



Pilot Power Group, Inc.

Response To The

COUNTY OF ALAMEDA

REQUEST FOR PROPOSAL No. 16-CCA-1

for

Alameda County Community Choice Aggregation/
East Bay Community Energy: Multi-Service Technical and
Administrative Tasks for Joint Powers Authority Initialization
and Service Delivery

CONTACT INFORMATION

Pilot Power Group, Inc.

Dennis Vermette, President

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San Diego, CA 92122

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December 14, 2016

Mr. Bruce Jensen
Alameda County, CDA-Planning
224 West Winton Avenue, Suite 111
Hayward, CA 94544

Dear Mr. Jensen:

Please accept this proposal ("Proposal") in response to the *COUNTY OF ALAMEDA REQUEST FOR PROPOSAL No. 16-CCA-1 for Alameda County Community Choice Aggregation/East Bay Community Energy: Multi-Service Technical and Administrative Tasks for Joint Powers Authority Initialization and Service Delivery* ("RFP").

Pilot Power Group, Inc. ("PILOT") submits this Proposal in response to the RFP Service Category 3: Data Management and Call Center Services. PILOT consists of Pilot Power Group and EDMS, both of which are organized under the same ownership and management. PILOT is also proud to partner with our sub-contractor, Direct Line Tele Response ("Direct Line"). PILOT is legally and financially responsible for the entirety of this Proposal, but when direct reference to a specific organization is appropriate, PILOT-EDMS or PILOT-Direct Line will be indicated.

TRULY LOCAL. PILOT is pleased to provide a Proposal that fully supports East Bay Community Energy's ("EBCE") dedication to providing demonstrable local economic benefits. Indeed, as far as we know, EBCE is California's first Community Choice Aggregation ("CCA") effort to elevate the promise of local economic benefits from rhetoric to a detailed, written commitment in the EBCE Joint Powers Agreement ("EBCE JPA").

Over a third of the revenue in our Proposal flows to PILOT-Direct Line, a SLEB-pending company headquartered, managed and operated in the heart of Alameda County ("County") for nearly 40 years, 27 of which include service to the County and to municipal entities located within the County. PILOT-Direct Line currently provides compensation and benefit packages to nearly 50 employees that exceed current City of Berkeley requirements, which are among the highest in the nation. PILOT-Direct Line's commitment to local job development, employee retention, training and career-track opportunities is unparalleled in the call center industry. We believe our approach provides the best frontline customer service possible and accounts for our unheard-of-in-the-industry 5 year average employee retention.

Our Proposal includes the addition of likely double digit numbers of local, EBCE-dedicated positions at PILOT-Direct Line, all of which reflect the same compensation, benefits, training and career-track opportunities we provide our existing employees. Should PILOT be selected to serve



EBCE, PILOT-Direct Line will likely grow more than 20%, directly impacting the local economy and creating new, real, substantial and measurable job growth in EBCE's first year of operations alone. No other organization can achieve this hallmark performance for EBCE.

MOVING TO THE NEXT LEVEL OF SERVICE. To match PILOT-Direct Line's unsurpassed frontline service, PILOT-EDMS brings a decade of PG&E data management and back office services to EBCE. Our current client base consists of over 7 million MWh of Direct Access and municipal customer load. Unfortunately, due to single provider currently serving all CCA existing and contracted for data management and call center services, we have not yet had the privilege of serving CCA load.

Understandably, CCA organizations are concerned about changing data management and call center service suppliers. We believe this concern is succinctly addressed by PILOT-EDMS's years of experience serving Direct Access and municipal customer load well in excess of EBCE's forecasted load. Moreover, our current customer base utilizes far more complex meter reading, rate schedules/billing determinants, billing and payment requirements than needed to serve the majority of CCA customers. In other words, the only subsection of CCA customers that are new to PILOT-EDMS is residential. Most residential customers are on simple to process, monthly, tiered rates, while the remaining residential customers' tariffs are a subset of the tariffs utilized by our current customers. The only measurable incremental impact to PILOT-EDMS serving EBCE is that of software and hardware scalability, which we handle on a daily basis. Our in-house systems and staff of a half dozen+ full time, dedicated software engineers are scalability, and reliability, experts. The jump from our current customer load to CCA customer load is smaller and more manageable than CCA advisors appear to believe, and our in-house team is immeasurably prepared to seamlessly make the transition.

PILOT further supports EBCE local economic benefits where possible. We are the only provider of non-generation CCA services to show our support for labor by signing a neutrality agreement with IBEW 1245.

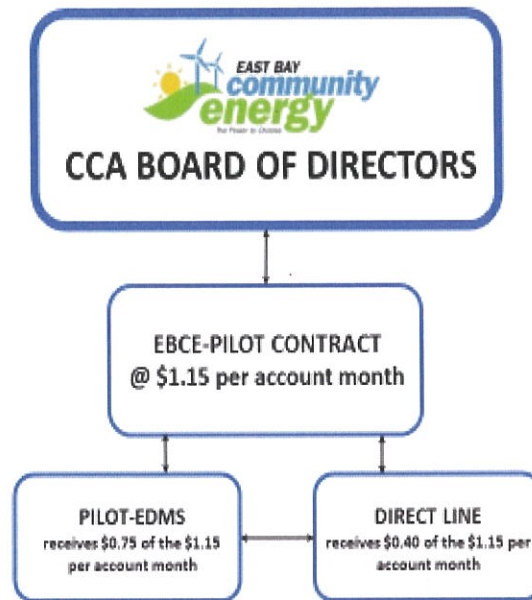
WE ARE CALIFORNIANS. All of the organizations in our Proposal are headquartered in California, and all of our employees are Californians. We know our owners and managers on a first name basis. We live in and care about California and California's communities. We are not national nor out of state, focusing almost exclusively on serving Californian clients. We are Davids amongst Goliaths, and we share the same hopes and concerns as local California organizations such as EBCE.

BETTER SERVICE AT COMPETITIVE PRICING. We stand ready to provide the data management and call center services as required in the RFP, as well as to exceed those requirements on many counts. Our proposed pricing is \$1.15 per account month, \$0.75 of which flows to PILOT-EDMS for general contract management, EBCE liaison support, Call Center training, data management, software engineering, communications software and hardware support, and all back office services. The remaining \$0.40 flows entirely to PILOT-Direct Line. Based on recent, publicly



available pricing, it appears that our competitors may be overcharging for data management and back office services while failing to properly price the cost of local, sustainable, truly incremental customer service jobs. Our Proposal presents EBCE with the first-of-its-kind opportunity to not only secure better service at competitive pricing, but to fulfill EBCE JPA commitments to bring measurable local economic growth back to the community.

PILOT is willing to consider alternate contract structures, but for initial purposes and to aid EBCE in understanding the relationships between our team members, PILOT proposes the following structure:



Thank you for the opportunity to submit this Proposal.

Very Truly Yours,
Pilot Power Group, Inc.

Denis Vermette, President

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EXHIBIT A

BID RESPONSE PACKET

RFP No. 16-CCA-1:

Alameda County Community Choice Aggregation / East Bay Community Energy: Multi-Service Technical and Administrative Tasks for Joint Powers Authority Initialization and Service Delivery

To: The County of Alameda

From: Pilot Power Group, Inc.
(Official Name of Bidder)

- AS DESCRIBED IN THE SUBMITTAL OF BIDS SECTION OF THIS RFP, BIDDERS ARE TO SUBMIT ONE ORIGINAL HARDCOPY BID (EXHIBIT A – BID RESPONSE PACKET), INCLUDING ADDITIONAL REQUIRED DOCUMENTATION), WITH ORIGINAL INK SIGNATURES, PLUS TEN (10) COPIES AND ONE ELECTRONIC COPY OF THE BID IN PDF (with OCR preferred)
- ALL PAGES OF THE BID RESPONSE PACKET (EXHIBIT A) MUST BE SUBMITTED IN TOTAL WITH ALL REQUIRED DOCUMENTS ATTACHED THERETO; ALL INFORMATION REQUESTED MUST BE SUPPLIED; ANY PAGES OF EXHIBIT A (OR ITEMS THEREIN) NOT APPLICABLE TO THE BIDDER MUST STILL BE SUBMITTED AS PART OF A COMPLETE BID RESPONSE, WITH SUCH PAGES OR ITEMS CLEARLY MARKED “N/A”
- BIDDERS SHALL NOT SUBMIT TO THE COUNTY A RE-TYPED, WORD-PROCESSED, OR OTHERWISE RECREATED VERSION OF EXHIBIT A – BID RESPONSE PACKET OR ANY OTHER COUNTY-PROVIDED DOCUMENT
- ALL PRICES AND NOTATIONS MUST BE PRINTED IN INK OR TYPEWRITTEN; NO ERASURES ARE PERMITTED; ERRORS MAY BE CROSSED OUT AND CORRECTIONS PRINTED IN INK OR TYPEWRITTEN ADJACENT, AND MUST BE INITIALED IN INK BY PERSON SIGNING BID
- BIDDER MUST QUOTE PRICE(S) AS SPECIFIED IN RFP.
- BIDDERS THAT DO NOT COMPLY WITH THE REQUIREMENTS, AND/OR SUBMIT INCOMPLETE BID PACKAGES, SHALL BE SUBJECT TO DISQUALIFICATION AND THEIR BIDS REJECTED IN TOTAL
- IF BIDDERS ARE MAKING ANY CLARIFICATIONS AND/OR AMENDMENTS, OR TAKING EXCEPTION TO POLICIES OR SPECIFICATIONS OF THIS RFP, INCLUDING THOSE TO THE

COUNTY SLEB POLICY, THESE MUST BE SUBMITTED IN THE EXCEPTIONS, CLARIFICATIONS, AMENDMENTS SECTION OF THIS EXHIBIT A – BID RESPONSE PACKET IN ORDER FOR THE BID RESPONSE TO BE CONSIDERED COMPLETE



BIDDER INFORMATION AND ACCEPTANCE

1. The undersigned declares that the Bid Documents, including, without limitation, the RFP, Addenda, and Exhibits have been read.
2. The undersigned is authorized, offers, and agrees to furnish the articles and/or services specified in accordance with the Specifications, Terms & Conditions of the Bid Documents of RFP No. 16-CCA-1 - Alameda County Community Choice Aggregation / East Bay Community Energy: Multi-Service Technical and Administrative Tasks for Joint Powers Authority Initialization and Service Delivery.
3. The undersigned has reviewed the Bid Documents and fully understands the requirements in this Bid including, but not limited to, the requirements under the County Provisions, and that each Bidder who is awarded a contract shall be, in fact, a prime Contractor, not a subcontractor, to County, and agrees that its Bid, if accepted by County, will be the basis for the Bidder to enter into a contract with County in accordance with the intent of the Bid Documents.
4. The undersigned acknowledges receipt and acceptance of all addenda.
5. The undersigned agrees to the following terms, conditions, certifications, and requirements found on the County's website:

- **Bid Protests / Appeals Process**

The Community Development Agency prides itself on the establishment of fair and competitive contracting procedures and the commitment made to follow those procedures. The following is provided in the event that bidders wish to protest the bid process or appeal the recommendation to award a contract for this project once the Notices of Intent to Award/Non-Award have been issued. Bid protests submitted prior to issuance of the Notices of Intent to Award/Non-Award will not be accepted by the County.

A. Any Bid protest by any Bidder regarding any other Bid must be submitted in writing to the County's Planning Director, located at 224 W. Winton Avenue, Room 111, Hayward, CA 94544, Fax: (510) 785-8793, before 5:00 p.m. of the FIFTH (5th) business day following the date of issuance of the Notice of Intent to Award, not the date received by the Bidder. A Bid protest received after 5:00 p.m. is considered received as of the next business day.

1. The Bid protest must contain a complete statement of the reasons and facts for the protest.
1. The protest must refer to the specific portions of all documents that form the basis for the protest.
2. The protest must include the name, address, email address, fax number and telephone number of the person representing the protesting party.
4. The Community Development Agency's Planning Department will transmit a copy of the bid protest to all bidders as soon as possible after receipt of the protest.

B. Upon receipt of written protest, the Planning Director, or designee will review and evaluate the protest and issue a written decision. The CDA Director, may, at his discretion, investigate the protest, obtain additional information, provide an opportunity to settle the protest by mutual agreement, and/or schedule a meeting(s) with the protesting Bidder and others (as appropriate) to discuss the protest. The decision on the bid protest will be issued at least ten (10) business days prior to the Board hearing.

The decision will be communicated by e-mail, fax, or US Postal Service mail, and will inform the bidder whether or not the recommendation to the Board of Supervisors in the Notice of Intent to Award is going to change. A copy of the decision will be furnished to all Bidders affected by the decision. As used in this paragraph, a Bidder is affected by the decision on a Bid protest if a decision

on the protest could have resulted in the Bidder not being the apparent successful Bidder on the Bid.

