

Parkrose School District

Permissive Cooperative Procurement - Completed by Robyn Stolin 3/10/2022

Site: District-wide

Project Description:

Current: Primary: All district sites are in need of lighting & energy system updates to address failing and outdated lighting & energy system equipment with the additional benefit of significant energy savings. Secondary: Russell and Prescott need HVAC upgrades for improved ventilation. This is being included as part of an ESPC due to the significant percentage of energy used for HVAC.

Proposed: Select Ameresco to be the district's Energy Service Company (ESCO) to create an Energy Savings Performance Contract (ESPC) tasked to identify, through an investment grade audit, and implement a bundled set of infrastructure upgrades (HVAC, lighting, etc.) at schools in Parkrose SD under the City of Medford co-op provision including timeline for issuing a public notice and company selection. The co-op agreement guarantees the district:

- Guarantee maximum pricing (GMAX) limit unforeseen budget overages
- Guarantee energy savings, backed up by the ESCO coming back a year(s) later to confirm the savings with an official Measurement and Verification audit of the projects' outcome.
- Guarantee State procurement responsibilities are taken care of by ESCO selecting/bidding out all the different trades necessary to perform the work.

Currently, the investment grade audit would focus mostly on the following:

- Test and retro-commissioning of HVAC systems
- Lighting and lighting control retrofit
- Ventilation retrofit at Prescott & Russell

The total approximate cost of upgrades could cost \$2 million plus BUT all details of the proposed upgrades scope would be presented and approved before moving forward.

Funding:

- Investment grade audit is projected to cost approximately \$45k but that cost would be rolled into the costs for the approved upgrades. This cost would be paid out if we were not to move forward with Ameresco or the upgrades after the audit.
- SB1149 funds would be the initial source of funding for all energy related upgrades.
- Energy Trust rebates would be utilized to their fullest extent for all energy related upgrades (\$ amount TBD).
- ESSER funds would be an option for funding ventilation improvements.
- Low interest financing, offset by future SB1149 funds and future utility cost savings, would be another funding option for any remaining project costs.



Classroom Environment & Facilities Improvement

Feasibility of Self-Funding Capital Projects

Parkrose School District

**Portland, Oregon
October 2021**



ameresco.com



Parkrose
School District



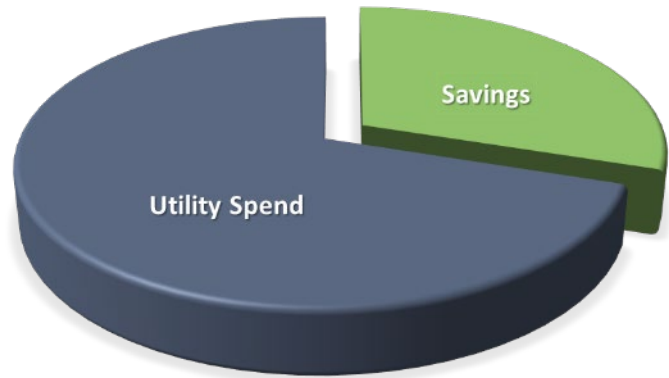
Agenda

- Brief overview of Ameresco
- Review of current challenges & mitigating those risks with Ameresco
- Project findings by facility
- Impact of investing now vs. not
- How to get from feasibility to investment and implementation
- Discussion & Questions

What are we? How do we build a partnership?

Energy Savings Fund Budget-

Neutral Improvements



Our Guarantees

1. Maximum Project Cost
2. Energy Savings/Generation
3. Performance & Verification



Ongoing Support and Partnership

Northwest Experience

School District Customers: 70+

Total implemented: 150+ project phases

Total contract values: \$165 million

Oregon School District Partner Highlights:

