focused on complete customer satisfaction.

We have established the following processes to provide a seamless transition from the green light to proceed through the project closeout and turnover of as-built drawings:

1. Management Tools

Trane uses **Microsoft Project** to create a detailed construction schedule, beginning with a preliminary design meeting and concluding with turnover to the customer. All milestone events are captured in a Gantt Chart, which helps the construction team assign resources, analyze workloads, track progress and manage the budget.

Trane also utilizes **Procore** to manage and report on all costs, receivables, change management, contracts, purchase orders and changes to items. ProCore incorporates the functions of organizing, planning, installing and successfully completing the project. This system integrates our branch personnel, our customer and our subcontractors into a success-oriented team focused on completing a superior project. This software is used throughout the pre-construction and construction phases. Thus allowing the project team to correctly monitor the project and make corrections if necessary.

2. Communication

Our performance contracting success springs from the high importance placed on communication between our project management team, the customer's team, and the subcontractors who perform the installation. We are skilled at avoiding the common pitfalls of poor communication, which may result in scheduling conflicts or delays in resolving issues. **A customer kickoff meeting** establishes the communication hierarchy between all entities. Weekly team meetings are held throughout the installation phase to continue the planning and coordination effort, and to inform all team members of the project status.

A focal point of these meetings is to closely coordinate the building's operations – and the needs of its occupants – with the construction activities. Trane's project manager and on-site superintendent will manage all installation subcontractors to ensure minimal interruption in day-to-day operations.

3. Planning and Scheduling

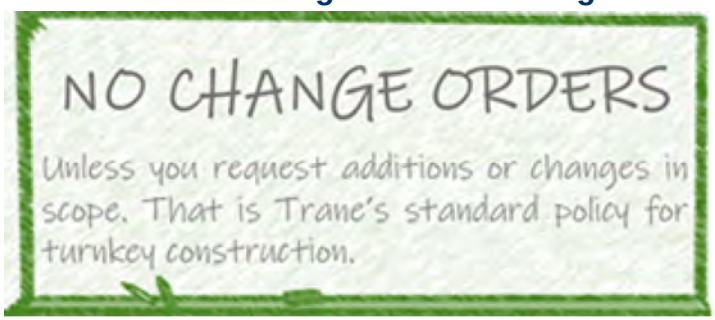
The project schedule is broken down into small manageable and measurable components, called a **work breakdown structure**. Each individual activity is then sequentially arranged and connected to other dependent activities to establish the project's critical path. This monitors progress to ensure that the project remains on target. The project management team also acts as a liaison between your personnel and the on-site subcontractors. Any conflicts in scheduling that arise during the installation phase are easily resolved through effective communication.

Manufacturer Neutrality is important to Trane. We define Energy Services Contracting as a partnership with our customer. Yes, we are the number 1 manufacturer of HVAC equipment in the world, both Commercial Residential, however Trane will ONLY recommend equipment solely based on a best value methodology (including customer preference) and WILL NOT include Trane manufactured equipment or controls when it does not meet that best value methodology (including customer preference).

Trane has performed plenty of Performance Contracts, which have taught us how to shorten project duration by getting into **DSA** ASAP. During prop 39, Trane was successful on every project achieving DSA exemptions and we would start the DSA process as soon as we completed the Audits. This meant shorter project duration, less cost allowing for more project scope to be performed. Stacking tasks in order to minimize project duration only comes with experience. Trane has the experience you want in this area. Materials ordering also occurs earlier in the process to ensure equipment is on site when it is needed to be installed.

Other planning and executing can involve the CEC for its known for excessive documentation, which needs to be approved prior to next steps. Once again, our experience working on CEC projects and our involvement with the California Public Utilities Commission (**CPUC**) brings anticipated tasks, checkpoints and documentation which Trane is used to performing. We are not planning on full construction within the schools on this project, and thus do not anticipate any involvement with OPSC.

On-Time and On Budget with No Change Orders Too many companies leave enough scope details vague so that they can ask for change orders once they have the job. Trane takes our role as a true partner of the District Seriously! We will put in the time and effort to get the scope right. If the scope was determined wrong, it should not be your fault or cost. This means you can expect the project to come in on-time and on-budget with no change orders!



4. Field Validation

After Trane has been given a Notice to Proceed, the preliminary findings outlined in our proposal will need to be **field verified for "constructability,"** which means identifying obstacles that could cause errors, delays, or cost overruns. This field validation will be incorporated into our final construction design. A set of engineer-stamped documents will be established for the project's scope of work. To provide full transparency, a third-party engineer will stamp the construction documents. The final documents will be reviewed with your team and then submitted for construction permits.

5. Mobilization

Upon completion of the construction documents, each component of the project will be organized into **sub-trade packages**. Each sub-trade package will be validated with our proposed design, schedule, and pricing structure. Sub-trade packages will be bid to local subcontractors, in most cases.

We will team with local subcontractors to develop our baseline pricing structure and anticipated scopes of work. This will minimize risk and any surprises after final engineering and design is completed. Upon the completion of the validation and engineering process, the sub-trades will

be contracted and will begin to mobilize. **Material and equipment will be ordered and expedited** in conformance with the project schedule.

6. Implementation

The project schedule will be finalized and reviewed with your team prior to implementation. Along with the weekly customer team meetings noted above, Trane holds **weekly construction progress meetings** with all subcontractors and major suppliers. This ensures that the construction progress remains in compliance with the project schedule.

Each subcontractor is required to maintain and submit daily logs documenting manpower, areas worked, tasks completed, and any safety issues or concerns. These are reviewed by the project manager and site superintendent in order to **monitor manpower requirements** and maintain accurate records for future reference. The site superintendent will closely coordinate the work of all trades involved in the project.