- C. The decision of the CDA Director on the bid protest may be appealed to the Auditor-Controller's Office of Contract Compliance (OCC) located at 1221 Oak St., Room 249, Oakland, CA 94612, Fax: (510) 272-6502. The Bidder whose Bid is the subject of the protest, all Bidders affected by the CDA Director's decision on the protest, and the protestor have the right to appeal if not satisfied with the CDA Director's decision. All appeals to the Auditor-Controller's OCC shall be in writing and submitted within five (5) business days following the issuance of the decision by the CDA Director, not the date received by the Bidder. An appeal received after 5:00 p.m. is considered received as of the next business day. An appeal received after the FIFTH (5th) business day following the date of issuance of the decision by the CDA Director shall not be considered under any circumstances by the Auditor-Controller OCC.
1. The appeal shall specify the decision being appealed and all the facts and circumstances relied upon in support of the appeal.
 2. In reviewing protest appeals, the OCC will not re-judge the proposal(s). The appeal to the OCC shall be limited to review of the procurement process to determine if the contracting department materially erred in following the Bid or, where appropriate, County contracting policies or other laws and regulations.
 3. The appeal to the OCC also shall be limited to the grounds raised in the original protest and the decision by the CDA Director. As such, a Bidder is prohibited from stating new grounds for a Bid protest in its appeal. The Auditor-Controller (OCC) shall only review the materials and conclusions reached by the CDA Director or department designee, and will determine whether to uphold or overturn the protest decision.
 3. The Auditor's Office may overturn the results of a bid process for ethical violations by Procurement & Support Services staff, County Selection Committee members, subject matter experts, or any other County staff managing or participating in the competitive bid process, regardless of timing or the contents of a bid protest.
 4. The decision of the Auditor-Controller's OCC is the final step of the appeal process. A copy of the decision of the Auditor-Controller's OCC will be furnished to the protestor, the Bidder whose Bid is the subject of the Bid protest, and all Bidders affected by the decision.
- D. The County will complete the Bid protest/appeal procedures set forth in this paragraph before a recommendation to award the Contract is considered by the Board of Supervisor.
- E. The procedures and time limits set forth in this paragraph are mandatory and are each Bidder's sole and exclusive remedy in the event of Bid Protest. A Bidder's failure to timely complete both the Bid protest and appeal procedures shall be deemed a failure to exhaust administrative remedies. Failure to exhaust administrative remedies, or failure to comply otherwise with these procedures, shall constitute a waiver of any right to further pursue the Bid protest, including filing a Government Code Claim or legal proceedings.

▪ **Debarment / Suspension Policy**

[<http://www.acgov.org/gsa/departments/purchasing/policy/debar.htm>]

▪ **Iran Contracting Act (ICA) of 2010**

[<http://www.acgov.org/gsa/departments/purchasing/policy/ica.htm>]

▪ **General Environmental Requirements**

[<http://www.acgov.org/gsa/departments/purchasing/policy/envIRON.htm>]

- **Small Local Emerging Business Program**
[<http://acgov.org/auditor/sleb/overview.htm>]
- **First Source**
[<http://acgov.org/auditor/sleb/sourceProgram.htm>]
- **Online Contract Compliance System**
[<http://acgov.org/auditor/sleb/elation.htm>]
- **General Requirements**
[<http://www.acgov.org/gsa/departments/purchasing/policy/genregs.htm>]
- **Proprietary and Confidential Information**
[<http://www.acgov.org/gsa/departments/purchasing/policy/proprietary.htm>]

6. The undersigned acknowledges that Bidder will be in good standing in the State of California, with all the necessary licenses, permits, certifications, approvals, and authorizations necessary to perform all obligations in connection with this RFP and associated Bid Documents.
7. It is the responsibility of each bidder to be familiar with all of the specifications, terms and conditions and, if applicable, the site condition. By the submission of a Bid, the Bidder certifies that if awarded a contract they will make no claim against the County based upon ignorance of conditions or misunderstanding of the specifications.
8. Patent indemnity: Vendors who do business with the County shall hold the County of Alameda, its officers, agents and employees, harmless from liability of an nature or kind, including cost and expenses, for infringement or use of any patent, copyright or other proprietary right, secret process, patented or unpatented invention, article or appliance furnished or used in connection with the contract or purchase order.
9. Insurance certificates are not required at the time of submission. However, by signing Exhibit A – Bid Response Packet, the Contractor agrees to meet the minimum insurance requirements stated in the RFP. This documentation must be provided to the County, prior to award, and shall include an insurance certificate and additional insured certificate, naming the County of Alameda, which meets the minimum insurance requirements, as stated in the RFP.
10. The undersigned acknowledges ***ONE*** of the following (please check only one box):
 - Bidder is not local to Alameda County and is ineligible for any bid preference; **OR**
 - Bidder is a certified SLEB and is requesting 10% bid preference; (Bidder must check the first box and provide its SLEB Certification Number in the SLEB PARTNERING INFORMATION SHEET); **OR**
 - Bidder is LOCAL to Alameda County and is requesting 5% bid preference, and has attached the following documentation to this Exhibit:
 - Copy of a verifiable business license, issued by the County of Alameda or a City within the County; and
 - Proof of six months business residency, identifying the name of the vendor and the local address. Utility bills, deed of trusts or lease agreements, etc., are acceptable verification documents to prove residency.

Official Name of Bidder: Pilot Power Group, Inc.

Street Address Line 1: 8910 University Center Lane, Suite 520

Street Address Line 2: _____

City: San Diego State: CA Zip Code: 92122

Webpage: www.pilotpowergroup.com

Type of Entity / Organizational Structure (check one):

- | | |
|--|--|
| <input checked="" type="checkbox"/> Corporation | <input type="checkbox"/> Joint Venture |
| <input type="checkbox"/> Limited Liability Partnership | <input type="checkbox"/> Partnership |
| <input type="checkbox"/> Limited Liability Corporation | <input type="checkbox"/> Non-Profit / Church |
| <input type="checkbox"/> Other: _____ | |

Jurisdiction of Organization Structure: California

Date of Organization Structure: March 28, 2001

Federal Tax Identification Number: 33-0957670

Primary Contact Information:

Name / Title: Denis Vermette, President

Telephone Number: 858-678-0118 ext 101 Fax Number: 858-678-0353

E-mail Address: dvermette@pilotpowergroup.com

SIGNATURE:  _____

Name and Title of Signer: Denis Vermette, President

Dated this 14th day of December 2016

EXHIBIT A, BID FORM

PILOT bids the below pricing for all of the RFP Service Category 3: Data Management and Call Center Services deliverables and any enhancements described in this Response. PILOT offers the below pricing for both the initial 2 year contract and a 2 year renewal.

\$0.75 per account month to PILOT-EDMS

\$0.40 per account month to PILOT-Direct Line

\$1.15 per account month total billed to EBCE

The \$1.15 per account month charge would not begin to accrue until the first day of the first opt out period.

REQUIRED DOCUMENTATION AND SUBMITTALS

All of the specific documentation listed below is required to be submitted with the Exhibit A – Bid Response Packet in order for a bid to be deemed complete. Bidders shall submit all documentation, in the order listed below and clearly label each section with the appropriate title (i.e. Table of Contents, Letter of Transmittal, Key Personnel, etc.).

- 1. **Table of Contents:** Bid responses shall include a table of contents listing the individual sections of the proposal/quotation and their corresponding page numbers. Tabs should separate each of the individual sections.
- 2. **Letter of Transmittal:** Bid responses shall include a description of Bidder’s capabilities and approach in providing its services to the County, and provide a brief synopsis of the highlights of the Proposal and overall benefits of the Proposal to the County. This synopsis should not exceed three pages in length and should be easily understood.
- 3. **Exhibit A – Bid Response Packet:** Every bidder must fill out and submit the complete Exhibit A – Bid Response Packet.
 - (a) **Bidder Information and Acceptance:**
 - (1) Every Bidder must select one choice under Item 10 of page 3 of Exhibit A and must fill out, submit a signed page 4 of Exhibit A.
 - (b) **SLEB Partnering Information Sheet:**
 - (1) Every bidder must fill out and submit a signed SLEB Partnering Information Sheet, (found on page 11 of Exhibit A) indicating their SLEB certification status. If bidder is not certified, the name, identification information, and goods/services to be provided by the named CERTIFIED SLEB partner(s) with whom the bidder will subcontract to meet the County SLEB participation requirement must be stated. Any CERTIFIED SLEB subcontractor(s) named, the Exhibit must be signed by the CERTIFIED SLEB(s) according to the instructions. All named SLEB subcontractor(s) must be certified by the time of bid submittal.
 - (c) **References:**
 - (1) Bidders must use the templates on pages 12 & 13 of this Exhibit A – Bid Response Packet to provide references.
 - (2) Bidders are to provide a list of current and former clients. References must be satisfactory as deemed solely by County. References should have similar scope, volume and requirements to those outlined in these specifications, terms and conditions.
 - Bidders must verify the contact information for all references provided is current and valid.
 - Bidders are strongly encouraged to notify all references that the County may be contacting them to obtain a reference.
 - (3) The County may contact some or all of the references provided in order to determine Bidder’s performance record on work similar to that described in this request. The County reserves the right to contact references other

than those provided in the Response and to use the information gained from them in the evaluation process.

(d) **Exceptions, Clarifications, Amendments:**

- (1) This shall include clarifications, exceptions and amendments, if any, to the RFP and associated Bid Documents, and shall be submitted with your bid response using the template on page 14 of this Exhibit A – Bid Response Packet.
- (2) **THE COUNTY IS UNDER NO OBLIGATION TO ACCEPT ANY EXCEPTIONS, AND SUCH EXCEPTIONS MAY BE A BASIS FOR BID DISQUALIFICATION.**

4. **Key Personnel:** Bid responses shall include a complete list of all key personnel associated with the RFP. This list must include all key personnel who will provide services/training to County staff and all key personnel who will provide maintenance and support services. For each person on the list, the following information shall be included:

- (a) The person's relationship with Bidder, including job title and years of employment with Bidder;
- (b) The role that the person will play in connection with the RFP;
- (c) Address, telephone, fax numbers, and e-mail address;
- (d) Person's educational background; and
- (e) Person's relevant experience, certifications, and/or merits.

5. **Description of the Proposed Equipment/System:** Bid response shall include a description of the proposed equipment/system, as it will be finally configured during the term of the contract. The description shall specify how the proposed equipment/system will meet or exceed the requirements of the County and shall explain any advantages that this proposed equipment/system would have over other possible equipment/systems. The description shall include any disadvantages or limitations that the County should be aware of in evaluating the RFP. Finally, the description shall describe all product warranties provided by Bidder.

6. **Description of the Proposed Services:** Bid response shall include a description of the terms and conditions of services to be provided during the contract term including response times. The description shall contain a basis of estimate for services including its scheduled start and completion dates, the number of Bidder's and County personnel involved, and the number of hours scheduled for such personnel. The description shall identify spare or replacement parts that will be required in performing maintenance services, the anticipated location(s) of such spare parts, and how quickly such parts shall be available for repairs. Finally, the description must: (1) specify how the services in the bid response will meet or exceed the requirements of the County; (2) explain any special resources, procedures or approaches that make the services of Bidder particularly advantageous to the County; and (3) identify any limitations or restrictions of Bidder in providing the services that the County should be aware of in evaluating its Response to this RFP.

7. **Implementation Plan and Schedule:** The bid response shall include an implementation plan and schedule. In addition, the plan shall include a detailed schedule indicating how Bidder will ensure adherence to the timetables set forth herein for the services.

- 8. **Credentials:** Copies of any licenses, certifications, or other third party verification of credentials stated as BIDDER QUALIFICATIONS in the RFP must be submitted with the bid response; Documents must be clearly identified as to which requirement they are responsive.
- 10. **Performance Bond/ Performance Requirements:** N/A.



**SMALL LOCAL EMERGING BUSINESS (SLEB)
PARTNERING INFORMATION SHEET**

RFP No. 16-CCA-1 -

**Alameda County Community Choice Aggregation /
East Bay Community Energy: Multi-Service Technical and Administrative Tasks for Joint
Powers Authority Initialization and Service Delivery**

In order to meet the Small Local Emerging Business (SLEB) requirements of this RFP, all bidders must complete this form as required below.

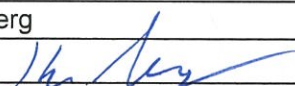
Bidders not meeting the definition of a SLEB (<http://acgov.org/auditor/sleb/overview.htm>) are required to subcontract with a SLEB for at least 20% of the total estimated bid amount in order to be considered for contract award. SLEB subcontractors must be independently owned and operated from the prime Contractor with no employees of either entity working for the other. This form must be submitted for each business that bidders will work with, as evidence of a firm contractual commitment to meeting the SLEB participation goal. (Copy this form as needed.)

Bidders are encouraged to form a partnership with a SLEB that can participate directly with this contract. One of the benefits of the partnership will be economic, but this partnership will also assist the SLEB to grow and build the capacity to eventually bid as a prime on their own.

Once a contract has been awarded, bidders will not be able to substitute named subcontractors without prior written approval from the Auditor-Controller, Office of Contract Compliance (OCC).

County departments and the OCC will use the web-based Elation Systems to monitor contract compliance with the SLEB program (Elation Systems: <http://www.elationsys.com/elationsys/>).

<input type="checkbox"/> BIDDER IS A CERTIFIED SLEB (sign at bottom of page) SLEB BIDDER Business Name: _____ SLEB Certification #: _____ SLEB Certification Expiration Date: _____ NAICS Codes Included in Certification: _____

<input checked="" type="checkbox"/> BIDDER IS <u>NOT</u> A CERTIFIED SLEB AND WILL SUBCONTRACT <u>35</u> % WITH THE SLEB NAMED BELOW FOR THE FOLLOWING GOODS/SERVICES: <u>Call Center</u> SLEB Subcontractor Business Name: <u>Direct Line Tele Response</u> SLEB Certification #: <u>PENDING</u> SLEB Certification Expiration Date: <u>PENDING</u> SLEB Certification Status: <input checked="" type="checkbox"/> Small / <input type="checkbox"/> Emerging NAICS Codes Included in Certification: <u>561421 and 561420</u> SLEB Subcontractor Principal Name: <u>Ken Goldenberg</u> SLEB Subcontractor Principal Signature: <u></u> Date: <u>December 14, 2016</u>

Upon award, prime Contractor and all SLEB subcontractors that receive contracts as a result of this bid process agree to register and use the secure web-based ELATION SYSTEMS. ELATION SYSTEMS will be used to submit SLEB subcontractor participation including, but not limited to, subcontractor contract amounts, payments made, and confirmation of payments received.

Bidder Printed Name/Title: Denis Vermette, President, Pilot Power Group, Inc.