Bethel School District – \$3.6 M

Grants Pass School District – \$15 M

Hillsboro School District – 2 Phases, \$4 M

Jefferson County School District - \$1.5 M

Phoenix-Talent School District – \$5 M

Portland Public Schools – 9 Phases, \$12 M

Silver Falls School District – \$2 M

South Lane School District – 2 Phase, \$2.3 M



SOUTH LANE SCHOOL DISTRICT



BETHEL SCHOOL DISTRICT



PORTLAND PUBLIC SCHOOLS

Where and why our clients are engaging Ameresco



What Ameresco brings to the table

CHALLENGES

Aging infrastructure

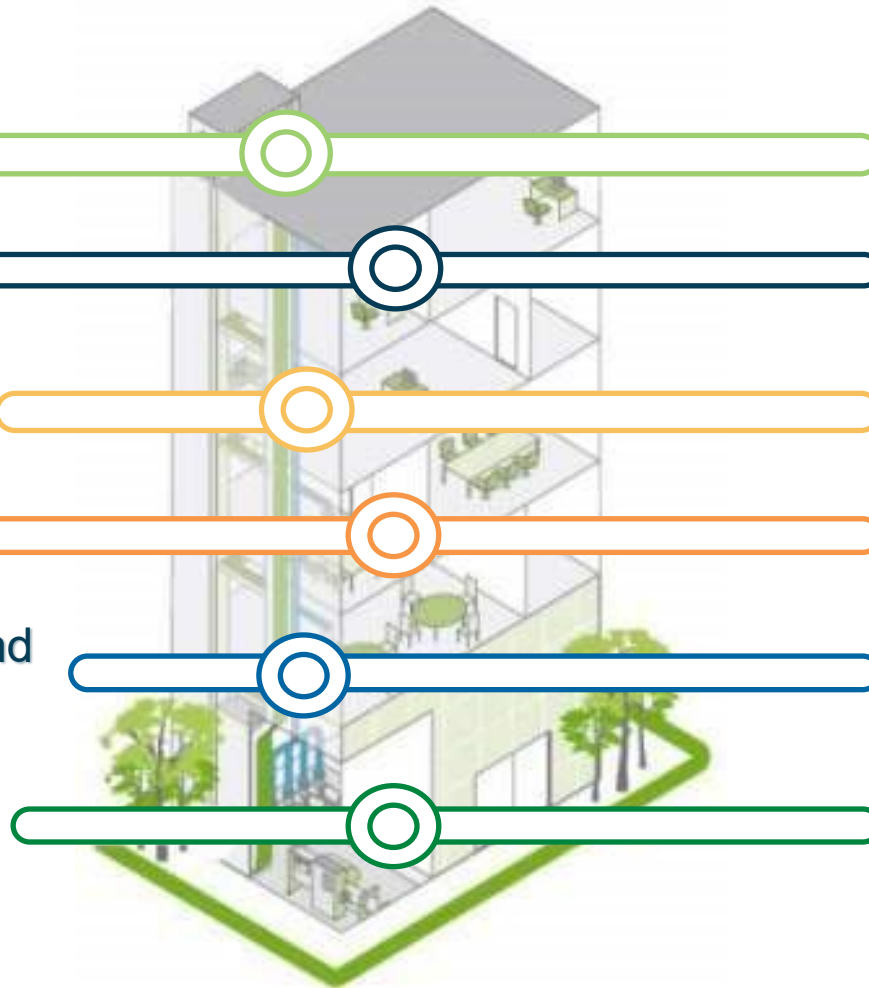
OpEx/CapEx Leased Revenue Model

Growing deferred maintenance outpacing revenue

Energy goals

Institutional knowledge transfer and staff turnover

Decision-making framework for real estate utilization



MITIGATION SOLUTIONS

Investment options now

Money to the table – new sources of funding

Intuitive facilities planning

GHG inventory, energy usage & utility tracking

Long-term asset management program

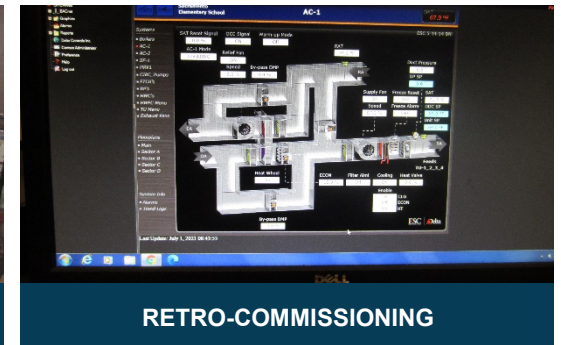
Comprehensive capital planning with financial and technical risk mitigation strategies

What is feasible?

Discovery Phase

To date...

