



CSRS | BUILDING STRONGER,
SMARTER COMMUNITIES
TOGETHER.



REQUEST FOR PROPOSALS FOR

RFP 22-2 (REVISED) – Docket R-36227 Independent Engineering Consultant

**CSRS | LOUISIANA PUBLIC SERVICE COMMISSION
BATON ROUGE, LA
DUE BY: MONDAY, APRIL 25 AT 4:30 P.M.**

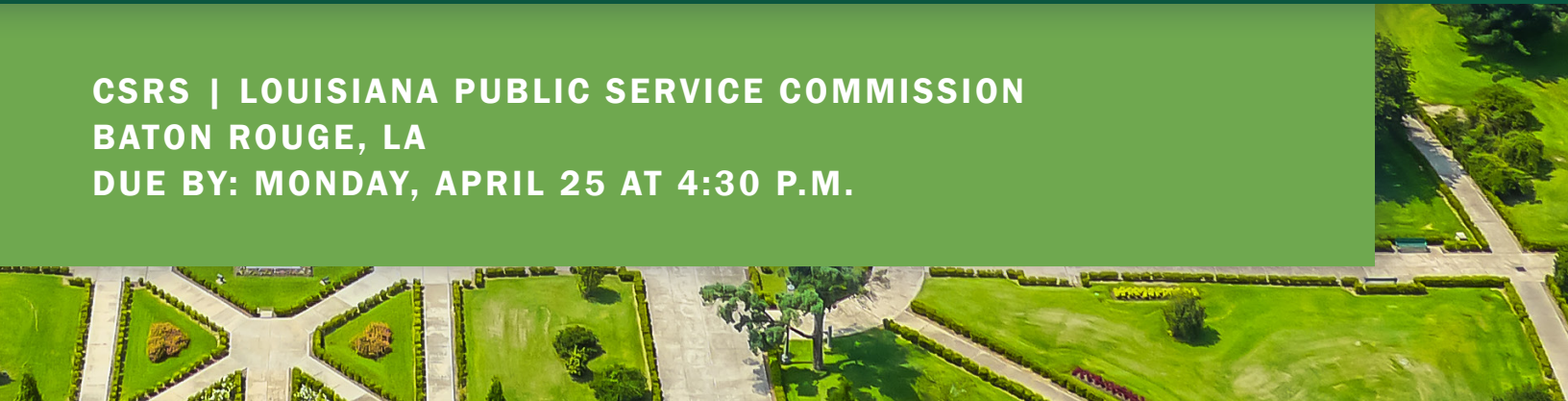


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April 25, 2022

Kimberly N. O'Brian
Kathryn H. Bowman
Louisiana Public Service Commission
602 North Fifth Street
Baton Rouge, Louisiana 70802

RE: CSRS Response to RFP 22-2 (REVISED) Docket No. R-36227

Dear Mses. Bowman & O'Brian:

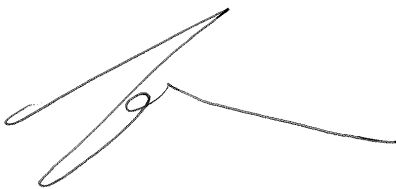
As a Louisiana company, we at CSRS, LLC (CSRS) have experienced all too often the effects of interruptions to the electric utility grid. Perhaps in no other time has the need for grid hardening and resilience been more apparent. In 2020 (the most recent data provided by the U.S. Energy Information Administration), our state ranked No. 1 for the number of minutes power was out for each customer on average. That statistic was only exacerbated by the severe weather events in 2021, when residents throughout Louisiana lost power – sometimes for extended periods. The effects of poor reliability and resilience are compounded by the fact that Louisiana ranks second in the nation in poverty rate, according to U.S. Census data.

While the current state of the electric utility grid seems daunting, there is reason to be hopeful. The Public Service Commission (Commission) and its partners have a unique opportunity to plan now to capture federal funding for grid resilience and transmission planning via the Infrastructure Investment and Jobs Act (IIJA) by developing a unified, state-wide resiliency plan. As a Louisiana firm that specializes in resilient infrastructure, CSRS is uniquely suited to assist Commission Staff with creating a platform for collaboration with regulated electric utilities and government agencies to design such a plan. Our expertise in resilience planning is complemented by the technical expertise in grid hardening and modernization of our partners – D-TEC, E Source, and Fides Consulting. Further, our experience road-mapping resilience projects to potential funding sources can help position that resiliency plan for implementation success.

As Louisianans, we share the goal of this effort with the Commission and ratepayers: to create a statewide, unified resiliency plan that will ensure that Louisiana has the most effectively hardened grid while utilizing external funding to offset the cost of those investments to ratepayers. If we can provide any additional information, please contact me at 225.270.5581 or mark.goodson@csrsinc.com.

Thank you for your consideration.

Sincerely,



Mark Goodson
Principal & Resilience Practice Lead



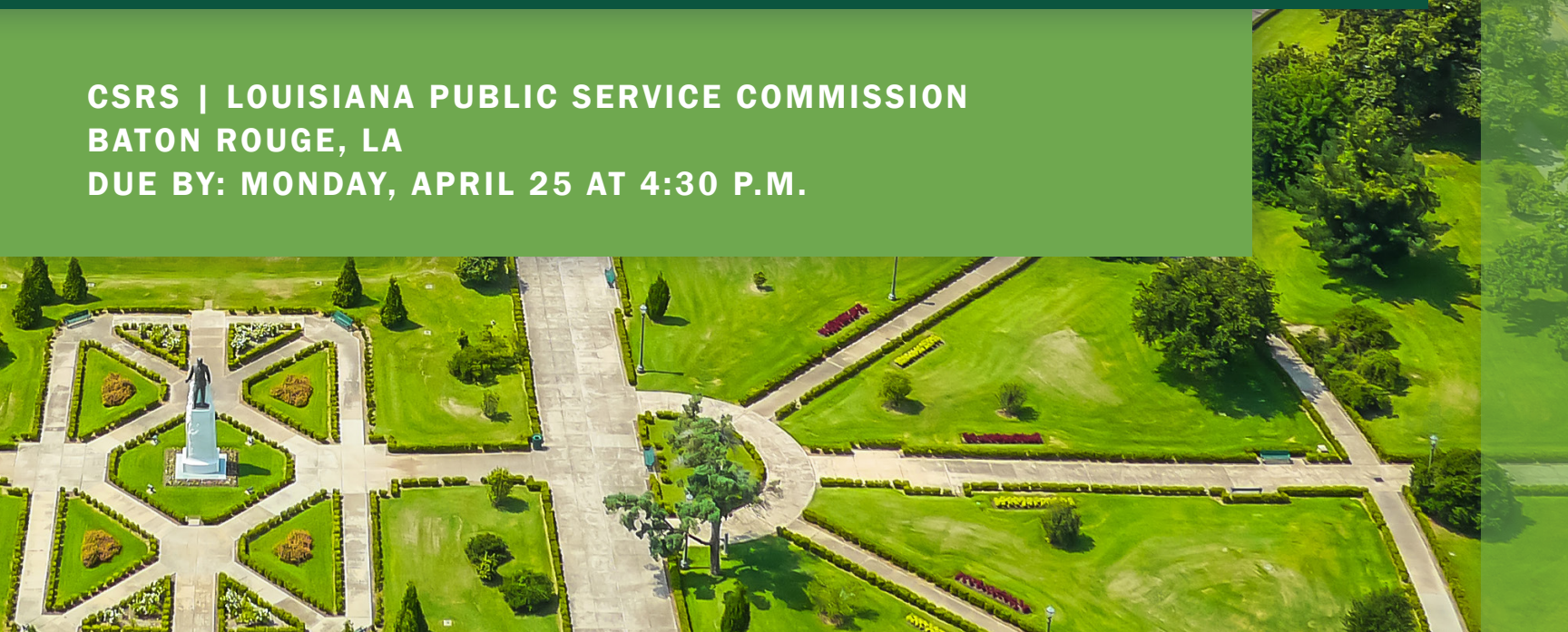
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FIRM PROFILES

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CORPORATE PROFILE



CSRS is a firm leading the way in the emerging resilience sector. For over 40 years, we have leveraged our innovation and leadership expertise to improve and revitalize our communities. With a culture of creative thinking, we provide a balance between big ideas and the technical ability to deliver a successful project every time, no matter how large, complex, or challenging.

CSRS is a leader in complex program and project delivery for public and private organizations. We are thought leaders, urban planners, program managers, social scientists, landscape architects, engineers, architects, development advisors, government advisory consultants, grant managers, climate adaptation specialists, and disaster recovery professionals. Whether we manage the process or perform the work ourselves, we understand every facet of successful project and program implementation.

Our Planning and Resilience Practice is working at the forefront of the discipline, from managing the first federally funded climate relocation program in the United States to designing statewide climate adaptation programs to support balanced approaches to watershed management. At the same time, our Planning and Resilience Practice is adept at managing more conventional planning processes, from area planning to code development.

We offer client focused solutions designed to meet the unique requirements of projects of all types and sizes. Our reputation for excellence is a product of a strong commitment to collaborative, multi-disciplinary, problem-solving. We work side-by-side and office-to-office, combining the skills, energy and focus needed to create and implement solutions in partnership with our clients.

Fides Consulting, LLC, a subsidiary of CSRS, was founded in November 2020 and is headquartered in Baton Rouge, Louisiana.

Fides Consulting employs an in-house engineering staff specializing in all disciplines, including process, mechanical, piping, civil/structural, electrical, and control systems engineering. Fides serves the renewable fuels, refining chemical and petrochemical, midstream markets. The company provides services for program and project management, procurement, and project controls, to name a few.



CORPORATE STRUCTURE:
Limited Liability Company

YEARS IN BUSINESS:
Established in 1978

NUMBER OF EMPLOYEES:
200+ Employees
(187 CSRS + 11 Fides)

OFFICE LOCATIONS:
Baton Rouge, LA
New Orleans, LA
Lake Charles, LA
Lafayette, LA
Dallas, TX
Miami, FL
Long Beach, CA

CAPABILITIES & EXPERIENCE

Over 25 Professional Engineers (PE),
and Professional Project Managers
(PMP) on staff

Project Management experience in
leading capital improvement projects
with a collective value exceeding \$11B

Platform Partner to 100 Resilient Cities

CORPORATE PROFILE



E Source is a solutions-based consulting, research and advisory, and data science firm that's been a change agent in the utility industry for over 30 years. We have worked with more than 600 utilities. To enhance relationships with the people you serve, achieve the next generation of savings, grid modernization, and lead the carbon-reduction effort, you'll need to think differently, make data useful, and learn from the best strategies across the industry.

