

Job Order Contracting.
It's what we do.



PROPOSAL RESPONSE FOR
Smart Building Solutions



6320 Research Rd., Frisco, TX 75033 | T: (972) 668-9340
DUE: 06-23-22 @ 2:00 PM Central Time

ELECTRONIC

RFP #R10-1135





June 23, 2022

Mr. Clint Pechecek
Purchasing Consultant
Region 10 ESC
400 E. Spring Valley Rd.
Richardson, TX 75081

RE: Proposal Response for Region 10 ESC and Equalis Group Smart Building Solutions | RFP # R10-1135

Dear Mr. Pechecek and Selection Committee Members:

CORE Energy, Ltd. (CORE) and its national partners truly appreciate this opportunity to submit our proposal response for Job Order Contracting (JOC) Services for Region 10 ESC Smart Building Solutions. We offer a proven team of construction professionals with significant related project experience. Our team was specifically chosen for this project due to their experience and understanding of the construction and operation of energy services and smart building. CORE has been passionately dedicated to our Clients for over 85 years, demonstrating value, quality and commitment that surpasses that of our competition. Below are a few reasons why CORE is uniquely qualified to deliver exceptional JOC Services to Region 10 ESC and Equalis Group.

SUSTAINABLE CONSTRUCTION PRACTICES: We know that Region 10 ESC recognizes the importance of sustainability in regards to environment, social, and economic concerns in our community and that you are committed to creating sustainable solutions. Likewise, CORE is passionate about building sustainable, energy efficient buildings that give our Clients long-term cost savings. We have built over 100 LEED certified projects and over 200MW in solar energy construction. For the past two decades, our team has been dedicated to helping our Clients achieve their green building and LEED Certification goals.

COMPREHENSIVE JOC: Through our experience with smart building products and services across multiple sectors, CORE will provide Region 10 ESC and Equalis Group with a unique approach to project delivery. We believe in fostering an environment of trust and collaboration. We utilize a management style centered around proactive thinking, transparent communication and innovation. We will serve as an extension of Region 10 ESC and Equalis Group and work with you to bring projects to fruition. CORE will customize our team per project to ensure we deliver it efficiently and timely. We will implement and establish clear lines of communication and provide you with the proper reporting metrics that are customized to your expectations. Our team members are qualified and focused on primary objectives critical to successful project delivery. CORE's strength is that we listen, are nimble in our approach to best suit your needs, and we will steward available funds to maximize impact. The strength of our team is only surpassed by the quality of the individual team members.

DASHBOARD REPORTING: CORE strongly believes that our Clients should have access to their smart building program data at any time from any device. Direct access to the program data will be provided through a customized business intelligence dashboard showing your preferred metrics. This reporting provides transparency throughout the process for all stakeholders and is one of many areas of continuous improvement through technology CORE is committed to. Our ability to utilize lessons learned to raise the bar has gotten us to where we are today. We work hard to find opportunities for continuous improvement at all levels of our business.

CORE is eager for the opportunity to serve Region 10 ESC and Equalis Group on the Smart Building Solutions Contract. Our team has the necessary, highly specialized skills and expertise essential to perform the required services within your current budget. We look forward to this opportunity, and I am dedicated as your primary point-of-contact. Please call me at (504) 272-7150 or email me at ronbordelon@coreltd.com should you require any additional information and/or clarification.

Respectfully Submitted,

Ronald Bordelon
CORE Energy, Ltd.



Proposal Form Checklist

The following documents must be submitted with the Proposal

The below documents can be found in Section 2; Proposal Submission and Required Bid Forms and must be submitted with the proposal. Please note Proposal Form 1 is a separate attachment (attachment B).

PROPOSAL PRICING: Attachment B is provided separately in a Microsoft Excel file and is required to complete your price proposal.

PROPOSAL FORM 1: ATTACHMENT B - PRICING

QUESTIONNAIRE & EVALUATION CRITERIA:

PROPOSAL FORM 2: QUESTIONNAIRE & EVALUATION CRITERIA

OTHER REQUIRED PROPOSAL FORMS:

PROPOSAL FORM 3: CERTIFICATIONS AND LICENSES

PROPOSAL FORM 4: CLEAN AIR AND WATER ACT

PROPOSAL FORM 5: DEBARMENT NOTICE

PROPOSAL FORM 6: LOBBYING CERTIFICATION

PROPOSAL FORM 7: CONTRACTOR CERTIFICATION REQUIREMENTS

PROPOSAL FORM 8: ANTITRUST CERTIFICATION STATEMENTS

PROPOSAL FROM 9: IMPLEMENTATION OF HOUSE BILL 1295

PROPOSAL FROM 10: BOYCOTT CERTIFICATION AND TERRORIST STATE CERTIFICATION

PROPOSAL FORM 11: RESIDENT CERTIFICATION

PROPOSAL FORM 12: FEDERAL FUNDS CERIFICATION FORM

PROPOSAL FORM 13: ADDITIONAL ARIZONA CONTRACTOR REQUIREMENTS

PROPOSAL FORM 14: OWNERSHIP DISCLOSURE FORM (N.J.S. 52:25-24.2)

PROPOSAL FORM 15: NON-COLLUSION AFFIDAVIT

PROPOSAL FORM 16: AFFIRMATIVE ACTION AFFIDAVIT (P.L. 1975, C.127)

PROPOSAL FORM 17: C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM

PROPOSAL FORM 18: STOCKHOLDER DISCLOSURE CERTIFICATION

PROPOSAL FORM 19: GENERAL TERMS AND CONDITIONS ACCEPTANCE FORM

PROPOSAL FORM 20: EQUALIS GROUP ADMINISTRATION AGREEMENT

PROPOSAL FORM 21: OPEN RECORDS POLICY ACKNOWLEDGEMENT AND ACCEPTANCE

PROPOSAL FORM 22: VENDOR CONTRACT AND SIGNATURE FORM

(The rest of this page is intentionally left blank)



Please refer below for a screenshot of the excel file submitted electronically via the online portal.

CORE is committed to providing a wide range of products and services that meet the needs of Region 10 ESC and the Equalis Group membership. All applicable manufacturer and installation warranties are included in the pricing methodology and all Customers will be able to verify alignment with contract pricing.

Verifiable Price List Location

Link to PDF: <https://core.egnyte.com/dl/8C46hSHOQa>

Vendor Product or	Product Description	Product Brand	Purchase	Unit List	Verifiable list price location	Equalis	Final Price
N/A	Turnkey Rooftop Solar PV system, ballasted	N/A	per kW	\$2.85	CORE Energy Equalis Price List	5%	\$2.71
N/A	Turnkey Ground mount Solar PV system, fixed tilt	N/A	per kW	\$3.00	CORE Energy Equalis Price List	5%	\$2.85
N/A	Turnkey Solar parking canopy system	N/A	per kW	\$4.40	CORE Energy Equalis Price List	5%	\$4.18
N/A	EV Charging station, Level 2, 40 A (4 ea. minimum)	N/A	ea.	\$12,500	CORE Energy Equalis Price List	10%	\$11,250.00
N/A	Turnkey Battery Energy Storage System	N/A	per kWh	\$600	CORE Energy Equalis Price List	5%	\$570.00
N/A	LED Lighting Retrofits	N/A	per sq. ft.	\$1.50	CORE Energy Equalis Price List	5%	\$1.43
N/A	HVAC - RTU Retrofits	N/A	per unit	\$1,500	CORE Energy Equalis Price List	5%	\$1,425.00
N/A	Energy & Natural Gas Procurement	N/A	per facility	\$1	CORE Energy Equalis Price List	50%	\$0.50
N/A	Energy Performance Modeling	N/A	per sq. ft.	\$0.29	CORE Energy Equalis Price List	10%	0.261
N/A	Energy Audit and Baseline Calculation	N/A	per sq. ft.	\$0.21	CORE Energy Equalis Price List	10%	0.189
N/A	Shared Savings Model	N/A	per sq. ft.	\$0.05	CORE Energy Equalis Price List	10%	0.045
N/A	Constructability Reviews	N/A	per sq. ft.	\$0.35	CORE Energy Equalis Price List	8%	0.322
N/A	Energy-as-a-Service Model Development	N/A	per sq. ft.	\$0.10	CORE Energy Equalis Price List	50%	0.05
N/A	Real-Time Utility and Data Analytics Dashboard	N/A	per sq. ft.	\$0.19	CORE Energy Equalis Price List	5%	0.1805
N/A	ESG Measurement and Verification	N/A	per sq. ft.	\$18	CORE Energy Equalis Price List	10%	16.2



PROPOSAL FORM 2: QUESTIONNAIRE & EVALUATION CRITERIA

Instructions:

Respondents should incorporate their questionnaire responses directly into the green cells below. Failure to provide responses in this format may result in the proposal being deemed as non-responsive at the sole discretion of Region 10.

Respondents may incorporate additional documents as part of their response which may be utilized by Region 10 as part of the evaluation. Additional documents must be consolidated as part of this Section 2 at the end of your response.

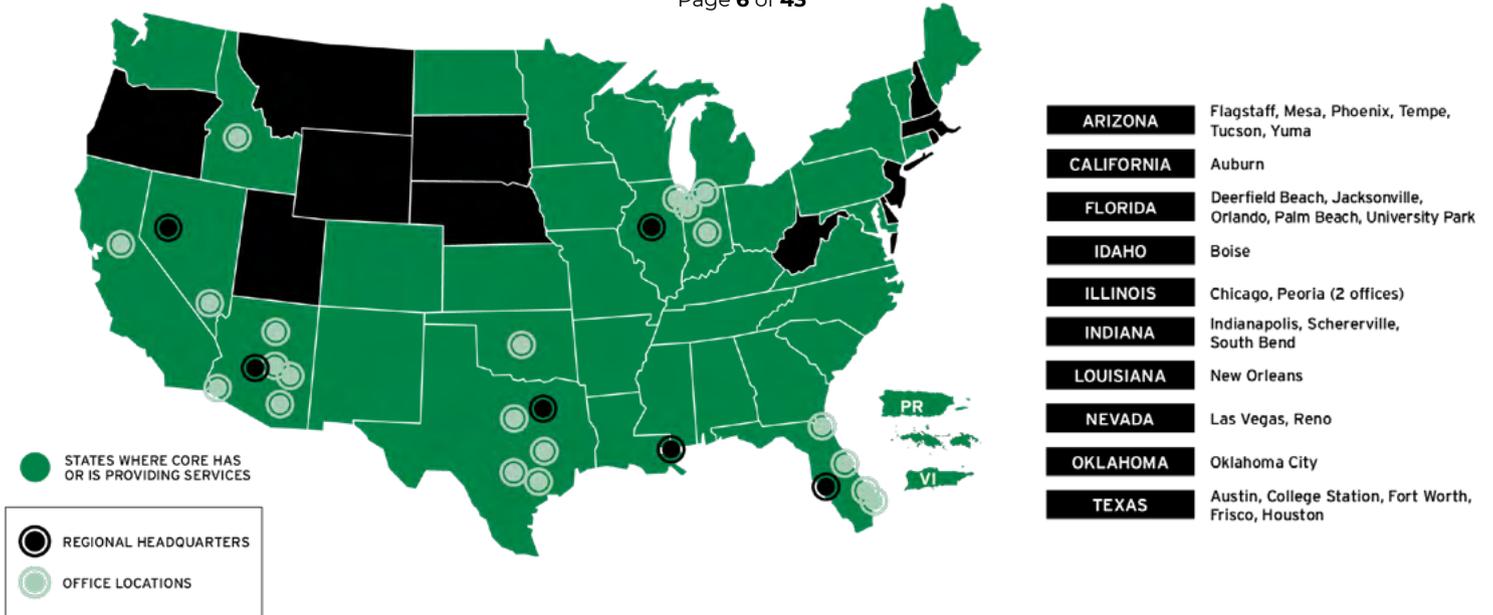
Region 10 has associated the evaluation criteria with the question that most closely aligns with that respective evaluation criteria. Region 10 reserves the right at its sole discretion to base its evaluation and specific evaluation criteria on any part of the respondent’s proposal.

Evaluation Criteria	Question	Answer
Basic Information		
Required information for notification of RFP results	<i>What is your company's official registered name?</i>	CORE Energy, Ltd.
	<i>What is the mailing address of your company's headquarters?</i>	6320 Research Rd., Frisco, TX 75033
	<i>Who is the main contact for any questions and notifications concerning this RFP response, including notification of award? Provide name, title, email address, and phone number.</i>	Ronald Bordelon, President E: ronbordelon@coreltd.com T: (504) 272-7150
Products/Pricing (30 Points)		
Coverage of products and services	No answer is required. Region 10 will utilize your overall response and the products/services provided in Attachment B to make this determination	
Ability of offered products and services to meet the needs requested in the scope	No answer is required. Region 10 will utilize your overall response and the products/services provided in Attachment B to make this determination	
Pricing for all available products and services, including warranties if applicable	<i>Does the respondent agree to offer all future product and services at prices that are proportionate to contract pricing offered herein?</i>	Yes
	<i>Does pricing submitted include the required administrative fee?</i>	Yes





	<i>Do you offer any other promotions or incentives for customers? If yes, please describe.</i>	Yes, we have incentives that will encompass this contract if awarded. CORE will offer a 50% sharing model to those Clients utilizing our asset concession and energy optimization services solution.
Ability of Customers to verify that they received contract pricing	<i>Were all products/lines/services and pricing being made available under this contract provided in the attachment B and/or Appendix B, pricing sections?</i>	Yes
	<i>Outline your pricing strategy provided in Attachment B. If utilizing a list price, please indicate where agencies can find the list and your methodology for determining that list price.</i>	CORE is a nation-wide firm with significant buying power in the sustainable energy solutions sector. These savings are passed on to the Client and part of our pricing calculation.
Payment methods	<i>Define your invoicing process and methods of payments you will accept. Please include the overall process for agencies to make payments</i>	CORE follows all State of Texas regulated payment laws. A signed authorization of CORE's proposal acceptance form or approved purchase order is required before any work can proceed. All invoicing is managed electronically and will be set up according to Region 10 ESC and Equalis Group's project accounting requirements.
Other factors relevant to this section as submitted by the Respondent	No answer is required. Region 10 will utilize your overall response and the products/services provided in Attachment B to make this determination	
Performance Capability (25 Points)		
Smart building products and services	<i>Please provide a high-level overview of the products and services being offered and how they address the scope being requested herein.</i>	CORE will provide comprehensive smart building and innovative energy solutions. Please refer to pages 7-12 for an overview of the products and services being offered and how they address the scope being requested.
	<i>Outline monitoring capabilities you provide, including the ability for agencies to access the data through an online or other platform(s).</i>	CORE has experience with a multitude of energy systems in various building types. Our team can provide services in all the listed areas. Please refer to page 7-12 for a sample of our experience.
	<i>Describe any products or equipment you can provide.</i>	CORE designs energy solutions based on the best technology at the time. We do not sell equipment and are agnostic with respect to manufacturers so you can be assured you are receiving the best advice and design to fit your needs.
	<i>States Covered - Respondent must indicate any and all states or geographies where products and services are being offered. If your services are limited to a certain area, please be specific on the area your services are provided.</i>	CORE is a national company and offers services throughout the contiguous United States.
	<i>List the number and location of offices, or service centers for all states being proposed in solicitation</i>	CORE has 25+ offices across the U.S. Please refer to the map below for a list and locations of our regional offices. (AZ-6, CA-1, FL-5, IL-3, IN-3, LA-1, NV-2, OK-1, TX-5)
	<i>Outline any other capabilities not already addressed.</i>	CORE will offer holistic smart building solutions while developing Environmental, Social, and Corporate Governance (ESG) plans. These long-term include Diversity & Inclusion (D&I) as well as capital planning components.
Ability to consult, design, and install products and services	<i>Please describe any consulting or design services you offer.</i>	CORE offers an investment-grade audit of the mechanical systems, should the facility fit the financial model. This audit is at no cost to the Client and may be utilized for additional long-term strategic planning.
	<i>Outline the process for installing products, equipment, software and/or other solutions you are offering.</i>	CORE will make every effort to utilize existing local Client relationships when sourcing installation of products and equipment.