- Facility Condition Assessment – Technical Assistance Program
 - In partnership with Soderstrom Architects
 - Review of current mechanical, electrical, and plumbing systems
 - Part of capital planning methodology for Long Range Facility Planning
- Sharing utility & energy data collection and evaluation
- July 2, 9, 19 – Site walkthroughs at nine school facilities
- Evaluation of the energy efficiency & renewable opportunities for the feasibility of self-funding ESCO projects



Project Findings by Facility



Project Data

Locations & Baseline Data



Facility	Area	Year Built	Address	2019 Electricity			2019 Natural Gas		Total \$	EUI
				kWh	kW	\$	Therm	\$		
Prescott Elementary School	48,544	1947	10410 NE Prescott St., Portland, OR 97220	273,280	812	\$28,073	13,484	\$11,044	\$39,117	47
Russell Elementary School	40,036	1963	2700 NE 127th Ave., Portland, OR 97230	256,836	670	\$26,491	15,879	\$13,022	\$39,513	62
Sacramento Elementary School	41,107	1960	11400 NE Sacramento St., Portland, OR 97220	215,280	706	\$21,321	16,185	\$13,236	\$34,557	57
Shaver Elementary School	43,916	1963	3701 NE 131st Pl., Portland, OR 97230	302,240	941	\$30,169	19,397	\$15,830	\$45,999	68
Parkrose Middle School	140,000	2013	11800 NE Shaver St., Portland, OR 97220	674,783	2,575	\$69,574	27,349	\$22,274	\$91,848	36
Parkrose High School	260,497	1996	12003 NE Shaver St., Portland, OR 97220	2,630,060	6,936	\$224,841	93,294	\$60,355	\$285,195	70
Sumner Elementary / Helensview School*	40,000	1954	8678 NE Sumner St., Portland, OR 97220	0	0	\$0	0	\$0	\$0	0
Thompson Elementary / Wheatley School*	40,000	1958	14030 NE Sacramento St., Portland, OR 97230	0	0	\$0	0	\$0	\$0	0
Knott Elementary / Knott Creek School*	32,592	1951	11456 NE Knott St., Portland, OR 97220	178,240	716	\$19,216	21,372	\$17,293	\$36,508	84
District Admin / Maintenance	20,700	1955	10636 NE Prescott St., Portland, OR, 97220	125,746	350	\$12,631	10,351	\$8,699	\$21,330	71
Total	707,392			4,656,465	13,706	\$432,314	217,312	\$161,754	\$594,068	53

All Improvement Project Measures

Potential Measures



Facility	Replace existing old boiler system	Repair Condensing Unit/Chiller	Refurbish AHUs	AHU/HV/RTU/UV/UH/FF Replacement	Test and retro-commissioning	Control upgrade	Lighting and lighting control retrofit	Replace water fixtures	Replace existing old DHW heater	Building Envelope Improvement
Prescott Elementary School					X	X	X		X	X
Russell Elementary School				X	X		X			X
Sacramento Elementary School					X		X			X
Shaver Elementary School			X		X		X		X	X
Parkrose Middle School					X		X			X
Parkrose High School	X	X		X	X	X	X	X	X	X
Sumner Elementary / Helensview School*	X			X	X	X	X	X	X	X
Thompson Elementary / Wheatley School*	X			X	X	X	X	X		X
Knott Elementary / Knott Creek School*	X			X	X	X	X	X	X	X
District Admin / Maintenance				X	X	X	X	X	X	X

Self-funding Project Measures

Self-funding & Capital Req'd



Facility	Replace existing old boiler system	Repair Condensing Unit/Chiller	Refurbish AHUs	AHU/HV/RTU/UV/UH/FF Replacement	Test and retro-commissioning	Control upgrade	Lighting and lighting control retrofit	Replace water fixtures	Replace existing old DHW heater	Building Envelope Improvement
Prescott Elementary School					X	X	X		X	X
Russell Elementary School				X	X		X			X
Sacramento Elementary School					X		X			X
Shaver Elementary School			X		X		X		X	X
Parkrose Middle School					X		X			X
Parkrose High School	X	X		X	X	X	X	X	X	X
Sumner Elementary / Helensview School*	X			X	X	X	X	X	X	X
Thompson Elementary / Wheatley School*	X			X	X	X	X	X		X
Knott Elementary / Knott Creek School*	X			X	X	X	X	X	X	X
District Admin / Maintenance				X	X	X	X	X	X	X