Street Address: 8910 University Center Lane City San Diego State CA Zip Code 92122

Bidder Signature:  Date: December 13, 2016

CURRENT REFERENCES

RFP No. 16-CCA-1 -

Alameda County Community Choice Aggregation / East Bay Community Energy: Multi-Service Technical and Administrative Tasks for Joint Powers Authority Initialization and Service Delivery

Bidder Name: PILOT-EDMS

Company Name: University of California	Contact Person: Mark Byron, Electricity Program Mgr.
Address: 1111 Franklin Street	Telephone Number: 510-287-3846
City, State, Zip: Oakland, CA 94607	E-mail Address: mark.byron@ucop.edu
Services Provided / Date(s) of Service: 2015 to Present	

Company Name: Pacific Gas and Electric Company	Contact Person: Kathy Follan, Account Manager
Address: 245 Market Street, 873B	Telephone Number: 415-973-6479
City, State, Zip: San Francisco, CA 94105	E-mail Address: kmf1@pge.com
Services Provided / Date(s) of Service: 2004 to Present	

Company Name: Northrup Gruman Systems	Contact Person: David Coe, PE, Energy Manager
Address: One Space Park, M1 1554	Telephone Number: 310-812-6861
City, State, Zip: Redondo Beach, CA 90278	E-mail Address: david.coe@ngc.com
Services Provided / Date(s) of Service: 2006 to Present	

Company Name: Shell Energy North America	Contact Person: Martin Kadillak, Director
Address: 4445 East Gate Mall, Suite 100	Telephone Number: 858-526-2113
City, State, Zip: San Diego, CA 92121	E-mail Address: martin.kadillak@shell.com
Services Provided / Date(s) of Service: 2004 to Present	

Company Name: Irvine Company	Contact Person: Rich Bluth, VP Energy Management
Address: 111 Innovation Drive	Telephone Number: 949-720-2216
City, State, Zip: Irvine, CA 92617	E-mail Address: rbluth@irvinecompany.com
Services Provided / Date(s) of Service: 2010 to Present	

CURRENT REFERENCES

RFP No. 16-CCA-1 -

Alameda County Community Choice Aggregation / East Bay Community Energy: Multi-Service Technical and Administrative Tasks for Joint Powers Authority Initialization and Service Delivery

Bidder Name: PILOT-Direct Line

Company Name: City of Berkeley	Contact Person: Jay Brown
Address: P.O. Box 700	Telephone Number: 510-981-6629
City, State, Zip: Berkeley, CA 94701	E-mail Address: ejbrown@ci.berkeley.ca.us
Services Provided / Date(s) of Service: 1989 to Present	

Company Name: Clean Power Finance	Contact Person: Devon Treece
Address: 201 Mission Street, 11th Floor	Telephone Number: 888-525-2123 ext 4853
City, State, Zip: San Francisco, CA 94105	E-mail Address: dtreece@sprucefinance.com
Services Provided / Date(s) of Service: 2011 to Present	

Company Name: Alameda County Transportation Commission	Contact Person: Jackie Taylor
Address: 1111 Broadway, Suite 800	Telephone Number: 510-208-7400
City, State, Zip: Oakland, CA 94607	E-mail Address: jtaylor@alamedactc.org
Services Provided / Date(s) of Service: 2004 to Present	

Company Name: Alameda County Water District	Contact Person: Andy Warren
Address: P.O. Box 5110	Telephone Number: 510-668-6502
City, State, Zip: Fremont, CA 94537	E-mail Address: andy.warren@acwd.com
Services Provided / Date(s) of Service: 1998 to Present	

Company Name: American Red Cross	Contact Person: Alex Rose
Address: 1663 Market Street	Telephone Number: 310-869-0062
City, State, Zip: San Francisco, CA 94103	E-mail Address: alexrose@redcross.org
Services Provided / Date(s) of Service: 2013 to Present	

FORMER REFERENCES

RFP No. 16-CCA-1 -

Alameda County Community Choice Aggregation / East Bay Community Energy: Multi-Service Technical and Administrative Tasks for Joint Powers Authority Initialization and Service Delivery

Bidder Name: PILOT-EDMS

Company Name: City of Rancho Cucamonga	Contact Person: Fred Lyn, Utilities Division Manager
Address: 10500 Civic Center Drive	Telephone Number: 909-477-2740 ext 4035
City, State, Zip: Rancho Cucamonga, CA 91729	E-mail Address: fred.lyn@cityofrc.us
Services Provided / Date(s) of Service: 2006 - 2010	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

FORMER REFERENCES

RFP No. 16-CCA-1 -

**Alameda County Community Choice Aggregation /
East Bay Community Energy: Multi-Service Technical and Administrative Tasks for Joint Powers
Authority Initialization and Service Delivery**

Bidder Name: PILOT-Direct Line

Company Name: Harmonic, Inc.	Contact Person: James Biggerstaff
Address: 4300 N. 1st Street	Telephone Number: 503-495-5985
City, State, Zip: San Jose, CA 95134	E-mail Address: james.biggerstaff@harmonicinc.com
Services Provided / Date(s) of Service: 2009 to 2015	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

Company Name:	Contact Person:
Address:	Telephone Number:
City, State, Zip:	E-mail Address:
Services Provided / Date(s) of Service:	

County of Alameda - RFP No.16-CCA-1

PILOT KEY PERSONNEL	TITLE	YEARS W/PILOT	ROLE IN RFP	ADDITIONAL INFO
Denis Vermette	President	1	General Executive Oversight	please see resumes
Kelly Foley	Senior Counsel	1	Legal, Regulatory and Compliance	""

EDMS KEY PERSONNEL	TITLE	YEARS W/EDMS	Software and Systems Executive Oversight	ADDITIONAL INFO
Bryson Allen	COO	12	Software and Systems Executive Oversight	please see resumes
Daniel Hill	Assistant Controller	12	Accounting and Accounts Management	""
Megan Dewers	Operations Manager	4	Back Office Operations and Customer Service	""
Dean Martin	Software Engineer	6	Software and Systems	""
Jeff Clark	Software Engineer	4	Software and Systems	""
Steven Do	Software Engineer	7	Software and Systems	""

DIRECT LINE KEY PERSONNEL	TITLE	YEARS W/DIRECT LINE	Software and Systems Executive Oversight	ADDITIONAL INFO
Ken Goldenberg	Owner and President	37	Call Center Executive Oversight	please see resumes
Beth Divine	Director of Marketing	3	Executive Account Management	""
John Freire	Director of Information Technology	9	Systems Management	""
Jarunee Lepnark	Director of Sales	8	Client Care	""
Gretchen Loderhose	Call Center Manager	4	Call Center Management	""
Constance Masings-Loville	Call Agent Skills Development Coordinator	23	Training	""
Alex Molochko	Application Specialist & Systems Coordinator	5	Systems Support	""

Denis Vermette

A strategic business executive and respected advisor, recognized for achieving significant improvements in company profitability and efficiency, fostering alliances with business partners, and optimizing internal operations. Skilled in accounting, treasury, finance, risk, operations, and tax.

Professional Experience

PILOT POWER GROUP, INC., SAN DIEGO, CALIFORNIA

Chief Financial Officer

February 2016 – Present

EDMS, LLC, SAN DIEGO, CALIFORNIA

President and Chief Financial Officer

February 2016 – Present

Responsible for business development and the growth strategy for Pilot Power Group and EDMS. Providing coordination and direction for company's community choice energy segment. Responsible for all financial components of the business including: accounting, finance, debt management, business planning, banking relationships, financial report, audit, and tax.

OASIS POWER LLC / TRIDENT RETAIL ENERGY LLC, HOUSTON, TEXAS

Chief Financial Officer

August 2014 – January 2016

Individually responsible for all financial components of the business including: accounting, finance, debt management, financial planning and analysis, banking relationships, financial reporting, audit, and tax.

- **Accounting:** Performed a complete GL reconciliation and review of 2014 financials; identified accounting irregularities and implementation of accounting controls. Responsible for financial reporting and executive presentation of financial statements.
- **Finance:** Implement and manage the budget, business planning process and monthly variance reporting. Improved financial performance increased quarterly EBITDA to \$2.6 mm from \$1.4 mm by expense reduction, margin analysis of products by market. Eliminated \$5.5 mm in preferred supplier debt in an eight-month period and reduced days payable outstanding from over 120 to 45 days.
- **Cash Management:** Implemented daily short-term cash forecast model, optimized cash liquidity and accelerated pay down of preferred supplier debt.
- **Banking:** Migrated the company from a small business platform to a corporate banking platform with Bank of America, reducing banking fees and providing better controls around treasury management.

AMERICAN BUREAU OF SHIPPING (ABS), HOUSTON, TEXAS

Global Treasurer (Contractor)

March 2014 – August 2014

Lead a team of three treasury managers with oversight of cash management, portfolio management and treasury operations.

- **Investment Management:** Oversight of a \$1.4 billion pension and investment portfolios. Working closely with each investment manager and custodian bank. Prepare and administer investment reporting for Investment, Pension and Finance committees.
- **Cash Management:** Oversight over 350 bank accounts in over 70 countries. Leading the selection process of a global Treasury Management System (TMS). Maintained and enhanced global cash forecast model.
- **Debt Management:** Manage and oversight of three L/C facilities and assist Finance Managers with the issuance of bid and performance bonds. Oversight of the company's \$100 million revolving credit facility and ensure bank covenants are met.
- **Internal Controls:** Monitor and audit investment portfolio controls ensuring investment managers are in compliance with the Investment Policy Statement.

ARGENTEUS SOLUTIONS, HOUSTON, TEXAS

Managing Director/Owner

January 2013 – September 2015

- Retailco, LLC / ENow, LP / Spark Energy Ventures – Providing ongoing financial and operational consulting services to the leadership of Spark Energy Ventures group of companies. Developed 2014 business plan and budget.
- Steadfast Foundation – Developing a business plan, cash forecast and financial statements for a startup technology company that specializes in stabilizing foundations for buildings.

SPARK ENERGY, L.P., HOUSTON, TEXAS

Vice President - Finance, Operations and Treasurer

January 2010 – December 2012

Leader of a large team of personnel from several departments: treasury, financial planning and analysis, credit risk, business operations and call center operations.

- **Treasury:** Managed all aspects of treasury, including cash flow, banking relationships, credit facilities and borrowing strategies, compliance with all debt covenants and collateral reporting. Reduced banking fees by 18% annually by completing an RFP for treasury services and implementing two additional banking relations.
- **Financial Planning and Analysis:** Oversaw annual, quarterly and monthly budgets, recommending corrective action as needed. Developed and implemented a short-term cash forecast model that identified possible cash needs three months in advance.
- **Credit Risk:** Developed a strategy for accounts receivable and collections, resulting in bad debt being reduced to 0.78% in 2011 and 1.38% in 2012, from an average of 3.4% in 2010.
- **Business Operations:** Managed a \$35 million budget and reduced OPEX by over \$6.6 million, through cutting costs, improving processes and increasing efficiency. Developed winning teams and provided mentoring and coaching for day-to-day operations.
- **Call Center:** Merged three independent call centers into one, saving the company \$1 million through process improvements, synergies between disciplines and reducing staff. Also improved service and occupancy levels to more than 75%.

SEQUENT ENERGY MANAGEMENT, L.P., HOUSTON, TX

Managing Director - Credit, Contracts and Compliance

October 2006 – January 2010

- Managed a \$3.5 billion energy risk portfolio of natural gas, fuel oil, producer services and retail relations. Supplied cross-functional management to the Contracts, Credit, and Compliance departments.
- Provided leadership, direction and the business insight necessary to anticipate and monitor risk associated with structured transactions, markets and counterparties.
- Oversaw monthly reporting, compliance with corporate policies, and portfolio and credit quality.
- Developed an online data warehouse of noncompliant transactions, allowing for easy data retrieval, real-time reporting and increased efficiencies.
- Developed and implemented an online contract and credit request form using Microsoft InfoPath, feeding into a real-time data log using SharePoint, resulting in increased efficiency and tracking.
- Implemented a counterparty credit underwriting and archiving system. Streamlined the review process, thus improving continuity and financial reliance on analysis.

DOMINION RESOURCES, INC., RICHMOND, VIRGINIA
Director, Portfolio Risk Management

June 2003 – October 2006

Managed a \$4.0 billion energy risk portfolio of power, natural gas, crude oil, coal, producer services, retail, aggregator and emission relations. Led a team of credit, contract and quantitative professionals.

AMEREN CORPORATION, ST. LOUIS, MO
Director of Credit

September 1999 – June 2003

KOCH OIL CO. LTD., CALGARY, CANADA
Credit Manager

March 1997 – September 1999

Education

Master in Business Administration – Mays Business School at Texas A&M
Bachelor of Arts, Economics – University of Calgary, Canada

Professional Associations

International Energy Credit Association (IECA)
President – 2008 - 2009
Various Board and Committee Positions – 1999 - 2013
Association of Financial Professionals

Kelly Foley

Experience

Pilot Power Group, San Diego, CA

Senior Counsel, March 2016 to Present

Responsible for Federal, State and Local legal, regulatory and compliance for non-utility load. Assist in all aspects of procurement and portfolio management. Develop and serve Community Choice Energy clients in all facets of inquiry, launch and operations.

Tanoak Energy Advisors, California

Consultant, January 2015 to March 2016

Develop turnkey service options for Community Choice Energy programs. Draft feasibility studies and ordinances, assist with community outreach, negotiate power purchase and structured finance transactions, analyze cost impacts, prepare GHG reduction forecasts, oversee utility data requests, and develop rate structures.

Sonoma Clean Power, Santa Rosa, CA

General Counsel/Consultant, December 2013 to March 2015

Executive management team member during program development, launch and operations. Provide all legal, regulatory and compliance services, including serving as Counsel for the Board of Directors, Business Operations Committee and Ratepayer Advisory Committee. Worked on GHG reduction and RPS strategies, FIT, and NEM.