CORE ENERGY SMART BUILDING SOLUTIONS

SERVICES AND CAPABILITIES

CORE's services and capabilities include, but are not limited to the following:

Audits

An on-site survey is the first step in performing a comprehensive audit. Equipment and building controls are evaluated and detailed information regarding the age, condition, reliability, resiliency, and energy efficiency (where applicable) is documented using checklists, observation notes, and photos. CORE's survey team also gathers data from the facility's computerized maintenance management software (CMMS) and building automation system (BAS) where available. For example, work orders are reviewed for the purpose of identifying infrastructure-related issues that are frequent, recurring, or systemic. Additionally, equipment trend data is gathered for use during the Analysis Phase.

Additional walk-throughs of each building during the on-site survey will provide a firm understanding of the building control, mechanical, lighting, and domestic water systems. While on-site and throughout the survey process, our team will periodically meet with facilities management personnel to gather additional information about the facility, including operational challenges, equipment maintenance processes and histories, comfort issues, and other related criteria to be addressed throughout the project. CORE typically meets with administrative, financial, and facilities management decision-makers to discuss priorities and long-term plans. Taking the Client's future needs into consideration during the planning stage ensures that the final project not only meets current needs but will also support future changes.

Energy Conservation Measures (ECMs)

Following the on-site survey, the team will compile all the information gathered from the survey and utilize energy modeling software, utility accounting software, and benchmarking tools to understand how the facility uses energy. The ECM analysis addresses supply-side and demand-side opportunities utilizing a comprehensive energy model of equipment and system performance for every hour in a typical year, and further considers the equipments' remaining useful life.

Comprehensive Reporting

After the supply-side and demand-side energy analyses are completed, CORE will provide a comprehensive report containing the following information:

- An executive summary detailing the overall approach to your contract
- An introduction with the project approach and background
- Assumptions used during the analysis process
- Methodology and processes used for energy savings
- The baseline model used to perform the ECM analysis
- Recommendations for ECMs discovered during the on-site survey
- Written savings calculations with all supporting information
- Energy cost, energy units, operating hours, and all assumptions made in the energy calculations
- Comparisons of reductions to historical utility consumption
- An explanation of the interactive effects of energy consumption reductions and their overall impact
- Turnkey pricing that includes all costs of each ECM
- Any results, conclusions, recommendations, and documentation related to the project and informed by the ECM analysis.

We will then present our methodology, conclusions, and recommendations to key facility personnel and other project stakeholders. After incorporating the input, CORE will use this report as a decision-making tool to prioritize ECMs for final scope development.

ASHRAE BEQ - Modeling & Optimization

CORE keeps the customer experience in mind by installing fixtures that provide indirect lighting and have multi-lighting levels. Multi-lighting level fixtures not only regulate comfort levels but are also an energy-efficient alternative. Our team adheres to the Illuminating Engineering Society standards which are internationally known and will work with the Architect and Client on every project to find a balance between aesthetics and code.

Additionally, CORE looks to guidance from the American Society of Heating, Refrigeration, and Air-Conditioning Engineers (ASHRAE) standards to ensure that we are aware of the direction for future codes and standards. We fully understand the need for balancing end-user comfort and maximizing energy savings. We also help ensure that strategies are in place to ensure that minimum ventilation requirements are maintained during



occupied times and unoccupied sequences are implemented, when possible, to reduce energy costs.

Baseline Calculation Methodology

Baseline calculations are built following the Efficiency Valuation Organization International Performance Measurement & Verification Protocol (IPMVP) and ASHRAE 14 Standards. IPMVP options A, B, C, and D are chosen on a project-by-project basis as applicable. Detailed Measurement and Verification (M&V) Plans are developed collaboratively with all parties prior to the beginning of the M&V period.

Adjustment to Baseline

Many factors can impact the calculated baseline and require adjusting the calculated baseline if one or more of these factors are present.

ROUTINE ADJUSTMENTS: Baselines are normalized for weather using multi-variable regression modeling.

NON-ROUTINE ADJUSTMENTS: Adjustments for facility size and operational and equipment changes are calculated using energy model data from industry standard software (eQUEST, TRANE TRACE 700, etc.) for measurements and/or statistical analysis. All adjustments, methods, and calculations are documented in an amended M&V Plan and reviewed by all invested parties.

Prior to implementing a project, CORE will work with the applicable agency to establish a baseline based on pre-existing and historical conditions at the facilities of the agency. In the event of a “material change” in the project, CORE would propose to adjust the baseline to accurately reflect the energy savings and changes in the project. A material change may include, but is not limited to, the following:

1. Change in the manner of use of any facility, building, structure, property, of the agency, or any entity operating a facility, building, structure, property, or Premises on behalf of the agency
2. Change in the hours of operation for any facility, building, structure, property, or for any equipment, ECMs or energy using systems related to the foregoing
3. Permanent changes in the comfort and service parameters for a facility, building, structure, property that deviate from defined standards of comfort
4. Change in occupancy of a building, facility, structure or property
5. Change in types and quantities of equipment or ECMs used at a building, facility, structure or property of the agency

6. Modification, renovation or construction at any of the facilities or structures of the agency
7. The failure of the O&M providers to perform its operational responsibilities in accordance with the obligations under the energy savings performance contract (“ESPC”), or to otherwise fail to operate the equipment and ECMs consistent with the provisions of this ESPC
8. Casualty or condemnation of a facility, building, structure or property of the agency
9. A catastrophic event, i.e., force majeure event, occurring at a facility, building, structure or property of the agency, or the equipment or ECMs at any of the foregoing
10. Changes in utility provider or utility rate classification
11. The closing, elimination, sale or transfer of any facility, structure or building
12. Any other conditions other than climate affecting energy or water use at any facility, building, structure or property of the agency.

Any changes in the operation of the ECMs of equipment, or energy usage within a facility, building, structure or property, which occurs as a result of a reported material change shall be reviewed by all parties to determine what, if any adjustments to the baseline are needed.

Building Energy Systems with Efficiency

CORE has experience with a multitude of energy systems in various building types. Our team can provide services in all the listed areas. Some of our experience includes:

- Central plants
- Control and building automation systems
- Daylighting
- Distributed generation
- Fuel switching
- Heating systems
- Indoor air quality
- Kitchens
- Laboratories
- Laundry
- Lighting systems (indoor and outdoor)
- Renewables (geothermal solar-electric/thermal, wind, biomass)
- Swimming pools and recreational facilities
- Transportation (fleet fuel management, etc.)
- Utility management
- Ventilation systems and Water-consuming systems



Financing Knowledge

At CORE, we take pride in our commitment to the energy services industry. While a significant part of that innovation resides within the engineering and construction sectors, our team is equally advanced in concepts related to tax, financing, commercial energy efficiency financing, and customer accounting. Our goal in each transaction is to craft a structure that best meets the customer's key objectives and thereby delivers the most ideal outcome. This involves a robust technical plan coupled with the right financing strategy to deliver the lowest annual cost to the customer.

As a result of our experience, we are intimately familiar with a variety of financing mechanisms including tax-exempt bonds, taxable bonds, certificates of participation, and lease financing arrangements including tax-exempt leases. We have learned that each of these funding mechanisms has its advantages and disadvantages, specifically interest rate or bond coupon, costs of issuance, underwriting fees, governance requirements, and debt service covenants. The right financing method for a specific project is dependent on project specific circumstances and constraints including, statutory and regulatory requirements, credit rating, indentures, lender consent, Unrelated Business Income Subject to Taxation (UBIT), private use, and much more.

Selecting the most favorable method for a specific application requires a comprehensive, rigorous, and collaborative analysis by a multi-discipline team. CORE purposefully includes key individuals with the technical, legal, accounting, tax, and finance experience needed to ensure each project is financed in the most cost-effective manner. Effectively, our thoughtful approach incorporates the use of low rates.

CORE also participates in infrastructure renewal projects for large building owners, using vehicles such as an energy asset concession arrangement or Design-Build-Finance-Own-Operate-Maintain (DBFOOM). These transactions typically involve a lease of public assets; a sale of the tax ownership of the underlying public assets; a design-build agreement; a performance guarantee; and a long-term service agreement.

Operational Efficiency and Performance-based Services

We do not believe in the 'check the box' approach that is commonly found in this industry. Our team members follow industry best practices and apply lessons learned from decades of experience delivering hands-on, professional services. CORE's team of experts will include engineers with experience in design and former facility managers who understand building operations. This knowledge will be embedded into our customized approach, enabling our team to optimize

smart building systems for the sustainable and energy efficient operations required. CORE's performance-based services include job order contracting, new construction, additions, renovations, and monitoring-based commissioning.

Building Solutions and Analytics

CORE takes pride in building solutions that achieve our Clients' outcomes. Our culture is grounded in assuring Client satisfaction through safe, quality work. Our team of professionals have broad experience in diverse market sectors. We bring innovative ideas, proven experience, and industry-leading pre-construction and construction services to perform quality service on projects across the nation.

All employees within our Operations Department are required to have a minimum OSHA 10-Hour certification and Supervisors/Management must obtain an OSHA 30-Hour certification. Employees are encouraged to report unsafe conditions and are challenged to form individual goals for S.A.F.E. work: "See it, Assess it, Fix it, Every day!" As a result, we hold an EMR of 0.63, well below industry average of 1.00.

Project Constructability

To ensure the most efficient use of the Client's two most valuable resources, time and money, our team conducts thorough constructability reviews to avoid wasting either one. An experienced Superintendent is an important contributor to the valuable constructability review process. Details take many shapes and forms. The details of how these systems or materials work together can suggest a certain sequence of construction or means and methods that will yield the most favorable schedule duration or finished product. The Superintendent, Project Manager, and other vital members of the project team will evaluate and comment on the design from a perspective of constructability, and use of materials and alternative approaches. Our project team will review the drawings and details to provide insight on how the details affect schedule and quality and suggest potential remedies. Our Project Manager and Superintendent will work together to advise the project team on the optimum path to identify potential detail or systems changes and/or resultant changes to Trade Partner bid packaging and selection strategy. All this work is done to ensure that your project is completed as quickly as possible and at the lowest cost without sacrificing quality.

System Review

We approach each project as a unique challenge. Creativity and innovation remain the cornerstone of our process. For engineering design, we have developed a project management process, quality control process, and comprehensive scope of



work that ensures the final deliverable will be consistent with the Owner's Project Requirements, the established Basis of Design, and the established project budget. The scope of work typically provided by engineers includes value added services, like building information modeling, schematic design documents, and life cycle cost analysis, which are considered above and beyond standard MEP design services. We believe that these services are essential to provide the most cost effective and energy-efficient design for each system within each project.

JOC Services

The foundation for our JOC services approach is open communication, proactive scheduling, and a commitment to quality and safety. Every project is assigned a dedicated Project Manager to serve as the liaison between the Client, the Design Team and Construction team members, and all contracted parties. This individual's primary responsibilities include serving the needs of Region 10 ESC above all others and promoting a successful execution of the project scope. The Project Manager, with support from the Client, will determine how each aspect of the project will be scheduled and logistically organized. The Project Manager will utilize tools such as the Last Planner System to confirm that work is being completed on schedule.

Efficient Equipment and Systems Solutions

CORE's measurement and verification process provides O&M personnel timely feedback on equipment and systems performance to ensure sustainable, energy-efficient operations. This process incorporates daily and monthly reporting from a whole-building perspective, providing a comparison of weather-adjusted baseline and targeted energy consumption to actual, metered consumption. Monthly reports provide financial information validating the effects of energy reduction measures and tracking achieved savings versus targeted goals. This equips facility managers with the justification they need to approach their board about future projects and investments.

The daily reporting provides valuable feedback that can be used as an operational tool, allowing facility managers the opportunity to make efficient, data-driven decisions and take ownership of operations. This creates an environment where the staff is focusing on the big picture and is consistently pushing towards the same goal: reducing energy consumption and overall net costs. Measurement and verification creates an environment where the entire staff is focusing on the big picture and is consistently pushing towards the same goal: reducing energy consumption and overall net costs.

Equipment Warranties

All equipment installed as part of the performance contract will be covered by a one-year warranty from the date of project completion. An equipment list will be prepared at Close Out for each building that will detail all warranty dates including any manufacturer's warranties which exceed this one-year period. This document will also include any specific service requirement details which might be required by the manufacturer to keep these warranties in force. The warranty claim process will emphasize prompt repair of critical systems and proper documentation of the circumstances surrounding the warranty issue. CORE will work with the Client to establish a warranty claim procedure which utilizes the present service contractors or the installing contractor to provide prompt reaction to warranty issues for critical systems.

Calculation and Reporting of Emissions Reductions

CORE is committed to sustainability and energy conservation. We believe that reducing greenhouse gas emissions and fossil fuel consumption is absolutely essential. Our Measurement and Verification Team has the capability to calculate and report emissions reductions and have calculated emissions reductions for a variety of project types and sizes.

Energy Star Label and LEED Certification

CORE is committed to the principles of sustainability. We believe that the transformation of the design and construction industry from conventional practices to sustainable practices is critical for a sustainable future. We have completed hundreds of LEED Certified projects, including new construction and renovations. Through this experience, we have learned that the foundation of all sustainable practices is stewardship. Stewardship of financial and natural resources is what we do best. Every aspect of our practice has been structured to produce energy efficient and environmentally sensitive designs.

CORE includes team members with extensive experience in LEED and Energy Star consulting services who have the capability to prepare and submit an Energy Star application on behalf of our Clients. Our experienced team has maintained Energy Star Portfolio Manager accounts for many Energy Star certified facilities. With this experience comes an intimate understanding of the goals and requirements of the Energy Star program, which include monthly invoice data, performance and savings data, and detailed facility information. Our team also includes registered Professional Engineers who are available to facilitate the Energy Star verification process by reviewing and approving the application.



Training of Maintenance Staff and Occupants

CORE created an Operations and Maintenance (O&M) program to support building operators and maintenance staff in effectively maintaining their facilities. The program gives O&M staff access to training courses involving field instruction and plain language guidance on the building systems they encounter on a day-to-day basis. The program empowers O&M staff to operate their facility more efficiently and builds a purpose-driven team that is proactive in improving daily operations and sustaining energy savings. Training sessions are delivered on-site by experienced trainers. Each class lasts approximately four hours and includes a PowerPoint presentation and handouts.

Prior to training, the O&M staff are given an online assessment. The assessment results are used to tailor the training to your team’s needs. The assessment consists of 75, multiple-choice questions and is made up of three sections: air-side, water- side, and controls. After the training is completed, the exact same assessment is given to verify retention and track progress.