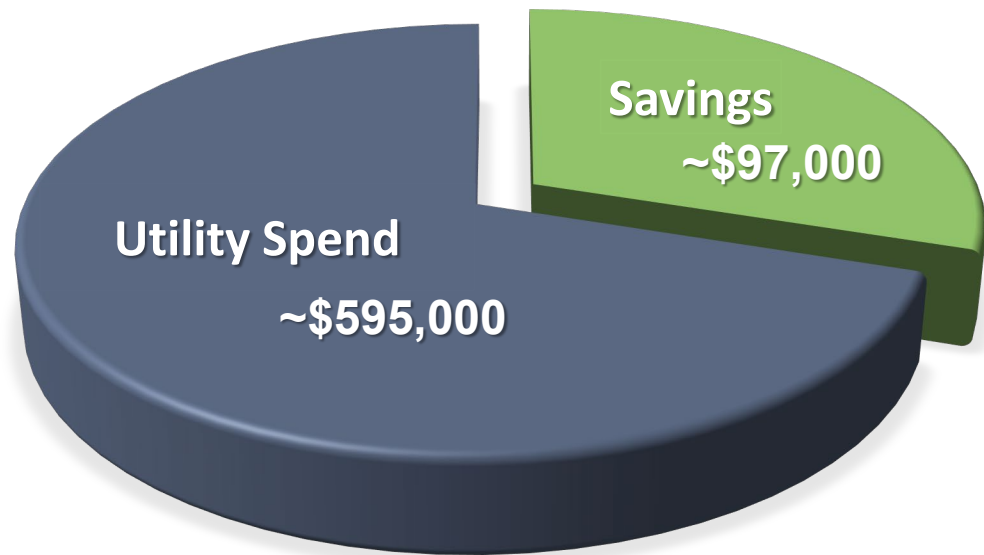
Self-funding Project

ESCO Project Estimates



Facility	2019 Utility Spend	Potential Annual Energy Savings (Self-Funding Measures)	Potential Annual Energy Savings (All Measures)
Prescott Elementary School	\$39,117	~\$6,500	~\$7,500
Russell Elementary School	\$39,513	~\$6,500	~\$9,000
Sacramento Elementary School	\$34,557	~\$5,000	~\$5,500
Shaver Elementary School	\$45,999	~\$7,500	~\$8,000
Parkrose Middle School	\$91,848	~\$16,000	~\$17,500
Parkrose High School	\$285,195	~\$47,000	~\$65,500
Sumner Elementary / Helensview School*	N/A	N/A	N/A
Thompson Elementary / Wheatley School*	N/A	N/A	N/A
Knott Elementary / Knott Creek School*	\$36,508	~\$5,000	~\$9,000
District Admin / Maintenance	\$21,330	~\$3,000	~\$4,500
Total	\$594,068	~\$97,000	~\$125,000

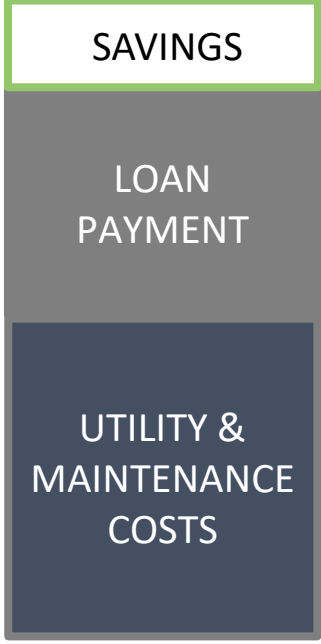
Self-funding Project



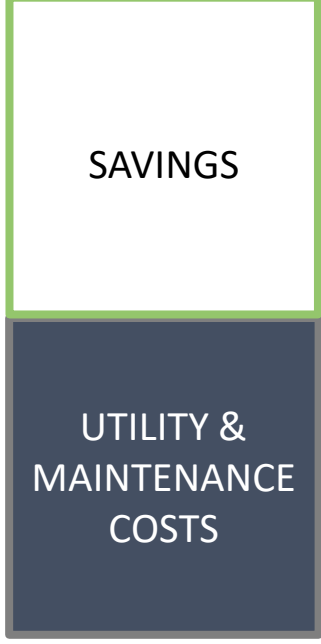
ANNUAL ENERGY UTILITY COSTS: ~\$595,000
ESPC POTENTIAL SAVINGS: ~\$97,000 PER YEAR
ESPC PROJECT POTENTIAL: \$1.3 - \$1.6 MILLION



BEFORE
ESPC



DURING
FINANCE
PERIOD



AFTER
ESPC



Self-funding + Capital Projects

ESPC TOTAL POTENTIAL SAVINGS: ~\$127,000 PER YEAR
 CAPITAL INVESTMENT: \$6.3 MILLION
ESPC PROJECT POTENTIAL: \$8.2 MILLION

WHY?

Traditional Implementation

vs.