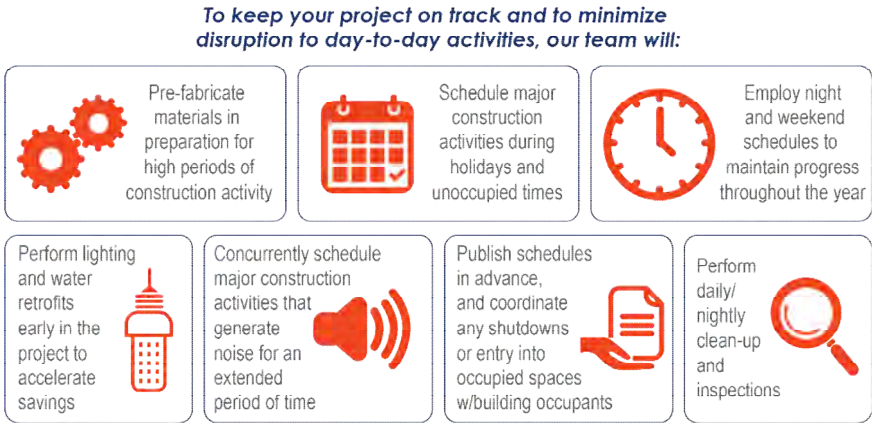
Trane requires all subcontractors to hold **weekly safety meetings** to address any anticipated safety concerns or any outstanding safety issues that need to be addressed. Trane's safety department requires strict compliance with the company's safety policies and all OSHA requirements. Trane enjoys an excellent Safety Experience Modification Rate (EMR) of 0.60, compared to the industry average of 1.00 – which means we have a much stronger safety track record than many of our peers.

Sets of **as-built drawings** will be updated on a daily or weekly basis as required, according to progress made by each subcontractor. This enables our customers to maintain an accurate record of construction after project completion. The as-built drawings are submitted at the end of the project with the equipment installation documentation, as well as operations and maintenance (O&M) manuals of all installed components.

Installation Obligations

Trane has performed many projects where labor agreements and need for skilled and trained workforce has been part of the project. This is not new to us. While most are similar, there can be subtle differences. Typically, it has us and our installing partners reporting certified payroll and participating in multiple audits through and following the project. We provide daily construction reports per school, and have even enrolled in Owner Controlled Insurance Programs (OCIP's). Under project Stabilization Agreements (PSA's), where local residents accounted for 50% for the positions for any one contractor, by craft.

Mitigating Disruptions to Daily Operations



Virtually all our performance contracting projects feature construction activities across multiple buildings and work in occupied spaces. Our local team is experienced in scheduling work activities and implementing energy conservation measures (ECMs) in a way that minimizes disruption to daily operations. We will work with your team to develop an effective project schedule and coordinate all implementation activities with project site representatives. For work performed in occupied areas – such as lighting and water conservation upgrades – we will attempt to schedule installation during low-occupancy times, as well as publish work schedules and estimated completion times well in advance.

Based on input from each building manager, we will develop a detailed phasing plan for each facility for your team's review prior to the start of construction. This phasing plan will include allowable work hours, days of the week that work is to be completed, and acceptable shutdown times for each occupied space.

7. Commissioning

Upon the completion of construction, our team will **identify a list of deficiencies or incomplete components** in the scope of work. Each subcontractor is required to complete all outstanding items within a reasonable timeframe and within the project schedule. Subcontractors also are required to submit final as-built drawings, which will be incorporated into a final set of documents prepared by the project engineering and design team. These drawings are packaged with all other construction installation documentation, equipment O&M manuals, warranties, and any other documentation from the construction phase.

Trane can utilize an in-house or a third-party commissioning agent to perform functional testing and verify that all systems are working to specification. Whichever you choose, the results will be reported directly to your team, and Trane will be held accountable for the results.

8. Construction Closeout and Turnover Process

Project Closeout involves both a legal and transitional component. All commissioning documents described above, as well as other contract documents, are submitted, providing a complete and accurate record of the project's construction phase. Trane then receives a **signed certificate of completion**

from the District, acknowledging that all project requirements to date have been achieved. The warranty start dates and terms for each newly installed piece of equipment or system are established and communicated. The project is then transitioned to Trane professionals who will provide any contractually required maintenance, measurement, and verification (M&V) or other services.

Trane's construction closeout and turnover process completes the installation period and transitions the program to operation, which trigger the guarantee period.

- Upon completion of construction and start-up, Trane will turn-over a complete and accurate performance contracting construction record in digital and binder format. Warranty start-dates will be clearly documented and submitted. Documents will be hosted indefinitely in the shared OneDrive established during the contract kick-off.
- The client, upon agreement and satisfaction, will submit a signed certificate of completion to Trane.
- Internally, Trane will seamlessly transition the project data to the performance period team measurement and verification team to monitor operational data and perform other services required by the contract.
- After making a large investment in a wide range of facility improvements, you will want assurance that they are delivering the expected savings. Our measurement and verification (M&V) process is transparent and agreed upon during the project development phase.
- Our engineers take periodic measurements of the equipment performance and issue quarterly reports, comparing the actual savings to the guaranteed amount. These figures are reconciled annually. Any excess savings are yours to keep. If actual savings fall short of the guarantee for that year, we will write a check for the difference or provide equivalent services or products (at your discretion).
- Regular maintenance must be provided on new equipment as long as the performance guarantee is in place. Depending on the type of performance guarantee, this service can be provided by your staff, by Trane or by a third-party firm. Trane offers one of the HVAC industry's largest and most experienced force of service technicians, who know how to optimize the performance of facility equipment from most manufacturers.
- Our local offices are fully staffed to provide ongoing support for additional HVAC, building automation and control systems, as well as parts and other services that you identify. We are also able to provide a wide range of energy and operational consulting services.