Hazardous material handling

CORE has developed policies and procedures that are compliant with all federal and state regulations regarding the handling of hazardous material.

Long-term Maintenance Services of Energy Systems

Facility managers and their staff are faced with pressure to save operating costs while maintaining a higher level of service, comfort, and quality. We understand this challenge and have developed services and smart solutions to support effective, long-term operation and maintenance. From energy performance measurement and verification to preventative maintenance, we create value for our Clients by offering services that focus on streamlining operations and sustaining energy efficiency.

Web-based Utility Information, Dashboards & Reports

We will customize a building analytics dashboard to house all critical data—utility bills, measurement and verification reporting, automatic fault detection, and more. This dashboard will provide a complete view of your facility/s energy use, from its initial procurement all the way to its end use in the facility in a platform totally configured to your needs and preferences. It is backed by a team of engineering experts and remote monitoring staff who offer real-time monitoring of your systems and facilities. Our team members monitor over 78M square feet, over 150 buildings, and more than 1,300 utility accounts.

Utility Management

We offer complete solutions for managing utility costs. Our team of analysts provides rate design, rate analysis, procurement, peak shaving, market monitoring, forecasting, budgeting, bill auditing, and more. We take a detailed and hands-on approach to deliver tangible results. The team has corrected over \$350K in utility billing errors on behalf of our Clients. You can trust that our expert staff will deliver maximum utility cost savings while ensuring a reliable energy supply.

Building Metering Platforms and Energy Data gathering Solutions.

ENERGY
AS AN
OPPORTUNITY

- Decrease operating expenses and drive efficiency
- Improve employee morale and productivity
- Increase brand credibility
- Mitigate business risk

Sustainability Tracking

Tracking is central to creating visibility of environmental goals, accountability for achieving key milestones, and automating the reporting and credit recognition. Much like with the Affordable Care Act (Healthcare Reform), organizations are faced with forthcoming government mandates and the requirement to demonstrate compliance.

Utility Bill Process and Payment Services

These services streamlined through industry-leading software, EnergyCAP. Improve your energy management with our full-service model to (1) reduce your AP per invoice processing cost (2) eliminate overpayment of bills with continuous audits and timely processing and (3) benchmark and identify efficiency opportunities across your portfolio.



Measurement and Verification

As previously mentioned, M&V delivers investment grade clarity on a facility's overall energy consumption to make data-backed decisions and optimize ongoing performance. *"The World's Most Valuable Resource is no longer oil, but data"* -The Economist.

Internet of Things

This is the nucleus of an operation with 24/7 control and visibility to manage energy from anywhere. Automation eliminates wasted energy and allows you to make fully informed business decisions.

LED

LED is today's lighting technology with a 30% adoption rate and doubling year after year. On average, our customizable solutions lead to 50% reduction in lighting load, a lifespan of over 20+ years, and 30% increase in elevated light levels. The results deliver a reduction in maintenance, an enhanced experience for increased productivity, improved safety to reduce risk, and more.

HVAC+R

This has the largest impact on energy consumption. Our solutions provide the ability to improve efficiencies up to 50%, prolong the life of your assets, reduce maintenance expenses via fault detections, and increase air quality, all without having to rip and replace your system.

Solar

Solar delivers an environmental advantage to the world, while providing the ability to monetize non-traditional assets like parking structures or the roof of your building. Today's production guarantees and technology now allow you to secure a levelized cost of energy at or below your current utility rate and mitigate your risk from market volatility and coincidental peak charges.

Distributed Energy Resources (DER)

DER programs and solutions (e.g. batteries, generators) are a significant step towards energy interdependence — a true microgrid that provide energy arbitrage opportunities. Moreover, DER allows you to mitigate risk via peak load shaving and creating operational resiliency.

Energy Procurement

Energy procurement goes beyond a transactional competitive bid process. Our approach to develop an hourly risk mitigation strategy around the most expensive (250) hours of the year, allows us to deliver customers (1) certainty without paying premium (2) opportunity to capitalize on favorable market conditions and (3) flexibility to accommodate load change. Consistent communication on business insights and a national energy outlook throughout contractual terms is key to a successfully managed strategy.

Finance and Incentive Management

CORE maximizes returns for our customers through customized structures and full management of the utility incentive process across all energy verticals. Results can lead to operating cash flow positive day one without investing capital.





Response to emergency orders and maintenance repair/requests	<i>Describe the type of emergency orders or requests your organization typically receives and how you respond to those requests</i>	If an emergency notification is received by the Warranty Manager, the appropriate Trade Partner will be called for an immediate response. The Trade Partner is scheduled to be on-site the same day, or the following morning. The issue will be addressed immediately, and temporary repairs or completed repairs will happen within 24 hours.
Integration with other platforms	<i>Describe any integrations your organization can provide with other platforms or systems.</i>	CORE is familiar with the platforms and systems that will be used and will integrate with them seamlessly. We will work collaboratively with Region 10 ESC and Equalis Group to meet your needs and goals.
Security protocols and privacy protection	<i>Please describe protocols taken to ensure the protection of privacy and data.</i>	CORE understands that privacy and data security is crucial. It is backed by a team of engineering experts and remote monitoring staff who offer real-time monitoring of your systems and facilities.
Customer service/problem resolution	<i>Describe your company's Customer Service Department (hours of operation, how you resolve issues, number of service centers, etc.).</i>	CORE has a Client Service Department that is available 24/7. These personnel serve as advocates for the Client and will be in constant communication with the Owner from pre-construction through close out and warranty. Each professional will direct all day-to-day business operations of job order contracts in their state.
Financial condition of vendor	<i>Demonstrate your financial strength and stability with meaningful data. This could include, but is not limited to, such items as financial statements, SEC filings, credit & bond ratings, letters of credit, and detailed reference letters</i>	CORE is financially qualified to propose on a project of this size, with a single project bonding capacity of \$300 million and an aggregate capacity of \$1.5 billion through Travelers Casualty and Surety Company of America in conjunction with Liberty Mutual Insurance Company. Please refer to page 14 for a letter from Travelers Casualty and Surety Company of America which demonstrates CORE's bonding capacity, and please refer to page 15 for CORE Bank Reference Letter.
	<i>What was your annual sales volume over last three (3) years?</i>	2019 \$1,004,834,000 2020 \$1,060,182,000 2021 \$1,132,609,000
Contract implementation / Customer training	<i>Describe training or support you provide to help agencies understand how to utilize the spaces and technology equipment being installed.</i>	CORE developed an Operations and Maintenance program to support building operators and maintenance staff in effectively maintaining their facilities. The program gives access to training courses involving field instruction and plain language guidance on the building systems they encounter on a day-to-day basis. The program empowers agencies to operate their facility efficiently and builds a purpose-driven team that is proactive in daily operations.
Other factors relevant to this section as submitted by the Respondent	<i>Describe the capacity of your company to provide management reports, i.e. consolidated billing by location, time and attendance reports, etc. for each eligible agency</i>	CORE has the ability to provide management reports, billing, daily reports, and more. The use of such reports on a project by project basis is part of the individual project team's responsibility. CORE utilizes Procure for all project management including contracts, billings, Trade Partner Agreements, change management, submittals, RFIs, daily reports, etc.
	<i>Provide your safety record, safety rating, EMR and worker's compensation rate where available.</i>	2022 EMR: 0.63 Safety Record: 0.63 Safety Rating: 0.63 Worker's Compensation Rate: 0.10%
Qualification and Experience (25 Points)		
Respondent reputation in the marketplace	<i>Provide a link to your company's website</i>	www.coreltd.com
	<i>Please provide a brief history of your company, including the year it was established.</i>	CORE was founded in 1937 and has grown into an industry leader in construction management with 20+ offices in ten states and more than 1,200 employees. Please refer below for our company history.
Past relationship with Region 10 ESC and/or Region 10 ESC members	<i>Have you worked with Region 10 in the past? If so, what was the timeframe for that work?</i>	Yes, CORE is currently working with Region 10 ESC on multiple ongoing contracts including Spring Valley Window Replacement, Region 10 Window & Door Maintenance and Cleaning, Abrams Additional Offices, Spring Valley Education Center Window Replacement, and Spring Valley Renovations Phase 2 throughout 2022.
Experience and qualification of key employees	<i>Please provide contact information and resumes for the person(s) who will be responsible for the following areas. Region 10 requests contacts to cover the following: * Executive Support * Account Manager * Contract Manager</i>	Executive Support: Ronald Bordelon Account Manager: Dave Wilson Contract Manager: Joy Kendall Marketing: Alli Linaman Billing, Reporting and Accounts Payable: John Verhoff Please refer to pages 58-62 for all resumes.

Our History

Our Founder, Otto Baum, immigrated to Morton, Illinois in 1925 with the hope of building better a life for himself and his family. He quickly established a reputation for being an honest and hard-working man. When Otto applied for a loan to purchase equipment for his masonry company in 1937, he had nothing to use as collateral except for his proven character and admirable reputation. When the bank manager asked the loan officer why they should consider Otto's request, the officer simply replied, "I trust him." This event sparked the beginning of our company, which now operates in multiple locations across the U.S., supported by over 1,200 employees and a strong culture built on the same trust and values that Otto started the company with in 1937.

Otto Baum

CORE's Founder, circa 1925



CORE in Morton, IL
circa 1960



SURETY LETTER

SAMPLE



Insurance and Surety Brokers
T: 469-430-1450

June 23, 2022

Mr. Clint Pechecek, Purchasing Consultant
Region 10 ESC
400 E. Spring Valley Rd.
Richardson, TX 75081

RE: Proposal Response for Region 10 ESC and Equalis Group Smart Building Solutions | RFP # R10-1135

Dear Mr. Pechecek and Selection Committee Members:

CORE Construction (CORE) bonds are written through a co-surety arrangement with Travelers Casualty and Surety Company (Travelers) and Liberty Mutual Insurance Company (Liberty).

CORE has advised Travelers and Liberty of their desire to perform construction services for your captioned project. Travelers has enjoyed a relationship with CORE for over 40 years. During our relationship we have provided any bid, performance and payment bonds that they have required. We have bonded significant individual projects for CORE and they are certainly qualified to perform contracts such as yours, as they have bonding capacity of \$300 million per single project and \$1.5 billion in the aggregate. This is not to be construed to be a maximum, but rather working parameters. CORE has always met their contractual obligations and we believe there is not a higher quality firm you could choose to work with.

Should CORE be awarded a contract on this or any of your projects and be required to provide performance and payment bonds for same, and should contractor so request, we would be in position to provide such bonds, subject to a favorable review of the final bond forms, contract documents and specifications and usual underwriting requirements at the time.

In addition, both Travelers and Liberty are licensed to do business in all states and Travelers has an A.M. Best Co. rating of A++ XV while the Liberty A.M. Best rating is A XV.

Sincerely,

Travelers Casualty and Surety Company
Liberty Mutual Insurance Company

By: 
David Buckman, Attorney-in-Fact

Agent Contact Information:
David Buckman, President, Glenn Allen Insurance and Surety Brokers
5205 McClellan Dr., Frisco, TX 75036 | T: (469) 430-1450



BANK REFERENCE LETTER



May 31, 2022

Gary Frazier
CORE Construction
6320 Research Rd
Frisco, TX 75033

Please accept this letter of reference for CORE Construction Services of Texas, Inc.

CORE Construction Services of Texas, along with a group of related companies, is a co-borrower on a secured line of credit provided by UMB Bank, N.A. This line of credit is available to a moderate eight figure level. Current availability on the line is a moderate eight figure amount. This line of credit is annually renewable and the next maturity date is September 1, 2022.

UMB Bank has had a relationship with the related companies, including CORE Construction Services of Texas, since 2013. The line of credit has not been used in excess of 365 days and the Borrowers remain in compliance with all financial covenants. UMB is proud to work with CORE Texas and we highly recommend them in all regards.

If you or anyone else needs additional information regarding these matters, please contact me at 602-337-6964.

Sincerely,

Philip Neidhart | V.P. Treasury Management
UMB Bank | 2777 East Camelback Rd., Ste. 350 | Phoenix, AZ 85016
(602) 337-6964 Office
(816) 510-1423 Cell
Philip.Neidhart@umb.com | www.umb.com

PROPOSAL FORM 2 QUESTIONNAIRE & EVALUATION CRITERIA



	<i>* Marketing * Billing, reporting & Accounts Payable</i>	Answered on previous page.
Past experience working with the public sector	<i>What are your overall public sector sales, excluding Federal Government, for last three (3) years?</i>	2019 \$1,004,834,000 2020 \$1,060,182,000 2021 \$1,132,609,000
	<i>What is your strategy to increase market share in the public sector?</i>	Education is CORE's strategy to increase market share. CORE participates in face-to-face communication with Clients daily, and we market alternative project delivery methods as a valuable solution for all Client needs.
Past litigation, bankruptcy, reorganization, state investigations of entity or current officers and directors	<i>Provide information regarding whether your firm, either presently or in the past, has been involved in any litigation, bankruptcy, or reorganization.</i>	Our entire team at CORE can proudly state that our firm and respective principals have not been involved in any litigation, bankruptcy, or reorganization.
Minimum of 5 public sector customer references relating to the products and services within this RFP	<i>Provide a minimum of five (5) customer references for product and/or services of similar scope dating within the past 3 years. Please try to provide references for K12, Higher Education, City/County and State entities. Provide the entity; contact name & title; city & state; phone number; years serviced; description of services; and annual volume</i>	Please refer to pages 63-65 for all reference information. CORE's customer references include the following: <ol style="list-style-type: none"> 1. Louisiana Department of Education - Ongoing (State) 2. AT&T Stadium 3. Johnson County Municipal Water Utility District 4. Las Vegas-Clark County Library District East Las Vegas Library 5. Illinois Wesleyan University 6. Starbucks Carson Valley Distribution Center
Certifications in the Industry	<i>Provide a copy of all current licenses, registrations and certifications issued by federal, state and local agencies, and any other licenses, registrations or certifications from any other governmental entity with jurisdiction, allowing Respondent to perform the covered services including, but not limited to licenses, registrations or certifications. M/WBE, HUB, DVBE, small and disadvantaged business certifications and other diverse business certifications, as well as manufacturer certifications for sales and service must be included if applicable</i>	CORE holds licenses in many states across the U.S., and Ronald Bordelon, President of CORE Energy, Ltd., holds a Data Center Energy Professional (DCEP) certification from the U.S. Department of Energy and is the Qualifying Party for GC or PMCM licenses in the following states: Oregon, Nevada, Louisiana, Mississippi, Arkansas, Tennessee, North Carolina Please refer to page 22-25 (Proposal Form 3: Certifications and Licenses) for copies of all licenses, registrations and certifications.
Company profile and capabilities	<i>What best describes your position in the distribution channel? (Manufacturer, Authorized Distributor, Value-Add Reseller, Other</i>	CORE's position is best described as the Program Manager of the entire distribution process.
Other factors relevant to this section as submitted by the Respondent	<i>If your company is a privately held organization, please indicate if the company is owned or operated by anyone who has been convicted of a felony. If yes, a detailed explanation of the names and conviction is required.</i>	CORE is not owned or operated by anyone who has been convicted of a felony.