The California Energy Commission, Sacramento, CA

Advisor to Commissioner Hochschild, March 2013 to November 2013

Lead advisor to Environmental Seat Commissioner, responsible for the Renewable Portfolio Standard, municipal utility compliance and media. Develop and recommend key clean energy policy initiatives. Act as liaison to the California Governor's Office, the California Legislature, sister agencies such as the California Public Utilities Commission and the California Independent System Operator, and Commission constituents. Provide analysis and support to the Commissioner on voting agenda review.

The Vote Solar Initiative, San Francisco, CA

Regulatory Director and Legal Counsel, June 2010 to February 2013

Management level director for non-profit solar and climate change advocacy organization. Formulate regulatory strategy for California. Advocate for sustainable policies before the California Public Utilities Commission and the California Independent System Operator in integrated resource planning, distribution interconnection, storage, resource adequacy, procurement, residential rate reform and solar rate design proceedings.

Sempra Energy, San Diego, CA

Senior Attorney, January 2003 to June 2009

Management level regulatory counsel for investor-owned utility and unregulated businesses. Represent the companies before the California Public Utilities Commission, the Federal Energy Regulatory Commission, and other government agencies. Work closely with business units in developing smart metering, rate making and rate design strategies. Other areas of experience include transmission siting applications and participation in procurement Request for Offers as both buyer and seller representative. Design and implement historic update of the utility Wholesale Distribution Access Tariff.

Pacific Gas and Electric Company, San Francisco, CA

Attorney, January 1997 to December 2002

Regulatory counsel for investor-owned utility. Represent the utility before the California Public Utilities Commission, the Federal Energy Regulatory Commission, and other government agencies. Negotiate agreements involving multiple entities including the Department of Energy Laboratories, the Bay Area Rapid Transit System, the Western Area Power Administration, the Westlands Water District, and California municipal utilities. Specialize in wholesale transmission tariff and rate making issues.

Davis Wright Tremaine, San Francisco, CA

Associate Attorney, June 1996 to December 1997

Represent energy industry clients in regulatory matters. Areas of practice included deregulation and direct access, power sales and regulatory compliance.

Merced and Napa County, Merced and Napa, CA

Deputy County Counsel, January 1994 to May 1996

Primary areas of responsibility include environmental services and planning and development. Serve as joint powers authority legal counsel to waste management and hospital boards.

National Economic Development and Law Center, Oakland, CA

Fellow, January 1993 to December 1993

Research and writing Fellow focusing on Community Economic Development strategies and providing legal advice to non-profit organizations.

Education

University of Michigan Law School, Ann Arbor, MI

J.D. December 1992

Wayne State University, Detroit, MI

B.A. Economics, May 1990

Bryson Allen

Summary of skills:

Twelve years expertise in the California, Texas and Portland retail electricity markets. Specializes in meter/account setup and maintenance, meter data analysis, and market data communications. Incorporating a background in computer science, currently leads a team of developers to create flexible and scalable software to support electric retail activities.

EDUCATION:

B.Sc. in -Management Science, Department of Economics, University San Diego California (UCSD)
2000-2005

Minor in Computer Science, Jacobs School of Engineering

EMPLOYMENT HISTORY:

Chief Operating Officer EDMS, LLC – San Diego, CA 2011 – Present

- Responsible for authoring and maintaining the company's strategic development roadmap
- Hired senior and mid-level software developers to form Development Department
- Responsible for the identification of hardware and software technologies required to support growing client base
- Orchestrated the design and development of scalable software systems to support extreme account growth in California
- Managed IT development for creating redundant and geographically separated data processing colocations
- Conducted software development efforts needed to provide back office support for clients in the ERCOT and Portland General Electric markets
- Completed certification of EDMS as a qualified CAISO Scheduling Coordinator

Chief Operating Officer Pilot Power Group, Inc. – San Diego, CA 2013 – Present

- Responsible for the analysis and submission of monthly/annual CRR nominations to the CAISO
- Hired and trained additional operations staff and formally created Operations Department
- Identified market changes and mitigated their impact on business activities by revising operational protocols and implementing software updates
- Resolved escalated or complex scheduling coordination issues on client's behalf
- Performed advanced meter data analysis including forecasting for supply procurement

Director of Operations Pilot Power Group, Inc. – San Diego, CA 2010 – 2013

- Trained and managed operations staff to perform daily operational tasks
- Completed certification of Pilot Power Group as a qualified CAISO Scheduling Coordinator
- Project managed software retrofits needed to reflect CAISO's transition to a nodal market

- Hired C#/.Net/SQL developers to write software to support operational growth
- Managed supply contracts and aggregation for scheduling to the CAISO
- Performed monthly billing and settlement processing

Operations Specialist

Pilot Power Group, Inc. – San Diego, CA

2004 – 2010

- Responsible for the setup and maintenance of electric retail accounts with utilities
- Coordinated meter installation and repairs for customer owned meters
- Responsible for meter data aggregation and submission of Settlement Quality Meter Data (SQMD)
- Responsible for market data communications including VAN Setup and DASR testing
- Developed .net/C# web application to generate, track, and parse EDI transactions from PGE, SCE, SDGE
- Developed web applications to automate operations tasks
- Established long-standing relationships with utility reps in California

CERTIFICATES:

Software Engineering Management, UCSD Extensions, San Diego, CA
2013-2014

Accounting, UCSD Extensions, San Diego, CA
2010-2012

VOLUNTEER EXPERIENCE:

Vice President TKE Board of Advisors, University San Diego California (UCSD)

2010 - Present

Daniel Hill

Skills and Qualifications:

- Wide knowledge of retail energy and settlements in California, Texas, and Oregon
- Strong analytical skills developed through mathematically rigorous economics coursework
- Advanced Excel skills (pivot tables, lookups, Microsoft query, statistical analysis)
- Experience designing reports and communicating requirements to software developers

Experience:

EDMS, LLC – San Diego, California, August 2011 – Present

- **Assistant Controller**, June 2016 – Present
 - Oversee accounts receivable, accounts payable, cash management
 - Oversee direct access energy billing for several service providers in multiple markets
 - Developed further controls for month end accounting processes
- **Accounting and Operation Senior**, August 2012 – June 2016
 - Analyze and settle direct access energy charges for six different entities in three territories
 - Prepare and review direct access energy invoices and reports
 - Oversee utility user taxes, including researching tax codes and determining any applicable taxes
 - Oversee power scheduling for multiple entities on a daily basis
 - Assist CFO in month end accounting for two companies
 - Assist CFO with year-end financial audit responsibilities
 - Maintain fixed asset documentation and depreciation schedules
 - Track IT purchases and licensing
 - Research new markets in two states and assist in development of settlement processes and software based on findings
 - Act as liaison to California Independent System Operator
 - Create load profiles for potential customers based on historical data
 - Manage settlement quality meter data self-audit for five different entities
 - Communicate with both back-office and retail customers and consultants
 - Basic SQL query usage
- **Accounting and Operations Staff**, August 2011 – August 2012
 - Bill and maintain database of direct access electricity customers
 - Identify and communicate issues to utility companies with meter or account data
 - Schedule electricity in California day-ahead market
 - Create NERC e-tags for imported power
 - Process, validate, analyze and submit settlement quality meter data to ISO
 - Prepare utility user tax returns
 - Accounts payable
 - Troubleshoot system issues and write software bug reports
 - Process and validate EDI transactions

Education:

Bachelor of Arts, Economics with a minor in Accounting
Bachelor of Arts, Political Science with a concentration in Public Policy
University of California, San Diego, **Magna cum Laude**
3.85 GPA (Overall), 3.9 GPA (Economics)

Relevant Coursework:

- Energy Economics
- Econometrics (3 quarters)
- Public Policy Analysis
- Game Theory
- Intermediate Micro/Macroeconomics
- Advanced Financial Accounting
- Advanced Cost Accounting
- Corporate Taxation & Auditing

Additional Energy Training:

- OATI webSmartTag Training, April 2016
- CAISO Settlements Training, April 2013
- CAISO CRR Market User Interface Training, July 2012
- CAISO Market Training, October 2011

College Internships and Activities:

- Faculty Relations Officer, UCSD Undergraduate Economics Society, November 2010 – May 2011
- Member of Phi Beta Kappa Honor Society, June 2010-Present
- UCSD Pep Band Public Relations Manager, 2009-2010 School Year
- Intern, U.S. Senator Dianne Feinstein's San Diego Office, September 2009 – January 2010
- UCSD Pep Band, 2007-2011

Awards:

- Nominee for 2011 Seymour Harris Award for outstanding economics student at UCSD
- UCSD Revelle College Provost's Honors (Quarterly), Fall 2007-Spring 2011
- John Phillip Sousa Award for outstanding leadership and musicianship, 2007

Megan Demers

EXPERIENCE

<i>Operations Manager, EDMS-LLC</i>	<i>June 2013 - Present</i>
<i>Operations Senior, EDMS-LLC</i>	<i>February 2015 - June 2016</i>
<i>Operations Analyst, EDMS-LLC</i>	<i>June 2013 - February 2015</i>
<i>IT Administrative Clerk, Sunrun</i>	<i>Oct 2012 - May 2013</i>

EDUCATION

San Francisco State University - Graduated May 2013

Major: Business Administration, Management



Ken B. Goldenberg

2487 Shattuck Avenue Berkeley, CA 94705
Office: (510) 843-3900 Cell: (925) 330-6355 Fax: (510) 841-3299
Email: keng@directlineanswers.com

Professional Summary



Ken is committed to coupling a human touch with state of the art technological elements so as to ensure all areas of service are functioning at peak efficiency and quality at all times.

As a Bachelor of Science, Business Administration graduate from San Diego State, Ken is a second generation owner of Direct Line Tele Response. After his parents and Direct Line founders, Ruth and Larry Goldenberg, retired in 2012, Ken assumed the role as President and Owner. His responsibilities continue to build upon the quality of service that was established over 38 years ago.

The industry looks to Ken as a leader and decision maker for the betterment of the Tele-Services industry. His constant sharing of best practices and extensive technological savvy is recognized as the best in the industry.

Relationship to Bidder

Owner and President of Direct Line Tele Response.

Project Role

Ken will be overseeing all aspects of this project including contract negotiations.

Educational Background

San Diego State University: BS, Business Administration

Relevant Experience

Ken has been involved in the Call Center industry for well over 25 years. He has been instrumental in growing Direct Line to the flagship organization it is today. His technological experience and business acumen has positioned Direct Line to be one of the leading Call Centers in the industry particularly for municipalities.

Certifications and Merits

Ken has had the distinct honor of serving as a member of the ATSI Board of Directors as well as serving as the President of the PINetwork Board of Directors during 2007-08. In addition, Ken was awarded the prestigious Allen Kalik Award in 2012. This award recognizes PINetwork members whose unselfish dedication and leadership have led to the advancement of the PINetwork Group.

Professional History

Direct Line Tele Response: President/Owner: September 1979- Present

Ken has been a part of Direct Line since its inception. He has mastered and led every position and now leads the company as President and Owner. For the past 15 years, Direct Line has been recognized at an unprecedented level for providing award winning call center services by winning the Association of Tele Services International's most coveted top honor, the Diamond Plus Award of Excellence. Direct Line is the most awarded Call Center in the State of California and is industry recognized as the best of the best.



Beth Devine

2487 Shattuck Avenue Berkeley, CA 94705
Office: (510) 843-3900 Cell: (650) 892-4411 Fax: (510) 841-3299
Email: bethd@directlineanswers.com

Professional Summary



Beth Devine has enjoyed a substantial career within Sales, Marketing and Business Development where for over 25 years, she has leveraged her knowledge, experience and talent to develop multi-million dollar businesses for many high profile companies such as Direct Line Tele Response, Greenwood & Moore, Inc., Gymboree Corporation, Cato Corporation and New York & Company just to name a few. Beth's bottom-line thinking and philosophy of "never confusing effort with results" has helped her achieve many goals and objectives throughout her career making her one of the most sought after Business Development professionals in the nation.

Beth's responsibilities include:

- Overall business development
- Top line growth through strategic lead generation
- Marketing content development/management
- Internet/website/social media positioning
- Process improvement
- Member of the Hiring Team

Relationship to Bidder

Beth is currently the Director of Marketing for Direct Line.

Project Role

Beth will be assisting with the hiring process for all new Call Agents associated with this account.

Educational Background

Florida State University, Bachelor of Science, Fashion Merchandising
Tallahassee Community College, Associates of Arts

Relevant Experience

Beth has been involved in the Call Center industry for over three years. She is responsible of all areas of business development, marketing and lead generation.

Certifications and Merits

- QuickBooks Certified
- Area Membership Director Rotary International
- John Goe Award: Rotary International
- Castro Valley Chamber of Commerce, Board Vice President
- Castro Valley Rotary, Member of the Board

Professional History

Direct Line Tele Response

Director of Marketing November 2016 – Present

Director of Sales and Marketing December 2013- November 2016

Beth is responsible for creating and implementing comprehensive sales, marketing and business solutions including but not limited to sales management, content development, email marketing and direct mail campaigns. Her strategies have elevated this well established Call Center/Answering Service to a new momentum phase on its own business growth curve.



Greenwood & Moore, Inc.

Vice President of Business Development June 2002-December 2013

Beth created and implemented solutions for all areas of business development including sales, marketing, finance and operations. She was responsible for maximizing growth and profitability for this well established civil engineering and land surveying firm.

Notable Results and Initiatives Include:

- Increased gross revenue 300%.
- Managed all areas of marketing and business development.
- Implemented processes and systems to ensure substantial growth and profit.
- Project management for a variety of civil engineering and land surveying projects.

Prior to 2002, Beth had a successful career in the retail industry. Companies include the following:

New York & Company

District Manager May 2001 - May 2002

- \$12M district of nine (9) stores selling woman's apparel.

McWhorter's Stationers

Director of Store Operations November 1999 – April 2001

- \$60M company of 27 stores selling office products, gifts, and stationery.

Gymboree Corporation

Regional Director-Internal promotion from District Manager October 1997 – November 1999

- \$50M corporate office region of 51 stores selling children's apparel.