Our mission is to build a sustainable future in partnership with utilities and cities. We do this by guiding utilities to flip their thinking, helping them design solutions that solve customers' specific energy problems. All of our solutions are meant to give your customers the best options and experience so they can make smart energy choices. We don't just help utilities with their role in sustainability—we hold ourselves to a high standard with our carbon impacts.

Working with utilities to create and implement energy-efficiency programs, E Source quickly realized that it had to understand the customer side of these programs. That naturally meant an expansion of E Source's work to include market research, customer experience, marketing, and communications.

Nearly 35 years later, we're still helping electric, gas, and water utilities solve their efficiency and reliability problems, but we're taking a different approach. In today's world, it's not just about providing a reliable commodity. Utilities must also understand customers' desire for comfort, productivity, self-reliance, environmental benefits, and security. This creates a need for much more sophisticated data models, predictive data science, and hands-on implementation solutions. To become an even stronger partner with utilities, E Source acquired a number of companies in 2020 that increase our ability to meet your most pressing needs. Our people, our experience, our curated industry insights, and our network will help you get there.

**CORPORATE STRUCTURE:**

Privately Held Corporation

YEARS IN BUSINESS:

Established in 1986

NUMBER OF EMPLOYEES:

200

OFFICE LOCATIONS:

Baton Rouge, LA
 Buffalo, NY
 Boulder, CO
 Birmingham, AL

CAPABILITIES & EXPERIENCE

We understand utilities because we've made them our business for 35 years.

E Source partners with utilities and cities to help them: Reduce costs, Evolve their technologies, Increase customer satisfaction, and Create programs that make an impact.

We're a solutions-based research, consulting, and data science firm that has been a change agent in the utility sector for over 30 years.

CORPORATE PROFILE



Darrell Thornley, D-TEC's Principal, is a founding member of a development company that installed 18 natural gas and methane fired CHP plants across the US, with over 30 years of experience in the Distributed Energy Resources (DER) business as a project engineer and project manager, Mr. Thornley has served as the O&M manager and developer/owner of DER systems, the Senior Consultant to the US Dept. of Energy's Combined Heat & Power Technical Assistance Partnership, and the Subject matter expert on power generation systems of many types including those fueled by natural gas, diesel, nuclear, landfill gas to energy, hydro, solar PV and various types of battery energy storage.

D-TEC brings environmental and Resilience planning capabilities ranging from infrastructure and operations program development, to program training and implementation guidance, and served as a teammate awarded projects by:

- Dominica's electric utility company to create a Climate Vulnerability Assessment and Resilience Planning Program.
- The State of Louisiana for a full feasibility study of a Community Microgrid for the relocated community of Isle de Jean Charles, Schriever, Louisiana funded by a \$48 million Community Development Block Grant from HUD under the National Disaster Resilience Competition.
- Puerto Rico Industrial Development Company, San Juan, Puerto Rico, as the team leader for the evaluation of proposals by multiple bidders to provide resilient power supply with microgrids industrial campuses throughout Puerto Rico in the aftermath of Hurricanes Irma and María.

D-TEC

DT Energy Consultants

CORPORATE STRUCTURE:
Limited Liability Corporation

YEARS IN BUSINESS:
8

NUMBER OF EMPLOYEES:
1 Employee

OFFICE LOCATIONS:
Austin, TX

CAPABILITIES & EXPERIENCE

Inventor of the patented engineering process "Secure Microgrid®", a comprehensive engineering and financial analysis methodology for developing microgrids



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BACKGROUND

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BACKGROUND

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In recent years, Louisiana's already-vulnerable electric utility grid has repeatedly endured major interruptions from extreme weather events. Tropical storms, hurricanes, and winter storms have left thousands of customers without electricity for extended periods and during times of extreme heat or cold when access to electricity is critical for survival and recovery. When critical services such as hospitals and first responder stations have limited supplies of back-up energy extended grid outages can hamper emergency response and compound the danger of the initial weather event. According to the U.S. Energy Information Administration, Louisiana customers experienced the most time with interrupted power in 2020. It is anticipated that the threat of extreme weather events will continue and even increase in the future and so building the grid's resilience is critical to public safety and the state's economic prosperity.

Since the costs of these damages ultimately impact ratepayers, it is essential that the state find proactive and cost-effective strategies to limit these impacts in the future. The Public Service Commission (the "Commission") and its utility partners are both eligible to receive funding directly for grid resilience through the Infrastructure Investment and Jobs Act (IIJA). The Commission and its partners have a unique opportunity to plan now to capture federal funding for grid resilience and transmission planning via the IIJA by developing a comprehensive, state-wide strategy. Furthermore, the IIJA requires states to incorporate transmission planning as a mandatory feature of their energy plans and is supported with increased funding for the State Energy Program.

Investments in grid resilience can not only reduce future losses but also potentially mitigate the need for major rates increases in the future.

Planning for resilience in the transmission and distribution of electricity also has the potential to advance complementary goals such as business attraction and retention, decarbonization, and the advancement of emerging industries. The Commission can undertake this resilience analysis as a first step in developing a comprehensive proposal for federal funding to reduce risk. Louisiana has an opportunity to demonstrate what's possible for other states around the country facing similar challenges in their utility grids.





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PROPOSED APPROACH

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PROPOSED APPROACH

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The CSRS team's proposed approach to developing a resilience strategy for Louisiana's electric utility grid is outlined below. Our shared objective is to create a statewide, unified resiliency plan that will ensure that Louisiana has the most effectively hardened grid while utilizing external funding to offset the cost of those investments to ratepayers.

I. CURRENT RESILIENCE EFFORTS AND PRACTICES

The CSRS team will establish the baseline of current efforts and opportunities by conducting a review of utility partners' current and planned resilience initiatives, existing data and reports on the state of the grid's challenges, outage events and their impacts on communities, and leading practices from around the country and the electric utility industry.

Data Exchange

The first step in the proposed approach is to review the current and planned grid resilience investments and approaches of each of the regulated utility partners under the jurisdiction of the Commission. The CSRS team will do this by working with PSC staff to send out a data call to each utility partner to collect consistent data, meeting with their representatives to exchange information where necessary, and compiling this information into a summary document for Commission staff.

Literature Review

CSRS will also review previous and current reports and reliability metrics that identified grid vulnerabilities or resilience challenges in the state or regional transmission and distribution systems. The CSRS team will compile and summarize the major challenges identified across these reports to distill themes and overarching challenges. This review would also include, if feasible, data provided by utility partners on outages and interruptions, asset data, and other relevant information.

Leading Practices

Another key component of the data collection and analysis step is to explore what approaches have been taken in other states, and best practices from across the electric utility industry, that have proven to reduce risk to the electric grid. The CSRS team will gather case studies of leading practices from other public utility commissions in their policy and technical approaches and determine which have relevance for Louisiana. This review will also include reports on grid resilience from the national energy laboratories and any emerging technology or approaches from the utility industry.

Deliverable: Current Conditions Report summarizing the above elements.

Timeline: Months 1 – 4

PROPOSED APPROACH

II. PRIORITIZATION OF RESILIENCE SOLUTIONS

CSRS will then facilitate the prioritization of the various potential resilience solutions. The CSRS team, in collaboration with Commission staff and utility partners, will examine the relative cost of each solution, how well each addresses the goals and desired outcomes of the Commission, the degree to which each reduces impact on critical facilities and vulnerable populations, the relative ease or difficulty of their implementation, how well each aligns with federal funding priorities, and any other factors critical to the Commission members. The prioritization will reflect the order of importance and urgency that the Commission assigns to each solution in the pursuit of its implementation. The outcome of this task is intended to provide the key inputs needed for a competitive application for federal funding to the “Upgrading Our Electric Grid and Ensuring Reliability and Resiliency” program under Section 40103 of the Bi-Partisan Infrastructure bill. Furthermore, the goals are to create a longer-term (2022 and beyond) sustainable approach that balances the need to maintain the operations of the grid system while also identifying high risk areas that could be mitigated to maximize the “risk-spend efficiency” of ratepayer funds.

Grid Resilience & Hardening Solution Menu

From the information collected from utility partners and industry leading practices, CSRS will develop a list of potential grid resilience solutions across various intervention categories. This menu of resilience activities could include a broad array of actions including physical upgrades or re-designs of the grid infrastructure, changes to operations and maintenance practices, partnerships with local entities to advance micro-grids and other distributed back-up energy systems, and peak shaving and demand-side management, among others.

Risk-Spend Efficiency Workshops

Recognizing that eliminating all grid interruptions, especially during extreme weather events, is likely infeasible and cost-prohibitive, but also that frequent and extended outages are unacceptable to ratepayers and the Commission alike, using metrics that compare costs and benefits consistently across the various solutions is key. In partnership with the Commission and a utility partner, the CSRS team will conduct workshops to explore and document the costs and benefits, or the “risk-spend efficiency,” of each solution, scoring the outcome across a set of metrics to gauge the relative impact and importance of each scenario. The workshops will include participating electric utilities, Commission staff, and any other stakeholders as directed by the Commission. This will ensure that the state’s electric utilities are able to express what approaches and investments will work best for their business models, service areas, and customers.

Central to the prioritization methodology will be the potential to maximize benefits across interdependent and intersecting objectives, such as grid modernization, energy efficiency, demand-side management, renewables and carbon reduction, micro-grids and long-term storage, and cost savings for ratepayers.

Deliverable: Summary Report of Prioritized Resilience Solutions

Timeline: Months 3 – 8 with Preliminary Report to Commission in Month 9

PROPOSED APPROACH

III. FINAL REPORT & FUNDING PLAN

CSRS will develop a final report that compiles the findings of the previous steps and sets a course for actions for the Commission, its utility partners, and other key stakeholders. Based on the prioritization of grid resilience options, the CSRS team will develop a road map that lays out the steps to further assess (if needed), secure funding, and realize the prioritized options. For capital investments, the CSRS team will develop the draft inputs needed for a federal funding application such as project concepts, cost estimates, and documentation of benefits. For policy solutions, the plan will include the actions that the Commission can take in its regulation of utility partners such as the Integrated Resource Plans and others to determine the best path for implementation. Since the Commission has broad latitude to set its own rules, using this authority will be critical to implementing grid resilience solutions.

Deliverable: Final Report with Recommendations for the Commission, its Utility Partners, and Elements of a Federal Funding Application for Grid Resilience

Timeline: Months 8 – 12

IV. PROJECT MANAGEMENT AND AS-NEEDED SERVICES

The Commission may need the support and services of the CSRS team in its B&E meetings, to provide testimony, to interface with state and federal partners, to coordinate with stakeholders, and other project management activities as directed. To provide the Commission with flexibility in its needs as this project evolves, the CSRS team will reserve a portion of the project budget to provide these services on an as-needed basis.

Timeline: Throughout life of Project



PROPOSED APPROACH

PLAN OF ACTION OUTLINE

The outline below is an alternative presentation of the CSRS team's project approach, to clearly relate to the Scope of Representation provided in the RFP.