	Provide a copy of all current licenses, registrations and certifications issued by federal, state and local agencies, and any other licenses, registrations or certifications from any other governmental entity with jurisdiction, allowing Respondent to perform the covered services. These will be provided in the space provided in Form 6. No answer is required here.	
MWBE Status and/or Program Capabilities (10 Points)		
MWBE status, subcontractor plan, and/or joint venture program	<i>Please indicate whether you hold any diversity certifications, including, but not limited to MWBE, SBE, DBE, DVBE, HUB, or HUBZone</i>	CORE does not hold any diversity certifications.
	<i>Do you currently have a diversity program in place, such as a Mentor Protégé Program or subcontractor program? If you have a diversity program, please describe it and indicate whether you plan to offer your program or partnership through Equalis Group?</i>	Yes, CORE has a Mentor Protégé Program and a diversity outreach approach in place. Please refer to pages 19-21 for a detailed overview of our program. This program will be available to Equalis Group.
	<i>Please attach any certifications you have as part of your response to Form 6.</i>	
Good faith efforts to involve MWBE subcontractors in response	<i>Did your company contact MWBEs or minority chambers of commerce by telephone, written correspondence, or trade associations at least one week before the due date of this RFP to provide information relevant to this opportunity and to determine whether any MWBEs were interested in subcontracting and/or joint ventures?</i>	As one of the largest qualification-based builders in the country, we have developed strong and loyal relationships with reliable, professional Trade Partners located in virtually every construction market that we serve. CORE will select our Trade Partners based on our selection process outlined at the bottom of this page. CORE's Values of Integrity, Fairness, Continuous Improvement, and Results drive us to lead our projects through inclusive, equitable business practices. Just as many of our Clients strive to ensure equal access for diverse and developing firms, CORE does as well. Each of CORE's offices across the nation are proactively engaging, attracting and employing diverse businesses. At CORE, we believe the entire team should reflect the diversity of the communities we serve regardless of whether there is a requirement or not. Having meaningful relationships with a diverse variety of MWBE or minority firms has been a normal business practice for CORE for many years, long before it was ever required.
Demonstrated ongoing MWBE program	<i>Outline your subcontractor strategy and efforts your organization takes to include MWBE subcontractors in future work, including but not limited to efforts to reach out to individual MWBE businesses, minority chambers of commerce, and other minority business and trade associations.</i>	CORE Trade Partner strategy and efforts taken to include MWBE firms in future work, including but not limited to efforts to reach out to individual MWBE business, minority chambers of commerce and other minority business and trade associations maybe be found on pages 19-21.
Commitment to Service Equalis Group Members (10 Points)		
Marketing plan, capability, and commitment	<i>Detail how your organization plans to market and promote this contract upon award, including how this contract will fit into your organization's current go-to-market strategy in the public sector.</i>	CORE plans to market and promote this contract as we would any other contract with our organization's current go-to-market strategy detailed below.
	<i>Detail how your organization will train your sales force and customer service representatives on this contract to ensure that they can competently and consistently present the contract to public agency customers and answer any questions they might have concerning it.</i>	CORE will seek to enroll in any Region 10 ESC training seminars or sessions that are provided. We will host virtual meetings with representatives in each of our offices to review the terms and conditions as well as discuss how Region 10 ESC operates. The goal will be to use the Region 10 ESC contract to expand into new markets and expand existing markets by adding new customers. CORE is also open to advice and suggestions from the Region 10 ESC and Equalis Group teams.
	<i>Acknowledge that your organization agrees to provide its company logo(s) to Region 10 ESC</i>	See answer on following page due to space.

GO-TO-MARKET STRATEGY

STEP 1

- a. CORE will issue an approved, co-branded press release within the first 30 days.
- b. CORE's Marketing Department will post on our website and social media accounts.
- c. CORE will mail an announcement of our award to our database of existing Clients and potential Clients.
- d. CORE will work with Region 10 ESC and Equalis Group to create co-branded collateral pieces including a profile sheet to include in our brochures.
- e. CORE will advertise our award in regional and national publications.
- f. CORE regularly participates in over 50 national conferences and trade shows for organizations that support the public sector, and we will promote Region 10 ESC Equalis Group at these events.

- g. CORE will establish a dedicated link on our company website. We will post our due diligence and featured projects on this site, including a summary of contract and services offered. A link to this information will be provided on our brochures as well as our website.

STEP 2

CORE will reach out to all Clients who have historically used this type of contract, and proudly notify them of our current standing with Region 10 ESC and Equalis Group. In addition, CORE will seek to provide services to new school districts, municipalities, and all other public Clients.



STEP 3

We will immediately promote this contract in our current 20+ offices across the country. In years to follow, as we grow into new markets, we will continue to promote the Region 10 ESC and Equalis Group contract to drive growth.

CORE will also seek to enroll in any Equalis training seminars or sessions that are provided. We will hold web-based meetings with representatives in each of our offices to review the terms and conditions. The goal will be to use the Region 10 ESC and Equalis Group contract to expand into new markets and expand existing markets by adding new Customers.

CORE is also open to advice and suggestions from the Region 10 ESC and Equalis Group. CORE has been assisted greatly in the past as to how the contract is to be implemented and how best to drive it.



CORE Office, Las Vegas, NV

CORE's regional office not only achieved LEED Gold Certification from the U.S. Green Building Council, it received the AIA of Western Mountain Regional Council Merit Award, and the AIA of Nevada Built Architecture Citation Award for innovation, sustainability, and energy efficient design.

	<i>and Equalis Group and agrees to provide permission for reproduction of such logo in marketing communications and promotions</i>	CORE will provide our company logo to Region 10 ESC and Equalis Group and agrees to provide permission for reproduction of such logo in marketing communication and promotion.
Ability to manage a cooperative contract	<i>Describe the capacity of your company to report monthly sales through this agreement to Equalis Group.</i> <i>Identify any contracts with other cooperative or government group purchasing organizations of which your company is currently a part of:</i>	As we are currently providing services on multiple similar contracts, CORE has demonstrated the ability to report monthly sales information as requested and will continue to do so with this contract if selected moving forward. 1GPA JOC Contract - May 17, 2020 *Option to renew for three (3) additional one (1) year periods. NCPA JOC Contract - November 30, 2019 *Option to renew for four (4) additional one (1) year periods. E&I Cooperative Services JOC Contract - June 30, 2020
Commitment to supporting agencies to utilize the contract	<i>If awarded a contract, how would you approach agencies in regards to this contract? Please indicate how this would work for both new customers to your organization, as well as existing.</i>	If selected, CORE will market our Region 10 ESC and Equalis Group contract to each of our existing Clients, and we will use it as a tool to market to new Clients. We will host lunch-and-learn sessions, in-person meetings, and conferences.
Other factors relevant to this section as submitted by the Respondent	<i>Provide the number of sales representatives which will work on this contract and where the sales representatives are located.</i>	CORE has 35 Business Development professionals across the nation, from California to Florida, in the following markets: Commercial Energy, Healthcare, Higher Education, Hospitality, K-12, Multifamily/Residential, Municipal, Senior Living



MENTOR PROTÉGÉ PROGRAM

DIVERSITY OUTREACH

APPROACH AND METHODOLOGY

CORE's Values of Integrity, Fairness, Continuous Improvement, and Results drive us to lead our projects through inclusive, equitable business practices. Just as many of our Clients strive to ensure equal access for diverse and developing firms, CORE does as well. Each of CORE's 20+ offices across the nation are proactively engaging, attracting and employing diverse businesses. Most construction firms enlist diverse and developing firms to meet specific requirements of a project or Client. That is not who we are as a company. At CORE, we believe the entire team should reflect the diversity of the communities we serve regardless of whether there is a requirement or not. Having meaningful relationships with a diverse variety of MWBE firms has been a normal business practice for CORE for many years, long before it was ever required.

DIVERSITY OUTREACH APPROACH

Our outreach extends beyond open houses and networking events, and past the construction of individual projects. It involves offering continuous education and formal mentoring partnerships with MWBE firms within the community. We have formal mentorship/protégée relationships with firms across the United States, and many of these firms have now, in turn, formed partnerships with other, smaller firms. This ripple effect of growth has strengthened CORE's belief that assisting with small business scalability and strengthening a diverse business community directly contributes to the overall economic growth of our markets. CORE also regularly engages in general outreach to MWBE firms, inviting them to tour our offices, meet with our PreConstruction and Construction Departments, and to participate in training seminars. These seminars involve education and mentorship in the areas of safety, construction management, and the latest industry technologies—such as Building Information Modeling classes held by our Virtual Construction Department. Our goal with these training opportunities is to remove the barriers that have long prevented emerging firms from leveraging industry's most powerful tools.

PROJECT-SPECIFIC DIVERSITY OUTREACH APPROACH DURING DESIGN:

CORE will request a list of certified MWBE firms from Region 10 ESC and Equalis Group to solicit in addition to those in our Trade Partner database. We maintain our database through active participation in professional minority organizations, events, and solicitations.



The identified MWBE Trade Partners will be contacted early and often to generate interest in the Region 10 ESC Smart Solutions program. Their responses will be recorded and reviewed to determine initial levels of MWBE involvement.

Next, public notices and blanket solicitations for upcoming projects will be made to ensure MWBE certified businesses are provided with ample notice for participation. Our team will coordinate with Region 10 ESC and Equalis Group to schedule outreach events where certified firms will have the opportunity to meet with our project team members and create business partnerships. These events will:

1. Provide additional details about upcoming projects
2. Review Region 10 ESC and Equalis Group's diversity goals
3. Solicit MWBE firms' support in creating interest within their respective trade groups and industries
4. Provide coaching and any technical assistance needed through the Prequalification and Bidding Phase

During this stage, we will regularly email, monitor and track the committed participation of MWBE firms to ensure we are meeting all project requirements. We will host additional outreach events and adjust our strategy as needed to ensure compliance.



PRE-BID PREPARATION:

CORE will host pre-bid meetings, notify MWBE firms of the pre-bid dates, and develop bid packages. Right-sizing the bid packages and identifying key scopes of work that allow certified firms to serve as the primary/first tier Subcontractor will be a key priority during this stage. We will work through all pre-construction documentation in order to achieve a healthy balance of MWBE participation while ensuring the firms’ ability to complete the work. Communications about bidding will be sent to agencies/associations for MWBE solicitations, and plans and specifications will be made available to MWBE firms for their review.

RECEIPT OF BIDS/CONFIRMATION OF COMPLIANCE

CORE will monitor all bid packages at the bid opening for compliance with Region 10 ESC and Equalis Group’s participation goals.

The task that will be performed at this stage include:

1. Verify the MWBE firms that are to be utilized on the project are currently certified
2. Verify whether trade contractors have met Region 10 ESC and Equalis Group’s minimum program requirements, and encourage companies to exceed those requirements
3. Review any proposed joint venture arrangements between majority and minority owned businesses seeking credit resulting from the partnership
4. Create networking opportunities with CORE’s PreConstruction and Construction Department personnel
5. Outlook for future work opportunities for MWBE firms

TRACKING OUR RESULTS

In compliance with our Values of Continuous Improvement and Results, we track this entire outreach process on every project. We will document:

- The responsiveness of MWBE firms to initial outreach efforts. We monitor whether the firms, regardless of whether they submitted a bid or not, are interested in being contacted for future CORE project opportunities.
- MWBE firms’ desire to participate in future training seminars
- The firms’ desire to grow and provide mentorship and management coaching to other, smaller firms
- The opportunity to refer MWBE firms to non-MWBE firms to form teaming arrangements on future projects
- The opportunity for specific MWBE personnel to engage with CORE’s PreConstruction and or Construction Department personnel for one-on-one training sessions or discussions

MWVBE PARTICIPATION BY REGION

FLORIDA:

- 10 Prime CM Partners, 100+ MWVBE Trade Partners
- 25+ Prime CM MWVBE Partnerships
- 30% average MWVBE Prime CM contracts and 35% MWVBE subcontracts
- 15+ MWVBE mentorships
- Active Participants and Members of:
 - Community Outreach Events
 - Trade Partner Fairs
 - Joined Local Contractors Associations (Regional Black Contractors Association and Regional Hispanic Contractors Association)
 - Participation in Local Chambers of Commerce
 - Helped found the Horus Academy (named after one of our MWBE partners) which is an MWVBE incubator that we are starting to incorporate into all of our local offices. It offers our partners rent free office space and associated resources, real-time access to daily hands-on mentorship, etc.
 - Have worked with several Clients to help them establish MWVBE programs for the first time, and with others to refine and strengthen their existing programs.





LOUISIANA:

- 26% - Average MWVBE Participation on all projects over last 10 years
- Over \$100M in subcontracts to MWVBE in past 10 years
- Initiated and participated in training seminars with local urban leagues starting eight years ago
- Established Mentor/Protégé Program to pair minority firms with majority firms
- Established an Early Pay Program to ensure minority firms are paid early on projects

MIDWEST:

- 40+ MWVBE partners
- 15+ JV Partnerships with MWVBE
- 25% average MWVBE participation on projects
- Active participants and members of:
 - Sponsored and taught ETI program
 - US Minority Contractors Association
 - Black Contractor Owners and Executives
 - Black Chamber of Commerce
 - Black Business Alliance
 - Minority Business Development Center – sponsorship and education

TEXAS:

- 30 MWVBE Partners
- 12 JV Partnerships with MWVBE
- 30% average MWVBE participation on projects
- 15+ MWVBE mentorships
- Active Participants and Members of:
 - Community Outreach Events
 - Trade Partner Fairs
 - Joined Local Contractors Associations (Regional Black Contractors Association and Regional Hispanic Contractors Association)
 - Participation in Local Chambers of Commerce
 - Mentor Protégé Program the University of North Texas



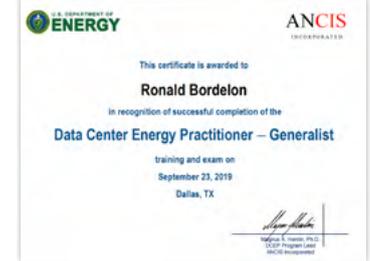


PROPOSAL FORM 3: CERTIFICATIONS AND LICENSES

Provide a copy of all current licenses, registrations and certifications issued by federal, state and local agencies, and any other licenses, registrations or certifications from any other governmental entity with jurisdiction, allowing Respondent to perform the covered services including, but not limited to licenses, registrations or certifications. M/WBE, HUB, DVBE, small and disadvantaged business certifications and other diverse business certifications, as well as manufacturer certifications for sales and service must be included if applicable.

CORE's Licenses		
State	License Class	License No.
Alabama	BC	46946
Arizona	B-01	069786
Arizona	A	110343
Arizona	B	199920
California	B	954885
Colorado	N/A	No License Required
Florida	CGC	1516489
Florida	CGC	43320
Georgia	GCQA	003427; 003325
Georgia	GCQA	A003334; A003437
Iowa	N/A	None Required
Idaho	RCE	41083
Idaho	Unlimited	025816
Illinois	N/A	None Required
Indiana	N/A	Registered Public Works Contractor
Louisiana	N/A	54378; 884216; 250681
Michigan	N/A	No License Required
Mississippi	N/A	21807-MC
Missouri	N/A	No License Required
North Carolina	Unlimited	77604
Nevada	Corporation	0077142; 0006144A
New Mexico	GB98	372635
Ohio	N/A	No License Required
Oklahoma	N/A	No License Required
South Carolina	Unlimited	G120463
Tennessee	Unlimited	00067481
Texas	N/A	No License Required
Utah	B100	8530400-5501
Washington	CC-01	CORECCM820JK
Wisconsin	N/A	None Required

Ron Bordelon is the Qualifying Individual on the licenses below.