Bebe

District Manager April 1997 - October 1997

- \$12M district of six (6) stores selling woman's apparel.

Cato Corporation

District Manager November 1993 - March 1997

- \$15M district of 17 stores selling woman's apparel.

Body Shops of America

District Manager October 1986 - January 1993

- \$6M district of 8 stores selling woman's apparel.
-



John Freire

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Email: johnf@directlineanswers.com

Professional Summary



John Freire is an innovative IT professional with a dedicated career reflecting strong technical, problem solving and communication skills supporting cutting-edge information, telephony and networking systems. Expertise in conceptualizing and delivering simultaneous large scale projects on time and under budget.

John has been our in-house Director of Information Technology since early 2007 and is responsible for all aspects of our technology infrastructure.

Relationship to Bidder

John is the Director of Information Technology at Direct Line and has been for close to 10 years.

Project Role

John's responsibilities include:

- Call Center hardware and software management
- Data Center hardware and software management
- Infrastructure and disaster recovery systems
- Database management and script programming

Educational Background

San Francisco State University: Business Administration (Information Computing Systems)

Relevant Experience

John has over 30 years of Call Center and Information Technology experience as outlined in his Professional History summary.

Certifications and Merits

- Allen Kalik Award 2016
- President-Professional Inbound Network PI Users Group 2005-2006

Professional History

Direct Line Tele Response - Berkeley, CA 2007 - Present

Director of Information Technology

Performs installation, upgrade and support of existing hardware and software systems to current industry standards including:

- Server and Desktop (Microsoft Windows) - Security (Cisco / SonicWALL Firewalls)
- Telephony (PBX / ACD / IVR / VoIP) - Email (Exchange Server)
- Backup (Datto/BackupExec) - Reporting (Crystal Reports)
- Remote Agents (Remote Desktop Services) - Database (SQL Server/Sybase-ADS)



Proxy Communications, Inc. - Brisbane, CA 1988 - 2006

Information Systems Director

Accomplished and enterprising technical leadership of a multi-million dollar inbound call center operation spanning 18 years of service. Scope of position was expansive and included departmental direction, full design, installation, implementation, support, training, administration and management authority for:

- 24x7x365 Call Center and Data Center - PC Desktop Systems
- PBX / ACD / IVR / VoIP Support - LAN/WAN Network Services & Support
- Telephony Support - T1's, DS3 - UNIX Systems Administration
- Data Security / Network Security - Routers / Firewalls / VPN's
- Database Administration - Email / FTP Admin
- Help Desk - Web/Intranet Design and Operation
- (CTI) Computer Telephony Integration - Terminal Services / CITRIX Systems

Key Projects and Achievements:

- Implemented disaster recovery and fault tolerance plans reporting near 100% uptime across all systems in a 24x7 environment.
- Devised and handled the installation of a 100 seat call center facility including all hardware, ACD and software systems within a two month period.
- Designed and managed a companywide 24x7 Help Desk.
- Planned, directed, and executed multiple call center acquisitions into the existing call center environment.
- Brought all systems (in-house and vendors) into Y2K compliance.
- Provided software solutions for clients as value added contract deliverables significantly increasing customer loyalty.

Managed Continuous Transition from Older Technology to Current Industry Standards Including:

- Microsoft Applications: Windows (95/98/2000/XP/2003), Office (2000/XP/2003/2007), SQL Server (6.0, 6.5, 7.0, 2000), Exchange Server (5.0, 5.5, 2000, 2003), IIS Internet Information Server (4.0, 5.0, 5.1, 6.0), ISA Internet Security and Acceleration Server (2.0, 2000, 2004), Visual Basic (VBA, VB5, VB6).
- Network Hardware: Cisco, CiscoPIX, and SonicWALL Firewalls and Routers.
- Telephony Systems: eOn eQueue, ASPECT, STARTEL and TASCOM Call Center / ACD and IVR Systems, Northern Telecom (Nortel) Meridian PBX Systems, BLUE PUMPKIN Workforce Suite, Professional Teledata PI-2000 Software System, Ecometry Data Exchange
- Legacy Systems - IBM RS/6000 AIX, PICK Operating System

US Sprint Communications - Burlingame, CA 1983 - 1988

Systems Support Specialist

- Acquired computer and voice/data skills in the Rapid Prototyping Department.
- Served as Network Administrator for telephony and computers systems.
- Provided technical consulting and training in the use of PC's for various departments.
- Performed maintenance, servicing, and upgrading of software and hardware.
- Experienced in the use of special systems including, Voice Verification Systems, Voice Recognition Systems, Text to Speech, and integrated Voice/Video Computer systems.



Jarunee "Jay" Lepnark

2487 Shattuck Avenue Berkeley, CA 94705
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Email: jaruneel@directlineanswers.com

Professional Summary



Jarunee started her career at Direct Line in 2008 as one of our professionally certified Call Agents and quickly moved to the rank of Lead where she provided training and call quality control/quality assurance. Due to her outstanding performance, Jarunee was promoted to an Account Manager then to our Communications Consultant. Jarunee is well versed in all aspects of our technology and messaging processes and procedures and has now assumed the role of Director of Sales.

Prior to joining Direct Line, Jarunee had over 10 years of customer service and sales experience within the financial industry.

Relationship to Bidder

Jarunee has been a part of the Direct Line team since 2008 and is currently our Director of Sales.

Project Role

Jarunee's role for this program will include

- Client satisfaction
- Account Management
- Needs assessment
- Account set-up
- Customized Call Solutions

Educational Background

Alameda College, Business Management. Pending

Relevant Experience

Jarunee has extensive call center experience at many levels including call taking, account set-up and programming, account management and customer satisfaction. Please see her Professional History for more detail of relevant experience.

Certifications and Merits

- Association of Tele Services International Professionally Certified Call Agent

AMC Mortgage Services

- Above & Beyond Award
 - October 2005, August and November 2006
- Top Performer
 - March 2006, August, October and November 2008
- Outstanding Performance
 - March, May, October, November 2005 and June, July 2006

Professional History

Direct Line Tele Response: October 2008 to Present

Director of Sales

- Provides communication solutions to businesses that will help them grow their business with minimal costs while maintaining a personable customer experience.
- Consults large companies on revolutionary communication methods that will increase efficiency and productivity to ensure customer satisfaction
- Responsible for the initial client intake, payment processing and account set up



Ameriquest Mortgage: January 2005-March 2007

Senior Mortgage Specialist

- Assisted the branch manager with interviewing potential new Mortgage Specialists
- Mentored and trained Mortgage Specialists in our branch
- Met and exceeded monthly sales goals
- Assisted borrowers with qualify and completing their mortgage refinance

Wells Fargo May 2004-January 2005

Product Specialist/Sales Coach

- Assisted bankers with escalated calls
- Mentored bankers to help them meet/exceed their sales goals
- Handled inbound calls from potential new banking customers, answered their questions on products and promotions and set them up for services
- Answered customer questions and concerns through chat
- Met and exceeded sales goals



Gretchen Lodderhose

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Professional Summary



Gretchen is a key member of our management team as she leads our Operations Department of 50+ Call Agents. She began her career as a call center representative in 1985 in Queens, NYC. Within four (4) years she was managing the Technical Support Department for this communication software company. After spending 25 years in NYC working in call centers for various companies, including Time Warner Cable, Waste Management, and the NYC Department of Education, she returned home to San Francisco Bay Area and joined Direct Line in 2012.

Relationship to Bidder

Gretchen has been our Call Center Manager since 2012.

Project Role

Gretchen's responsibilities include:

- Operational compliance
- Statistic management
- Staffing, training and leadership development
- Call Agent scheduling and performance management

Educational Background

- University of Phoenix, Business Administration - Pending

Relevant Experience

With over 30 years of experience in Call Centers, Gretchen is by far one of the most experienced and qualified Call Center Operations professionals in the industry.

Certifications and Merits

- Multiple Certificates in Professional Development/Management /Quality Assurance
- Association of Tele Services International Professionally Certified Call Agent

Professional History

Direct Line Tele Response - Berkeley, CA 2012 – Present

Operations Manager

- Manage all HR areas related to call center staff
- Create multiple training programs to increase productivity and morale
- Resolves escalated customer complaints and disputes
- Screen, interview, and hire new employees
- Perform disciplinary actions
- Mediate employee disputes

NYC Department of Education - Brooklyn, NY 2007 – 2011

Call Center Trainer, 08/10 to 12/11 – Call Center

- Create material utilized for call center training
- Lead training of existing and new hire classes
- Identify needs and provide solutions management
- Revise policies and procedures to increase staff productivity
- 311 liaison



NYC Department of Education - Brooklyn, NY (continued)
Call Center Supervisor December 2007- August 2010

- Supervised a highly responsive staff of 25-30 providing support to staff, parents and students.
- Supervise the implementation of continuous data driven improvement
- Resolve complex problems and conflicts when necessary
- Train and develop staff following quality assurance guidelines
- Maintained attendance and payroll records
- Monitored call center queue to ensure service agreements were maintained
- Performed disciplinary actions when necessary

Waste Management - Brooklyn, NY 2005-2006
Supervisor – Call Center

- Design material used to train new hires
- Facilitate new hire training
- Monitor calls, provide coaching to representatives
- Issue account credits and adjustments
- Resolve irate caller issues

TML Information Services – Queens, NY 1986-1996
Call Center / Technical Support Manager 2001-2005

- Create User Guides for customer products
- Facilitate new hire training
- Monitor calls, quality assurance
- Issue account credits and adjustments
- Resolve irate caller issues
- Perform disciplinary actions as needed



Constance Masinga-Loville

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Professional Summary



Constance Masinga-Loville is our in-house Call Agent Skills Development Coordinator and is responsible for all aspects of Call Agent training. With over 30 years of experience within the Call Center Industry, Constance began her career using cord plug boards known as PBX. Since 1993, Constance has been an integral part of the Direct Line team. She started as a Tele Receptionist and quickly moved into a "Lead" position. After mastering the "Lead" position, she was then promoted to "Person in Charge or (PIC)", from PIC, Constance assumed the role of Swing Supervisor and now she is our company Skills Development Coordinator.

It is important to note that Constance has been instrumental in multiple training process improvement initiatives here at Direct Line. She is responsible for creating our training infrastructure and ensures that all ATSI Standards of Excellence are trained and performed consistently to all Call Agents.

Relationship to Bidder

Constance has been a part of the Direct Line team since 1993 and has led our Call Agent Training and Development department for 11 years. Constance has been hugely instrumental for Direct Line's success in winning 15 consecutive ATSI Awards of Excellence and becoming the most awarded call center in the state of California.

Project Role

Constance's responsibilities include:

- Development and training of all new hires
- Managing ongoing training and development for existing Call Agents
- Training process improvement
- Call Agent performance management

Educational Background

College of San Mateo: Liberal Arts 1976
Cal State East Bay: Social Studies/Marketing-pending

Relevant Experience

With over 30 years of experience within the Call Center Industry, Constance has experienced firsthand the changes in technology and has been able to adapt and train her team successfully while ensuring complete client satisfaction at all levels.

Certifications and Merits

- Association of Tele Services International Professionally Certified Call Agent

Professional History

Direct Line Tele Response, Berkeley CA 1993- Present
Skills Development Coordinator 2006-Present

Originally hired as a Call Center Agent in 1993, Constance now leads the skills development, quality control/quality assurance and mentoring teams here at Direct Line. She is responsible for all training initiatives and coaching practices to ensure Call Agents are delivering the expected service level for all clients.



A Piece of the Rainbow 1992-1993

Customer Service Representative

Responsible for managing all aspects of customer service and customer relations. Assisted in order placement of product line and promotion implementation.

Burns Security 1988-1989

Security Officer

Provided security service including monitoring and observing facility.

Payless Shoe Source 1987-1988

Management Trainee

Responsible for managing customer service escalations and assisted in order taking.

Glass Answering and Paging Services-1986-1987

Call Center Agent

Call taking and Messaging for medical and dental offices

Nordstrom

Customer Service Representative 1982-1986

PBX Department-operating Sentex Systems, paging, message delivery, data entry and customer satisfaction.



Alex Molochko

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Professional Summary



Alex Molochko is our Application Specialist & Systems Coordinator. His role at Direct Line includes primary responsibility for programming scripts and dispatch functions plus other duties ranging from IT and application support to furniture assembly.

Following an extended hiatus that included stints in the worlds of higher education, online lead generation and senior living, Alex returned to Direct Line in early 2015, where he previously worked from 2005 to 2008. His past experience as a Call Agent, Shift Leader and Account Manager serves him well in a role that supports both Operations and the Account Management team. His versatility, knowledge, technical ability, and creativity help to ensure excellence in customer service as well smooth, continuous growth for Direct Line.

Relationship to Bidder

Alex has been employed by Direct Line for an aggregate total of five years.

Project Role

Alex's responsibilities include:

- Account programming
- Operations support
- Customized data management solutions
- Application integration and systems coordination

Educational Background

California State University, East Bay: BS, Business Economics

Relevant Experience

Alex has over five years of call center experience with Direct Line. He has held a multitude of valuable positions where he consistently excelled. His current technical role affords him the opportunity to ensure our client's expectations are exceeded in every regard. His accuracy and attention to detail are beyond reproach and make him a tremendous asset to our team.

Certifications and Merits

- Association of Tele Services International Professionally Certified Call Agent
- Lead Certified Trainer
- Dispatch Certified Trainer
- Facilitative Leadership, Source Potential. Certified May 2014

Professional History

Direct Line Tele Response, Berkeley CA

Application Specialist March 2015-present

Developed call center solutions via programming and updating agent scripts, dispatch functions and client-side interface integration in dBase derived environment. Custom CRM development. Proactive & reactive application support and process improvement, both internal and external. Honored to give web-based training presentations to user groups. Data-driven support for both sales & customer service teams.