Collaborating with electric utilities (IOUs and Co-Ops) on current and planned resiliency efforts

a.

The focus of our efforts will be on collecting, organizing, and refining grid resilience opportunities into a report and outputs for a federal funding application in collaboration with the regulated electric utilities and the PSC.

b.

Create a platform for collaboration with utilities – this is an opportunity to identify and secure funding for long-term resilience-building investments with alignment on the front end between the PSC and utilities.

c.

Data exchange with jurisdictional electric utilities

- i. Data call for key information such as outage event details, resilience initiatives current or planned, data sets from the O&M efforts, etc.

d.

Analysis of each utility's respective resiliency and hardening efforts and/or plans;

- i. We'll develop a framework or rubric to assess the relative merits, and anticipated benefits, of each approach to grid resilience, and identify gaps in the proposed resilience activities.
- ii. We'll convene a workshop on work-spend efficiency to refine the rubric, generate approaches to address gaps, and to feed into the report and grant proposal.

Independent research and analysis on methods where Louisiana's electric infrastructure - related to hardening and resiliency – can be improved.

a.

Summary of best practices from industry literature and cases studies, to be a section of final report and to feed into gap analysis and workshop.

Assisting in drafting requests for information/comments to stakeholders;

- a. reviewing and analyzing comments filed by all parties;
- b. participating in technical conferences, as needed;
- c. conducting site visits, if necessary; preparing technical analysis as requested by Staff;
- d. Collaborating with state or federal agencies, if deemed necessary;
 - i. On an as-needed basis.

PROPOSED APPROACH

PLAN OF ACTION OUTLINE

Draft a single comprehensive report on Louisiana’s electric infrastructure related to hardening and resiliency; assist in...

a.

Drafting a Staff recommendation based on the single, all-inclusive comprehensive report, including:

- i. Staff recommendations will be included in the report and will focus on regulatory issues such as coordinating utility applications for federal funding with state efforts and coordination of formula funds for grid resiliency.

b.

Rules associated with resiliency efforts;

- i. This could include recommendations to align with funding opportunities, such as the state enabling rate-payer reimbursement for certain types of grid resiliency investments.
- ii. Includes baseline performance standards or goals (e.g. reduced downtime, reducing impact on vulnerable populations, etc.)

c.

Participating and testifying regarding any proposed recommendation and rules

Seeking federal or any other applicable funding for implementation of a statewide resiliency plan;

- a. The focus the CSRS team’s effort will be on developing outputs that are geared towards competing for federal and/or state funds for grid resiliency. For instance, if an equity analysis is required as part of the federal funds, building that into our scope, or if some sort of technical feasibility study is required, including whatever aspects of that can fit into the budget. Or for instance, adapting the rubric to match the federal priorities (e.g. decarbonization, etc.) We will follow the federal programs as information is released concurrently with developing this report and deliverables.





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PROJECT EXPERIENCE

RELEVANT PROJECT EXPERIENCE



100 Resilient Cities Platform Partnership

WASHINGTON, D.C. AND BOULDER, COLORADO, AND LATIN AMERICA REGION

CSRS

CLIENT

- 100 Resilient Cities, pioneered by the Rockefeller Foundation

SERVICES PROVIDED

- Resilience Advisory Services
- Adaptation Advisory Services
- Capital Planning

SCHEDULE

- 2017 - 2019

PROJECT VALUE

- \$16,000

CLIENT REFERENCE

Jeb Brugmann

Principal

Resilient Cities Catalyst

+1 (416) 371-0705

jbrugmann@rcc.city

CSRS is a 100 Resilient Cities Platform Partner and Subject Matter Advisor (SMA) and was asked to provide guidance to help shape D.C.'s planning process.

When Washington, D.C. was part of the 100 Resilient Cities' member city network and developing its Resilience Strategy, CSRS was asked to share best practices from previous work related to using the capital improvement processes to foster co-design and mutual-benefit capital projects. Washington D.C. has confronted a range of challenges through the strategy development process, including economic inequality, extreme heat and rainfall flooding, infrastructure failure, lack of affordable housing and shifting macroeconomic trends. In addition to general guidance and advisory services, CSRS provided a sample decision support tool for evaluating capital expenditures for infrastructure.

In the wake of successive natural disasters, the City of Boulder created the Sustainability and Resilience Framework as well as the Resilience Strategy to position its communities to rebound, positively adapt to, and thrive amidst changing conditions or challenges. In this project, Boulder sought to move beyond resilience planning toward the institutionalization of resilience through its city budgeting process. To support budget decision making and service delivery model optimization, CSRS and its partner developed tangible key performance indicators for resilience and sustainability outcomes and evaluation criteria that position the City and local stakeholders to prioritize services and programs in the General Fund, while providing guidance on how to replicate the process for other funds and cities.

RELEVANT PROJECT EXPERIENCE



City of New Orleans - Joint Infrastructure Recovery Request (JIRR) Program

CSRS

NEW ORLEANS, LA

SERVICES PROVIDED

- Project Management Reconciliation
- Design of Capital Program
- Financial and Staffing Capacity Assessment

PROJECT VALUE

- \$3M

SCHEDULE

- 2016-2019

CLIENT REFERENCE

Ramsey Green

City of New Orleans
(504) 658-8901
ramsey.green@nola.gov

The City of New Orleans' Department of Public Works and the Sewerage and Water Board received a \$2 billion FEMA settlement for roads and sub-surface utility infrastructure repairs and upgrades called the Joint Infrastructure Recovery Request (JIRR). The JIRR is the largest and arguably the most critical capital program the City has ever undertaken and is a once-in-a-generation opportunity for the City and its residents to substantially improve its infrastructure and provide resiliency. The City of New Orleans requested CSRS to perform a 30-day comprehensive assessment to determine the current state of affairs as related to the City's:

- Management systems
- Funding reimbursements
- Staffing
- Programmatic procedures
- Processes
- Construction oversight

After performing the assessment, CSRS provided a written report summarizing the assessment findings and offered recommended actions, best practices, and strategies that will help the City manage and successfully administer and deliver the JIRR program.

RELEVANT PROJECT EXPERIENCE



Isle de Jean Charles Community Resettlement Program

TERREBONE PARISH, LA

CSRS

CLIENT

- State of Louisiana, Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD-DRU) Phase II (Master Plan)
- Louisiana Land Trust (LLT) Phase III – Development of the new community

SCHEDULE

- 2017–Present

PROJECT VALUE

- \$48 million

SERVICES

- Master plan development
- Community outreach
- Green infrastructure design
- H & H modeling
- Cost estimates
- Geotechnical investigation
- Surveying
- Wetlands delineation
- Green Building/Sustainable Design

CLIENT REFERENCE

Michael Taylor

Executive Director

Louisiana Land Trust

318.613.7701

mtaylor@lalandtrust.us

Isle de Jean Charles (IDJC) is a place of exceptional beauty, biodiversity, and deep cultural roots. However, the island has lost 98% of its land mass over the past 60 years and is now a narrow strip of marshland off the Louisiana Coast, vulnerable to storms, high tides, and rising sea levels. The IDJC community and the State of Louisiana have partnered to carry out the first major climate resettlement project in the country. Using CDBG-NDR funds, awarded through the National Disaster Resilience Competition, they are developing a new settlement that offers economic, environmental, cultural, and social sustainability for current residents and future generations as well.

CSRS has been a partner and consultant on this project since it first began. Having led an intensive community engagement and design process to complete a comprehensive Community Master Plan for the new community and the overall program design, CSRS is now fully engaged to design and manage the construction of the new community itself. The new community features sustainable and resilient design, including:

- Green Infrastructure
- Resilient Home Design
- Economic Opportunity
- Solar & Microgrid Feasibility

RELEVANT PROJECT EXPERIENCE



850,000 Electric Meters

PORTLAND, OR



CLIENT

- Portland General Electric

SCHEDULE

- 2014–2019

PROJECT VALUE

- Estimated \$1.5 to \$2.5 million

CLIENT REFERENCE

Ms. Jamie Swails
Network Data Operations Supervisor
 Portland General Electric
 (503) 464-7541
 Jamie.swails@pgn.com

E Source's Excergy personnel conducted the strategic implementation planning and project for Portland General Electric's Distribution Technology Platform (DTP). This encompassed AMI, MDMS, GIS, Work Management Systems (WMS), Outage Management System (OMS), and External Asset Management (EAM) technologies and delivered a business case and technology roadmap. Our staff also supported PGE in their planning and deployment of an AMI to its entire service territory. We then assessed MDMS technologies and provided a roadmap that PGE used to guide its meter data strategies and plan for the replacement of its in-house developed MDMS. In 2015, PGE engaged us to support Data Analytics activities. Our solution architects implemented the Data Analytics solution using Microsoft SQL Server, SSIS, SSAS, and SSRS tools to provide daily AMI performance, event, and billing metrics for their 850K meters, and ESRI based ArcGIS Online reporting/display on the success rate of AMI data delivery. In 2017, we were hired to look at opportunities to leverage their systems for greater value to the utilities and their customer bases. Because we have extensive experience working with several different utilities to explore and implement such "Day 2" benefits, PGE requested that we share the insights from that experience and general industry insights in a report that documents the different possible options available to PGE and how they could proceed to implement those options to leverage the installed system going forward.

RELEVANT PROJECT EXPERIENCE



ElectriCities of North Carolina

RALEIGH, NC



CLIENT

- ElectriCities of North Carolina

SCHEDULE

- 2017 - 2018

CLIENT REFERENCE

Mr. Andy Fusco

Vice President of Member Services

ElectriCities of North Carolina

(919) 760-6219

afusco@electricities.org

When ElectriCities of North Carolina needed to identify future technology offerings for its approximately 80 Member utilities, they turned to E Source's Excerpt for our strategy development expertise. Using state-of-the-art alignment optimization technology from SchellingPoint, staff helped the organization identify which future informational and operational technology (IT/OT) offerings were most beneficial to the public power communities across North Carolina and in parts of South Carolina and Virginia. Pairing this approach with our standard technology roadmap methodology resulted in a more viable, valuable and endorsed plan, setting a new standard of practice for our clients. The Strategic Technology Roadmap extends ElectriCities' existing technology and services offerings to its members to address pressing industry trends. The Roadmap identified offerings in the areas of project delivery services, CIS and customer engagement, design and mapping, AMI, demand response, distributed energy resources, Smart Cities/Internet of Things, and operations. We also provided data analytics vendor procurement services and supported the creation of an analytics offering for ElectriCities members, which included analytics vendor procurement and selection services.