State of Indiana
Office of the Secretary of State

CERTIFICATE OF EXISTENCE

To Whom These Presents Come, Greeting:

I, **CONNIE LAWSON**, Secretary of State of Indiana, do hereby certify that I am, by virtue of the laws of the State of Indiana, the custodian of the corporate records and the proper official to execute this certificate.

I further certify that records of this office disclose that

CORE CONSTRUCTION INDIANA, LLC

duely filed the requisite documents to commence business activities under the laws of the State of Indiana on April 17, 2013, and was in existence or authorized to transact business in the State of Indiana on June 10, 2016.

I further certify this Domestic Limited Liability Company has filed its most recent report required by Indiana law with the Secretary of State, or is not yet required to file such report, and that no notice of withdrawal, dissolution, or expiration has been filed or taken place.



In Witness Whereof, I have caused to be affixed my signature and the seal of the State of Indiana, at the City of Indianapolis, June 10, 2016



CONNIE LAWSON
SECRETARY OF STATE

2013041700396 / 201633502
Verify this certificate: <https://bsd.sos.in.gov/ValidateCertificate>

1/26/22, 10:33 AM CORE CONSTRUCTION SERVICES, L.L.C. Details

600 North Street, Baton Rouge, 70802 | (225) 765-2301 | Text-To-Verify: 1 (855) 999-7896

Louisiana State Licensing Board for Contractors

Contractor Information

Business Name	CORE CONSTRUCTION SERVICES, L.L.C.
Mailing Address	6320 Research Road Frisco, TX 75033
Phone Number	(972) 668-9340
Fax Number	(504) 733-2214
Email Address	shawnglasser@ccg-services.com
Website	www.coreconstruction.com

Active Licenses

License Number	54378	License Type	Commercial License
Issue Date	09/23/2021	Expiration Date	09/23/2024
License Number	884216	License Type	Residential License
Issue Date	01/27/2022	Expiration Date	01/26/2023
License Number	250681	License Type	Mold Remediation License
Issue Date	03/20/2019	Expiration Date	03/06/2022

Classifications

Class	Qualification	Expiration
BUILDING CONSTRUCTION	Gary Lee Wenk	ALL
BUSINESS AND LAW	Dennis Matthew Hoffman	ALL
BUSINESS AND LAW	Lucas Schutte	ALL
BUSINESS AND LAW	Lucas Schutte	ALL
MOLD REMEDIATION CONTRACTOR	Lucas Schutte	ALL
RESIDENTIAL BUILDING CONTRACTOR	Lucas Schutte	ALL
UNFAIR TRADE PRACTICES AND CONSUMER PROTECTION LAW SEMINAR	Lucas Schutte	ALL

STATE OF MISSOURI

Robin Carnahan
Secretary of State

CERTIFICATE OF REGISTRATION
FOR FOREIGN LIMITED LIABILITY COMPANY

WHEREAS,

WALTON CONSTRUCTION, LLC (COMPANY) LTD
"LLC (MS)"

Using in Missouri the name:

WALTON CONSTRUCTION, LLC (COMPANY), LLC

and existing under the laws of the State of Louisiana has filed with this state its Application for Registration and subject to this Application for Registration conforms to the Missouri Limited Company Act.

NOW, THEREFORE, I, **ROBIN CARNAHAN**, Secretary of State of the State of Missouri, by virtue of authority vested in me by law, do hereby certify and declare to the public that the above-captioned foreign limited liability company is duly and lawfully organized to transact business in the State of Missouri, and is entitled to any rights granted to Limited Liability Companies.

IN WITNESS WHEREOF, I have hereunto set my hand and cause to be affixed the Great Seal of the State of Missouri.
Done at the City of Jefferson, this 15th day of September, 2016.




Joseph A. Esparza
P.O. Box 1307
Austin, Texas 78711-0997

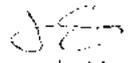
Office of the Secretary of State

Certificate of Fact

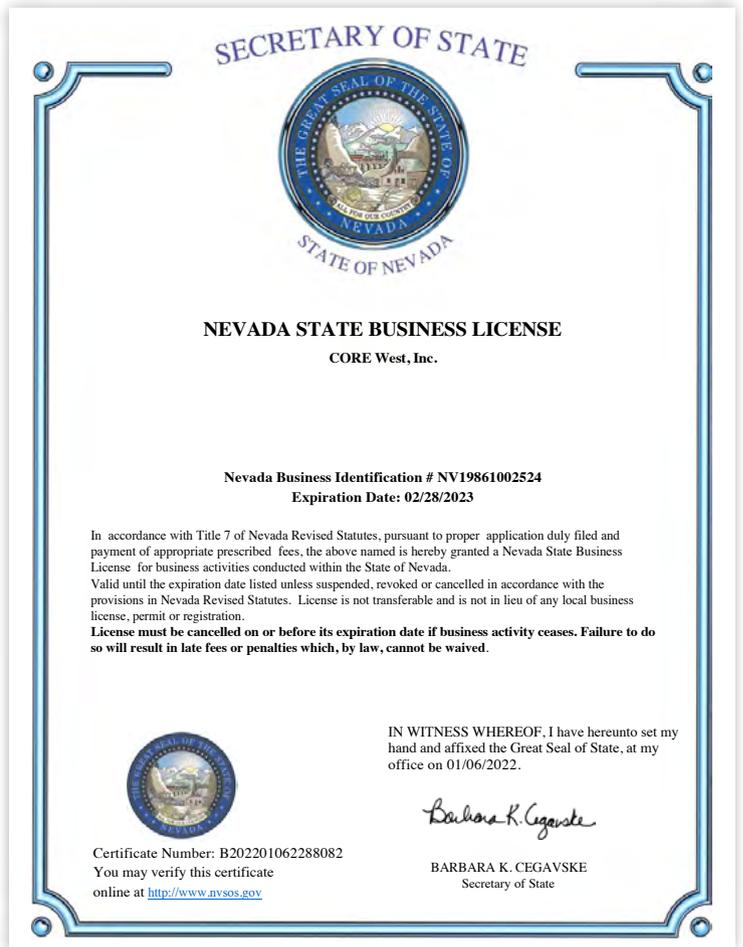
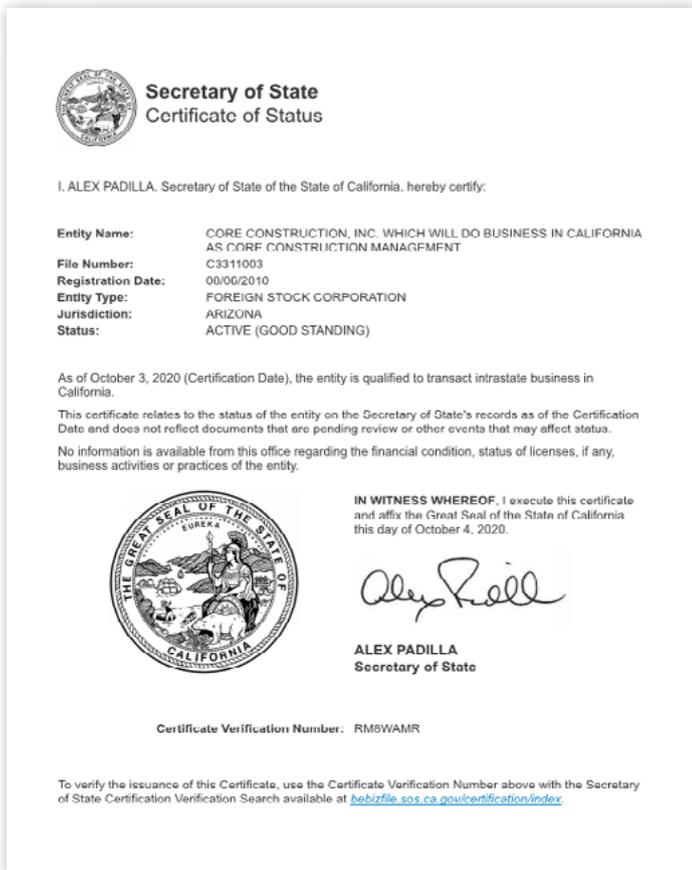
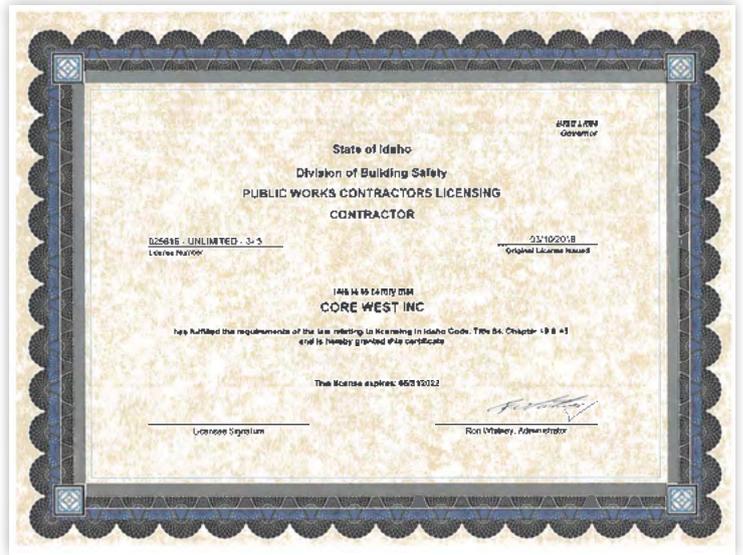
The undersigned, as Deputy Secretary of State of Texas, does hereby certify that the document Articles Of Incorporation for Core Construction Services of Texas, Inc. (file number: 110978900), a Domestic For-Profit Corporation, was filed in this office on October 18, 1990.

It is further certified that the entity status in Texas is in existence.

In testimony whereof, I have hereunto signed my name officially and caused to be impressed hereon the Seal of State at my office in Austin, Texas on June 28, 2021.

Jose A. Esparza
Deputy Secretary of State





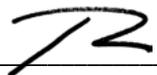
PROPOSAL FORM 4: CLEAN AIR WATER ACT

I, the Vendor, am in compliance with all applicable standards, orders or regulations issued pursuant to the Clean Air Act of 1970, as Amended (42 U.S. C. 1857 (h), Section 508 of the Clean Water Act, as amended (33 U.S.C. 1368), Executive Order 117389 and Environmental Protection Agency Regulation, 40 CFR Part 15 as required under OMB Circular A-102, Attachment O, Paragraph 14 (1) regarding reporting violations to the grantor agency and to the United States Environment Protection Agency Assistant Administrator for the Enforcement.

Potential Vendor: CORE Energy, Ltd.

Title of Authorized Representative: President

Mailing Address: 6320 Research Rd., Frisco, TX 75033

Signature: 



PROPOSAL FORM 5: DEBARMENT NOTICE

I, the Vendor, certify that my company has not been debarred, suspended or otherwise ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension", as described in the Federal Register and Rules and Regulations.

Potential Vendor: CORE Energy, Ltd.

Title of Authorized Representative: President

Mailing Address: 6320 Research Rd., Frisco, TX 75033

Signature: 



PROPOSAL FORM 6: LOBBYING CERTIFICATION

Submission of this certification is a prerequisite for making or entering into this transaction and is imposed by Section 1352, Title 31, U.S. Code. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Any person who fails to file the required certification shall be subject to civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

The undersigned certifies, to the best of his/her knowledge and belief, that:

1. No Federal appropriated funds have been paid or will be paid on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.
2. If any funds other than Federal appropriated funds have been or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal contract or cooperative agreement, the undersigned shall complete and submit Standard Form LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all covered sub-awards exceeding \$100,000 in Federal funds at all appropriate tiers and that all sub-recipients shall certify and disclose accordingly.

Signature of Respondent

June 23, 2022

Date



PROPOSAL FORM 7: CONTRACTOR CERTIFICATION REQUIREMENTS

Contractor’s Employment Eligibility

By entering the contract, Contractor warrants compliance with the Federal Immigration and Nationality Act (FINA), and all other federal and state immigration laws and regulations. The Contractor further warrants that it is in compliance with the various state statutes of the states it will operate this contract in.

Participating Government Entities including School Districts may request verification of compliance from any Contractor or subcontractor performing work under this Contract. These Entities reserve the right to confirm compliance in accordance with applicable laws.

Should the Participating Entities suspect or find that the Contractor or any of its subcontractors are not in compliance, they may pursue any and all remedies allowed by law, including, but not limited to: suspension of work, termination of the Contract for default, and suspension and/or debarment of the Contractor. All costs necessary to verify compliance are the responsibility of the Contractor.

The Respondent complies and maintains compliance with the appropriate statutes which requires compliance with federal immigration laws by State employers, State contractors and State subcontractors in accordance with the E-Verify Employee Eligibility Verification Program.

Contractor shall comply with governing board policy of the Region 10 ESC Participating entities in which work is being performed.

Fingerprint & Criminal Background Checks

If required to provide services on school district property at least five (5) times during a month, contractor shall submit a full set of fingerprints to the school district if requested of each person or employee who may provide such service. Alternately, the school district may fingerprint those persons or employees. An exception to this requirement may be made as authorized in Governing Board policy. The district shall conduct a fingerprint check in accordance with the appropriate state and federal laws of all contractors, subcontractors or vendors and their employees for which fingerprints are submitted to the district. Contractor, subcontractors, vendors and their employees shall not provide services on school district properties until authorized by the District.

The Respondent shall comply with fingerprinting requirements in accordance with appropriate statutes in the state in which the work is being performed unless otherwise exempted.

Contractor shall comply with governing board policy in the school district or Participating Entity in which work is being performed.

Signature of Respondent

June 23, 2022

Date



PROPOSAL FORM 8: ANTITRUST CERTIFICATION STATEMENTS
(Tex. Government Code § 2155.005)

I affirm under penalty of perjury of the laws of the State of Texas that:

- (1) I am duly authorized to execute this contract on my own behalf or on behalf of the company, corporation, firm, partnership or individual (Company) listed below;
- (2) In connection with this proposal, neither I nor any representative of the Company has violated any provision of the Texas Free Enterprise and Antitrust Act, Tex. Bus. & Comm. Code Chapter 15;
- (3) In connection with this proposal, neither I nor any representative of the Company has violated any federal antitrust law; and
- (4) Neither I nor any representative of the Company has directly or indirectly communicated any of the contents of this proposal to a competitor of the Company or any other company, corporation, firm, partnership or individual engaged in the same line of business as the Company.

VENDOR CORE Energy, Ltd.

ADDRESS 6320 Research Rd.

Frisco, TX 75033

PHONE (972) 668-9340

FAX N/A

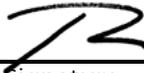
RESPONDANT


Signature

Ronald Bordelon
Printed Name

President
Position with Company

AUTHORIZING OFFICIAL


Signature

Ronald Bordelon
Printed Name

President
Position with Company



PROPOSAL FORM 9: IMPLEMENTATION OF HOUSE BILL 1295

Certificate of Interested Parties (Form 1295):

In 2015, the Texas Legislature adopted House Bill 1295, which added section 2252.908 of the Government Code. The law states that a governmental entity or state agency may not enter into certain contracts with a business entity unless the business entity submits a disclosure of interested parties to the governmental entity or state agency at the time the business entity submits the signed contract to the governmental entity or state agency. The law applies only to a contract of a governmental entity or state agency that either (1) requires an action or vote by the governing body of the entity or agency before the contract may be signed or (2) has a value of at least \$1 million. The disclosure requirement applies to a contract entered into on or after January 1, 2016.