Direct Line Tele Response, Berkeley CA
Account Manager January 2007-January 2008

Customer service and client retention. Design and implementation of agent scripts and dispatch functions, both anticipating and responding to client needs to exacting specifications. Sales support. **Designed and implemented a digital system - still being used today - that revolutionized client information management.**

Direct Line Tele Response, Berkeley CA
Shift Supervisor Oct 2005-Jan 2007

Busy inbound call center serving medical, legal and service industries. Recognized top performance as an operator and dispatcher with simultaneous responsibility for escalations, oversight, staffing and scheduling, employee on-boarding and training, performance management, conflict resolution. Successfully managed diverse personalities.

Carlton Senior Living, Fremont CA
Associate Retirement Counselor November 2014-February 2015

Shared sales and marketing responsibility for occupancy rate. In 2014 the average move-ins per month was 4.1. In 2015: 13 move-ins by February 11. My inquiry to tour: 77%. Initial tour to deposit: 30%, both well above company average. Carlton Senior Living, Fremont CA Personal Expressions Director Jun 2013-Nov 2014 Conceived of and executed all aspects of a comprehensive assisted living activity program designed to foster development of the mind, body and soul of each of Carlton Plaza of Fremont's residents. Supervised two direct reports. Monthly, quarterly and yearly budgeting. Events planning for 120+ attendees on a near monthly basis.

CalFinder Inc., Oakland CA
Project Manager March 2012-July 2012

Directed new product line roll-out: client acquisition, management and retention; directing, refining and promoting the product both internally and externally; successfully managing managers in multiple disciplines and across multiple office locations. Grew program from zero revenue to \$20,000 per month in three months.

CalFinder Inc., Oakland CA
Account Manager March 2011-March 2012

Results-based client retention, problem-solving, marketing analysis, sales liaison. New feature promotion, up-selling, escalations, frequently coordinated with Sales to close deals requiring multi-departmental coordination.

La Val's Northside Pizza, Berkeley CA
Delivery Manager January 2008-March 2011

Comprehensive responsibility for catering/delivery functions: customer acquisition, order management, quoting and invoicing, purchase order reconciliation. Directed workflow to ensure timely and high-quality results. Developed a customer pipeline and referral base of corporate and university clients taking us from under \$10,000 delivery revenue per month to over \$50,000 per month in the first year. Learned conversational Spanish.



Lindsay Lutomski

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Professional Summary



Lindsay Lutomski is one of our in-house Account Managers providing customer care to over 350 Direct Line clients. Lindsay has been working within the Call Center Industry and has been an integral part of the Direct Line team since 2011. After only three (3) months as a Call Agent, Lindsay was promoted to Call Center "Lead" where she provided agent training and call quality control/quality assurance. Due to her outstanding performance, Lindsay has since been promoted to Account Manager providing responsive and dedicated attention to our client's needs.

"Lindsay is one of the sharpest Account Managers I've ever interfaced with. I would like you to know how much we appreciate her. I feel now is the time I acclaim her, to you, in recognition of the valuable role she plays at Direct Line. I appreciate her immediate response to every inquiry, call or email I've sent her. She goes that extra step to be sure we are satisfied. It must be nice to know you have such a wonderful worker, who is so much more than an employee, one who adds that little 'extra touch' to keep us smiling." -Teri Balestrero-Tri County Alarm Systems, Inc.

Lindsay's responsibilities include:

- Client satisfaction
- Account set-up and management
- Customizing Call Solutions
- Script programming

Relationship to Bidder

Lindsay is one of our dedicated Account Managers for Direct Line.

Project Role

As our senior most Account Manager, Lindsay will be assisting in all areas of account management needs including script and contact list updates and reporting.

Educational Background

Diablo Valley College: Associate of Arts pending

Relevant Experience

Over 10 years of Call Center experience and customer service support.

Certifications and Merits

- Association of Tele Services International Professionally Certified Call Agent
- Lead Certified Trainer
- Dispatch Certified Trainer
- Employee of the Month-Tickets.com
- Fidelity National Warranty Certified Customer Service Trainer

Professional History

Direct Line Tele Response September 2011-Present Account Manager

- Responsible for over 350 Direct Line Clients
- Provides urgent client service



- Performs various account updates including scripts, contact lists and custom reporting
- Ensures quality control for call taking procedures.
- Overall solution provider for clients and addressing their questions with efficiency and urgency.

Tickets.com

Call Center Customer Service Representative May 2009-May 2011

- Responsible for providing viable solutions for dissatisfied customers and assisted them in a courteous, patient and professional manner.
- Conduct outbound calls with event changes as required
- Assisted with finance and banking procedures
- Assisted with sales support

Fidelity National Home Warranty

Call Center Customer Service Representative May 2007-June 2008

- Inbound call taking
- Assisted tenants/homeowners/property managers by providing solutions for their real estate assets.
- Promoted to Dispatch Lead for contacting on-call emergency services for callers.
- Consistently recognized for my work ethic, results and client satisfaction rate.

EXHIBIT A, SUBSECTION 5
DESCRIPTION OF THE PROPOSED EQUIPMENT/SYSTEM

NOT
APPLICABLE

EXHIBIT A, SUBSECTION 6 DESCRIPTION OF THE PROPOSED SERVICES

SUMMARY OF PROPOSED SERVICES AND PILOT QUALIFICATIONS

EDI Services: PILOT-EDMS has a proven track record when it comes to electronic data interchange (EDI) services. Our comprehensive EDI validation ensures that we accurately process thousands of transactions per month with our automated systems. PILOT-EDMS stores detailed sets of rules for processing EDI files into actionable information that can be transmitted to end-use customers in easy-to-understand and fully-customizable formats.

Customer Relationship Management: PILOT-EDMS has direct experience dealing with and fulfilling the needs of thousands of Direct Access customer accounts. We have successfully accommodated hundreds of customer inquiries for specific, detailed, non-standard information requests in a format that is agreeable to the customer. PILOT-EDMS's system stores detailed correspondence and customer interaction data such as account notes and emails so that they are accessible to all personnel involved in customer account management.

Customer Information Systems: PILOT-EDMS's customer information system places detailed information at employees' fingertips. Information relayed by PG&E during the enrollment process is visible at all times and can be retrieved using virtually any piece of account information. PILOT-EDMS's customer information system is capable of producing dynamic reports based on any number of desired fields. Furthermore, PILOT-EDMS's system is designed and maintained by our in-house development staff, ensuring that any needed customization or reporting capability can be rapidly implemented.

Billing Management: PILOT-EDMS's proprietary billing system was designed by our in-house development staff and maintains years of billing history. We have been billing Direct Access customers using our systems for over 10 years. During that time, the system has been continuously improved based on real-world testing and feedback. Our unparalleled accuracy means that our sophisticated, Direct Access customers rarely ever find the need to dispute or contest an invoice.

Customer Account Switching: PILOT-EDMS routinely manages service change requests for its Direct Access customers. Thousands of accounts have been transitioned successfully from either bundled service or another ESP and back by PILOT-EDMS. PILOT-EDMS operations staff have years of experience with PG&E rules regarding service changes and are experts at managing the required EDI transactions. PILOT-EDMS operations staff have extensive experience with working with PG&E to successfully service changes by their requested dates.

Call Center Management: PILOT-Direct Line has been a premier Call Center service provider within Alameda County since 1979. Since 1989 we have provided Call Center services to the City of Berkeley and the Alameda County Transportation Commission has been a loyal client since 2004. We also have the honor of working with the Alameda County Water District as they have been a loyal client since 1998. Our experience in providing Call Center services for municipalities in and around the San Francisco Bay Area is extensive.

Key attributes of PILOT-Direct Line's call center management are:

- Extensive experience providing 24 Hour Call Center services for Government Agencies and Municipalities.
- Extensive on-going Call Agent training, skills development, quality control analysis and implementation.
- Proven track record of demonstrating the ability to organize information and accuracy which maximizes effectiveness and cost efficiency.
- Ability to provide Call Center services in over 160 languages through the partnership of our translation service provider.
- Tremendous history and track record of positive customer service and feedback.
- Technical excellence, experience and resources necessary to deliver the required services especially for this type of account.
- Reasonable rate structure that reflects our commitment to quality by keeping fiscally strong, hiring and retaining excellent and qualified staff.

Experience with PG&E: PILOT-EDMS's long-standing relationship with PG&E goes back over a decade. PILOT-EDMS staff regularly communicates any issues to PG&E and have a strong working relationship with PG&E Direct Access operations staff. PILOT-EDMS currently manages approximately 2.5 GWh annually of Direct Access load in PG&E territory, which is the equivalent of over 200,000 residential accounts based on average U.S. residential energy usage.

WREGIS Experience: PILOT-EDMS has over 7 years of experience using WREGIS for ESP renewable energy requirements mandated by the state of California.

Direct Access Experience: PILOT-EDMS was founded more than a decade ago with the purpose of providing unique, custom-tailored, Direct Access back-office services to ESPs. PILOT-EDMS has excelled in these duties throughout its entire existence and will continue to do so whether our customers are CCA or Direct Access.

PILOT'S FULFILLMENT OF SPECIFIC REQUIREMENTS

1. *Electronic Data Exchange Services:*

- a. Process CCA Service Requests (CCASRs) from/to PG&E which specify the changes to a customer's choice of services such as enrollment in CCA programs, customer initiated returns to bundled utility service or customer initiated returns to direct access service (814 Electronic Data Interchange Files).*

PILOT-EDMS has extensive experience handling DASRs (Direct Access Services Requests) with PG&E, having worked to enroll thousands of Direct Access accounts. PILOT-EDMS also smoothly manages account transitions back to bundled services or other ESPs under Direct Access. PILOT-EDMS reviews reports provided by PG&E monthly to ensure our list of accounts matches theirs to ensure that DASRs have been accurately processed and that PILOT-EDMS's system is in-sync with PGE's system. The processing of PG&E CCASRs are very similar to DASRs and present no incremental challenge to PILOT-EDMS capabilities.

- b. Obtain all customer usage data from PG&E's Metered Data Management Agent (MDMA) server to allow for timely billing (according to PG&E requirements) of each customer (867 Electronic Data Interchange Files).**

PILOT-EDMS already has automated processes in place to retrieve 867 EDI files from PG&E's MDMA server and has been doing since the beginning. PILOT-EDMS's system retrieves files multiple times per day as part of a scheduled process and stores them in a fully-searchable database. Any issues with the download process are immediately brought to PILOT-EDMS operations staff's attention and resolved in a timely manner. PILOT-EDMS's system immediately reads the contents of 867 usage files and inserts them into our meter read database under the correct account and meter. PILOT-EDMS's system validates all usage data for reasonableness and brings any questionable usage patterns to the attention of operations staff. The system is programmed to quarantine any data beyond a dynamic threshold to ensure that it is questioned and analyzed appropriately before being used to bill a customer. 867 usage data is stored in the same level of detail in which it is reported to PILOT-EDMS.

- c. Maintain and communicate the amount to be billed by PG&E for services provided by EBCE (810 Electronic Data Interchange Files).**

PILOT-EDMS's system reads and reports on 810 invoice files. All information from these files is preserved in PILOT-EDMS's system and can be reported the customer or other parties at-will in a user-friendly format. Data can be easily queried by account or customer.

- d. Receive and maintain all data related to payment transactions toward CCA Electronic Data Interchange Files).**

PILOT-EDMS currently directly bills and collect payments for a diverse Direct Access client base. The transition to CCA related billing and payments represents an easier subset of our current work. Our extensive experience with EDI transaction allows us to rapidly develop a customized solution to receiving, maintaining, managing, and reporting on EDI payment transactions.

- e. Process CCASRs with PG&E when customer status changes.**

As mentioned previously, PILOT-EDMS has extensive 814 EDI experience with Direct Access DASRs that can easily be integrated with CCASRs.

- f. Provider shall participate in the Customer Data Acquisition Program (CDA) beta testing for SmartMeter data sharing as EBCE's Data Manager.**

PILOT-EDMS stands ready to participate in any data management capacity requested by EBCE. Our in-house development staff can accommodate any sort of development requests by the CCA.

2. Qualified Reporting Entity (QRE) Services:

- a. Consistent with terms and conditions included in the Qualified Reporting Entity (QRE) Services Agreement(s) between EBCE and Data Management Provider, serve as QRE for certain locally situated, small-scale renewable generators supplying electric energy to EBCE through its feed-in tariff (FIT).**

PILOT-EDMS is not currently a QRE, as it has no generation assets. However, given our broad energy market experience and work with WREGIS and CAISO, we can easily provide these services. PILOT-EDMS's core competency is data management in all forms and we believe whether data is reported to WREGIS or CAISO, the same standards of accuracy apply.

- b. *Submit a monthly generation extract file to Western Renewable Energy Generation Information System (WREGIS) [DELIVERABLES] on EBCE's behalf, which will conform to the characteristics and data requirements set forth in the WREGIS Interface Control Document for Qualified Reporting Entities.***

As stated above, PILOT-EDMS's experience with SQMD submissions to CAISO is easily transferrable to reporting generation data to WREGIS.

- c. *Provider shall receive applicable electric meter data from PG&E for EBCE FIT projects, consistent with PG&E's applicable meter servicing agreement, and shall provide such data to EBCE for purposes of performance tracking and invoice creation.***

PILOT-EDMS's in-house meter data management system is easily adapted to fit the needs of EBCE.

3. *Customer Information System:*

- a. *Maintain an accurate database [DELIVERABLE] of all eligible accounts who are located in the EBCE service area and identify each account's enrollment status (opt out, program enrollment), rate tariff election(s), payment history, collection status, on-site generating capacity, if applicable, and any correspondence with customer as well as other information that may become necessary to effectively administer EBCE as mutually agreed to by parties from time to time.***

PILOT-EDMS's custom account management system can be easily modified to include any needed information. It is already used by PILOT-EDMS to store email communications with PG&E and customers regarding specific accounts. PILOT-EDMS's robust customer notes functionality allows operations staff to keep detailed notes with a traceable audit trail indicated what users added notes or files to an account as well as keeping track of all edits and previous versions of account notes. This information is viewable by all PILOT-EDMS operations staff at any time.