RELEVANT PROJECT EXPERIENCE



Mandeville Resilience Pilot Plan and Modeling Study

MANDEVILLE, LA

CSRS

CLIENT

- State of Louisiana, Coastal Protection and Restoration Authority in coordination with the City of Mandeville and St. Tammany Parish

SCHEDULE

- 2021–Present

CLIENT REFERENCE

Cara Bartholomew

Director, Dept. of Planning & Development

City of Mandeville

cbarholomew@cityofmandeville.com

(985) 624-3103

CSRS is leading the first **community scaled resilience planning pilot project** funded by the Coastal Protection and Restoration Authority (CPRA). The pilot program is intended to inform a framework for CPRA to assist coastal communities in **determining an acceptable level of risk, identify hazards and creating policy and project solutions to reduce risk and improve community resilience.**

As a part of this effort, CSRS will work with **key stakeholders and the public** in Mandeville to identify the local context for resilience and inform grounded strategies that improve the community's ability to respond to and recover from natural hazards.

Following identification of the community's desired resilience goals, CSRS will develop detailed surface **2D hydraulic and hydrologic (H&H) models** that factor in storm surge, fluvial flood risk and their complex interactions for the areas of St. Tammany Parish located south of Interstate-12. Layered into this analysis will be an **assessment of what critical infrastructure, housing, commercial and industrial real estate are at risk from flooding** under various scenarios, including the impact of different growth scenarios.

The risk modeling and hazard identification will inform opportunities to position projects, including initial assessments of benefits and costs, and develop policies that reduce existing risk and inform future growth. CSRS will work with CPRA and the City of Mandeville to identify grounded project and policy strategies that respond to the available funding landscape and political constraints.

RELEVANT PROJECT EXPERIENCE



BREC Resilience Strategy

BATON ROUGE, LA

CSRS

CLIENT

- BREC - Recreation and Park Commission for the Parish of East Baton Rouge

SCHEDULE

- 2018 - 2019

CLIENT REFERENCE

Reed Richard, CPRP, AICP, ASLA
Assistant Superintendent System Planning

BREC

(225) 273-6405 ext. 1369
r-richard@brec.org

Cities around the world are recognizing the promise that parks hold in reducing the risks of extreme weather, environmental degradation, and threats to public health. The Great Flood of 2016 devastated the Baton Rouge area and highlighted the importance of the Recreation and Park Commission for the Parish of East Baton Rouge (BREC). BREC parks already provide resilience benefits and naturally serve as flood storage due to their natural areas. However, with intentional design, investment, and maintenance, BREC can greatly expand the range and depth of these benefits, reducing risk for the entire Parish while improving its own operations.

To understand BREC's parish-wide positive impacts, CSRS conducted eight site assessments, interviewed staff, and researched existing programs and initiatives to create BREC's first Resilience Strategy. Working directly with BREC staff, CSRS helped craft both system-wide and park-specific resilience-building action items in response to the Great Flood of 2016. The report also highlights high-risk watershed zones and BREC's opportunity to invest in future resilience planning.

CSRS provided specific action items to both improve the resilience of BREC's facilities, and increase the resilience benefits that BREC can provide to communities in East Baton Rouge Parish.

BREC already has several plans and programs to improve the resilience and sustainability of its parks and facilities, and to educate the public about the related benefits its parks provide. In addition to some new recommendations, the Resilience Strategy helped to consolidate BREC's great work in one place and provide recommendations to institutionalize some of the initiatives that were successful at a smaller scale.



CSRS | BUILDING STRONGER,
SMARTER COMMUNITIES
TOGETHER.

REQUEST FOR PROPOSALS FOR

RFP 22-2 (REVISED) – Docket R-36227 Independent Engineering Consultant

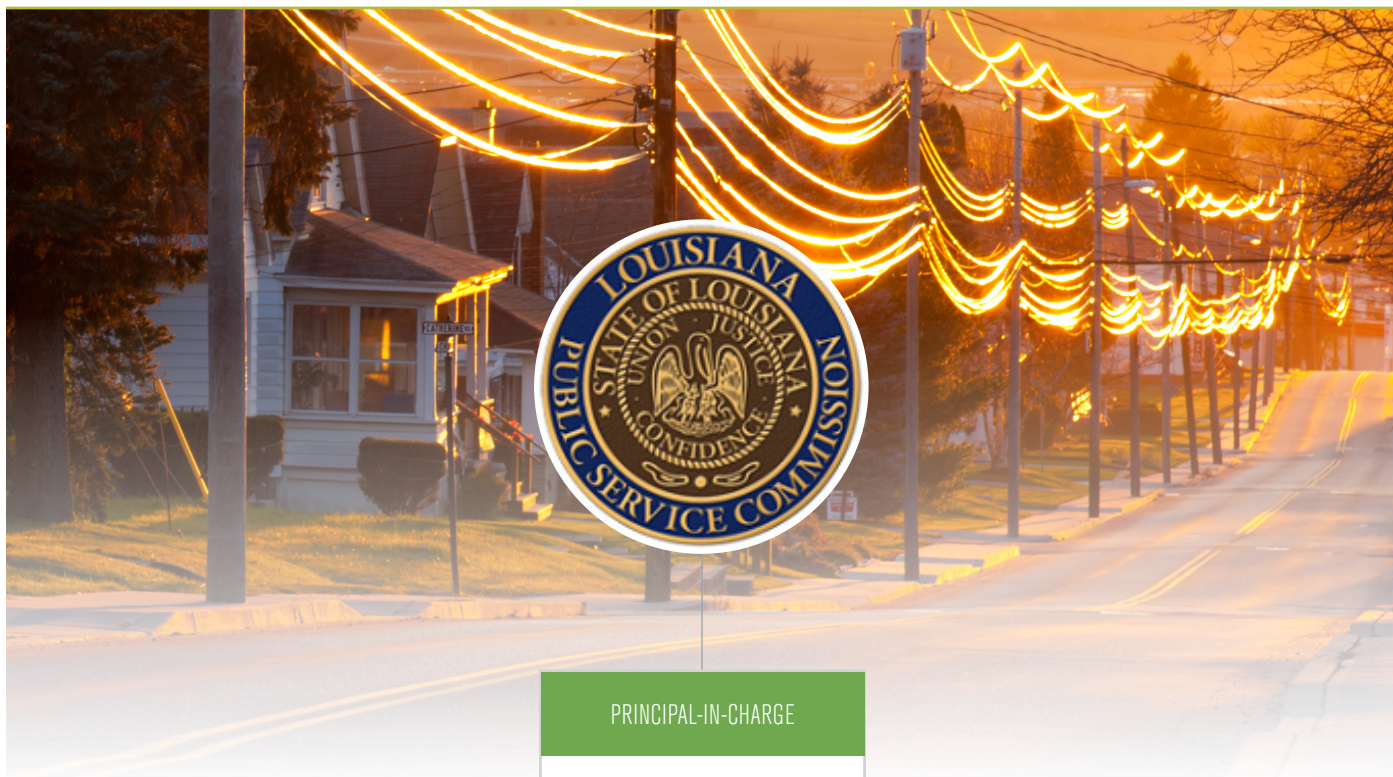
PROPOSED PERSONNEL

**CSRS | LOUISIANA PUBLIC SERVICE COMMISSION
BATON ROUGE, LA
DUE BY: MONDAY, APRIL 25 AT 4:30 P.M.**



PROPOSED PERSONNEL

ORGANIZATIONAL CHART



PRINCIPAL-IN-CHARGE

Mark Goodson

PROJECT MANAGER

David Lessinger

JUNIOR ENGINEER

Austen Dubriel

RESILIENCE PLANNER

Mark Forsyth, GISP, CFM

SUBJECT MATTER EXPERTS

Tim Barfield
Government & Utility Relations

James L. Corwin, PE
Distribution Systems

Darrell Thornley
Grid Resilience

Tom Martin
Data Science

Joel Westvold, PMP
AMI & Smart Grid

Steve Catanach, PE
Regulatory & Smart Grid

Todd Barlow
Material Acquisition & Cost Modeling



Mark Goodson

ROLE ON PROJECT: *PRINCIPAL-IN-CHARGE*

PHONE: (225) 769-0546

8555 United Plaza Boulevard, Baton Rouge, LA 70809 | mark.goodson@csrsinc.com



Mr. Goodson's career, which now spans over 18 years, has been focused on resilience, urban planning and redevelopment, public finance and budgeting, and local government operations. He serves as CSRS' Resilience Practice Lead, helping commercial and governmental clients adapt to thrive, no matter the changing conditions confronting them. To achieve resilience, Mr. Goodson and his team members provide technical assistance to identify risks and vulnerabilities, develop strategic interventions, and design and implement resilience programs, as well as integrate resilience and sustainability into existing capital programs. He is particularly skilled at helping clients plan for turning liabilities into assets and maximizing the community benefits produced by capital expenditures and investments.

EDUCATION

- Bachelor of Landscape Architecture, Louisiana State University, Baton Rouge, LA, 2004
- Master of Public Administration, Louisiana State University, Baton Rouge, LA, 2006

TRAINING & CERTIFICATIONS

- Vacant Property Leadership Institute Certificate, Emory University Law School, 2013
- Community Progress Leadership Institute Certificate, Harvard Law School, 2012

TRAINING & CERTIFICATIONS

- Project & Program Management
- Brownfields Redevelopment
- Real Estate Transactions
- Community Outreach
- Resilience Planning
- Land Banking
- Public Finance & Alternative Financing

YEARS OF EXPERIENCE

- With Firm: 4
- Total: 18

Relevant and Related Experience

Louisiana Watershed Initiative. Statewide. Principal. CSRS is one of the state's program management consultants for the Louisiana Watershed Initiative (LWI), which is primarily funded with \$1.2 billion in CDBG-Mitigation funding allocated to Louisiana. As Principal, Mr. Goodson serves as the primary Point of Contact for the Office of Community Development and serves as an advisor to the state on matters of program design and regional-scale watershed planning. The LWI seeks to manage future flood risks in Louisiana through watershed-based solutions and is overseen by the Governor's five-agency Council on Watershed Management. (2019–Present)

Budgeting for Community Resilience. Boulder CO. Resilience Advisor. In the wake of successive natural disasters, the City of Boulder created its Sustainability and Resilience Framework and Resilience Strategy to position its communities to rebound, adapt to, and thrive amidst changing conditions and challenges. In this project, Boulder sought to move beyond resilience planning toward the institutionalization of resilience through its city budgeting process. Mr. Goodson brought lessons learned from other communities using resilience benefits to make choices and set priorities among their projects and activities. (2018–2019)

Isle de Jean Charles Resettlement, Phase I, II & III, Louisiana OCD-DRU. Isle de Jean Charles, LA. Principal Program Director. This project, funded through HUD's National Disaster Resilience Program, involves the master planning of a new development to accommodate the voluntary resettlement of an island community in response to significant environmental degradation from ongoing coastal land loss, subsidence, and sea level rise. Mr. Goodson is leading a multi-disciplinary team tasked with performing site due diligence, community planning, public outreach, and program design in support of this first-of-its-kind project in the U.S. (2017–Present)



David Lessinger

ROLE ON PROJECT: PROJECT MANAGER

PHONE. (504) 539-3670

935 Gravier St. Suite 1650, New Orleans, LA 70112 | david.lessinger@csrsinc.com



Mr. Lessinger has 18 years of experience in urban planning, stormwater management, resilience planning, and city government operations. He is a mission-driven professional skilled at managing teams and working across disciplines. An excellent communicator and resourceful problem-solver, Mr. Lessinger is known for facilitating solutions through collaboration.