The Texas Ethics Commission was required to adopt rules necessary to implement that law, prescribe the disclosure of interested parties form, and post a copy of the form on the commission's website. The commission adopted the Certificate of Interested Parties form (Form 1295) on October 5, 2015. The commission also adopted new rules (Chapter 46) on November 30, 2015, to implement the law. The commission does not have any additional authority to enforce or interpret House Bill 1295.

Filing Process:

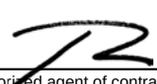
Starting on January 1, 2016, the commission will make available on its website a new filing application that must be used to file Form 1295. A business entity must use the application to enter the required information on Form 1295 and print a copy of the completed form, which will include a certification of filing that will contain a unique certification number. An authorized agent of the business entity must sign the printed copy of the form and have the form notarized. The completed Form 1295 with the certification of filing must be filed with the governmental body or state agency with which the business entity is entering into the contract.

The governmental entity or state agency must notify the commission, using the commission's filing application, of the receipt of the filed Form 1295 with the certification of filing not later than the 30th day after the date the contract binds all parties to the contract. The commission will post the completed Form 1295 to its website within seven business days after receiving notice from the governmental entity or state agency.

Information regarding how to use the filing application will be available on this site starting on January 1, 2016. https://www.ethics.state.tx.us/whatsnew/elf_info_form1295.htm



FILED FORM 1295

CERTIFICATE OF INTERESTED PARTIES		FORM 1295		
		1 of 1		
Complete Nos. 1 - 4 and 6 if there are interested parties. Complete Nos. 1, 2, 3, 5, and 6 if there are no interested parties.		OFFICE USE ONLY CERTIFICATION OF FILING		
1 Name of business entity filing form, and the city, state and country of the business entity's place of business. CORE Energy, Ltd. Frisco, TX United States	Certificate Number: 2022-902603 Date Filed: 06/23/2022 Date Acknowledged:			
2 Name of governmental entity or state agency that is a party to the contract for which the form is being filed. Region 10 ESC and Equalis Group				
3 Provide the identification number used by the governmental entity or state agency to track or identify the contract, and provide a description of the services, goods, or other property to be provided under the contract. RFP #R10-1135 Smart Building Solutions				
4	Name of Interested Party	City, State, Country (place of business)	Nature of interest (check applicable)	
			Controlling	Intermediary
5 Check only if there is NO Interested Party. <input checked="" type="checkbox"/>				
6 UNSWORN DECLARATION My name is <u>Ronald Bordelon</u> , and my date of birth is <u>08/17/1966</u> . My address is <u>6320 Research Rd.</u> , <u>Frisco</u> , <u>TX</u> , <u>75033</u> , <u>USA</u> . <small>(street) (city) (state) (zip code) (country)</small> I declare under penalty of perjury that the foregoing is true and correct. Executed in <u>Collin</u> County, State of <u>TX</u> , on the <u>23rd</u> day of <u>June</u> , 20 <u>22</u> . <small>(month) (year)</small> <div style="text-align: center; margin-top: 20px;">  _____ Signature of authorized agent of contracting business entity <small>(Declarant)</small> </div>				



PROPOSAL FORM 12: FEDERAL FUNDS CERTIFICATION FORM

When a participating agency seeks to procure goods and services using funds under a federal grant or contract, specific federal laws, regulations, and requirements may apply in addition to those under state law. This includes, but is not limited to, the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 CFR 200 (sometimes referred to as the “Uniform Guidance” or “EDGAR” requirements). All Vendors submitting proposals must complete this Federal Funds Certification Form regarding Vendor’s willingness and ability to comply with certain requirements which may be applicable to specific participating agency purchases using federal grant funds. This completed form will be made available to participating agencies for their use while considering their purchasing options when using federal grant funds. Participating agencies may also require Vendors to enter into ancillary agreements, in addition to the contract’s general terms and conditions, to address the member’s specific contractual needs, including contract requirements for a procurement using federal grants or contracts.

For each of the items below, Vendor should certify Vendor’s agreement and ability to comply, where applicable, by having Vendor’s authorized representative complete and initial the applicable lines after each section and sign the acknowledgment at the end of this form. If a vendor fails to complete any item in this form, Region 10 ESC will consider the Vendor’s response to be that they are unable or unwilling to comply. A negative response to any of the items may, if applicable, impact the ability of a participating agency to purchase from the Vendor using federal funds.

1. Vendor Violation or Breach of Contract Terms:

Contracts for more than the simplified acquisition threshold currently set at \$150,000, which is the inflation adjusted amount determined by the Civilian Agency Acquisition Council and the Defense Acquisition Regulations Council (Councils) as authorized by 41 USC 1908, must address administrative, contractual, or legal remedies in instances where contractors violate or breach contract terms, and provide for such sanctions and penalties as appropriate.

Any Contract award will be subject to Region 10 ESC General Terms and Conditions, as well as any additional terms and conditions in any Purchase Order, participating agency ancillary contract, or Member Construction Contract agreed upon by Vendor and the participating agency which must be consistent with and protect the participating agency at least to the same extent as the Region 10 ESC Terms and Conditions.

The remedies under the Contract are in addition to any other remedies that may be available under law or in equity. By submitting a Proposal, you agree to these Vendor violation and breach of contract terms.

Does vendor agree? _____ *RS*
 (Initials of Authorized Representative)

2. Termination for Cause or Convenience:

When a participating agency expends federal funds, the participating agency reserves the right to immediately terminate any agreement in excess of \$10,000 resulting from this procurement process in the event of a breach or default of the agreement by Offeror in the event Offeror fails to: (1) meet schedules, deadlines, and/or delivery dates within the time specified in the procurement solicitation, contract, and/or a purchase order; (2) make any payments owed; or (3) otherwise perform in accordance with the contract and/or the procurement solicitation. participating agency also reserves the right to terminate the contract immediately, with written notice to offeror, for convenience, if participating agency believes, in its sole discretion that it is in the best



and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

Does vendor agree? *TR*
(Initials of Authorized Representative)

11. Profit as a Separate Element of Price:

For purchases using federal funds in excess of \$150,000, a participating agency may be required to negotiate profit as a separate element of the price. See, 2 CFR 200.323(b). When required by a participating agency, Vendor agrees to provide information and negotiate with the participating agency regarding profit as a separate element of the price for a particular purchase. However, Vendor agrees that the total price, including profit, charged by Vendor to the participating agency shall not exceed the awarded pricing, including any applicable discount, under Vendor’s Cooperative Contract.

Does vendor agree? *TR*
(Initials of Authorized Representative)

12. Prohibition on Certain Telecommunications and Video Surveillance Services or Equipment

Vendor agrees that recipients and subrecipients are prohibited from obligating or expending loan or grant funds to procure or obtain, extend or renew a contract to procure or obtain, or enter into a contract (or extend or renew a contract) to procure or obtain equipment, services, or systems that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system from companies described in Public Law 115-232, section 889. Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, in consultation with the Director of the National Intelligence or the Director of the Federal Bureau of Investigation, reasonably believes to be an entity owned or controlled by, or otherwise connected to, the government of a covered foreign country are also prohibited.

Does vendor agree? *TR*
(Initials of Authorized Representative)

13. General Compliance and Cooperation with Participating Agencies:

In addition to the foregoing specific requirements, Vendor agrees, in accepting any Purchase Order from a participating agency, it shall make a good faith effort to work with participating agencies to provide such information and to satisfy such requirements as may apply to a particular participating agency purchase or purchases including, but not limited to, applicable recordkeeping and record retention requirements.

Does vendor agree? *TR*
(Initials of Authorized Representative)

14. Applicability to Subcontractors

Offeror agrees that all contracts it awards pursuant to the Contract shall be bound by the foregoing terms and conditions.

Does vendor agree? *TR*



(Initials of Authorized Representative)

By signature below, I certify that the information in this form is true, complete, and accurate and that I am authorized by my company to make this certification and all consents and agreements contained herein.

CORE Energy, Ltd.

Company Name

RB

Signature of Authorized Company Official

Ronald Bordelon

Printed Name

President

Title

June 23, 2022

Date



PROPOSAL FORM 13: ADDITIONAL ARIZONA CONTRACTOR REQUIREMENTS

AZ Compliance with Federal and state requirements: Contractor agrees when working on any federally assisted projects with more than \$2,000.00 in labor costs, to comply with all federal and state requirements, as well as Equal Opportunity Employment requirements and all other federal and state laws, statutes, etc. Contractor agrees to post wage rates at the work site and submit a copy of their payroll to the member for their files. Contractor must retain records for three years to allow the federal grantor agency access to these records, upon demand. Contractor also agrees to comply with the Arizona Executive Order 75-5, as amended by Executive Order 99-4.

When working on contracts funded with Federal Grant monies, contractor additionally agrees to comply with the administrative requirements for grants, and cooperative agreements to state, local and federally recognized Indian Tribal Governments.

AZ Compliance with workforce requirements: Pursuant to ARS 41-4401, Contractor and subcontractor(s) warrant their compliance with all federal and state immigration laws and regulations that relate to their employees, and compliance with ARS 23-214 subsection A, which states, "...every employer, after hiring an employee, shall verify the employment eligibility of the employee through the E-Verify program" Region 10 ESC reserves the right to cancel or suspend the use of any contract for violations of immigration laws and regulations. Region 10 ESC and its members reserve the right to inspect the papers of any contractor or subcontract employee who works under this contract to ensure compliance with the warranty above.

AZ Contractor Employee Work Eligibility: By entering into this contract, contractor agrees and warrants compliance with A.R.S. 41-4401, A.R.S. 23-214, the Federal Immigration and Nationality Act (FINA), and all other Federal immigration laws and regulations. Region 10 ESC and/or Region 10 ESC members may request verification of compliance from any contractor or sub contractor performing work under this contract. Region 10 ESC and Region 10 ESC members reserve the right to confirm compliance. In the event that Region 10 ESC or Region 10 ESC members suspect or find that any contractor or subcontractor is not in compliance, Region 10 ESC may pursue any and all remedies allowed by law, including but not limited to suspension of work, termination of contract, suspension and/or debarment of the contractor. All cost associated with any legal action will be the responsibility of the contractor.

AZ Non-Compliance: All federally assisted contracts to members that exceed \$10,000.00 may be terminated by the federal grantee for noncompliance by contractor. In projects that are not federally funded, Respondent must agree to meet any federal, state or local requirements as necessary. In addition, if compliance with the federal regulations increases the contract costs beyond the agreed on costs in this solicitation, the additional costs may only apply to the portion of the work paid by the federal grantee.

Registered Sex Offender Restrictions (Arizona): For work to be performed at an Arizona school, contractor agrees that no employee or employee of a subcontractor who has been adjudicated to be a registered sex offender will perform work at any time when students are present, or reasonably expected to be present. Contractor agrees that a violation of this condition shall be considered a material breach and may result in the cancellation of the purchase order at the Region 10 ESC member's discretion. Contractor must identify any additional costs associated with compliance to this term. If no costs are specified, compliance with this term will be provided at no additional charge.



Offshore Performance of Work Prohibited: Due to security and identity protection concerns, direct services under this contract shall be performed within the borders of the United States.

Terrorism Country Divestments: In accordance with A.R.S. 35-392, Region 10 ESC and Region 10 ESC members are prohibited from purchasing from a company that is in violation of the Export Administration Act. By entering into the contract, contractor warrants compliance with the Export Administration Act.

The undersigned hereby accepts and agrees to comply with all statutory compliance and notice requirements listed in this document.

A handwritten signature in black ink, appearing to be the initials 'JR'.

Signature of Respondent

June 23, 2022

Date



PROPOSAL FORM 14: OWNERSHIP DISCLOSURE FORM (N.J.S. 52:25-24.2)

Pursuant to the requirements of P.L. 1999, Chapter 440 effective April 17, 2000 (Local Public Contracts Law), the Respondent shall complete the form attached to these specifications listing the persons owning 10 percent (10%) or more of the firm presenting the proposal.

Company Name: CORE Energy, Ltd.

Street: 6320 Research Rd.

City, State, Zip Code: Frisco, TX 75033

Complete as appropriate:

I _____, certify that I am the sole owner of _____, that there are no partners and the business is not incorporated, and the provisions of N.J.S. 52:25-24.2 do not apply.

OR:

I _____, a partner in _____, do hereby certify that the following is a list of all individual partners who own a 10% or greater interest therein. I further certify that if one (1) or more of the partners is itself a corporation or partnership, there is also set forth the names and addresses of the stockholders holding 10% or more of that corporation's stock or the individual partners owning 10% or greater interest in that partnership.

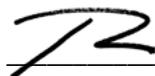
OR:

I Ronald Bordelon, an authorized representative of CORE Energy, Ltd., a corporation, do hereby certify that the following is a list of the names and addresses of all stockholders in the corporation who own 10% or more of its stock of any class. I further certify that if one (1) or more of such stockholders is itself a corporation or partnership, that there is also set forth the names and addresses of the stockholders holding 10% or more of the corporation's stock or the individual partners owning a 10% or greater interest in that partnership.

(Note: If there are no partners or stockholders owning 10% or more interest, indicate none.)

Name	Address	Interest
None. CORE is not a public company.		

I further certify that the statements and information contained herein, are complete and correct to the best of my knowledge and belief.

 President
Authorized Signature and Title

June 23, 2022
Date



PROPOSAL FORM 15: NON-COLLUSION AFFIDAVIT

Company Name: CORE Energy, Ltd.
Street: 6320 Research Rd.
City, State, Zip Code: Frisco, TX 75033

State of New Jersey

County of Collin

I, Ronald Bordelon of the City of Frisco
Name City

in the County of Collin, State of Texas of full age, being duly sworn according to law on my oath depose and say that:

I am the President of the firm of CORE Energy, Ltd.
Title Company Name

the Respondent making the Proposal for the goods, services or public work specified under the Harrison Township Board of Education attached proposal, and that I executed the said proposal with full authority to do so; that said Respondent has not directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free, competitive bidding in connection with the above proposal, and that all statements contained in said bid proposal and in this affidavit are true and correct, and made with full knowledge that the Harrison Township Board of Education relies upon the truth of the statements contained in said bid proposal and in the statements contained in this affidavit in awarding the contract for the said goods, services or public work.

I further warrant that no person or selling agency has been employed or retained to solicit or secure such contract upon an agreement or understanding for a commission, percentage, brokerage or contingent fee, except bona fide employees or bona fide established commercial or selling agencies maintained by

CORE Energy, Ltd.
Company Name

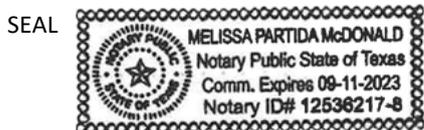
 President
Authorized Signature & Title

Subscribed and sworn before me

this 23rd day of June, 2022



Notary Public of New Jersey
My commission expires 9/11, 2023





PROPOSAL FORM 16: AFFIRMATIVE ACTION AFFIDAVIT (P.L. 1975, C.127)

Company Name: CORE Energy, Ltd.

Street: 6320 Research Rd.