- b. *Allow EBCE to have functional access to the online database to add customer interactions and other account notes.***

Because our system was developed and is maintained in-house, PILOT-EDMS can accommodate access to customer interaction notes and correspondence, in any format specified by EBCE.

- c. *Allow EBCE to view customer email or written letter correspondence within online database.***

See above.

- d. *Maintain and provide as-needed historical usage data [DELIVERABLE] on all customers for a time period equal to the lesser of either (a) the start of customer service to present or (b) five years.***

Historical usage data is maintained by PILOT-EDMS for as long as needed by the client. PILOT-EDMS frequently runs usage data reports using the database. These usage reports can be customized to run for any time period and provide multiple ways to aggregate data, depending on the client's needs. Usage data reports are linked directly to the database and can be run at any time by PILOT-EDMS operations staff. Reports can also be scheduled to run automatically at specific times as needed by the client.

- e. *Until cloud-based storage solutions for SmartMeter historical usage data is implemented, Provider will store SmartMeter historical usage data, as received by the Metered Data Management Agent (MDMA), for a 48 hour window.***

PILOT-EDMS stores all data on its own servers that are kept at a secure co-location in San Diego, CA and backed-up at a secondary co-location in Katy, TX to ensure no data loss in the event of a natural disaster or server failure. Any data storage needs of the client can easily be met.

- f. *Maintain viewing access, available to appropriate EBCE staff, to view PG&E bills for EBCE customers, including supporting the intuitive parsing and labeling of PG&E provided files. Maintain accessible archive of billing records for all EBCE customers from the start of EBCE Service or a period of no less than five years.***

PILOT-EDMS's standard practice is to maintain billing records for as long as possible. We recognize the importance of storing this data for long periods in order to settle customer disputes that may arise well after their occurrence. EBCE can be provided access to this data as specified.

- g. *Maintain and communicate as needed record of customers who have been offered service with EBCE but have elected to opt out, either before or after starting service with EBCE.***

PILOT-EDMS's database is capable of tracking this information for each account.

- h. *Maintain and communicate as needed records of Net Energy Metering credits and generation data for customers to be posted on bill and settled annually.***

All generation data received from the MDMA is stored separately from consumption data received from the utility, thus PILOT-EDMS's software development staff is capable of settling this data at any interval requested. PILOT-EDMS's commitment to flexibility means that bills can be produced to the specifications of the client.

- i. *When requested by EBCE, place program charges on the relevant customer account, identified by Service Agreement ID (SAID).***

The PILOT-EDMS customer database already stores all Direct Access accounts with their SAID as one of the database fields, so any program changes requested by SAID can be accommodated by a simple update of the database.

- j. *Identify customers participating in various EBCE programs in database.***

The PILOT-EDMS database is capable of any custom queries requested by EBCE relating to any attributes stored in our database.

- k. Include various program payment information in all relevant reports.**
PILOT-EDMS currently stores payment information in its separate accounting database, but EBCE's needs can be accommodating by incorporating EDI payments into the main database.
- l. Perform quarterly EBCE program reviews to assess appropriate customer charge level.**
PILOT-EDMS will perform analysis quarterly to ensure customers have the appropriate charge level.
- m. Maintain all customer data [DELIVERABLE] according to EBCE's customer privacy policy and the requirements of relevant California Public Utilities Commission Decisions including D.12-08-045, including a daily backup process.**
PILOT-EDMS already backs up its database at the secondary co-location located in Texas at least every 15 minutes. PILOT-EDMS complies with all relevant CPUC standards regarding data security and privacy.
- n. Maintain a Data Management Provider Security Breach Policy.**
PILOT-EDMS maintains a security breach policy and will customize a policy specific to EBCE. PILOT-Direct Line employees will also be trained with respect to the policy.

4. Customer Call Center:

- a. Provide professional Interactive Voice Response (IVR) recordings for CCA customer call center.**
PILOT-EDMS will custom design a dynamic, user friendly IVR based on EBCE specifications. PILOT-Direct Line Call Agents will supply the IVR recordings. Furthermore, the Call Agents will be trained to seamlessly integrate their live services with the IVR, and to recommend ongoing improvements to the IVR based on EBCE customer feedback.
- b. Provide option for IVR self-service and track how many customers start and complete self-service options without live-agent assistance.**
PILOT-EDMS's IVR software provides self-service options and captures start/completion performance data, as well as a number of other customized metrics. Easy to read performance reports are generated based on these metrics.
- c. Staff a call center[DELIVERABLE], during any CCA Statutory Enrollment Period, 24 hours a day 7 days a week to process opt out requests.**
- d. Staff a call center [DELIVERABLE] during Non-Enrollment Period between the hours of 8 AM and 5 PM PPT Monday through Friday, excluding EBCE and PG&E holidays.**
- e. Provide sufficient call center staffing to meet the requirements set forth herein, including designating EBCE specific agents to the extent needed to provide for full functionality.**
PILOT-Direct Line will assign and specifically train a dedicated core team of professionally certified Call Agents exclusively to EBCE. These Call Agents will not answer calls for any other clients, including other CCA clients. Monday through Friday, 8am to 5pm, both during CCA Statutory Enrollment Periods and Non-

Enrollment Periods, this core team of dedicated call Agents will be first order service providers. For 7 day a week, 5pm to 8am service during CCA Statutory Enrollment Periods and other periods as EBCE may designate, PILOT-Direct Line currently operates a 24 hour a day/7 days a week/365 days a year call center and will bring this same around the clock service to EBCE customers.

f. Provide sufficient number of Data Manager Experts available to manage escalated calls between the hours of 8 AM and 5 PM PPT Monday through Friday, excluding EBCE and PG&E holidays (“Regular Business Hours”).

PILOT-Direct Line Data Manager Experts, including EBCE dedicated Call Agents, are available to manage escalated calls during Regular Business Hours as well as 24 hour a day calls. We can also work with EBCE to establish specialized services such as major commercial account management, a solar desk and a low income program desk.

h. 100% of voicemail messages answered within one (1) business day.

i. 100% of emails receive an immediate automated acknowledgement.

j. 95% of emails receive a customized response within one (1) business day.

k. 100% of emails receive a customized response within three (3) business days.

l. Achieve a no greater than 10% abandon rate for all Non-Enrollment Period calls.

m. Provide callers with the estimated hold time, if applicable. Provide an automated ‘call back’ option for callers who will be put on hold for an estimated five minutes or longer.

n. Record all inbound calls and make recordings available to EBCE staff upon request. Maintain an archive of such recorded calls for a minimum period of 24 months.

o. Track call center contact quality with criteria including:

(1) Use of appropriate greetings and other call center scripts

(2) Courtesy and professionalism

(3) Capturing key customer data

(4) Providing customers with correct and relevant information

(5) First-contact resolution

(6) Accuracy in data entry and call coding

(7) Grammar and spelling in text communication (email and chat)

p. Evaluate customer satisfaction through voluntary customer surveys that ask general questions about call quality, call resolution, and how satisfied the customer was with the service received.

q. Respond to customer emails.

r. Receive calls from EBCE customers referred to Provider by PG&E and receive calls from EBCE customers choosing to contact Provider directly without referral from PG&E.

s. Provide the call center number on PG&E invoice allowing EBCE customers to contact the call center. Collect and/or confirm current email, mailing address and phone number of customers and add to or update database during inbound call.

t. Collect permission (via voice recording, email request, or electronic form

submittal) from customers to send electronic correspondence instead of printed mail.

u. Respond to telephone inquiries from EBCE customers using a script developed and updated quarterly by EBCE. For questions not addressed within the script, refer inquiries either back to PG&E or to EBCE. Respond to customer inquiries within 24 hours, excluding weekends and holidays, including inquiries received either through telephone calls, email, fax or web-portal.

Offer bi-annual cross training to PG&E call center in coordination with EBCE.

v. Ensure monthly status reports are provided during the first week of each month [DELIVERABLES].

Provide weekly status reports during Statutory Enrollment Periods [DELIVERABLES].

w. Use commercially reasonable efforts to make Spanish speaking call center staff available to customers during Regular Business Hours.

x. Provide translation services for inbound calls for English and four other languages, to be determined in consultation with the County.

y. Create and maintain forms for the EBCE website [DELIVERABLE] so that customers may change their account status to enroll or opt out of various EBCE programs.

z. Host EBCE meeting

For our existing client base, PILOT-Direct Line currently meets or exceeds deliverables that are similar or identical to those stated above and stands ready to fulfill these requirements for EBCE customers. We currently achieve the following top level Call Center performance metrics:

- Seventy-five percent (75%) of calls to be answered within 20 seconds during Non-Enrollment periods.
- Voicemails responded to within one (1) business day.
- Emails responded to with an automated acknowledgement.
- Ninety-five percent (95%) of emails responded to with a custom response within one (1) business day and 100% of emails responded to within three (3) business days.

We achieve superior customer service by hiring the right people the first time and providing comprehensive training. Our extensive hiring process consists of behavioral interviewing, comprehensive testing and background checks. Coupled with a higher than average compensation and benefits package, this allows us to retain our staff and minimize turnover to well below industry standards of 25%. Our 12 week training program provides new Call Agents the best possible chance of success and ensures that we will have sufficient call center staffing that will meet EBCE's requirements. Our new Call Agent screening process proceeds as follows:

- Job Hotline call recordings are listened to by a member of our hiring team.
- Candidates who are articulate, accurate and professional are contacted and invited to participate in a Group Interview which consists of potentially upwards of 12 individuals at one time.

- Spelling tests are administered when candidates arrive for their Group Interview.
- Group Interviews are then conducted.
- Once candidates are vetted, they are invited back for a second interview which consists of comprehensive testing and behavioral interviewing including:
 - Typing Test
 - Typing Names and Phone Numbers
 - Call Center Simulation
 - Individual interviews with key management personnel
- Once all tests and interviews are successfully completed and scores meet our hiring standards, we will complete the hiring process with the following:
 - Three Reference Checks are conducted to validate candidates past performance and work ethic
 - Background checks are completed.
 - If all testing, references and background check are acceptable then an offer is extended to the candidate and the beginning of their 12-week training program is scheduled.

Our Training/Quality Assurance and Documentation Monitoring protocol is critical for ensuring the success and accuracy of messaging and call taking. Our training procedures and quality control standards are one of the main reasons PILOT-Direct Line is the most awarded Call Center in the State of California. Below illustrates specific training for a new Call Agent in their first 90 days of employment:

Section 1 – Training Week One

- Mission Statement
- Every Call Counts
- New Hire Hints Review
- New Hire Outline
- Agent Excellence 1-4
- Supervised / Unsupervised Transfers
- ATSI/Award of Excellence Power Point
- Customer Service: "You Have the Power"
- Customer Service Skills
- Schedule Review
- Client Website Review

Section 2 – Training Week Two

- Level 6 & 7 Account Review/Screen Training
- Active Listening Video
- Killer words of Customer Service
- Safety, Ergonomics and Fire Extinguisher Video & Safety Book
- Positive Phrasing
- Back to Basics – The Essence of Message Taking
- Agent Shadowing

- You have the Power
- Specialty Account Review Levels 1 & 2
- Observations Review / ATSI/Award of Excellence Program
- ESL Callers Handout
- Software Review

Section 3 – Training Week Three Through Seven

- Continued Client Specific Training
- Supervised / Unsupervised
- Power Point-Every Call Counts
- Extra Hours Review
- Message History

Section 6 – Training Weeks Eight Through Twelve

- Reminder's
- Program Review
- Agent Training Survey

During this twelve week training period, new Call Agents work directly with one of our Training Mentors. This one on one tandem training sets the tone for new hires to take calls with confidence. Once a new Call Agent is released for regular shifts, they are continually observed either live or via our voice logger. Each Call Agent is observed by our training team at least two times per week. Their scores are tracked for compliance and/or coaching. All Call Agents are required to consistently achieve a minimum of a 90% score on their observation reports.

The governing entity of the Call Center industry, The Association of Tele Services International (ATSI), has established minimal acceptable performance standards for call taking and messaging. Each year, ATSI recognizes the top performing call centers and answering services with what is known as the Award of Excellence. To highlight how a Call Agent is scored, an anonymous caller is designated by ATSI to place an inbound call to anyone of our agents without the Call Agents knowledge. So we never know when one of these calls will come in. It's very much like a secret shopper conducting customer service compliance for retailers. PILOT-PILDirect Line is proud to have won this exclusive award for 15 consecutive years.

As stated above, independent judges are contracted by ATSI to evaluate message services over a six month period. The scoring criteria are listed below:

“ATSI Award of Excellence Program-How the Judges Score”

Section A - Ring Count

Note: Ring count is scored N/A when Auto Answer or Custom Greeting is used
0-3 rings = 5 points
4 rings = 4 points
5 rings = 3 points
6+ rings = 0 points.

Section B - Hold Time

- B1 - Hold after Auto Answer / Custom Greeting
- B1a - How long before the Customer Service Representative (“CSR”) answers the call?

<15 seconds = 2, 15-30 seconds = 1, 30-60 seconds = .5, 60+ seconds = 0

- B1b – CSR return from auto answer / custom greeting as per CPS
5 points - Complete with genuine interest, positive attitude and preferred tone intended for this account as per cps form

0 points - Not complete / poor

- B2 - Calls placed on hold by the CSR

NOTE: If call is not placed on hold, the total point score is reduced. If the call is placed on hold more than once, the total point score is increased.

- B2a - Were you asked politely / Did CSR wait for your answer?

2 points - CSR asks caller to hold and waits for an answer

1 point - CSR asks caller to hold and does not wait for an answer

0 points - CSR does not ask caller to hold (i.e.: One moment...)

- B2b - Hold Time

<15 seconds = 2, 15-30 seconds = 1, 30-60 seconds = .5, 60+ seconds / 0

- B2c - Polite return from hold

2 points - CSR returned to the call politely, recognizing the hold

0 points - CSR does not thank the caller or recognize the hold (i.e.: starts with "your name...")