Ameresco Single Point of Accountability

ECM	Incentive Coordination	Design	Implementation (Bidding & Proj. Mgmt)
Lighting & Lighting Controls	Parkrose & ETO	Parkrose Hires	Parkrose hires Lighting Contractor
Boiler & Chiller	Parkrose & ETO	Parkrose Hires	Parkrose hires Mechanical Contractor
Pump & Fan VFDs	Parkrose & ETO	Parkrose Hires	Parkrose hires Mechanical Contractor
DDC & DCV Upgrades	Parkrose & ETO	Parkrose Hires	Parkrose hires Mult. Controls Contractors
RCx heating systems	Parkrose & ETO	Parkrose Hires	Parkrose hires Cx Firm
Windows	Parkrose	Parkrose Hires	Parkrose hires Window Contractor
Roofing	Parkrose	Parkrose Hires	Parkrose hires Roofing Contractor
Domestic Fixtures	Parkrose	Parkrose Hires	Parkrose hires Plumbing Contractor
Irrigation Improvements	Parkrose	Parkrose Hires	Parkrose hires Plumbing Contractor
Solar PV	Parkrose & ETO	Parkrose Hires	Parkrose hires Solar Contractor
Building Envelope Sealing	Parkrose & ETO	Parkrose Hires	Parkrose hires Building Contractor

ECM	Incentive Coordination	Design	Implementation
Lighting & Lighting Controls	Ameresco	Ameresco	Ameresco
Boiler & Chiller			
Pump & Fan VFDs			
DDC & DCV Upgrades			
RCx heating systems			
Windows			
Roofing			
Domestic Fixtures			
Irrigation Improvements			
Solar PV			
Building Envelope Sealing			

What are your options?

Do It Yourself

- Parkrose responsible for:
 - Raising the capital
 - Managing construction
 - Hiring contractors
 - Product selection
 - Applying for grants/incentive programs

Partner with Ameresco

- An extension of your team with turnkey finances and risk mitigation
- No capital required
- Guaranteed utility savings pays for service fee
- Guaranteed maximum price so you know what you're getting up front

Process Comparison

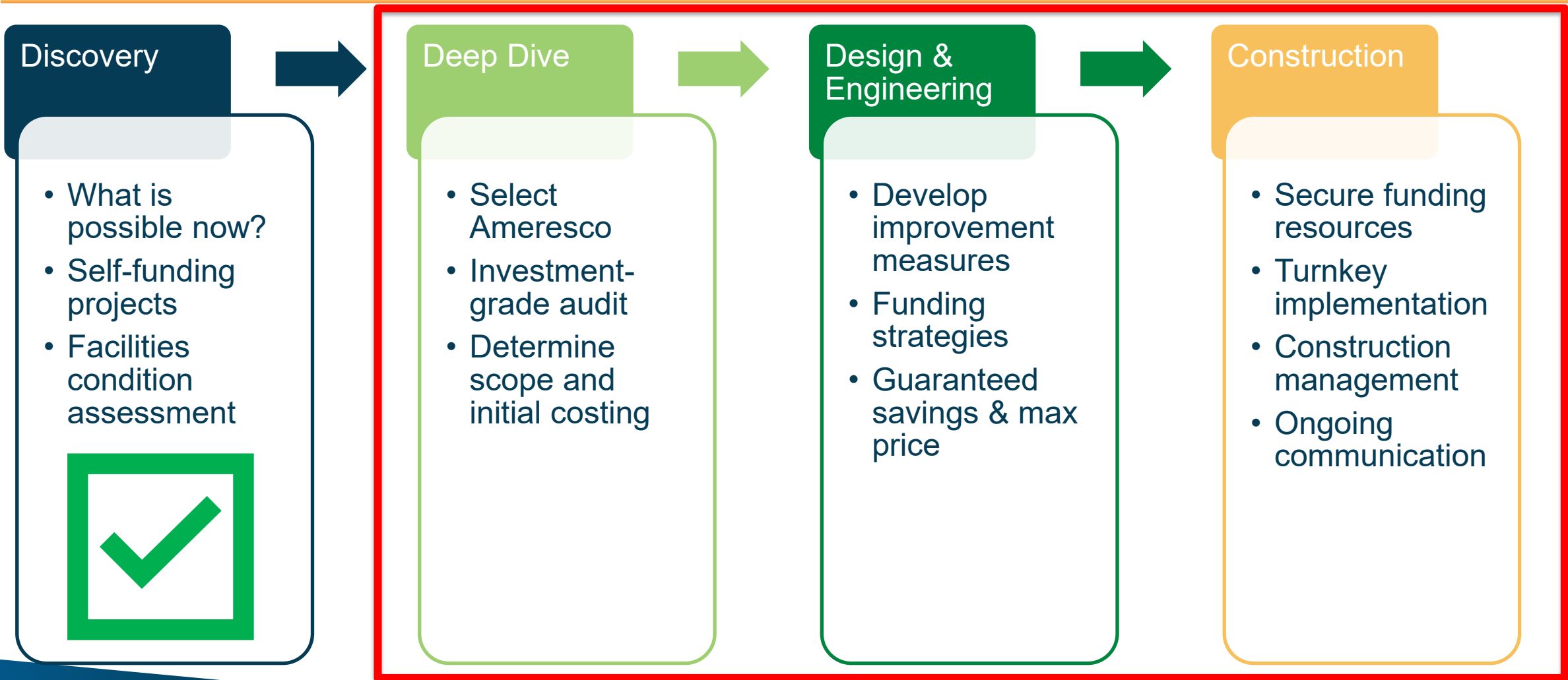
Project Detail	Traditional Design, Bid, Build	Self-Performed	ESCO Process
Contractor Procurement	Multiple contracts	Multiple contracts	One contract
Upfront audit costs	High	Medium	Low
Internal resource cost	Medium	High	Low
Single contract	No	N/A	Yes
Change Orders	Medium	Yes	Low to None
Low Bid Contractors	Yes	Likely	Not required
Measure & verify installation cost (hard costs)	Not required	Low	Medium
Energy Savings Guarantee	No	No	Yes
Project Duration	23 months	Cannot Determine	6-18 months
Total Project Cost	Medium	High	Medium