Relevant and Related Experience

EDUCATION

- B.A., Oberlin College, Oberlin, OH
- Master of Regional Planning, Cornell University, Ithaca, NY

TRAINING & CERTIFICATIONS

- 2008, Certificate in Urban Redevelopment, University of Pennsylvania, Philadelphia, PA
- Rockefeller Foundation Redevelopment Fellow, Center for Urban Redevelopment
- 2016 American Planning Association National Best Practices Award, *Resilient New Orleans*

AREAS OF EXPERTISE

- Resilience Planning & Program Design
- Project Management
- Stormwater Policy and Codes

YEARS OF EXPERIENCE

- With Firm: 3
- Total: 18

Louisiana Watershed Initiative. Statewide, LA. Project Manager. CSRS is one of the state's program management consultants for the Louisiana Watershed Initiative (LWI), focused on transforming the state's approach to flood risk by regionalizing watershed and floodplain management. As Project Manager, Mr. Lessinger leads a team that designs and manages capacity building programs and policy development for local governments related to regional watershed management. (2019–Present)

Sewerage & Water Board of New Orleans Strategic Plan. New Orleans, LA. Planning Advisor. The Sewerage and Water Board (SWB) provides water, wastewater, and drainage services to all businesses and households in New Orleans. Facing decades of deferred maintenance and underinvestment, increasing costs and interruptions from extreme weather events, and a deficit of public confidence, SWB called upon CSRS and its partners to develop the utility's strategic plan to provide a clear and achievable roadmap to continuous improvement. Mr. Lessinger served as a local project partner and subject matter expert, supporting each element of the strategic planning process. (2021)

Prior to CSRS

City of New Orleans. New Orleans, LA. Chief of Staff to the Deputy Mayor/Chief Administrative Officer. In his role as Chief of Staff, Mr. Lessinger supported the City's 2nd-in-command to manage the daily operations and finances of city government, encompassing over 3,000 employees and a \$600M annual operating budget. Mr. Lessinger also managed the Office of Resilience & Sustainability, overseeing a staff of policy experts managing transit, stormwater, energy, and coastal resilience programs who worked to integrate resilience and sustainability into the operations and policies of city government. (2016–2018)

National Disaster Resilience Competition: Gentilly Resilience District, New Orleans Redevelopment Authority. New Orleans, LA. Project Manager. Mr. Lessinger managed the development of the City's application to U.S. HUD's National Disaster Resilience Competition, which was awarded \$141 million to implement the Gentilly Resilience District, the second largest award in the country. The project takes a district-based approach to reducing flood risk through green infrastructure and microgrids while creating recreation and redevelopment opportunities. (2014–2015)

Resilient New Orleans, City of New Orleans Resilience Strategy, New Orleans Redevelopment Authority. New Orleans, LA. Project Manager. Mr. Lessinger managed the development, launch, and implementation of the city's resilience strategy, released in August 2015. The strategy received the National Best Practice Award from the American Planning Association and has been recognized by cities around the world as a model. The strategy has also been the foundation and guide for tens of millions of dollars in new investment in risk reduction projects and programs across the city. (2014–2015)



Tim Barfield

ROLE ON PROJECT: *SME - GOVERNMENT & UTILITY RELATIONS*

PHONE. (225) 769-0546

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Tim Barfield serves as the President of CSRS. In his capacity as President, Mr. Barfield oversees all aspects of corporate operations. He serves as a liaison between CSRS' Principals and major corporate and government clients. He brings with him years of expertise in legal and budgetary matters that positively impacts our ability to meet the needs of both our private and public clients. He previously served as CSRS' Executive Vice President, during which time he interfaced with numerous public clients to assist in the betterment of communities by providing project oversight, planning, and advisory services. Prior to joining CSRS, Mr. Barfield worked many years in the corporate arena, followed by more recent experience in Louisiana State Government. He continues to maintain professional relationships with key stakeholders including business leaders, industry groups, taxpayers, taxpayer advocates and similar groups, statewide elected officials and state departments, legislative leaders, committees and other members and their staffs. In addition to the experience listed below, Mr. Barfield served as a senior executive at The Shaw Group Inc. (now part of CB&I) for over 12 years and as a practicing corporate finance attorney for Houston-based Vinson & Elkins, LLP for 4 years, and has significant experience in public and private financing arrangements and transactions (including debt issuances), and budgeting and financial matters.

EDUCATION

- Executive Development Program, Kellogg School of Management, Northwestern University, 1999
- J.D., Paul M. Hebert Law Center, Louisiana State University, 1989
- B.S., Business Administration - Finance, Louisiana State University, 1986

PROFESSIONAL MEMBERSHIPS

- Louisiana State Bar Association, 1989-Present

AREAS OF EXPERTISE

- Debt Issuance
- Budgeting
- Finance
- Strategic Planning
- Policy Development

YEARS OF EXPERIENCE

- With Firm: 6
- Total: 32

Relevant and Related Experience

City of New Orleans Grants Management and Administration. New Orleans, LA. Advisory Services. Mr. Barfield's expertise and experience in negotiations and advisory roles enhanced his ability to put together a team for CNO's roads and sewer project with a potential value of \$2 billion. (2016–Present)

Louisiana Community and Technical College System (LCTCS) Act 360 Statewide Facilities Improvement Program. Statewide, LA. Advisory Services. CSRS is providing program management services for the delivery of 50+ projects, which includes projects located at 14 community and technical colleges throughout the state with a total value of \$450+ million. Using his knowledge and expertise, Mr. Barfield was instrumental in planning, assembling the team, and implementing the Public-Private Partnership to enhance revenue opportunities for the campuses. He regularly interfaced with associated agencies and entities to assist the successful implementation of the P3 plan. (2016–Present)

Louisiana Department of Revenue, Louisiana State Government. Baton Rouge, LA. Secretary. Mr. Barfield served as the agency's head and a cabinet member in Governor Bobby Jindal's Administration, where he led significant culture change and performance improvements within the agency. He was responsible for oversight of more than \$9 billion of annual gross cash collections, over \$7.5 billion of annual net cash collections, and the processing of over \$2.5 million returns and refunds annually. The department included 700 employees and had annual budgets as high as \$115 million. (2012–2015)

Amedisys, Inc. Baton Rouge, LA. Chief Development Officer. Amedisys is one of the nation's leading providers of skilled nursing and therapy services and hospice care at home. In 2010, Amedisys had a revenue of \$1.6 billion, 17,000 employees and operations in 45 states. As the company's Chief Development Officer, Mr. Barfield led the company's activities for mergers and acquisitions, strategic investments, strategic relationships, and development of new products and services. He also provided shared oversight of governmental relations and certain legal and compliance matters. (2010–2012)



James L. Corwin, PE

ROLE ON PROJECT: SME - DISTRIBUTION SYSTEMS

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James Corwin has over 24 years of experience as a Lead Engineer with the responsibilities of producing engineering and design documents for construction and Department Manager for Electrical Engineering with the responsibilities of identifying and hiring engineers, designers, and drafters.

Relevant and Related Experience

EDUCATION

- Bachelor of Science, 1990, Electrical Engineering

TRAINING & CERTIFICATIONS

- LA PE: 29404, 2001, Expires: 03-31-2023

YEARS OF EXPERIENCE

- With Firm: <1
- Total: 25

Wink Engineering, Westminister, Louisiana. Sr. Engineer. Mr. Corwin was responsible for providing leadership, supervision and guidance to an engineering staff through the Department Managers in the various departments ensuring the delivery of cost effective, safe and reliable engineering via designs, specifications and deliverables to clients. Specific duties include coordinating between the different department man-power staffing/scheduling, organizing department standards and procedures, establishing quality assurance programs, competitive estimating, monitoring project management interfaces with engineering, resolving technical issues by finding efficient engineering solutions, and setting goals and objectives for department managers. (2016–2020)

Davies Engineering/Excel Engineering, Inc./Excel Midstream Solutions, Inc. Baton Rouge, Louisiana. Manager of Engineering/ Sr. Project Manager. Mr. Corwin was responsible for coordinating between the different department man-power staffing/scheduling, organizing department standards and procedures, establishing quality assurance programs, competitive estimating, monitoring project management interfaces with engineering, resolving technical issues by finding efficient engineering solutions, and setting goals and objectives for department managers. Responsible for providing leadership, supervision and guidance to the engineering and design staff ensuring the delivery of cost effective, safe and reliable engineering via designs, specifications and deliverables to clients. (2011–2016)



Steve Catanach, PE

ROLE ON PROJECT: SME - REGULATORY AND SMART GRID



Mr. Catanach is an accomplished utility executive manager with 35 years of experience. He has the proven ability to successfully direct multiple departments responsible for a diverse set of functions and activities and develop new ordinances, legislation, and policies in support of electric utility operations and programs. Mr. Catanach brings exceptional experience in the development of short-, medium-, and long-range strategic plans with the goal of providing direction, shaping culture, and strengthening employees and the organization, with a focus on safety, team building, employee growth and continuous improvement. His expertise includes delivering large scale complex projects with multiple paths on time and within budget. He was awarded the 2014 Energy Central KITE (Knowledge, Innovation, Technology and Excellence) Award for the Small Utility Operations Executive of the Year.

EDUCATION

- BS, Electrical Engineering with a focus on Power Systems, New Mexico State University

TRAINING & CERTIFICATIONS

- Certified Professional Engineer
- Licensed Electrical Engineer

AREAS OF EXPERTISE

- Project Management and Delivery
- Customer Relations and Community Engagement
- Strategic Planning
- Business Case Assessments and Process Improvements
- AMI / Smart Metering / Smart Grid
- Planning, Design, Modeling & Analysis
- Utility System Operation & Maintenance
- CIP Development
- Microgrid Design
- Expert Witness
- Policy and Legislation Development
- Contract Negotiations

YEARS OF EXPERIENCE

- With Firm: 5
- Total: 16

Relevant Experience and Background

- Successfully negotiated Franchise, Settlement and Partnership agreements between the City of Boulder and Xcel Energy.
- Worked as both a consultant and director to successfully carry a case through the PUC and FERC, which allowed the City of Boulder to move forward with the acquisition of the electric distribution facilities within the City.
- Lead the development of the FortZED (Fort Collins Zero Energy District) implementation of a microgrid on two of the utilities electrical feeders serving downtown Fort Collins. Along with multiple partners successfully demonstrated the coordinated operation of multiple distributed resources to reduce peak load.
- Led the City of Fort Collins participation in the American Public Power Reliable Public Power Program (RP3), which is a peer reviewed program where electric utilities are reviewed in four categories: Reliability, Safety, Workforce Improvement, and System Improvement. Over three review periods scores improved from 90.5% to 98% to 100%.