Several Training Options

New equipment will achieve a substantial part of the savings that you expect from a performance contract. Proper training of your staff on how best to operate that equipment will complete the picture.

Furthermore, an investment in boosting the skills of your facility staff will keep your buildings at peak operating efficiency.

Trane provides complete training resources to help you achieve these goals, including both technical competency and behavior modification training to underscore the importance of energy conservation.

To begin with, we'll assess the skills of the people who operate and maintain your buildings. This will involve interviews with facility managers and staff. Once we understand their competency levels, we'll recommend a training plan to upgrade their skills to maximize the energy savings promised by the new equipment. **The selected training program will be mutually agreed upon by both of our organizations.**

You can choose from a variety of training programs, which can be conducted at your location, at a nearby Trane office, at our national training centers, or through training manuals. We can include any combination of these resources, depending on your preference. This project includes on-site training; the other training options below are available for an additional cost.

Our course instructors have strong controls and HVAC service backgrounds. They draw on the expertise of Trane applications engineers, product engineers, technical support engineers and product development teams to provide the highest quality training experience. This means that your staff will be equipped with the most current best practices in facility operation.

On-Site Training:

This training is designed around applications specific to your facilities. Examples include:

- System training to understand the installed equipment and its operation
- Controls training to obtain the best performance from your building automation system
- Shadowing Trane technicians while we provide contracted maintenance services

Office Training:

Enjoy customized training for your employees at our offices. This includes the material covered in our Trane University courses listed below.

Trane University:

Trane University offers Building Systems and Controls training in St. Paul, MN and Technical Service training in La Crosse, WI, (during normal circumstances). These courses also can be conducted at Trane offices throughout North America. In either case, our instruction will further advance your staff's understanding of systems and the interaction between various components. Well-trained facility managers and technicians will minimize service costs by efficiently identifying and correcting problems.

- ***Building System and Controls*** training offers a comprehensive portfolio of technical courses to help you effectively monitor and coordinate your HVAC equipment and systems using your Trane building automation system.

- ***Technical Service*** training offers factory training for commercial systems service, maintenance and operation. These courses are designed to increase technician competence and confidence when servicing HVAC and controls systems.

Trane A/C Clinics:

We've developed several training manuals to support our in-person training efforts, including an A/C Clinic. This comprehensive course covers the fundamentals of heating, ventilating, and air conditioning. Each clinic includes a student workbook, with corresponding quiz questions/problems. This is a cost-effective way of increasing the competency of your staff.

Staff Involvement

An important, but sometimes overlooked aspect of a performance contract is the impact of building occupants on the project's overall success. In addition to facility staff, your employees should understand the importance of energy conservation and how their day-to-day actions can contribute to the project's total savings. Through this type of education, we are striving to change the *culture*, not just the *building*. The goal is to provide your staff with no cost or low-cost strategies that they can implement quickly, thereby increasing the program's overall savings.

Post Project office capabilities

The Trane offices in Sacramento and Fresno have full service capabilities, which include: full HVAC servicing of any manufacture's equipment; full controls automation servicing of Trane and other manufacturers; remote 24/7 monitoring capabilities to ensure quick response to any failures; and Trane Intelligent Services, which connects data and analytics to your buildings to provide powerful insight to your operations.

Safety

Deploying large Energy Efficiency and Infrastructure Modernization Programs in active campuses require a strong and proven safety program. Trane's current Safety Experience Modification Rate (EMR) is .60 compared to the industry average of 1.00. Our safety department requires strict compliance to Trane company policies from all employees and partners. To the best of our knowledge, Trane CA has not had any prior serious or willful violations of the California Occupational Safety and Health Act (OSHA) or the federal OSHA, settled against any member of our firm.

The strength of our safety program is rooted in a healthy balance between utilizing standard, proven practices and teaming with our clients to address specific campus operations and risks. Occupied and active District campuses are traditionally challenging spaces to improve aging infrastructure while avoiding disruption. Trane developed several measures to ensure maximum safety and minimum interference with day-to-day operations.

- Employees are instructed to have no communication with any student
- All employees performing work on campus have fingerprinting clearance/live scanned
- Work areas are clearly marked and cordoned off as necessary
- Work will be performed outside of educational hours whenever possible
- Check in with the designated District representative to learn of any special circumstances at the beginning of each day
- Evaluate job site conditions at the beginning of each day

- Conduct weekly safety meetings and daily task planner to prevent possible harm to students, staff members, Trane personnel, and our installers.
- Trane is prepared to support the School District's security requirements, including the following measures:
    - Badging and Background Checks: At the outset of the audit, we will identify District requirements for each of the sites included in the Program, and document where escorts are required

Financing Options

Trane can facilitate all financing projects and coordinate with the appropriate utility company on rebates, incentives, and the 0% On-Bill-Financing energy efficiency loan program as those options are available.

Trane is a large, successful, financially stable company that can procure and provide **various financing options** for energy projects. Based on our past performance experience and credit worthiness, Trane can attract all the major financial firms to competitively bid and provide the best financial rates. Our financial support process is transparent, seamless, timely, and cost-effective, with the most competitive interest rates available. We have highlighted different financing methods below.

Trane Purchasing Programs

Anticipation Discount Program

The Trane **Anticipation Discount Program** can give you the opportunity to reduce the cost of equipment purchases by making payment prior to shipment. This method reduces program costs, enhance your credit standing, and gain immediate order approval. Trance can customize the program for different projects utilizing Trane HVAC supplies, which allows for variable payment amounts in addition to variable payment dates. The amount of the final discount is based on a formula that incorporates several factors including payment amount, time of payment, current discount rate and sipping dates.