Section C - Answer Phrase - Live Answer

- C1 - Did CSR use complete / proper answer phrase as per CPS? (The answer phrase must contain all required words from CPS but may be modified in order of phrasing.)

5 points- Complete with genuine interest, positive attitude and preferred tone intended for this account as per cps form

0 points - Not complete / poor

Section D - Service

D1 - Call Control

5 points - CSR guides the caller throughout the call with appropriate questions.

3 points - CSR maintains control throughout most of the call with minimal dead air or evidence that caller is leading the conversation.

0 points – Caller leads the call, rambles on / dead air is heard

D2 - Attitude

5 points - CSR conveys a pleasant and helpful attitude by his/her choice of words and/or tone of voice throughout the call

3 points – CSR sounded interested and was helpful and composed BUT became flustered, seemed nervous or unsure, or lost control of the call during some portion of the call

0 points - CSR did not convey a pleasant helpful attitude

D3 - Manners

5 points - CSR used please and/or thank you during the call

0 points - CSR did not use please and/or thank you during the call

D4 – Grammar

NOTE: example of slang: Yup, Yep, Nope, ya/yeah (instead of yes), Gonna/Gunna, Lemme, Okey Dokey, Ya (instead of you), All Righty, Uhhhh, Cool, Ain't, like (when

used as a filler), bye-bye now, bu-buy, speak'in, The CSR habitually used a particular word (more than 3 times) during the call. Habitually means that a particular word is overused to the point of distraction during the call. Examples of unacceptable words when used habitually include, but not limited to: Okay, Um, Alright, no problem, no worries, K, thanks, mmmmmm, crutch words such as: so, well.

5 points – CSR used proper business phrasing throughout the call, without slang or habitual use of a particular word

0 points – CSR used any slang term OR CSR habitually used a particular word

D5 – Knowledgeable / Confident

5 points - CSR appears knowledgeable of the account, giving appropriate responses and navigating account information with confidence / call flows smoothly

3 points - CSR has some knowledge, but is not consistent

0 points - CSR does not sound confident / stumbles through account information

D6 - Voice Quality - This section tests the voice quality of the CSR. It does not test the system quality or telephone line quality.

5 points - CSR enunciates clearly, does not mumble and speaks at an appropriate pace.

3 points - CSR does not speak clearly OR speaks too quickly or too slowly.

0 points - CSR enunciates poorly, mumbles and speaks either too quickly or too slowly

D7 - Tone of Voice

Tone of voice is to be evaluated based on the information provided by the Call Centre on the CPS for each client. Examples are: clinical...showing little or no emotion, friendly & interested. (New section added to cps form)

5 - Agent showed appropriate mood and genuine interest

0 - Agent did not show appropriate mood or genuine interest

Section E - Message

E1 - Offer to take a message / offer to assist

5 points - CSR advises caller how the message will be handled in a clear and professional manner any time during the call. (Examples: "I'll have the office return your call in the morning" or "I'll page the on call right away and have your call returned.")

3 points – CSR takes a message but gives only a vague reference as to how the message will be handled. (Example: "I'll have someone return the call")

0 points - CSR did not advise caller how the message would be handled any time during the call or allows the caller to hang up without taking a message

E2 – Spelling of Caller's name

5 points - CSR confirms spelling of surname

0 points - CSR does not confirm spelling of surname

E3 – Confirmation of telephone number as per CPS (7 or 10 digits)

5 points - CSR repeats full number

0 points - CSR does not repeat full number E4 – Completion of 'message requirements' as per CPS?

5 points - CSR completed all of the CPS requirements

3 points - CSR missed one of the CPS requirements

- Employed at least six (6) months.
- Consistently demonstrate competency in job skills and knowledge.
- Studied the provided study guide

PILOT-Direct Line maintains a robust Business Continuity Plan. We understand the important nature of the many critical calls and data we handle from our clients. EBCE can be assured that we have taken all reasonable steps to keep our systems running smoothly with little or no interruption. We are ATSI Site Certified. Which requires us to meet or exceed nearly 60 site security related requirements. Together, the requirements represent a collection of best practices and guidelines that we strictly adhere to. By receiving this award we have demonstrated a high level of proficiency in recovery techniques, good business practices, documentation of procedures, and levels of redundancy necessary for 24/7 preparedness. From scenarios ranging from internal system issues, to unavoidable external disasters, PILOT-Direct Line has the systems and equipment in place to manage them.

PILOT-Direct Line provides robust internal system/server/equipment redundancy. Running a 24/7/365 operation requires us to have Business Critical computer systems running smoothly and able to recover in case of corruption. We backup client account data to 3 sources daily and rotate a backup offsite. We have a complete replicated server should our main server be compromised. We can quickly move over to a backup server and continue managing client calls and emails. We also backup messages and voice recordings to a separate server for further protection of data.

Although we can never predict a power outage, since our start in 1979, PG&E has always provided us excellent service- only once did we have a power outage for 3 hours. Our onsite UPS battery backup system kept us running smoothly. In 2011, we upgraded to a new UPS system that is not only connected to our network so our IT personnel is notified immediately when there is any issue, but can smoothly keep us running as our Diesel generator kicks on automatically. Although we have never been down longer than our UPS can keep us powered, we took the extra step of investing in a 100 KW generator to make sure we can stay up in any long term power outage situation.

We have multiple types of voice and data lines which allow us to take on just about any service provider or local line issue. We not only utilize multiple T-1 circuits, but also have data and voice via our cable provider. Our firewall allows us to automatically switch to the backup provider if there is any sort of outage. We also subscribe to multiple telephone providers, some thru PRI T-1's and some through our VOIP circuits. If our PRI circuits go down, we can send the calls over our VOIP circuit.

If our building is not inhabitable for any reason, we can deploy Call Agents to take calls from remote locations. We now have a complete replicated system off site that is synced daily this gives us protection in a number of ways. One, in case our servers are not accessible in any way we always have an offsite backup copy of all

account setups. Second, if our telephone service provide cannot send calls to our location, we can re-route that traffic to our Safety Net Business Continuity solution. Our Call Agents can then process calls either from our location, or from a remote location if necessary.

5. Billing Administration:

a. Maintain a table of rate schedules offered by EBCE to its customers.

PILOT-EDMS will work with EBCE to determine the appropriate rate schedules to include as a part of EBCE billing determinants. PILOT-EDMS already maintains PG&E rate schedules in our system as part of our Direct Access customer base, and is thus completely familiar with processing and updating the schedules.

b. Send certain EBCE program charges for non- EBCE customers, when supported by PG&E, based on information provided to Provider by EBCE.

PILOT-EDMS has the capability to import charges into the system for billing.

c. Send certain EBCE program charges as a separate line item to PG&E for placement on monthly bill during term of repayment.

PILOT-EDMS already uses custom-developed invoices that can be tailored to any be able to invoice any type of charge desired by the client.

d. Apply PG&E account usage for all EBCE customers against applicable rate to allow for customer billing.

PILOT-EDMS's system already applies billing rates to customer usage for Direct Access customers.

e. Review application of EBCE rates to PG&E accounts to ensure that the proper rates are applied to the accounts.

PILOT-EDMS already employs strict validation of all invoices before being transmitted to the customer. Rate validation will certainly be a centerpiece of the cross-check system implemented by PILOT-EDMS to validate CCA bills. Billing a customer with the incorrect rate creates a headache for both the CCA and the customer and is therefore a top priority.

f. Timely submit billing information for each customer to PG&E to meet PG&E's billing window.

PILOT-EDMS is well accustomed to operating on strict deadlines for submission of data. PILOT-EDMS is already held to CAISO timelines for SQMD submissions and has a near-perfect record of meeting those submission deadlines.

g. Use commercially reasonable efforts to remedy billing errors for any customer in a timely manner, no more than two billing cycles.

PILOT-EDMS prides itself on attention to detail. When a mistake is detected, we work as quickly as possible to correct the issue. If re-issuing a bill is not an option, PILOT-EDMS is more than capable of correcting the error by the next billing cycle.

- h. Assist with annual settlement process for Net Energy Metering customers by identifying eligible customers, providing accrued charges and credits, and providing mailing list to CCA designated printer [DELIVERABLE].**

PILOT-EDMS can flag customers eligible for NEM in its database. Since customer address information is already stored in our database, meeting this requirement does not pose a challenge.

6. Reporting:

Report [DELIVERABLES]	Frequency	Delivery Method
Aging	Weekly, Monthly	SFTP
Call Center Statistics	Weekly, Monthly	Email
Cash Receipts	Weekly, Monthly	SFTP
County Invoice Summary Reports	Monthly	SFTP
Days To Invoice	Weekly, Monthly	SFTP
Program Opt Up with Address	Weekly, Monthly	SFTP
Utility User Tax (UUT) where applicable	Monthly	Email
Invoice Summary Report	Weekly, Monthly	SFTP
Invoice Summary Report – Mid Month	Monthly	SFTP
Monthly Transaction Summary	Monthly	Email
Opt Out with Rate Class	Weekly, Monthly	SFTP
Retroactive Returns	Monthly	Email
Sent to Collections	Monthly	Email
Snapshot	Weekly	SFTP
Snapshot with Addresses	Weekly	SFTP
Unbilled Usage	Monthly	SFTP
Full Volume Usage by Rate Class	Monthly	SFTP

Provider shall also assist EBCE, as needed, in compiling various customer sales and usage statistics that may be necessary to facilitate EBCE’s completion of requisite external reporting activities. Such statistics will likely include annual retail sales statistics for EBCE customers, including year-end customer counts and retail electricity sales (expressed in kilowatt hours) for each retail service option offered by EBCE.

PILOT-EDMS prides itself on having developed all of its reports in-house based on its breadth of experience in the Direct Access market. Any reports requested can be developed to the client's specifications. PILOT-EDMS already reports on many of the items listed above as they relate to Direct Access customers. All reports developed by PILOT-EDMS are extensively validated before being used in order to ensure their accuracy in all situations. PILOT-EDMS can also make improvements to, and customize, the reports if EBCE's needs should change in the future. We believe that is a large part of the value that PILOT-EDMS provides to our clients.

7. Settlement Quality Meter Data:

- a. Provider shall provide EBCE or EBCE's designated Scheduling Coordinator (SC) with Settlement Quality Meter Data (SQMD) as required from SC's by the California Independent System Operator (CAISO).**

CAISO requires that each SC submit its own meter data according to strict deadlines. As this data provides the basis for financial settlement with the CAISO, its importance cannot be understated. Any erroneous submissions have direct financial consequences for the energy provider. PILOT-EDMS's automated systems provide both quality control and timely submission to CAISO.

1. **Aggregation of meter data:** PILOT-EDMS submits an aggregation of the metered load plus losses to CAISO at the hourly DLAP-level.
2. **Automated Data Validation:** Our software checks aggregated meter data for any missing intervals at the meter level by comparing account start and stop dates with available data to ensure that no meters are left out of the aggregated total.
3. **Bottom-up approach:** PILOT-EDMS's bottom-up approach to meter data ensures the highest level of accuracy, since each meter is validated individually.
4. **Post-submission monitoring:** If PG&E revises meter data, PILOT-EDMS provides the reporting tools to capture any difference between the data submitted to CAISO versus the most current data in the system. PILOT-EDMS monitors the difference to determine if resubmission and/or resettlement are warranted.
5. **Annual CAISO self-audit:** The California ISO requires that each SC perform a self-audit of its meter data submittal process. PILOT-EDMS performs this annual self-audit of its SQMD system separately for each SC ID it submits for. The audit helps ensure that PILOT-EDMS is consistent in applying its procedures and controls to all settlement quality meter data.

- b. Upon EBCE's request, Provider shall submit the SQMD directly to the CAISO on behalf of EBCE or EBCE's designated SC.**

PILOT-EDMS has been lauded by its utility partners for its SQMD submission accuracy when compared to their own data. PILOT-EDMS currently handles SQMD submission for multiple CAISO SCIDs. PILOT-EDMS's submissions will be transparent, timely, and accurate as they have always been for all our clients.



EXHIBIT A, SUBSECTION 7 IMPLEMENTATION PLAN AND SCHEDULE

The below schedule represents expected timeframes for the tasks required to successfully implement the Data Management and Call Center deliverables. The tasks are representative and not intended to provide an exhaustive inventory. In developing this schedule PILOT assumed that EBCE would launch a first tranche of customers equaling approximately 150,000 MWh of load. Notwithstanding this assumption, PILOT is willing to adhere to, accelerate, modify or change the schedule consistent with EBCE's needs.

TASK	DURATION	START	END
Execute Contract	NA	Day 1	
Designated as Back office Service Provider with the Utility	7 days	Day 2	Day 9
EDI Certification	30 days	Day 9	Day 39
Infrastructure & Application Configuration	90 days	Day 2	Day 92
CRM Install and Configuration	60 days	Day 5	Day 65
FAQ Approval	14 days	Day 2	Day 16
IVR and CSR Scripting Approval	14 days	Day 12	Day 26
IVR Recordings	21 days	Day 30	Day 51
IVR Programming	21 days	Day 51	Day 72
Phone Center Training	21-84 days	Day 6	Day 27 to 90
Rate Design and Approval	N/A		Day 75
Program Rates	60 days	Day 75	Day 135
Report Programming	21 days	Day 95	Day 116
1st Opt-out Period	30 days	Day 90	Day 120
2nd Opt-out Period	30 days	Day 120	Day 150
Utility Account Set Up	30 days	Day 150	Day 180
1st Accounts Switch	30 days	Day 180	Day 210
61st Full Cycle bills	N/A		Day 210
3rd Opt-out Period	30 days	Day 210	Day 240
4th Opt-out Period	30 Days	Day 240	Day 270



**EXHIBIT A, SUBSECTION 8
CREDENTIALS**

**NOT
APPLICABLE**