Questions and Next Steps



Where can we go from here?



Thank you.

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Statement of Diversity, Equity, Inclusivity, and Justice

Parkrose School District, Portland, OR

Submitted by: Ameresco, Inc.

This Proposal contains data and information that has been submitted in response to a request for proposal or similar solicitation and is provided in confidence. The contents includes proprietary information and trade secrets that belong to Ameresco, Inc., ("Confidential Information") and is disclosed to the recipient only for purposes of evaluation. In the event Ameresco is awarded a contract or purchase order as a result of or in connection with the submission of this proposal, Customer shall have a limited right as set forth in the governing contract or purchase order to disclose the data herein, but only to the extent expressly allowed.

Diversity

Diversity and Inclusion

Equal Opportunity & Non-Discrimination Initiatives

As we strive to change the world as the trusted sustainability partner, we welcome, support, and celebrate unique ways of thinking.

The value we place on embracing employee diversity goes beyond gender, racial, ethnic and geographical differences. We take pride in building a workforce with different educational backgrounds, family status, religion, race, gender, color, sexual orientation, gender identity, national origin, age, physical or mental disability, citizenship status, veteran status, and socioeconomic standards. We are dedicated to providing a workplace free from discrimination and harassment, where employees are treated with respect and dignity.

But beyond just promoting a discrimination-free workplace, Ameresco also encourages and promotes the hiring, recruitment, and promotion of underrepresented groups within our firm.

Ameresco is proud to be an equal opportunity workplace and an inclusionary employer; we believe innovation demands diversity of thought, and Ameresco has done well by welcoming and celebrating employees from diverse backgrounds, attracting, retaining, developing and promoting the most qualified employees without regard to their race, gender, color, religion, sexual orientation, gender identity, national origin, age, physical or mental disability, citizenship status, veteran status, or any other characteristic protected by applicable law. We are dedicated to providing a work environment free from discrimination and harassment, and where employees are treated with respect and dignity. Ameresco will provide reasonable accommodations to individuals with disabilities who need an accommodation to fully participate in the application process.

Recruitment and Hiring

Beyond just promoting a discrimination-free workplace, Ameresco also encourages and promotes the hiring and recruitment of underrepresented groups within our firm.

Recruitment is a key element in our commitment to Diversity, Equity, Inclusion, and Justice. Our recruiting team further focuses on attracting and recruiting a diverse workforce by partnering with the following organizations and reaching out to the following sources:

- National Association of Women in Construction
- American Association of Blacks in Energy (AABE)
- American Freedom Foundation
- Latino STEM Alliance
- Browning the Green Space
- Women of Renewable Industries & Sustainable Energy (WRISE)
- The Society for Hispanic Engineers (SHPE): particularly active in the Portland, Oregon Chapter
- National Society of Black Engineers
- New England Women in Energy and the Environment (NEWIEE)
- Dolce Center for the Advancement of Veterans and Service Members at Northeastern

- Society of Asian Scientists and Engineers
- National Alliance on Mental Illness
- Hire Heroes, USA
- DisabilityIN
- Out in Science, Technology, Engineering, and Mathematics
- National Council for Minorities in Engineering
- Regional Boys and Girls Clubs
- Canadian Council of Aboriginal Business (CCAB)

Investing time, energy, and money in targeted outreach with these organizations, among others, has helped Ameresco engage and gain audience with candidates from underrepresented and protected classes, as well as the opportunity to volunteer and have an impact in these national and local associations. Our efforts have proven successful over the course of the last five years, showing consistent progression across all areas in the diversification of our workforce.