Loans

Bank or Specialty Energy Savings Performance Contracting (ESPC) Lender

A loan from an existing creditor is often an efficient way to access funding and leverage additional funds on deposit to secure favorable rates. However, traditional lenders often require shorter terms, substantial down payments/collateral, pre-specified credit ratios, and strict covenants. Trane has established relationships with Specialty ESPC Lenders that are comfortable with performance contracting and longer-term loans. Trane's banking partners have invested billions of dollars in ESPCs and renewable energy projects for tax-exempt client organizations. In this case, Trane has no interest or stake in the financing option chosen. The client makes payments directly to the selected lender and will own the assets at the end of the financing term. Trane's clients have financed projects through lenders including Bank of America, Bluepath

Financial, Bostonia, DLL, Grant Capital, Hannon Armstrong, Metrus Energy, Truist, US Bank, and Wells Fargo.

Property Assessed Clean Energy (PACE) Loans

PACE loans are intended to promote the adoption of clean and energy-efficient and include improvements like solar panel installations, energy-efficient windows, insulation, and HVAC system upgrades. The loans are repaid through an assessment on the property's tax bill over an extended period, typically 10-25 years. The loan is attached to the property, so if the property is sold, the new owner assumes the remaining loan obligations. PACE loans often have lower interest rates compared to traditional financing options and the repayment is made through property tax assessments. PACE loan programs vary across jurisdictions and are available in areas where state legislation has authorized them, and local governments have implemented the program.

Third-Party Ownership Models

Energy Service Agreement (ESA) / Managed Energy Services Agreement (MESA)

An ESA/MESA is a type of contractual agreement between an ESCO and typically a commercial or industrial entity. In this arrangement, the ESCO takes responsibility for managing and optimizing the client's energy-related systems and infrastructure. This is a credit-neutral/off-balance-sheet structure with zero upfront capital outlay. A third-party installs energy efficiency equipment and the client agrees to make contingent payments based on the energy savings or other contractual performance realized, rather than a fixed debt-service payment that is typical under an ESPC. The arrangement is structured as a service contract and often includes the supply, installation, operation, maintenance, and financing of energy-related equipment and systems, such as HVAC systems, lighting, renewable energy generation, and energy storage. Payments are made from operating funds and is always less than or equal to the corresponding reduction in operating costs.

Energy as a Service (EaaS)

An EaaS allows an organization to outsource their energy needs to a third-party service provider that handles energy procurement, management, and optimization. By working with an EaaS provider, organizations can transfer certain risks associated with energy procurement, market fluctuations, regulatory changes, and technology obsolescence to the service provider. Key aspects of an EaaS are:

- **Comprehensive Energy Solutions:** Includes energy procurement, demand response, energy efficiency upgrades, renewable energy installations, energy storage, and other customized energy solutions.
- **Outsourcing Energy Infrastructure:** Avoids the upfront costs and complexities associated with owning and maintaining energy infrastructure. The EaaS provider takes responsibility for designing, implementing, and operating energy systems.

Performance-Based Agreements: Contracts are often structured as performance-based agreements. The service provider guarantees a certain level of energy savings, performance, or cost reduction, and the organization pays based on the achieved results.

Energy Monitoring and Optimization: Employs a data-driven, advanced monitoring and analytics tools to continuously track energy consumption, identify inefficiencies, and optimize energy usage.

Power Purchase Agreement (PPA)

A PPA is a legally binding contract between a power producer and a buyer, typically an electricity purchaser like a utility, corporation, or government entity. The PPA establishes the terms and conditions under which the power producer will generate and supply electricity to the buyer over a specified period and allows them to lock in a low and consistent utility rate in exchange for hosting energy generating assets. PPAs provide a long-term revenue stream for power producers and allow electricity buyers to procure a predetermined amount of renewable energy and meet their sustainability and renewable energy targets.

Under a PPA, the power producer agrees to develop, construct, and operate a power generation facility, such as a solar farm, wind farm, or power plant. The buyer commits to purchasing all or a portion of the electricity generated by the facility at an agreed-upon price or rate. The PPA may also include provisions for factors such as the duration of the agreement, the delivery schedule, the terms for supply interruptions, and any penalties or incentives related to performance. The duration of a PPA can vary, ranging from several years to several decades, depending on the agreement between the parties and any regulatory or market factors. At the end of the PPA term, the power producer may choose to sell the facility, negotiate a new PPA with the same or a different buyer, or explore other options.

Tax Credits & Utility Rebates

There are often federal, state, and local grants and utility rebates that can be used to offset the cost of an energy efficiency project. Trane's detailed energy studies can form the foundation for these applications. Recent legislation has expanded long-standing corporate tax incentives for commercial and industrial building operators. Every incentive program varies by property, solutions applications, and location.

Our national incentive team keeps us up to date on any Federal, local, and industry funding availability. Trane continuously monitors and collaborates with federal agencies to develop new funding programs and promotes related funding opportunities.

Most federal funding programs flow to local building owners through state agencies (i.e. State Energy Programs, State Weatherization programs). Trane works together with local program implementers such as state energy offices to help our clients capture appropriate funding for their projects. Trane works with the world's leading accounting experts, grant writers, and law firms to navigate the nuanced guidelines of incentive programs so that our clients can capture and maximize grant, utility, and federal tax incentives for their energy efficiency, renewables, energy storage, and electrification projects.

Utility Rebates and Incentives

U.S. utilities award commercial and industrial facilities with over $4 billion worth of incentives for investments in building electrification, energy efficiency improvements, water conservation, load shifting, and renewable energy generation. While some rebates are straightforward with Day 1 benefit, others require more tailored monitoring and reporting after the project is finished.

