

As a subsidiary of The CORE Group, CORE Energy utilizes several innovative solutions, such as Energy-as-a-Service, to achieve the environmental, social, and corporate governance goals of their Clients.

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. The 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 survey 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. In addition, our team 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 will further consider equipment remaining useful life.

COMPREHENSIVE REPORT

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

1. An executive summary that details the overall approach to the project
2. An introduction with project approach and background
3. Assumption used during the analysis process
4. Methodology and processes used to project energy savings
5. The baseline model used to perform the ECM analysis
6. Recommendations for ECMs discovered during the on-site survey
7. Written savings calculations with all supporting information
8. Energy cost, energy units, operating hours, and all assumptions made in the energy calculations
9. Comparison of reductions to existing historical utility consumption
10. Explanation of the interactive effects of energy consumption reductions and their overall impact
11. Turnkey pricing that includes of all costs of each ECM
12. Results, conclusions, recommendations, and work papers 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, our team will use this report as a decision-making tool to prioritize ECMs for final scope development.

STANDARDS OF COMFORT AND CONSTRUCTION SPECIFICATIONS

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 help implement strategies that affirm minimum

ventilation requirements are consistent 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 M&V Plans are developed collaboratively with all invested parties prior to the beginning of the M&V period.

ADJUSTMENT TO BASELINE

Many factors can impact the calculated baseline, which may require adjustments if present.

Routine Adjustments: Baselines are normalized for weather using multi-variable regression modeling.

Non-Routine Adjustments: Adjustments for facility size, 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, or 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, that occurs as a result of a reported material change shall be reviewed by the parties to determine what, if any, adjustments to the baseline are needed.

ENERGY SYSTEMS IN BUILDINGS

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:

1. Central plants
2. Control and building automation systems
3. Daylighting
4. Distributed generation
5. Fuel switching
6. Heating systems
7. Indoor air quality
8. Kitchens
9. Laboratories
10. Laundry
11. Lighting systems (indoor and outdoor)
12. Renewables (geothermal solar-electric/thermal, wind, biomass)
13. Swimming pools and recreational facilities
14. Transportation (fleet fuel management, etc.)
15. Utility management
16. Ventilation systems
17. 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 this 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.

COMMISSIONING

Our new building commissioning and existing building commissioning services focus on long-term, sustainable operation. We do not believe in a 'check the box' commissioning approach that is commonly found in the commissioning industry. Our building commissioning team members follow industry best practices and apply lessons learned from our experience to deliver hands-on, comprehensive commissioning services. The commissioning team of experts includes engineers with experience in design and former facility managers who understand building operations. This knowledge is embedded into our approach, enabling our team to optimize building systems for sustainable and energy efficient operation. CORE's commissioning services include new construction commissioning, existing building commissioning, retro-commissioning, and ongoing and monitoring-based commissioning. Identification of asbestos and other hazardous materials and abatement, recycling or disposal, as applicable CORE is aware of the typical areas asbestos can be found in older facilities such as mechanical insulation, ceiling tiles, etc. Our team has extensive experience with consultants who will test the facility and remove any hazardous materials.

CONSTRUCTION

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 the best ideas from our proven experience to every project through pre-construction and construction services, and perform quality service on projects across the nation.

All employees within our construction division are required to have a minimum OSHA 10 certification, and supervisors/management must obtain an OSHA 30 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 have been able to maintain an EMR well below industry average reported by BLS/NCCI and prevent specification non-compliance.

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, ranging from structural and roof system decisions to wall/ceiling/floor material decisions. 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 and/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 subcontractor bid packaging and selection strategy. All this work is done to ensure that your project is completed as quickly as possible at the lowest cost, without sacrificing quality.

SYSTEM REVIEW

We approach each project as a unique challenge. Creativity and innovation remain as the cornerstones 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 Client'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 project.

PROGRAM AND CONSTRUCTION MANAGEMENT

The foundation for our project management and construction plan 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 and construction team members, and all contracted parties. This individual's primary responsibilities include serving the Client's needs 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 conforming to the project schedule, specifications of satisfactory work quality, and to determine the current percent of total project completion.

MEASUREMENT AND VERIFICATION

CORE's Measurement and Verification process provides operations and maintenance 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 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.

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 project 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 M&V team is willing and has the capability to calculate and report emissions reductions and have done so 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.

The CORE team includes team members with extensive experience in LEED and Energy Star consulting services and 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

The CORE team developed an Operations and Maintenance 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 onsite by experienced trainers. Each class lasts approximately four hours and includes a PowerPoint presentation and handouts. Classes include air handling units, air distribution systems, hydronic systems, chilled water system, and controls.

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 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.

BUILDING ANALYTICS

The BES Platform is a customized building analytics dashboard to house all of your critical data—utility bills, measurement and verification reporting, automatic fault detection, and more. You get a complete view of your facility's energy use, from its initial procurement, all the way to its end use in the facility, on a platform configured to your needs and preferences. The best part? 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.

FOR QUESTIONS CONTACT:

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