To further facilitate the advancement of women in a traditionally male dominated industry Ameresco has formed a women's mentorship program, in which women in leadership positions are partnered with Ameresco's next generation of female leaders. The objective of this program is to provide support, motivation, and inspiration for the women in our organization who are emerging as our next generation of thought leaders, engineers, project developers, and managers.

Ongoing Support and Diversity Training for Employees

To educate, support, and promote the culture of diversity and inclusion at Ameresco, annual Diversity in the Workplace training is rolled out to all Ameresco employees. This comprehensive training is critical to ensuring we are doing our best in educating all of our teams and fostering a corporate culture that is all-inclusive.

As a result of our efforts to encourage the hiring and retention of minority and/or key protected classes, Ameresco has demonstrated meaningful growth over the last five years, as members of these groups currently represent 39% of all employees. In addition, we have a 40% rolling three-year average of promotions for individuals in these categories across the company. In 2020, 17% of all management position promotions were employees in a key protected class.

Diversity in Consulting and Procurement

Ameresco makes every effort to utilize Minority, Woman and Disabled Business Enterprises (M/W/DBE) on every project we undertake, as part of our continuing outreach program. Once the specific elements of a project are identified, Ameresco submits the names of the firms under consideration to prospective clients. In addition to the relationships that we have established, a client may have a list of pre-approved contractors they wish us to consider as participants on the project(s).

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

Our commitment to a diversity program is important to our business for several reasons. First and

foremost, our customers generally share our concern and viewpoint on this issue; but beyond this, we care about our supplier diversity program because it adds value to our business. Just as we see the value of diversity across our customer base and employees, so is the value apparent across our supply chain. We continually benefit from diversity suppliers that not only manufacture or supply great products and services, but great ideas.

Ameresco recognizes that providing competitive opportunities for diverse and small businesses supports our national economy and the enterprise system in which we operate. Additionally, broad-based competition contributes to our goal of providing the highest quality services at competitive prices. Ameresco affords minority, diverse, and small and/or disadvantaged concerns ample opportunity to compete for subcontracted work and to supply materials and equipment.

Ameresco will identify and qualify new minority, diverse, small and/or disadvantaged businesses through the following outreach processes:

- Maintain a subcontractor / supplier resource listing
- Participate with select minority, diverse and small and/or disadvantaged business associations to identify and recruit potential new small businesses
- Provide advice and assistance to small, small disadvantaged, and woman-owned small

Company Makeup

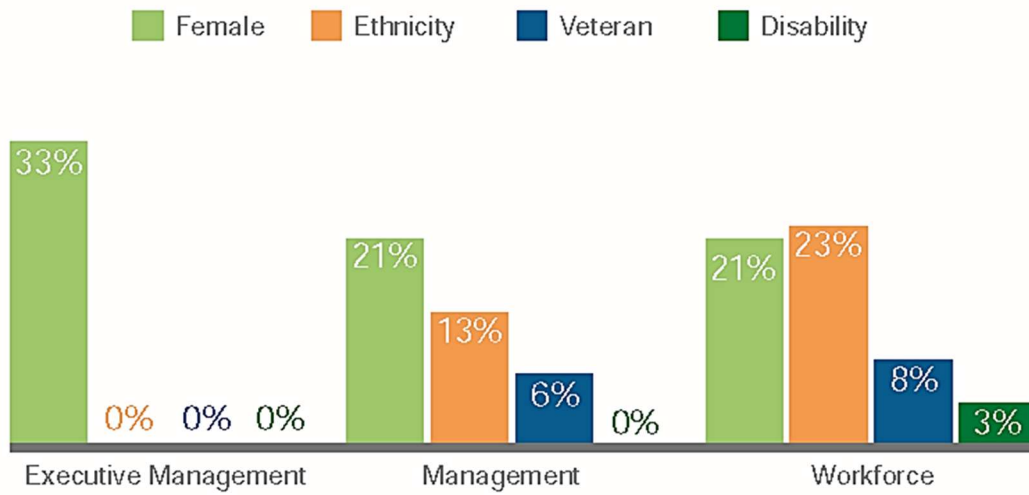
Ameresco has demonstrated meaningful growth over the last five years in the number and percentage of employees from key protected classes, currently representing 39% of all employees. In addition, we have a 43% rolling three-year average of key protected class promotions among all promotions throughout the company: in 2021, over 21% of all management position promotions were employees in a key protected class.