Darrell Thornley

ROLE ON PROJECT: SME - GRID RESILIENCE

PHONE: (512) 230-6277

10601 Pointe View Dr., Austin, TX 78738 | darrell@d-tec.us

D-TEC
DT Energy Consultants

EDUCATION

- Western Michigan University
 - BS, Mechanical Engineering
 - BA, Environmental Studies

TRAINING & CERTIFICATIONS

- Inventor “Secure Microgrid®”, US patent # 9,026,260

PROFESSIONAL MEMBERSHIPS

- American Society of Mechanical Engineers
- Association of Energy Engineers
- Society of American Military Engineers

YEARS OF EXPERIENCE

- With Firm: 7
- Total: 30

Providing expert advisement during engineering and construction of energy projects throughout the US, Puerto Rico, and multiple islands in the Caribbean. Projects include solar PV systems, battery energy storage systems (BESS), natural gas fired CHP system, diesel generators (all in “islanding” microgrids), and an extensive menu of energy conservation measures. Senior level consultant for the US Department of Energy’s CHP TAP program. Inventor of patented engineering process “Secure Microgrid®”; secured CB&I’s first Engineer/Procure/Construct order for a smart microgrid system from US Air Force (2011). Initiated CB&I’s business entry into seawater desalination process plants (10 MGD – 200 MGD) and secured the company’s first agreement for EPC delivery of a 50 MGD plant on the US Gulf Coast (2017).

Relevant Experience and Background

Climate Vulnerability Assessment and Resilience Planning Program.

DOMLEC, Dominica. *Sub-contractor to Sustainability Visions.* Mr. Thornley provided consulting services for electric utility for post hurricane Maria restoration; subsequent system evaluation, resilience program creation, and training of utility personnel. (2020-2022: delayed due to pandemic travel limitations)

Solar Photovoltaic Feasibility Study & Community Microgrid, Isle de Jean Charles Community. Schriever, Louisiana.

Sub-contractor to APTIM. Mr. Thornley provided consulting services for application of a \$48M Community Development Block Grant awarded to the State of Louisiana from HUD under the National Disaster Resilience Competition. Funding for resettlement of residents in Terrebonne Parish to a resilient and historically-contextual community further inland, necessitated by ongoing coastal land loss and barrier island destruction on the Gulf Coast. Lead effort on feasibility study to identify community microgrid options using solar PV, Battery Energy Systems and synchronous power generating to both generate revenue in support of operations and maintenance of the community as well as provide energy independence for community homeowners. (2019)

Microgrid-based Resilient Energy Solutions – Proposal Evaluations. Puerto Rico Industrial Development Company, San Juan, Puerto Rico.

Sub-contractor to McGeown Associates. Mr. Thornley provided consulting services to lead the evaluation of proposals by multiple bidders for microgrid development projects at four industrial campuses throughout Puerto Rico in the aftermath of Hurricanes Irma and María. Created evaluation criteria, led proposal reviews, in-person oral interviews of bidders, created evaluation reports with recommendations for award. (2018)

Resilient Distributed Energy CHP Projects. New York City, Chicago, Los Angeles, San Diego.

Operations Director in the Energy Department at Equity Office Properties. Mr. Thornley was responsible for design, construction and operations of CHP of EOP’s nationwide fleet of 17 natural gas fired on-site (Class A commercial office buildings) CHP systems. Responsibilities included development and implementation of an operations program manual, standardizing maintenance programs and contracts, instituting operations communications protocols and reporting for maintenance services and operations support, systems reliability enhancements, and fleet-wide financial reporting.



Tom Martin

ROLE ON PROJECT: *SME - DATA SCIENCE*

PHONE. (314) 210-7575

1745 38th St, Boulder, CO 80301 | tom.martin@esource.com



Mr. Martin has 10+ years of utility and engineering expertise focused on delivering impactful results through the implementation and strategic alignment of new technology to the utility sector. As a leader at PG&E, Mr. Martin managed the deployment of more than \$50 million of new technology demonstrations and pilot projects focusing on grid analytics, DERs, and smart meter applications.

Relevant and Related Experience

EDUCATION

- Master of Business Administration, University of Notre Dame, 2013
- Bachelor of Science in Electrical Engineering, University of Notre Dame, 2008

YEARS OF EXPERIENCE

- With Firm: 4
- Total: 14

E Source. Seattle, WA. *Vice President – Commercialization, Data Science.* Support the delivery of high-powered analytics use cases ensuring they meet the end business and process needs of TROVE’s customers. (2018 – Present)

Pacific Gas & Electric. San Francisco, CA. *Manager, Emerging Grid Technology.* Business Lead for \$50M portfolio of technology demonstration projects including SmartMeter algorithms supporting safety, reliability, and affordability, and the installation and operations of wirelessly communicating line sensors. Business lead and Product Manager for development of situational intelligence platform visualizing internal and external data for support of electric operations end users in control centers and in the field; responsibilities included use case development, stakeholder engagement, vendor management, and project management. Manager of high performing team leading the technology demonstration and strategy of PG&E’s Grid Integration and Innovation team. Successfully led the execution of Distributed Energy Resource Management System (DERMS) pilot, Smart Inverter technology demonstration, and utility controllable behind-the-meter energy storage demonstration. (2013 – 2018)

Booz Allen Hamilton. O’Fallon, IL. *Management Consultant.* (2012)

Black & Veatch. Overland Park, KS. *Electrical Engineer Section Head.* (2008–2011)



Joel Westvold, PMP

ROLE ON PROJECT: *SME - AMI AND SMART GRID*

PHONE: (314) 210-7575

1745 38th St, Boulder, CO 80301 | joel.westvold@esource.com



EDUCATION

- Executive MBA, University of Washington, Seattle
- BS, Chemical Engineering, Oregon State University

TRAINING & CERTIFICATIONS

- Certified Project Management Professional, Nationwide
- Six Sigma and Numerous other Professional Development/Quality courses

AREAS OF EXPERTISE

- Program and Project Management
- Smart Metering/Grid Modernization
- Programs
- Management Consulting
- Utility Data Analytics
- System Integration & Implementation

Joel Westvold, PMP, brings a unique perspective to addressing Smart Utility issues based on his experience in implementing programs at utilities and providing technology solutions to utility customers to meet their Smart metering needs. With 35 years of experience, Mr. Westvold has served in a senior management capacity for a large electric utility and as management executive with a technology solutions provider to the utility industry. While working for Portland General Electric, Mr. Westvold led a team that implemented an award-winning AMI project that involved the installation of over 800,000 electric meters, the network to communicate with the meters and integration of the technology with utility systems to gain the most financial benefit and efficiency possible. Mr. Westvold has led teams of Engagement Directors and Project Managers in the delivery of nearly a hundred Smart Grid projects, including an area of focus on several large projects of over 1M meters/endpoints. Mr. Westvold's passion is doing everything possible to see clients succeed in their Smart Metering projects. He brings a number of skills ranging from project management, engineering expertise, strong people management, and communications at all levels within the organization. As Vice President, PMO, of E Source's Technology Planning and Implementation Consulting Division, Mr. Westvold leverages his core strength in system implementation and integration in support of the firm's complex implementation and other larger projects.

Presentations & Publications

“Successful Utility Project Management – The Art and Science,” Co-instructor, DistribuTECH 2018 and 2019

“Smart Metering 101 and Advanced Smart Metering,” Co-instructor, EUCI March 2018

“Overcoming Challenges in AMI at Silicon Valley Power,” Co-presenter, DistribuTECH 2016

Relevant Experience and Background

- Examining business and technical issues related to migrating from existing systems to smart meter solutions
- Providing direct project and program management services for key strategic and large projects—from business case and vendor selection, through contract negotiation and deployment (including field services and testing)
- Successfully delivering complex, multidimensional projects for utility Smart Meter & Grid Modernization
- Managing or supporting more than 60+ AMI projects; including 25+ full implementations in the past 10 years
- Developing roadmaps, strategies, implementation plans, and business cases
- Overseeing organizational change and business process transformation activities



Todd Barlow



ROLE ON PROJECT: SME - MATERIAL ACQUISITION AND COST MODELING

PHONE: (314) 210-7575

1745 38th St, Boulder, CO 80301 | todd.barlow@esource.com

Todd Barlow is an Executive Consultant with over 30 years of experience guiding clients through the development and delivery of complex infrastructure and IT projects in the utilities industry. He is co-founder of a smart grid consulting / systems integration business that he directed from startup to acquisition in 2014. His expertise includes strategic planning, feasibility studies, project definition, procurement planning, vendor selection, executive oversight quality assurance during project implementation. Todd combines application knowledge with a practical understanding of commercial transactions involving multiple stakeholders for an end-to-end project delivery. He spends time engaging customers, partners, and vendors to ensure that contract delivery fully supports the technical and business objectives for the project.

EDUCATION

- B.S. Petroleum Engineering, Louisiana State University

TRAINING & CERTIFICATIONS

- Numerous professional development courses related to utility automation, project management, and public procurement.

INDUSTRY RECOGNITION

- Principal in Charge for Smart Grid Project of the Year in 2010 (Ruston, LA) by Utility Automation and Engineering T&D Magazine. Awarded at DistribuTECH
- Principal in Charge for Best Smart Infrastructure/Grid Project (City of San Marcos, TX) in 2010 by CS Week

YEARS OF EXPERIENCE

- With Firm: 5
- Total: 16

Relevant Experience and Background

- Strategic Planning for Electric, Gas and Water Utilities
- Conceptual Project Development with Business Case
- Procurement and Delivery Strategy
- Vendor Evaluation and Selection
- Vendor Contracting and Negotiation
- Program Management
- Corporate Vision and Management



Austen Dubriel

ROLE ON PROJECT: JUNIOR ENGINEER

PHONE: (225) 769-0546

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Mr. Dubriel is a graduate from Southern University with a Bachelor of Science in Electrical Engineering. He currently works as an electrical engineer both at CSRS LLC and Fides LLC., a wholly-owned subsidiary of CSRS LLC.