City, State, Zip Code: Frisco, TX 75033

Bid Proposal Certification:

Indicate below your compliance with New Jersey Affirmative Action regulations. Your proposal will be accepted even if you are not in compliance at this time. No contract and/or purchase order may be issued, however, until all Affirmative Action requirements are met.

Required Affirmative Action Evidence:

Procurement, Professional & Service Contracts (Exhibit A)

Vendors must submit with proposal:

- 1. A photo copy of their Federal Letter of Affirmative Action Plan Approval _____
OR
- 2. A photo copy of their Certificate of Employee Information Report _____
OR
- 3. A complete Affirmative Action Employee Information Report (AA302) _____

Public Work – Over \$50,000 Total Project Cost:

A. No approved Federal or New Jersey Affirmative Action Plan. We will complete Report Form _____ AA201-A upon receipt from the Harrison Township Board of Education

B. Approved Federal or New Jersey Plan – certificate enclosed _____

I further certify that the statements and information contained herein, are complete and correct to the best of my knowledge and belief.

 President _____
Authorized Signature and Title

June 23rd, 2022
Date

P.L. 1995, c. 127 (N.J.A.C. 17:27)

MANDATORY AFFIRMATIVE ACTION LANGUAGE

PROCUREMENT, PROFESSIONAL AND SERVICE CONTRACTS

During the performance of this contract, the contractor agrees as follows:

The contractor or subcontractor, where applicable, will not discriminate against any employee or applicant for employment because of age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation. The contractor will take affirmative action to ensure that such applicants are recruited and employed, and that employees are treated during employment, without regard to their age, race, creed, color,



national origin, ancestry, marital status, sex, affectional or sexual orientation. Such action shall include, but not be limited to the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided by the Public Agency Compliance Officer setting forth provisions of this non-discrimination clause.

The contractor or subcontractor, where applicable will, in all solicitations or advertisement for employees placed by or on behalf of the contractor, state that all qualified applicants will receive consideration for employment without regard to age, race, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation.

The contractor or subcontractor, where applicable, will send to each labor union or representative of workers with which it has a collective bargaining agreement or other contract or understanding, a notice, to be provided by the agency contracting officer advising the labor union or workers' representative of the contractor's commitments under this act and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

The contractor or subcontractor, where applicable, agrees to comply with any regulations promulgated by the Treasurer pursuant to P.L. 1975, c. 127, as amended and supplemented from time to time and the Americans with Disabilities Act.

The contractor or subcontractor agrees to attempt in good faith to employ minority and female workers trade consistent with the applicable county employment goal prescribed by N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, C.127, as amended and supplemented from time to time or in accordance with a binding determination of the applicable county employment goals determined by the Affirmative Action Office pursuant to N.J.A.C. 17:27-5.2 promulgated by the Treasurer pursuant to P.L. 1975, C.127, as amended and supplemented from time to time.

The contractor or subcontractor agrees to inform in writing appropriate recruitment agencies in the area, including employment agencies, placement bureaus, colleges, universities, labor unions, that it does not discriminate on the basis of age, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation, and that it will discontinue the use of any recruitment agency which engages in direct or indirect discriminatory practices.

The contractor or subcontractor agrees to revise any of its testing procedures, if necessary, to assure that all personnel testing conforms with the principles of job-related testing, as established by the statutes and court decisions of the state of New Jersey and as established by applicable Federal law and applicable Federal court decisions.

The contractor or subcontractor agrees to review all procedures relating to transfer, upgrading, downgrading and lay-off to ensure that all such actions are taken without regard to age, creed, color, national origin, ancestry, marital status, sex, affectional or sexual orientation, and conform with the applicable employment goals, consistent with the statutes and court decisions of the State of New Jersey, and applicable Federal law and applicable Federal court decisions.



The contractor and its subcontractors shall furnish such reports or other documents to the Affirmative Action Office as may be requested by the office from time to time in order to carry out the purposes of these regulations, and public agencies shall furnish such information as may be requested by the Affirmative Action Office for conducting a compliance investigation pursuant to Subchapter 10 of the Administrative Code (NJAC 17:27).

A handwritten signature in black ink, appearing to be the initials 'JR', positioned above a horizontal line.

Signature of Procurement Agent



PROPOSAL FORM 17: C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM

Public Agency Instructions

This page provides guidance to public agencies entering into contracts with business entities that are required to file Political Contribution Disclosure forms with the agency. **It is not intended to be provided to contractors.**

What follows are instructions on the use of form local units can provide to contractors that are required to disclose political contributions pursuant to N.J.S.A. 19:44A-20.26 (P.L. 2005, c. 271, s.2). Additional information is available in Local Finance Notice 2006-1 (https://www.nj.gov/dca/divisions/dlgs/resources/lfns_2006.html).

1. The disclosure is required for all contracts in excess of \$17,500 that are **not awarded** pursuant to a “fair and open” process (N.J.S.A. 19:44A-20.7).
2. Due to the potential length of some contractor submissions, the public agency should consider allowing data to be submitted in electronic form (i.e., spreadsheet, pdf file, etc.). Submissions must be kept with the contract documents or in an appropriate computer file and be available for public access. **The form is worded to accept this alternate submission.** The text should be amended if electronic submission will not be allowed.
3. The submission must be **received from the contractor and** on file at least 10 days prior to award of the contract. Resolutions of award should reflect that the disclosure has been received and is on file.
4. The contractor must disclose contributions made to candidate and party committees covering a wide range of public agencies, including all public agencies that have elected officials in the county of the public agency, state legislative positions, and various state entities. The Division of Local Government Services recommends that contractors be provided a list of the affected agencies. This will assist contractors in determining the campaign and political committees of the officials and candidates affected by the disclosure.
 - a) The Division has prepared model disclosure forms for each county. They can be downloaded from the “County PCD Forms” link on the Pay-to-Play web site at https://www.state.nj.us/dca/divisions/dlgs/programs/pay_2_play.html They will be updated from time-to-time as necessary.
 - b) A public agency using these forms **should edit them to properly reflect the correct legislative district(s)**. As the forms are county-based, **they list all legislative districts** in each county. **Districts that do not represent the public agency should be removed from the lists.**
 - c) Some contractors may find it easier to provide a single list that covers all contributions, regardless of the county. These submissions are appropriate and should be accepted.
 - d) The form may be used “as-is”, subject to edits as described herein.
 - e) The “Contractor Instructions” sheet is intended to be provided with the form. It is recommended that the Instructions and the form be printed on the same piece of paper. The form notes that the Instructions are printed on the back of the form; where that is not the case, the text should be edited accordingly.
 - f) The form is a Word document and can be edited to meet local needs, and posted for download on web sites, used as an e-mail attachment, or provided as a printed document.
5. It is recommended that the contractor also complete a “Stockholder Disclosure Certification.” This will assist the local unit in its obligation to ensure that contractor did not make any prohibited contributions to the committees listed on the Business Entity Disclosure Certification in the 12 months prior to the contract. (See Local Finance Notice 2006-7 for additional information on this obligation) A sample Certification form is part of this package and the instruction to complete it is included in the Contractor Instructions. **NOTE: This section is not applicable to Boards of Education.**



C. 271 POLITICAL CONTRIBUTION DISCLOSURE FORM

Contractor Instructions

Business entities (contractors) receiving contracts from a public agency that are NOT awarded pursuant to a “fair and open” process (defined at [N.J.S.A. 19:44A-20.7](#)) are subject to the provisions of P.L. 2005, c. 271, s.2 ([N.J.S.A. 19:44A-20.26](#)). This law provides that 10 days prior to the award of such a contract, the contractor shall disclose contributions to:

1. any State, county, or municipal committee of a political party
2. any legislative leadership committee*
3. any continuing political committee (a.k.a., political action committee)
4. any candidate committee of a candidate for, or holder of, an elective office:
 1. of the public entity awarding the contract
 2. of that county in which that public entity is located
 3. of another public entity within that county
 4. or of a legislative district in which that public entity is located or, when the public entity is a county, of any legislative district which includes all or part of the county. The disclosure must list reportable contributions to any of the committees that exceed \$300 per election cycle that were made during the 12 months prior to award of the contract. See [N.J.S.A. 19:44A-8](#) and [19:44A-16](#) for more details on reportable contributions.

[N.J.S.A. 19:44A-20.26](#) itemizes the parties from whom contributions must be disclosed when a business entity is not a natural person. This includes the following:

5. individuals with an “interest” ownership or control of more than 10% of the profits or assets of a business entity or 10% of the stock in the case of a business entity that is a corporation for profit
6. all principals, partners, officers, or directors of the business entity or their spouses
7. any subsidiaries directly or indirectly controlled by the business entity
8. IRS Code Section 527 New Jersey based organizations, directly or indirectly controlled by the business entity and filing as continuing political committees, (PACs). When the business entity is a natural person, “a contribution by that person’s spouse or child, residing therewith, shall be deemed to be a contribution by the business entity.” [[N.J.S.A. 19:44A-20.26\(b\)](#)] The contributor must be listed on the disclosure. Any business entity that fails to comply with the disclosure provisions shall be subject to a fine imposed by ELEC in an amount to be determined by the Commission which may be based upon the amount that the business entity failed to report. The enclosed list of agencies is provided to assist the contractor in identifying those public agencies whose elected official and/or candidate campaign committees are affected by the disclosure requirement. It is the contractor’s responsibility to identify the specific committees to which contributions may have been made and need to be disclosed. The disclosed information may exceed the minimum requirement. The enclosed form, a content-consistent facsimile, or an electronic data file containing the required details (along with a signed cover sheet) may be used as the contractor’s submission and is disclosable to the public under the Open Public Records Act. The contractor must also complete the attached Stockholder Disclosure Certification. This will assist the agency in meeting its obligations under the law.

NOTE: This section does not apply to Board of Education contracts.

* [N.J.S.A. 19:44A-3\(s\)](#): “The term “legislative leadership committee” means a committee established, authorized to be established, or designated by the President of the Senate, the Minority Leader of the Senate, the Speaker



List of Agencies with Elected Officials Required for Political Contribution Disclosure

N.J.S.A. 19:44A-20.26

County Name:

State: Governor, and Legislative Leadership Committees

Legislative District #s:

State Senator and two members of the General Assembly per district.

County:

Freeholders

County Clerk

Sheriff

{County Executive}

Surrogate

Municipalities (Mayor and members of governing body, regardless of title):

CORE has no contributions to list.

USERS SHOULD CREATE THEIR OWN FORM, OR DOWNLOAD FROM WWW.NJ.GOV/DCA/LGS/P2P A COUNTY-BASED, CUSTOMIZABLE FORM.



PROPOSAL FORM 18: STOCKHOLDER DISCLOSURE CERTIFICATION

Name of Business:

I certify that the list below contains the names and home addresses of all stockholders holding 10% or more of the issued and outstanding stock of the undersigned.

OR

I certify that no one stockholder owns 10% or more of the issued and outstanding stock of the undersigned.

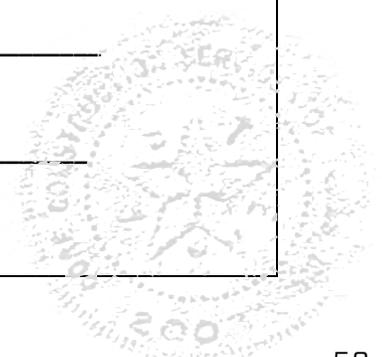
Check the box that represents the type of business organization:

- | | | |
|---|--|--|
| <input type="checkbox"/> Partnership | <input type="checkbox"/> Sole Proprietorship | <input type="checkbox"/> Limited Liability Partnership |
| <input checked="" type="checkbox"/> Corporation | <input type="checkbox"/> Limited Liability Corporation | <input type="checkbox"/> Subchapter S Corporation |

Sign and notarize the form below, and, if necessary, complete the stockholder list below.

Stockholders:

Name:	Name:
Home Address:	Home Address:
Name:	Name:
Home Address:	Home Address:
Name:	Name:
Home Address:	Home Address:
Subscribed and sworn before me this <u>23rd</u> day of <u>June</u> , 2 <u>022</u>	_____ (Affiant)
(Notary Public)	Ronald Bordelon, President _____ (Print name & title of affiant)
My Commission expires: <u>9/11/2023</u>	(Corporate Seal)





PROPOSAL FORM 19: GENERAL TERMS AND CONDITIONS ACCEPTANCE FORM

Signature on the Vendor Contract Signature form certifies complete acceptance of the General Terms and Conditions in this solicitation, except as noted below (additional pages may be attached, if necessary).

Check one of the following responses to the General Terms and Conditions:

We take no exceptions/deviations to the general terms and conditions

(Note: If none are listed below, it is understood that no exceptions/deviations are taken.)

We take the following exceptions/deviations to the general terms and conditions. All exceptions/deviations must be clearly explained. Reference the corresponding general terms and conditions that you are taking exceptions/deviations to. Clearly state if you are adding additions terms and conditions to the general terms and conditions. Provide details on your exceptions/deviations below:

(Note: Unacceptable exceptions shall remove your proposal from consideration for award. Region 10 ESC shall be the sole judge on the acceptance of exceptions/deviations and the decision shall be final.)



PROPOSAL FORM 20: EQUALIS GROUP ADMINISTRATION AGREEMENT

Requirements for Master Agreement To be administered by Equalis Group

Attachment A, Equalis Group Administrative Agreement is used in administering Master Agreements with Region 10 and is preferred by Equalis Group. Redlined copies of this agreement should not be submitted with the response. Should a respondent be recommended for award, this agreement will be negotiated and executed between Equalis Group and the respondent. **Respondents must select one of the following options for submitting their response.**

- Respondent agrees to all terms and conditions outlined in each of the Administration Agreement.
- Respondent wishes to negotiate directly with Equalis Group on terms and conditions outlined in the Administration Agreement. Negotiations will commence after sealed Proposals are opened and Region 10 has determined the respondent met all requirements in their response and may be eligible for award.



**PROPOSAL FORM 21: OPEN RECORDS POLICY ACKNOWLEDGEMENT AND ACCEPTANCE
OPEN RECORDS POLICY ACKNOWLEDGMENT AND ACCEPTANCE**

Be advised that all information and documents submitted will be subject to the Public Information Act requirements governed by Chapter 552 of the Texas Government Code.

Because contracts are awarded by a Texas governmental entity, all responses submitted are subject to release as public information after contracts are executed. If a Respondent believes that its response, or parts of its response, may be exempted from disclosure to the public, the Respondent must specify page-by-page and line-by-line the parts of the response, which it believes, are exempted from disclosure. In addition, the Respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s). Respondent must provide this information on the "Acknowledgement and Acceptance to Region 10 ESC's Public Information Act Policy" form found on the next page of this solicitation. Any information that is unmarked will be considered public information and released, if requested under the Public Information Act.

The determination of whether information is confidential and not subject to disclosure is the duty of the Office of Attorney General (OAG). Region 10 ESC must provide the OAG with the information requested in order for the OAG to render an opinion. In such circumstances, Respondent will be notified in writing that the material has been requested and delivered to the OAG. Respondent will have an opportunity to make arguments to the OAG in writing regarding the exception(s) to the TPIA that permit the information to be withheld from public disclosure. Respondents are advised that such arguments to the OAG must be specific and well-reasoned--vague and general claims to confidentiality by the Respondent are generally not acceptable to the OAG. Once the OAG opinion is received by Region 10 ESC, Region 10 ESC must comply with the opinions of the OAG. Region 10 ESC assumes no responsibility for asserting legal arguments on behalf of any Respondent. Respondents are advised to consult with their legal counsel concerning disclosure issues resulting from this procurement process and to take precautions to safeguard trade secrets and other proprietary information.