To facilitate the advancement of women in a traditionally male dominated industry, Ameresco has formed a women's mentorship program, in which women in leadership positions are partnered with Ameresco's next generation of female leaders. The objective of this program is to provide support, motivation, and inspiration for the women in our organization who are emerging as our next generation of thought leaders, engineers, project developers, and managers.

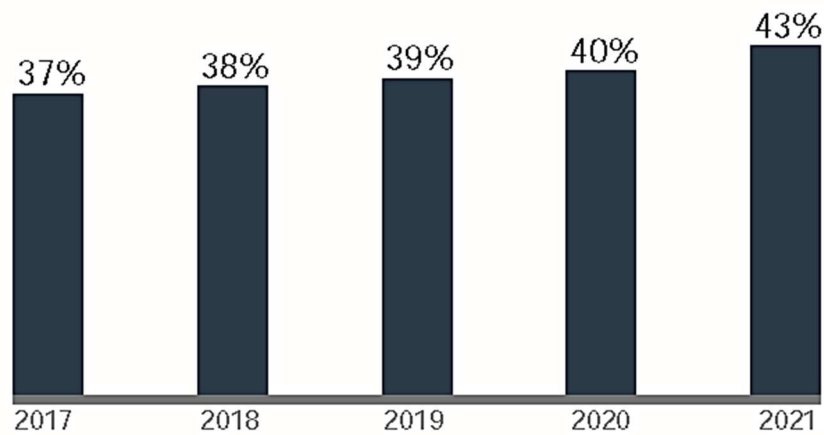
Our general workforce makeup is as follows:

- Disability – 3%
- Veteran – 8%
- Female – 21%
- Ethnicity – 23%

Organization Totals (as of 09/30/21)⁽³⁾



% Cumulative Employee Diversity (2017-2021)^(1,2)



(1,2,3) Note: Data 1/1/2021 through 9/30/2021, and 1/1/2020 through 12/31/2020 respectively. Key diversity groups include women, people of color, veterans, and individuals with disabilities. Data represents US employees only due to personal information privacy regulations in Canada and Europe.

A chart detailing Ameresco's demographics can be found on the page immediately following

Ownership and Senior Management

Led by our President and Chief Executive Officer, George Sakellaris, Ameresco's Executive Management Team (EMT) is comprised of twelve senior leaders with decades of combined experience in cleantech, sustainability, energy efficiency, renewable energy, and other distributed energy generation technologies.

With 33% female leadership, the EMT oversees the day-to-day running of the company and meets monthly to focus on Ameresco's strategic initiatives.

As of March 2022, Ameresco's Executive Management Team includes four (4) women:

George P. Sakellaris, P.E Chairman, President & Chief Executive Officer

Michael Bakas, Executive Vice President (EVP), Distributed Energy Systems

Nicole Bulgarino, P.E., EVP and General Manager (GM), Federal Solutions

Mark Chiplock, Vice President (VP) and Chief Accounting Officer

Peter Christakis, SVP, Construction & Operations

David Corrsin, EVP, General Counsel, Corporate Secretary and Director

Leila Dillon, SVP, Marketing Communications

Robert Georgeoff, Executive VP

Doran Hole, Senior Vice President (SVP), Chief Financial Officer

Britta MacIntosh, SVP, Western Region & London Operations

Louis Maltezos, Executive Vice President

Lauren Todd, SVP, Human Resources & Operations

As of March 2022, Ameresco's Governing Board includes two (2) women:

George P. Sakellaris, P.E Chairman, President & CEO, Ameresco

David J. Corrsin, Executive Vice President, General Counsel, Secretary, Ameresco

Douglas I. Foy, President, Serrafix Corporation; Chair of Nominating and Corporate Governance Committee

Claire Hughes Johnson, Chief Operating Officer, Stripe

Jennifer L. Miller, Chief Business Sustainability Officer (Retired), Sappi North America

Thomas S. Murley, Principal, Two Lights Energy Advisors LLC

Nickolas Stavropoulos, President and Chief Operating Officer (Retired), Pacific Gas and Electric Company

Joseph W. Sutton, Chief Executive Officer, Sutton Ventures Group; Chair of Compensation Committee

Frank V. Wisneski, Partner (Retired), Wellington Management

Ameresco's Social Responsibility Efforts

To learn more about Ameresco's Social Responsibility efforts, please view our Environmental, Social & Governance Report for 2021 here: [Ameresco 2021 ESG Report](#).