Relevant and Related Experience

LADOTD/LA 182 Electrical Design Criteria. *Lead Photometric Analyst.* Mr. Dubriel was responsible for researching LEDs and luminaires approved by IES standardizations. He retrieved existing photometrics and compared to new photometric analysis. Mr. Dubriel communicated with partners such as utilities to find out specifics of the supplies being used. He also communicated with colleagues to process final dimensions of roadways, medians, sidewalks, conduits, existing poles, etc., ultimately coming up with luminaire equations that would make the project efficient, safe, and feasible.

Koch Marine Rail Truck, GRON Fuels. *Electrical & Instrumentation Engineer Assistant.* Mr. Dubriel was responsible for editing P&IDs P&EDs, helping design block diagrams for customers to evaluate, understanding concepts in regard to project design, placement and utilization of components, and budgets associated with design/implementation criteria.

EDUCATION

- Electrical Engineering, Southern University, 2021

TRAINING AND CERTIFICATIONS

- Visual Lighting-AGi32-Microsoft Office-AutoCAD-Civil 3D, 2021

PROFESSIONAL MEMBERSHIPS

- IES Member

AREAS OF EXPERTISE

- Cost Estimating
- Scheduling
- Permitting
- Roadway Assessment
- Engineering Consulting

YEARS OF EXPERIENCE

- With Firm: <1
- Total: <1



Mark Forsyth, GISP, CFM

ROLE ON PROJECT: RESILIENCE PLANNER

PHONE. (225) 769-0546

8555 United Plaza Boulevard, Baton Rouge, LA 70809 | mark.forsyth@csrsinc.com



EDUCATION

- M.S., Agronomy, Louisiana State University, Baton Rouge, LA, 2001
- B.S., Environmental Management Systems, Louisiana State University, Baton Rouge, LA, 1998

TRAINING & CERTIFICATIONS

- GISP, Louisiana License No. 0006194, 2009
- Certified Flood Manager, License No. US-12-06389, 2011

AREAS OF EXPERTISE

- Program Management and Project Execution
- Roadway and Complete Streets Engineering Design
- GIS Application Development
- Geospatial Data Development and Delivery
- Field Data Collection
- FAA Licensed Drone Operator with seven years of experience

YEARS OF EXPERIENCE

- With Firm: 3
- Total: 18

With over 16 years of experience in the GIS field, Mr. Forsyth currently serves as the GIS Manager for CSRS. He is responsible for project management, proposal development, GIS database development, analyses, and map and report production for complex research, survey, planning, and impact assessment projects. His academic credentials in Agronomy, Environmental Management Systems, and GPS data collection enable him to effectively participate in a variety of project, research, and field investigations. Mr. Forsyth has been active in the local GIS community over the last 11 years and, in turn, has a firm foundation of relationships with state agencies and universities as well as the knowledge of data availability and limitations for the region.

Relevant and Related Experience

Transportation Capacity Improvements, MOVEBR Program. East Baton Rouge Parish, LA. Mr. Forsyth provides GIS support for this \$600 million transportation program, including the mapping of data using ArcGIS Online, environmental mapping, and the support of right-of-way acquisition.

Calcasieu Parish Drainage Master Plan. Calcasieu Parish, LA. GIS Manager. Mr. Forsyth worked with Parish and CSRS staff to assist in the development of Parish Plan maps and project figures. He led the effort to develop a parish-wide Esri ArcGIS Online that was used to inform the client and eventually the public of Master Plan goals. Mr. Forsyth also worked with Parish staff to develop a project base map that will be used in the final master plan documents as well as all public outreach efforts. (2019–Present)

Central Drainage Master Plan. Central, LA. GIS Manager. Mr. Forsyth led a team in the development of project base map detailing the master plan efforts during the project. He developed an ArcGIS Online application that was used by the project team to display GIS and other model outputs. Mr. Forsyth was responsible for developing an economic damage assessment for the project area. He created a detailed structure inventory to be input, along with HEC-RAS flood depth outputs, into HEC-FIA to estimate damages associated with 10-, 50- and 100-year floods events in the project area. (2019–Present)

Isle de Jean Charles Resettlement Project–Phase III. Terrebonne Parish, LA. GIS Specialist. This project, funded through HUD’s National Disaster Resilience Program, involves the master planning of a new development to accommodate the voluntary resettlement of an island community in response to significant environmental degradation from ongoing coastal land loss, subsidence, and sea level rise. Mr. Forsyth utilized drone technology to support a corridor survey along LA Highway 24 for final design of the wastewater system for the new community. (2019–Present)

Chennault International Airport Infrastructure Master Plan. Calcasieu Parish, LA. GIS Manager. Mr. Forsyth developed a project base map and developed data that were used to guide decisions on the best land use and overall strategy for land services team working on the Chennault Project. He used TransCAD model outputs to analyze traffic, demographic, and housing data around the airport to assist the project team in making recommendations the Chennault Airport. All datasets were stored and delivered in Esri Geodatabase format. (2019–Present)



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TOGETHER.

REQUEST FOR PROPOSALS FOR

RFP 22-2 (REVISED) – Docket R-36227 Independent Engineering Consultant

PROPOSED PRICING

**CSRS | LOUISIANA PUBLIC SERVICE COMMISSION
BATON ROUGE, LA
DUE BY: MONDAY, APRIL 25 AT 4:30 P.M.**



ESTIMATE OF COST

Below is an overview of the CSRS' cost estimate to perform this project, separated by task as outlined in the RFP.

Title	Rate
Collaborating with electric utilities (IOUs and Co-Ops) on current and planned resiliency efforts:	\$69,200 fees + \$6,000 expenses = \$75,200
Independent research and analysis on methods where Louisiana's electric infrastructure-related to hardening and resiliency – can be improved:	\$61,200 fees
Assisting in drafting requests for information/comments to stakeholders:	\$28,800 fees
Draft a single comprehensive report on Louisiana's electric infrastructure related to hardening and resiliency:	\$112,000 fees + \$6,000 expenses = \$118,000
Seeking federal or any other applicable funding for implementation of a statewide resiliency plan:	\$47,750 fees
TOTAL COST ESTIMATE:	\$330,950

Title	Rate
Principal	\$250
Project Manager	\$210
Resilience Planner	\$185
Junior Engineer	\$110
Project Coordinator	\$95
Subject Matter Expert	\$260

MINIMUM REQUIREMENTS

Requirement	Qualifications
<p style="text-align: center;"></p> <p style="text-align: center;">The Commission’s Contract Order requires Applicants to be prequalified by the Commission in order to be eligible.</p>	<ul style="list-style-type: none"> CSRS was pre-qualified by Commission staff in February 2021, thus meeting General Order dated November 14, 2014.
<p style="text-align: center;"></p> <p style="text-align: center;">Applicants shall, at a minimum, be qualified and prepared to assist in conducting research and analysis as outlined above, answer questions with respect to all of the issues addressed in this RFP, and be qualified and prepared to render testimony at a technical conference and/or a B&E regarding the same. Applicants shall, in addition to those requirements expressed above, be qualified and prepared to render expert testimony regarding and have knowledge of:</p> <ul style="list-style-type: none"> <i>The Commission’s General Order dated March 12, 1974 prohibiting “promotional practices” by public utilities;</i> <i>The Commission’s General Order dated April 20, 2012 (Corrected) (Docket No. R-30021) regarding electric utilities filing Integrated Resource Plans;</i> <i>Midcontinent Independent System Operator (“MISO”) tariffs, rules and planning processes, generally;</i> <i>Southwest Power Pool (“SPP”) tariffs, rules and planning processes, generally;</i> <i>Construction, design and operation of electric utility infrastructure, including but not necessarily limited to the distribution and transmission systems; and</i> <i>Familiarity with cost allocation methodologies for the allocation of investment and expenses among affiliates and utilities, including the relationship of a parent company to its subsidiary operating companies; the transfer of investment and costs among affiliates and utilities, and the provision of services among affiliates and utilities.</i> 	<ul style="list-style-type: none"> The staff proposed to work on the scope of representation are either Licensed Professional Engineers (PE) or Project Management Professionals (PMP) and have experience working with state and local governments, as well as electric utilities. In addition to being licensed or certified in their field, many have provided expert testimony in federal/state court as well as arbitration hearings. Many have testified before the Louisiana Legislature.
<p style="text-align: center;"></p> <p style="text-align: center;">Further, Applicants must be, or have on staff, a licensed electrical engineer. Such engineer shall be licensed and in good standing with all applicable engineering licensing and certification boards. Applicants must be able to provide technical advice regarding industry standards and widely accepted industry practices regarding transmission grids, and maintenance thereof, as outlined above. Consideration will be given for experience and knowledge of transmission system standards, as well as utility regulation and cost allocation methodologies.</p>	<ul style="list-style-type: none"> As a firm, CSRS is licensed in engineering, architecture, and general contracting. We have over 15 professional engineers and project management professionals on staff. As noted in the resumes, our mechanical engineer has designed and constructed over 10 power plants internationally.



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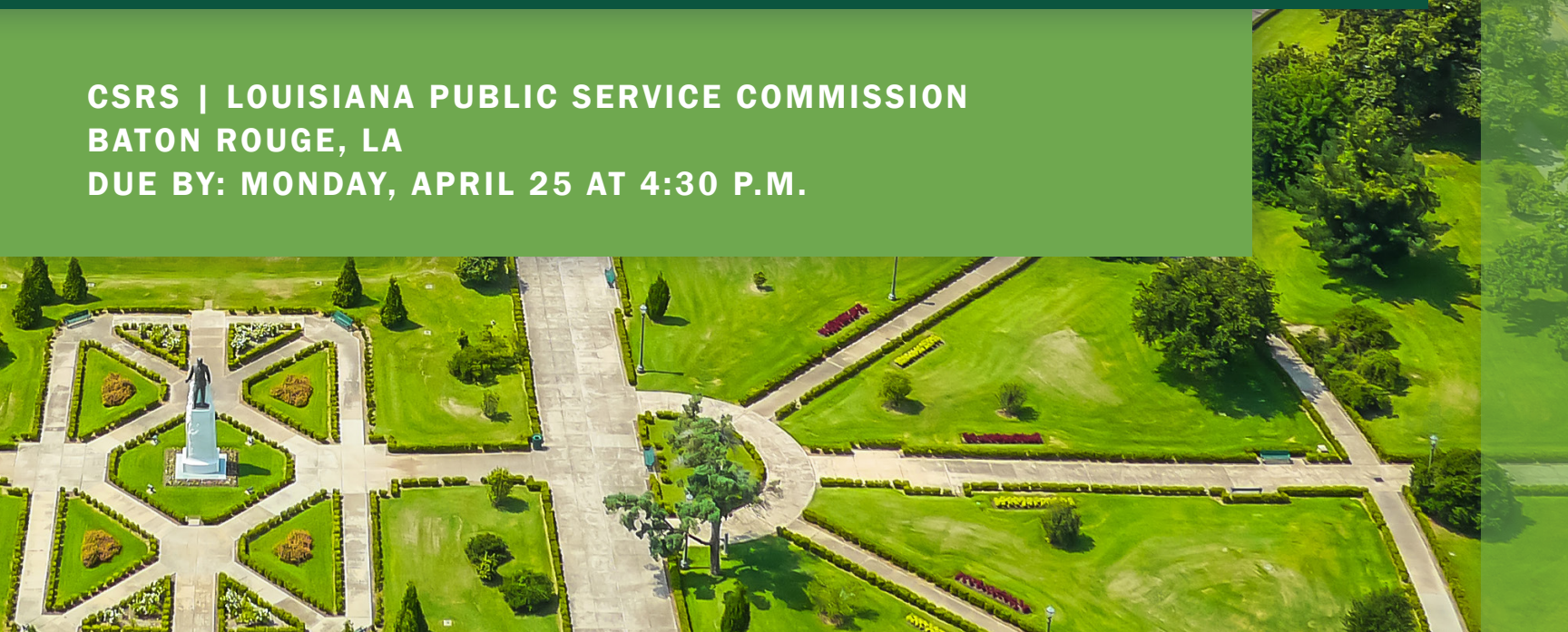
ATTACHMENTS