Our expertise in manufacturing leading edge, high-efficiency building technologies and managing high-efficiency, decarbonized building operations enables our customers to qualify for the applicable utility incentives from project initiation to final refund.

Federal Tax Incentives

Recent legislation has expanded long-standing corporate tax incentives for commercial and industrial building operators. Every incentive program varies by property, solutions applications, and location. We work with the world's leading legal accounting and tax experts to help customers navigate the complex landscape of each program. Notable incentives include:

Section	Name	Applicability	Value
48 ITC	**Energy Property Investment Tax Credit**	Tax credit for investments in renewable energy projects; incl: solar, geothermal heat pumps, energy storage, thermal energy storage, and combined heat & power	Up to 70%
48E ITC	**Clean Electricity Investment Tax Credit**	Technology-neutral tax credit for investment in facilities that generate clean electricity; Replaces 48 ITC after 1/1/2025	Up to 70% of the qualified property investment costs
179D	**Energy Efficient Commercial Buildings Tax Deduction**	Tax deduction for improving commercial building energy efficiency > 25%, eligible improvements incl: interior lighting; HVAC & hot water; and building envelope.	Up to $5.65/sq. ft.
45 PTC	**Electricity Production Tax Credit**	Tax credit for facilities producing electricity from renewable sources, incl: wind, biomass, geothermal, solar, and more	Up to $2.75/kWh *addt'l bonus credits available
45Y PTC	**Clean Energy Production Tax Credit**	Technology-neutral tax credit for production facilities generating clean electricity for which the GHG emissions rate is zero	Up to $2.75/kWh *addt'l bonus credits available
48C	**Advanced Energy Project Credit**	Tax credit for investing in property that either: a) Produces/recycles advanced energy components (inc. solar modules, inverters and batteries) b) Re-quips industrial or manufacturing facilities w/ equipment designed to reduce GHG emissions by >20%	Up to 30%

Section	Name	Applicability	Value
48D ITC	Advanced Manufacturing Investment Credit	Tax credit for retrofit or new construction of semiconductor and/or related equipment domestic manufacturing facilities (incl. HVAC)	Up to 25% of qualifying investment
45X PTC	Advanced Manufacturing Production Credit	Tax credit for domestic production of eligible solar, wind and battery components	Varies by component

K-12 District References

Clovis Unified School District

Clovis, California

Performance Contracting

CONTACT

Denver Stairs
Assistant Superintendent, Facilities
(559) 327-9260
DenverStairs@clovisusd.k12.ca.us

ROLE PERFORMED FOR PROJECT

Ph 1 & 2 General Contractor on Development, Design, Installation, Commissioning, and Warranty. Engaged with quarterly check-ins as well as annual measurement and verification reporting. Trane balanced performance contracting with ESSER funding to expand possible scope to greatly increase the number of HVAC units being replaced. ECMs include:

- Packaged HVAC unit replacements
- Exterior LED Lighting retrofit

PROJECT TYPE

Energy Services Agreement. **ESSER Funding**, Governor's surplus funds

PROJECT LOCATION

8316 Red Oak Street
Rancho Cucamonga**,** CA

ANNUAL ENERGY SAVINGS VERIFIED

Ph 1 First-year guaranteed savings of:

- $141,492 in Energy Savings
- $98,430 in Operational Savings

DSA CERTIFICATION AND CLOSE-OUT STATUS,

Complete

PROJECT DURATION

Ph 1 2021-2022
Ph 2 2023-2024

TOTAL PROJECT COST

Ph 1 $5,549,168
Ph 2 $7,050,198

Sanger Unified School District

Sanger, California

Performance Contracting

CONTACT

Ryan Kilby, CBO

559-524-6521

ryan_kilby@sangerusd.net

ROLE PERFORMED FOR PROJECT

Ph 1. Trane was the General Contractor on this ESSER funded project.

- Packaged HVAC unit retrofits

Ph 2 Trane performed Design Build HVAC replacement and upgrades of 2 gym buildings on one campus

PROJECT TYPE

Ph 1. ESSER

Ph2. Capital with Financing

PROJECT LOCATION

1905 Seventh Street

Sanger CA 93657

DSA CERTIFICATION AND CLOSE-OUT STATUS,

Complete

PROJECT DURATION

Ph 1 2023 – 2023

Ph 2 2024, 2024

TOTAL PROJECT COST

Ph 1 $844,181

Ph 2 $4,450,386

Manteca Unified School District

Manteca, California

Large Design Build Project

CONTACT INFORMATION

Aaron Bowers

Director of Facilities and Operations

209-858-0802

abowers@musd.net

SCOPE OF PROJECT

Replacement of over 500 package units and split systems on 18 Campus's across the district

Installation of Trane Controls District wide over all campuses where HVAC equipment was replaced

PROJECT TYPE

ESSER Funds

PROJECT LOCATION

2271 W Louise Ave, Manteca, CA 95337-8381

CLOSE-OUT STATUS

Complete

PROJECT DURATION

2023-2024

TOTAL PROJECT COST

$18,429,189

Folsom Cordova USD

Folsom, California

Large Design Build Project

CONTACT INFORMATION

Jim Bonovich
Dir Maintenance and Operations
916-631-0501
jbonovic@fcusd.org

SCOPE OF PROJECT

Large Project to replace package units at multiple campuses.