After completion of award, these documents will be available for public inspection.

Signature below certifies complete acceptance of Region 10 ESC's Open Records Policy, except as noted below (additional pages may be attached, if necessary). Check one of the following responses to the Acknowledgment and Acceptance of Region 10 ESC's Open Records Policy below:

We acknowledge Region 10 ESC's Public Information Act policy and declare that no information submitted with this proposal, or any part of our proposal, is exempt from disclosure under the Public Information Act. *(Note: All information believed to be a trade secret or proprietary must be listed below. It is further understood that failure to identify such information, in strict accordance with the instructions below, will result in that information being considered public information and released, if requested under the Public Information Act.)*

We declare the following information to be a trade secret or proprietary and exempt from disclosure under the Public Information Act. *(Note: Respondent must specify page-by-page and line-by-line the parts of the response, which it believes, are exempt. In addition, Respondent must specify which exception(s) are applicable and provide detailed reasons to substantiate the exception(s).)*

June 23rd, 2022
Date


President
Authorized Signature & Title



PROPOSAL FORM 22: VENDOR CONTRACT AND SIGNATURE FORM

The undersigned hereby proposes and agrees to furnish goods and/or services in strict compliance with the terms, specifications and conditions at the prices proposed within response unless noted in writing. The undersigned further certifies that he/she is an officer of the company and has authority to negotiate and bind the company named below and has not prepared this proposal in collusion with any other Respondent and that the contents of this proposal as to prices, terms or conditions of said proposal have not been communicated by the undersigned nor by any employee or agent to any person engaged in this type of business prior to the official opening of this proposal.

VENDORS MUST SUBMIT THIS FORM COMPLETED AND SIGNED WITH THEIR RESPONSE TO BE CONSIDERED

Company name CORE Energy, Ltd.

Address 6320 Research Rd.

City/State/Zip Frisco, TX 75033

Telephone No. T: (972) 668-9340

Fax No. N/A

Email address ronbordelon@coreltd.com

Printed name Ronald Bordelon

Position with company President

Authorized signature 

Term of contract September 1, 2022 to August 31, 2025

Unless otherwise stated, all contracts are for a period of three (3) years with an option to renew annually for an additional two (2) years if agreed to by Region 10 ESC. Vendor shall honor all administrative fees for any sales made based on the contract whether renewed or not.


Jana Melsheimer (Aug 18, 2022 11:26 CDT)
 Region 10 ESC Authorized Agent

8/17/22
 Date

Dr. Jana Melsheimer
 Print Name

Equalis Group Contract Number R10-1135A

EXECUTIVE SUPPORT

Ronald Bordelon, CCM

As Executive Support, Ronald will be accountable for the overall success of the Program with more than 30 years of experience in the industry. Client satisfaction is one of Ronald’s paramount goals. He has diversity in every aspect of construction, from pre-construction and strategic planning to program management and staff development. As former Chief Facilities Officer for the Louisiana Department of Education RSD, Ronald was responsible for all aspects of a \$2B Capital Construction Program which included recreational facilities and green spaces. Ronald brings a unique blend of both public and private sector approaches to large capital programs.



33
YEARS OF
TOTAL EXPERIENCE

EDUCATION

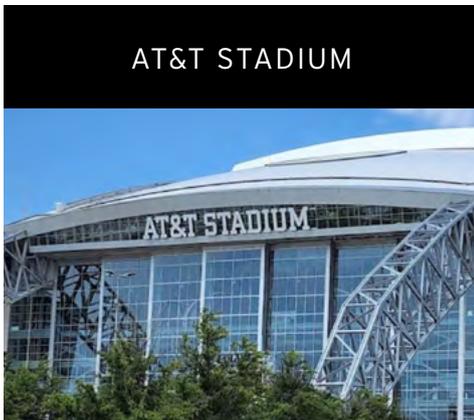
Master of Human Resource Development,
Villanova University

Integrated Project Management, Program, Harvard University
Graduate School of Design

Thermodynamics,
Stanford University

CERTIFICATIONS/ REGISTRATIONS

Certified Property Manager
Lean Six Sigma Black Belt
Professional in Human Resources
Licensed Real Estate Appraiser
Licensed General Contractor



NATIONAL DIRECTOR OF JOC / ACCOUNT MANAGER

Dave Wilson

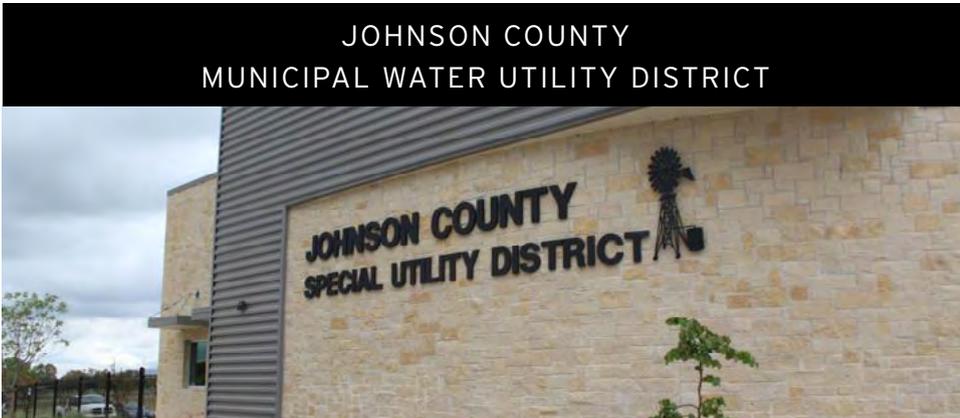
As CORE's National Director of Job Order Contracting / Account Manager, Dave has been in the construction industry for more than 26 years. He is extremely hands-on with every project. His broad knowledge base and experience in the industry is demonstrated through his strong leadership skills and project performance. Dave will ensure that the team is meeting or exceeding all schedule and budget expectations and providing Region 10 ESC and Equalis Group with quality services.



26
YEARS OF
TOTAL EXPERIENCE

CERTIFICATIONS/
REGISTRATIONS

OSHA 30-Hours
RS Means Certified

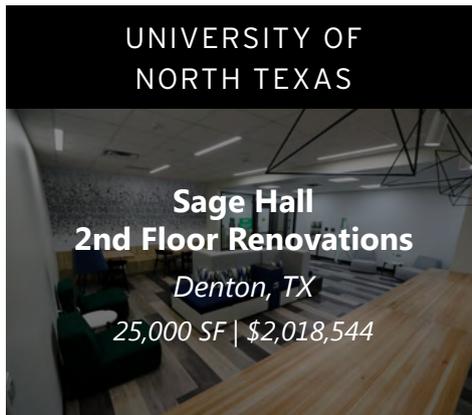


JOHNSON COUNTY
MUNICIPAL WATER UTILITY DISTRICT



STEPHEN F AUSTIN
STATE UNIVERSITY

**Central Plant
No. 1 Expansion**
Nacogdoches, TX
1,200 LF | \$2,474,620



UNIVERSITY OF
NORTH TEXAS

**Sage Hall
2nd Floor Renovations**
Denton, TX
25,000 SF | \$2,018,544

RESUME

CONTRACT MANAGER

Joy Kendall

As the Contracts Manager, Joy will assist in writing and managing contracts and purchase orders for CORE. She will review and verify the accuracy of documents before they are sent, and assess all documents for compliance once they are returned. Joy also reviews Trade Partner insurance compliance, verifying coverage meets the requirements of both CORE and our Clients.



4
YEARS OF
TOTAL EXPERIENCE



RESUME

NATIONAL VICE PRESIDENT OF MARKETING

Alli Linaman

Alli Linaman serves as National Vice President of Marketing. She is responsible for setting and overseeing marketing and brand standards across The CORE Group companies. Alli works closely with company leadership and Business Development to provide our Customers with the best project experience, while striving to continuously improve on how we serve our Clients and communities. Her passion for CORE's culture and dedication to our Clients permeates through CORE's Marketing Department at all levels, and she will be a great asset to the Region 10 ESC Smart Building Solutions program.



18
YEARS OF
TOTAL EXPERIENCE

EDUCATION

Mass Communications,
University of South Florida, Tampa

CERTIFICATIONS/ REGISTRATIONS

First Aid/CPR Certified

LAS VEGAS-CLARK COUNTY
LIBRARY DISTRICT



LSU HEALTH FOUNDATION



ILLINOIS
WESLEYAN UNIVERSITY



LOUISIANA DEPARTMENT
OF EDUCATION



RESUME

BILLING, REPORTING, AND ACCOUNTS PAYABLE

John Verhoff

As a Billing, Reporting, and Accounts Payable Accountant (AP Accountant), John is responsible for overseeing audits including construction, corporate, employee benefit plans, non-profit financial statements, and any related reporting in order to meet the requirements of CORE's and Region 10 ESC and Equalis Group's standards. He is also responsible for payment to all Trade Partners and working the Project Coordinator to ensure a seamless transition from pre-construction to construction, and adherence to the budget on all outgoing funds.



22
YEARS OF
TOTAL EXPERIENCE

LOUISIANA DEPARTMENT OF EDUCATION



ILLINOIS
WESLEYAN UNIVERSITY



LSU HEALTH FOUNDATION



EDUCATION

BS in Accounting,
Missouri State University

CERTIFICATIONS/ REGISTRATIONS

Certified Public Accountant (CPA)

RESUME



REFERENCES

FROM OUR CLIENTS



ENTITY: LOUISIANA DEPARTMENT OF EDUCATION

CONTACT NAME AND TITLE: Paul Unkauf, General Counsel

CITY, STATE: New Orleans, LA

P: (504) 296-9782

E: paul.unkauf@la.gov

YEARS OF SERVICE: 8

DESCRIPTION OF SERVICES: Management of a capital program including sustainable energy solutions, resiliency, and US Green Building Council certification awards. All new projects constructed to LEED Silver or greater following best practices and ensuring all critical elements of the systems work cohesively to create the best possible outcome. Design of Operation and Maintenance standards for long-term high performing energy solutions.

ANNUAL VOLUME: \$300M in construction activity



ENTITY: AT&T STADIUM

CONTACT NAME AND TITLE: Brian Black, Chief Business Officer

CITY, STATE: Frisco, TX

P: (214) 865-6160

E: bblack@prostarenergy.com

YEARS OF SERVICE: 10-year term - Ongoing

DESCRIPTION OF SERVICES: National teaming partners of CORE implemented sustainable energy performance solutions that significantly decreased the energy consumption of the facility. Utilizing the Energy-as-a-Service model over \$1M of annual savings were achieved, and smart building technologies and solutions were installed as part of a 10-year solution.

ANNUAL VOLUME: \$12M in construction activity



ENTITY: JOHNSON COUNTY MUNICIPAL WATER UTILITY DISTRICT

CONTACT NAME AND TITLE: Albert Ramirez, Water Operations

CITY, STATE: Cleburne, TX

P: (817) 760-5200

E: aramirez@johnsoncountytexas.org

YEARS OF SERVICE: 10 years

DESCRIPTION OF SERVICES: Design and engineering of a Smart Building Solutions program including emergency power redundancy. Sized generator and automatic transfer switches yielding a minimum of 1000 kW power production as part of a larger solution strategy, aligning with the needs of the municipality and existing mechanical system energy supply load requirements. Provide smart building solutions that ensure the County Water Utility District can serve the area in the event of electrical power distribution interruption.

ANNUAL VOLUME: \$10M in construction activity



5% OF PARKING SPACES ARE FOR LOW-EMITTING/FUEL EFFICIENT VEHICLES AND INCLUDE EV CAR CHARGING STATIONS



FSC CERTIFIED WOOD WAS USED THROUGHOUT THE PROJECT FOR STANDARD CASEWORK, MANY FINISH CARPENTRY WALL FINISHES, AND MORE

A HIGHLY REFLECTIVE SIPLAST PARADIENE ROOFING SYSTEM INCLUDED A PORTION TO BE VERAL ALUMINUM.

(see picture to the left)

ENTITY: EAST LAS VEGAS LIBRARY

CONTACT NAME AND TITLE: John Vino, General Services Director (LV Clark County Library District)

P: (702) 208-0503

E: vinoj@lvclld.org

YEARS OF SERVICE: 2017-2019

DESCRIPTION OF SERVICES: Built for the Las Vegas-Clark County Library District, this project included the new construction of a 44,370-square-foot library. The facility functions as a community hub offering technology, wi-fi, workforce training, and cultural event space. The project features a 10,775-square-foot library with seven reading areas and a 3,476-square-foot multipurpose room with a 300-seat capacity. **The project received LEED Gold Certification from the U.S. Green Building Council for CORE's preservation of trees throughout the project site, the allocation of five percent of parking spaces for low-emitting/fuel efficient vehicles, and other sustainable features.** The most unique feature of this project was constructing the building around large existing Aleppo pine trees. It was of great importance to the Client and community that as many of these trees were preserved as possible. This was challenging as we coordinated earthwork, underground utilities, structure, enclosure, and irrigation activities around the existing trees so as not to disturb or damage them. The East Las Vegas Library now provides a modernized multi-use space for Las Vegas residents, as well as vital access to technological resources for a previously underserved community.

ANNUAL VOLUME: \$21M in construction activity



ENTITY: STARBUCKS CARSON VALLEY DISTRIBUTION CENTER

CONTACT NAME AND TITLE: Alric Lam, Continuous Improvement Project Manager

CITY, STATE: Minden, NV

P | E: (775) 439-3273 | alam@starbucks.com

YEARS OF SERVICE: 2 years

DESCRIPTION OF SERVICES: This project included the installation of a grid-tied 1.17 MW rooftop solar photovoltaic generating system with a 750 kW battery energy storage photovoltaic system. This system considered a utility interactive system and interconnects with the existing electric distribution system. The photovoltaic system consists of 2610 photovoltaic modules and nine utility interactive inverters. The ESS system consists of a 1320 kWh battery bank and a 750 kW AC utility interactive inverter. **This system offsets over 70% of annual electrical consumption from the facility while helping reduce demand charges.**

ANNUAL VOLUME: \$3M in construction activity



ENTITY: ILLINOIS WESLEYAN UNIVERSITY (IWU)

CONTACT NAME AND TITLE: James Blumberg, Director of Physical Plan

CITY, STATE: Peoria, IL

P | E: (309) 556-3066 | jblumber@iwu.edu

YEARS OF SERVICE: 8 years

DESCRIPTION OF SERVICES: CORE's services range from pre-construction and construction to smart building solutions. **CORE developed an Energy-as-a-Service model that includes a comprehensive chilled water and boiler central plant asset concession solution that will ensure optimal performance for over 20 years.** Included in the program are operational and maintenance smart building solutions such as LED lighting retrofits, smart controls, and energy dashboard development.

ANNUAL VOLUME: CORE has completed 150+ projects for IWU.

CORE HEADQUARTERS

FRISCO, TX

CORE is committed to sustainable energy practices and solutions such as solar, geothermal, water conservation, energy savings dashboards, and green technologies at our 50,000-square-foot headquarters. Conferences presenting the Energy-as-a-Service model are held at the Wayne Baum Learning Center for Trade Partners, Clients, and anyone interested in learning the latest in Smart Building Solutions.