PROJECT TYPE

ESSER Funds

PROJECT LOCATION

735 Halidon Way, Folsom, CA 95630

PROJECT DURATION

2020-2022

TOTAL PROJECT COST

$6,930,069

CONTACT INFORMATION

Kirk McCallum, Facilities, Operations & Maintenance Supervisor
(775) 463-6800
kmccallum@lyoncsd.org

ECM's PERFORMED FOR PROJECT

- Each school was provided with upgraded DX Split System air handling units and condensing units along with controls and infrastructure upgrades.
- Cottonwood ES: (3) AHU's & CU's
- Sutro ES: (3) AHU's & CU's

PROJECT TYPE

HVAC Modernization Upgrades – General Funds

PROJECT LOCATION

Cottonwood Elementary School:
925 Farm District Rd
Fernley, NV 89408

Sutro Elementary School:
190 Dayton Village Pkwy
Dayton, NV 89403

PROJECT DURATION

2023 - 2024

TOTAL PROJECT COST

Total Project: $3,025,537
Cottonwood Elementary: $1,573,280
Sutro Elementary: $1,452,258

PERMIT AND CLOSE-OUT STATUS

Complete

Letters of Recommendation

Letter of Recommendation 1: Clovis Unified School District, Clovis, CA

CLOVIS UNIFIED SCHOOL DISTRICT

11-23-2022

Doug Walker
Senior Sales Executive
Trane U.S. Inc.
4145 Delmar Avenue
Rocklin, CA 95677

To Whom It May Concern,

I am writing this letter as a referral of Trane U.S. Inc (Trane) on behalf of Clovis Unified School District (CUSD). Over the last year, Trane has been a partner with us to collaboratively develop, price, and construct much needed infrastructure for our organization. This work was procured using Government code 4217, which aligns and accomplishes the major goals of our organization.

The measures performed include:

- HVAC replacement
- Lighting retrofits

The partnership with Trane through this process has been truly collaborative. Trane continues to work in a fashion that showcases their desire to create an unparalleled customer experience and puts us, as the client, first. Trane faithfully performed under this contract with the highest level of safety, workmanship, professionalism, and expertise. It has caused us to move to a second phase of work which was just approved by our board.

Trane was able to clearly communicate and provide guidance through the duration of the project's schedule, as well as successfully and smoothly navigate through the challenges and adversity of a complex infrastructure project of this type and magnitude.

It should also be noted that Trane's knowledge about the many options available regarding energy, other utilities, and their markets, is extensive. They have developed a strong relationship with the local community resources and are constantly aware of the available industry technologies and available incentives that allows for maximized return on investment.

My team and I would recommend any organization with large infrastructure needs to work directly with Trane in the future. Trane truly believes and cares about their work. This shines through in what we have accomplished at our facilities. Please feel free to contact me with any questions regarding the above.

Sincerely,

Denver Stairs
Assistant Superintendent Facilities
Clovis Unified School District

1450 Herndon Avenue • Clovis, CA 93611-0599
559-327-9000 • www.cusd.com

Letter of Recommendation 2: Sanger Unified School District, Sanger, CA

SANGER UNIFIED SCHOOL DISTRICT
1905 SEVENTH STREET • SANGER, CA 93657
(559) 524-6521 FAX (559) 875-0311

ADELA MADRIGAL JONES
SUPERINTENDENT

March 29, 2022

Doug Walker
Senior Sales Executive
Trane U.S. Inc.
4145 Delmar Avenue
Rocklin, CA 95677

Subject: Reference Letter of Trane U.S. Inc for Performance Contracting project

To Whom It May Concern,

I am writing this letter as a referral of Trane U.S. Inc (Trane) on behalf of Sanger Unified School District (SUSD). Over the last 10 months, Trane has been a partner with us to collaboratively develop, price, and construct much needed infrastructure for our organization. This work involved replacing HVAC in a very short amount of time, to complete work ahead of new regulations.

The partnership with Trane through this process has been truly collaborative. Trane continues to work in a fashion that showcases their desire to create an unparalleled customer experience and puts us, as the client, first. Trane faithfully performed under this contract with the highest level of safety, workmanship, professionalism, and expertise.

Trane was able to communicate and provide guidance well through the duration of the project's schedule, as well as successful and smooth navigation through the challenges and adversity of a complex infrastructure projects of this type and magnitude.

My team and I, as well as the entire SUSD organization, would recommend any organization with large infrastructure needs to work directly with Trane in the future. Trane truly believes and cares about their work. This shines through in what we have accomplished at our facilities. Please feel free to contact me with any questions regarding the above.

Sincerely,

Ryan Kilby
Chief Operations Officer
Sanger Unified School District
ryan_kilby@sangerusd.net

Every Child, Every Day, Whatever it Takes!

Trustees: Peter R. Filippi Va Her Ismael (Mike) Hernandez
Jesse Solorio G. Brandon Vang Jesse Vasquez Tammy Wolfe

Some of our K-12 projects performed over past 5 years

There is no better way to show a company that they did an excellent job, other than committing to and performing another project with them. We have remarkable success with School Districts performing an initial project, and then moving forward with additional phases of work through the years. This Chart shows some of our CA K-12 projects worked on over the past 5 years, along with the multiple phases.

Project Name	Scope	Total Value	Contact
Bakersfield City School District- Infrastructure & Energy Upgrade Phase 1	2020 Prop 39 - Lighting, Controls, and HVAC	$1,098,624.84	Sherry Gladin Asst Superintendent Business Services 661-631-4600 gladins@bcsd.com
Bakersfield City School District- Infrastructure & Energy Upgrade Phase 2	2021 Performance Contract - Lighting, Controls, and HVAC	$2,223,994.27	Sherry Gladin Asst Superintendent Business Services 661-631-4600 gladins@bcsd.com
Brawley Elementary School District Lighting and Mech Renovation	2020 - Lighting, Lighting Controls, DSA-approved HVAC Packaged Unit Replacements	$4,098,363.14	Cynthia Dickerson Director of Fiscal Services 760-334-2330 cdickerson@besd.org
Capital Christian Center	2022 - Controls	$580,480.00	Rich Hillmer Director of Facility Operations 916-870-2473 rich@ccconline.cc
Chino Valley USD - Design-Build Phase 3	2020 - Lighting Systems, Transformers Upgrade	$12,582,312.89	Carla Kleinjan Sustainabiity Coordinator 909-628-1201 carla.keinjan@chino.ca.us
Clovis USD PACT phase 1	2021 - HVAC, Transformers, Lighting	$5,600,000.00	Denver Stairs Assistant Superintendent Facilities 559-327-9260 DenverStairs@clovisusd.k12.ca.us

Project Name	Scope	Total Value	Contact
Clovis USD PACT phase 2	2022 - HVAC Replacements	$7,050,198.00	Denver Stairs Assistant Superintendent Facilities 559-327-9260 DenverStairs@clovisusd.k12.ca.us
Folsom Cordova Gold Ridge Elementary School	2022 - HVAC Replacement	$1,891,345.00	Jim Bonovich Dir Maintenance and Operations 916-631-0501 jbonovic@fcusd.org
Folsom Cordova USD Folsom MSA 2-Story Bldg	2022 - HVAC Replacement	$1,400,612.45	Jim Bonovich Dir Maintenance and Operations 916-631-0501 jbonovic@fcusd.org
Folsom Cordova USD - Mills MS	2022 - HVAC Replacement	$1,732,097.48	Jim Bonovich Dir Maintenance and Operations 916-631-0501 jbonovic@fcusd.org
Folsom Cordova USD - Natoma Station ES	2022 - HVAC Replacement	$1,906,015.00	Jim Bonovich Dir Maintenance and Operations 916-631-0501 jbonovic@fcusd.org
Irvine USD Energy Performance Contract	2022 - Lighting, Transformers, HVAC Replacement, Controls	$7,224,104.00	Joe Hoffman Dir M&O 949-936-5303 Joehoffman@LYON CSD.org
Los Angeles Unified School District	2021 - Lighting retrofit, Transformers Upgrade	$10,314,704.00	Peter Yee Sr. Project Mgr. 213-241-6271 peter.yee@lausd.net
Los Angeles Unified School District Charter Schools	2021 - Interior and Exterior Lighting Systems (14)	$3,622,511.00	Peter Yee Sr. Project Mgr. 213-241-6271 peter.yee@lausd.net

Project Name	Scope	Total Value	Contact
Manteca Unified School District	2023 HVAC & Controls Upgrade of 16 Campuses	$18,429,189.	Aaron Bowers Director of Facilities and Operations 209-858-0802 abowers@musd.net
Merced City School District	2023 - Controls	$2,585,024.00	Doug Williams Director M&O 209-381-2841 dswilliams@mcsd.k12.ca.us
Morongo Unified School District - ESSER - Phase III	2022 - HVAC Replacement, EMS, LED Lighting	$6,000,000.00	David Daniels Facilities Director 760-367-9191 David_Daniels@morongo.k12.ca.us
Placer Union High School District Phase 2	2020 - Lighting Systems, Controls, Pool Pump VFD	$420,265.00	Jeff Patton Dir of M&O 530-308-7461 jpatton@puhsd.k12.ca.us
Rialto Unified School District - Infrastructure & Energy Upgrade Phase 4	Lighting Systems & Controls, Transformers, HVAC Replacements, Water Fixtures	$14,527,952.00	Angie Lopez Exec Dir Facilities, M&O 909-421-7555 aploez@rialto.k12.ca.us
Salida Union School District - ESSER	HVAC and Controls	$2,659,600.00	Twila Tosh Superintendent 209-545-0339 Ttosh@salida.k12.ca.us
Sanger USD	HVAC Replacement	$844,181.00	Ryan Kilby, CBO 559-524-6521 ryan_kilby@sangerusd.net
Simi Valley Unified School District Infrastructure Upgrade Phase 2	Lighting Systems & Controls, DSA-Approved HVAC Replacements & Controls	$2,929,936.91	Pedro Avila Dir. of Facilities 805-306-4500 Ext. 4401 pedro.avila@simivalley.org
Whittier Union High School District ESCO Services	2022 - HVAC unit retrofits, Lighting, HVAC EMS	$3,122,640.00	Steven Rodriguez Dir. Business Operations 562-698-8121

Subcontractor Information & Project Personal overlap.

Subcontractor Information: Does this proposal include the use of subcontractors?
Yes _X___ No _____ Unknown _____

Until final scope of work is determined, we do not know the specific installing subcontractors we may need to bring on for your project. The main point we want to share is that if we are not self performing the work, our selected subcontractors will be local to the Reno area and from a pool of preapproved and qualified subcontractors that a have gone through our vetting process. These would be companies who you are also familiar with.

Below is a list of our references projects and those from the Trane team who worked on these projects and would **also be working on your projects**:

Clovis USD

- Ian Leisle - Project Development
- Doug Walker – Energy Services
- Keit Tan – Area General Manager
- Scott Krebs – Contracting Operations Leader
- Dean Perry – Project Development Manager
- Omar Hattab – Energy Engineer
- Natasha Vassallo – M&V
- Eileen North – Contract Administration

Sanger USD

- Ian Leisle - Project Development
- Doug Walker – Energy Services
- Keit Tan – Area General Manager
- Scott Krebs – Contracting Operations Leader
- Dean Perry – Project Development Manager
- Eileen North – Contract Administration

Lyon County SD

- Alec Lyons – Account Manager
- Ian Leisle - Project Development
- Doug Walker – Energy Services
- Keit Tan – Area General Manager
- Scott Krebs – Contracting Operations Leader
- Connor Secrest – Project Manager
- Javier Estrada - Superintendent
- Dean Perry – Project Development Manager
- Eileen North – Contract Administration

Folsom Cordova USD

- Keit Tan – Area General Manager
- Dean Perry – Project Development Manager
- Eileen North – Contract Administration

Manteca USD

- Ian Leisle - Project Development
- Keit Tan – Area General Manager
- Scott Krebs – Contracting Operations Leader
- Dean Perry – Project Development Manager
- Omar Hattab – Energy Engineer
- Natasha Vassallo – M&V
- Eileen North – Contract Administration

Trane Contracting Litigation or Failed Projects

- Trane has not ever been terminated or dismissed by a client or replaced by another firm during any educational project.
- Trane has no pending litigation presently or over the past 5 years in Nevada.
- Trane has not defaulted on a contract within the past 5 years, nor have we declared bankruptcy, or been placed in receivership within the past 5 years.

TAB 4 Costs

Please see separate envelope for Tab 4 contents.

Appendix 1

Example of Insurance Information

ACORD®

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 5/1/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER MARSH & MCLENNAN COMPANIES 1166 Avenue of the Americas New York NY 10036 ATTN: 212-345-6000	CONTACT NAME: Michaela Grasshoff, ARM PHONE (A/C, No, Ext): 212-345-2794 FAX (A/C, No): E-MAIL ADDRESS: Michaela.Grasshoff@marsh.com
INSURED Trane U.S. Inc. dba Trane 800E Beaty Street Davidson, NC 28036 United States	INSURER(S) AFFORDING COVERAGE / NAIC # COMPANY A: Old Republic Insurance Company 24147 COMPANY B: Travelers Indemnity Co of America 25666 COMPANY C: Travelers Property Casualty Co of Amer 25674

COVERAGES **CERTIFICATE NUMBER:** 728160 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR X TIME ELEMENT POLLUTION LIABILITY X CONTRACTUAL LIABILITY GEN'L AGGREGATE LIMIT APPLIES PER: POLICY X PRO-JECT X LOC OTHER:			MWZY 317456-23	4/17/2023	4/17/2024	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG policy aggregate	$10,000,000.00 $1,000,000.00 $10,000.00 $10,000,000.00 $10,000,000.00 $10,000,000.00 $20,000,000.00
A	AUTOMOBILE LIABILITY X ANY AUTO OWNED AUTOS ONLY HIRED AUTOS ONLY SCHEDULED AUTOS NON-OWNED AUTOS ONLY PHYSICAL DAMAGE/SELF INS. APD - Self Insured			MWTB 317455-23	4/17/2023	4/17/2024	COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$10,000,000.00 $
	UMBRELLA LIAB OCCUR EXCESS LIAB CLAIMS-MADE DED RETENTION $						EACH OCCURRENCE AGGREGATE	 $
B B C C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANYPROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBEREXCLUDED? (Mandatory in NH) Y/N: N If yes, describe under DESCRIPTION OF OPERATIONS below	N/A		UB-8M35413A-23-51-K (AOS) UB-9L048059-23-51-D (MN) UB-8M370386-23-51-R (AZ,MA,OR,WI) TWXJ-UB-7434L45A-23 (OH)	4/17/2023 4/17/2023 4/17/2023 4/17/2023	4/17/2024 4/17/2024 4/17/2024 4/17/2024	X PER STATUTE OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	 $3,000,000.00 $3,000,000.00 $3,000,000.00

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Please see page 2 for additional information.

CERTIFICATE HOLDER	CANCELLATION
Evidence of Insurance , ,, , United States	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE Marsh USA, Inc. BY: Michaela Grasshoff, ARM

ACORD 25 (2016/03) The ACORD name and logo are registered marks of ACORD

Requested By:Marsh TraneTechnologies

ADDITIONAL REMARKS SCHEDULE

AGENCY	NAMED INSURED Trane U.S. Inc. dba Trane 800E Beaty Street Davidson, NC 28036 United States
	EFFECTIVE DATE:

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: _____ **FORM TITLE:** _____

Evidence of Insurance is included as Additional Insured where required by contract with respect to General Liability pursuant to applicable endorsement.

Evidence of Insurance are included as Additional Insured where required by contract with respect to Automobile Liability pursuant to applicable endorsement.

Job Description: For Purposes of RFP Submission and General Evidence of Insurance

For questions regarding this certificate of insurance contact: Marsh TraneTechnologies Email: Trane.Certificates@marsh.com Phone:

IL 10 (12/06) OLD REPUBLIC INSURANCE COMPANY

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED – WHERE REQUIRED UNDER CONTRACT OR AGREEMENT

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART/FORM

It is agreed that such insurance as is afforded by the policy applies subject to the following provisions:

SECTION II - WHO IS AN INSURED is amended to include as an additional insured:

1. Any person or organization to whom you become obligated to include as an additional insured under this policy, as a result of any written contract or agreement you enter into which requires you to furnish insurance to that person or organization of the type provided by this policy, but only with respect to liability to the extent caused by you and arising out of your operations, including both continuing and completed operations, or premises owned by or rented to you; or

2. Any designated person or organization, designated by you in writing to us, but only with respect to liability to the extent caused by you and arising out of your operations or premises owned by or rented to you and provided the "bodily injury", "property damage" or "personal and advertising injury" occurs subsequent to your written request to designate such person or organization as additional insured.

However, the insurance provided will not exceed the lesser of:

a. The coverage and/or limits of this policy; or

b. The coverage and/or limits required by said contract or agreement.

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MWZY 317456 23 Trane Technologies Company LLC 04/17/23 - 04/17/24

ATTACHMENT 2