REQUEST FOR PROPOSALS FOR

RFP 22-2 (REVISED) – Docket R-36227 Independent Engineering Consultant

ATTACHMENTS

**CSRS | LOUISIANA PUBLIC SERVICE COMMISSION
BATON ROUGE, LA
DUE BY: MONDAY, APRIL 25 AT 4:30 P.M.**



AUTHORIZATION RESOLUTION

LIMITED LIABILITY COMPANY AUTHORIZATION RESOLUTION

I, Tim Barfield, certify that I am the manager of, or a member designated to act on behalf of CSRS, LLC, a limited liability company, organized and existing under the laws of the State of Louisiana and domiciled in the City of Baton Rouge, Louisiana, and that Mark Goodson, Principal of CSRS, LLC, be, and is hereby authorized and empowered to execute any and all proposals, contracts, documents and agreements of whatever kind on behalf of the Limited Liability Company for professional services related to the Request for Proposals (RFP) 22-2, Docket No. R-36227, for an Independent Engineering Consultant with Specialized Engineers on Staff for the Louisiana Public Service Commission in East Baton Rouge Parish, State of Louisiana.

IN TESTIMONY WHEREOF, I have hereunto set my hand this 14th day of April 2022.



Tim Barfield, Manager

ENGINEERING LICENSES

4/12/22, 11:14 AM

Print Lookup Details



Lookup Detail View

Licensee Information

This serves as primary source verification* of the license.

*Primary source verification: License information provided by the Colorado Division of Professions and Occupations, established by 24-34-102 C.R.S.

Name	Public Address
Steven D. Catanach	Longmont, CO 80504

Credential Information

License Number	License Method	License Type	License Status	Original Issue Date	Effective Date	Expiration Date
PE.0032919	Examination	Professional Engineer	Active	07/15/1998	11/01/2021	10/31/2023

Board/Program Actions

Discipline
There is no Discipline or Board Actions on file for this credential.

Generated on: 4/12/2022 10:14:34 AM


ENGINEERING LICENSES



LOUISIANA PROFESSIONAL ENGINEERING AND LAND SURVEYING BOARD

As of 4/22/2022 the Louisiana Professional Engineering and Land Surveying Board (LAPELS) has the following information on file:

Mr. James Linn Corwin
8555 United Plaza
Baton Rouge, Louisiana 70809



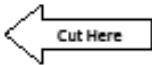
**LOUISIANA PROFESSIONAL
ENGINEERING & LAND SURVEYING BOARD
(LAPELS)**
 9643 Brookline Avenue, Suite 121
 Baton Rouge, LA 70809
 Phone (225) 925-6291
www.lapels.com

Mr. James Linn Corwin

License/Certificate Type - Number	Expiration Date
PE.0029404	03/31/2023
Status: Active	

Please be advised that your license must be in "Active" status in order for you to (a) provide or offer to provide engineering or land surveying services in Louisiana or (b) use the words "engineer", "engineering", "land surveyor", "land surveying" or any modification or derivative thereof in your name or in connection with your business or activities in Louisiana. Licensees whose licenses are in "Revoked", "Inactive", or "Expired" status are prohibited from engaging in the activities described above in items (a) and (b).

LA R.S. 37:689 requires firms practicing or offering to practice engineering or land surveying in the state of Louisiana to be licensed by the Board prior to offering such services.



Print and keep the following information for your record or verification. The pocket card may also be printed on card stock or laminated to keep with you as license/certificate verification.

Disclaimer

All information provided by LAPELS on this web page, and on its other web pages and internet sites, is made available to provide immediate access for the convenience of interested persons. While LAPELS believes the information to be reliable, human or mechanical error remains a possibility, as does delay in the posting or updating of information. Therefore, LAPELS makes no guarantee as to the accuracy, completeness, timeliness, currency, or correct sequencing of the information. Neither LAPELS, nor any of the sources of the information, shall be responsible for any errors or omissions, or for the use or results obtained from the use of this information. Other specific cautionary notices may be included on other web pages maintained by LAPELS.


ENGINEERING LICENSES



LOUISIANA PROFESSIONAL ENGINEERING AND LAND SURVEYING BOARD

As of 12/06/2018, the Louisiana Professional Engineering and Land Surveying Board (LAPELS) has the following information on file:

Mr. Michael B. Songy
6767 Perkins Road, Suite 2
Baton Rouge, LA 70808-42



**LOUISIANA PROFESSIONAL
ENGINEERING & LAND SURVEYING BOARD
(LAPELS)**
9643 Brookline Avenue, Suite 121
Baton Rouge, LA 70809
Phone (225) 925-6291
www.lapels.com

Mr. Michael B. Songy

License/Certificate Type - Number	Expiration Date
PE.0021029	03/31/2023

Status: **Active**

Please be advised that your license must be in "Active" status in order for you to (a) provide or offer to provide engineering or land surveying services in Louisiana or (b) use the words "engineer", "engineering", "land surveyor", "land surveying" or any modification or derivative thereof in your name or in connection with your business or activities in Louisiana. Licensees whose licenses are in "Retired", "Inactive", or "Expired" status are prohibited from engaging in the activities described above in items (a) and (b).

LA R. S. 37:689 requires firms practicing or offering to practice engineering or land surveying in the state of Louisiana to be licensed by the Board prior to offering such services.

Cut Here

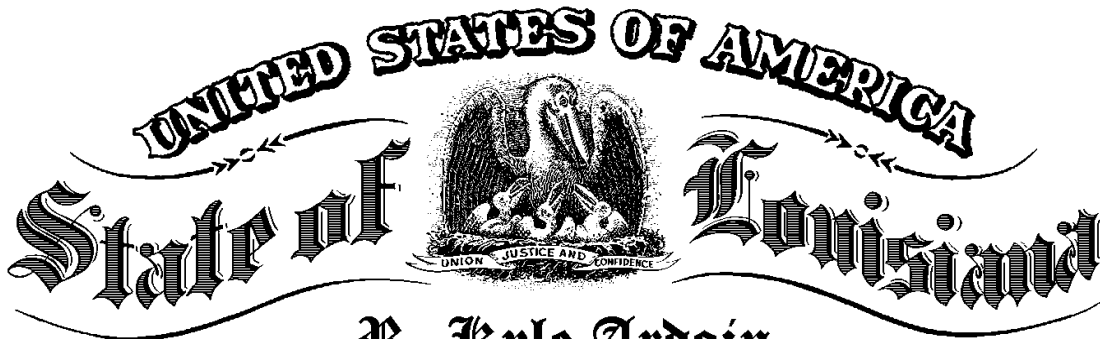
Fold Here

Print and keep the following information for your record or verification. The pocket card may also be printed on card stock or laminated to keep with you as license/certificate verification.

Disclaimer

All information provided by LAPELS on this web page, and on its other web pages and internet sites, is made available to provide immediate access for the convenience of interested persons. While LAPELS believes the information to be reliable, human or mechanical error remains a possibility, as does delay in the posting or updating of information. Therefore, LAPELS makes no guarantee as to the accuracy, completeness, timeliness, currency, or correct sequencing of the information. Neither LAPELS, nor any of the sources of the information, shall be responsible for any errors or omissions, or for the use or results obtained from the use of this information. Other specific cautionary notices may be included on other web pages maintained by LAPELS.

CERTIFICATE OF GOOD STANDING



R. Kyle Ardoin
 SECRETARY OF STATE

As Secretary of State of the State of Louisiana, I do hereby Certify that

CSRS, LLC

A limited liability company domiciled in BATON ROUGE, LOUISIANA,

Filed charter and qualified to do business in this State on March 10, 1978,

I further certify that the records of this Office indicate the company has paid all fees due the Secretary of State, and so far as the Office of the Secretary of State is concerned, is in good standing and is authorized to do business in this State.

I further certify that this certificate is not intended to reflect the financial condition of this company since this information is not available from the records of this Office.

In testimony whereof, I have hereunto set my hand and caused the Seal of my Office to be affixed at the City of Baton Rouge on,

December 3, 2021



Secretary of State

Web 32130960K

Certificate ID: 11492609#T9R93

To validate this certificate, visit the following web site, go to **Business Services, Search for Louisiana Business Filings, Validate a Certificate**, then follow the instructions displayed.
www.sos.la.gov

Form **W-9**
(Rev. October 2018)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
CSRS, LLC

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC C Corporation S Corporation Partnership Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ **P**

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
Exempt payee code (if any) _____
Exemption from FATCA reporting code (if any) _____
(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
8555 United Plaza

6 City, state, and ZIP code
Baton Rouge, LA 70809

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

			-					
--	--	--	---	--	--	--	--	--

or

Employer identification number

7	2	-	0	8	3	7	4	5	9
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Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here Signature of U.S. person ▶  Date ▶ **12/1/2021**

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

INSURANCE CERTIFICATE

AGENCY CUSTOMER ID: _____
LOC #: _____



ADDITIONAL REMARKS SCHEDULE

Page 1 of 1

AGENCY Arthur J. Gallagher Risk Management Services, Inc.		NAMED INSURED CSRS, LLC 8555 United Plaza, Suite 100 Baton Rouge, LA 70809	
POLICY NUMBER		EFFECTIVE DATE:	
CARRIER	NAIC CODE		

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
FORM NUMBER: 25 FORM TITLE: CERTIFICATE OF LIABILITY INSURANCE

General Liability:
Blanket Additional Insured (Form #CGD3810907) & Waiver of Subrogation, as required by written contract, as respects the General Liability coverage.

Business Auto:
Blanket Additional Insured (Form #CAT4200710) & Waiver of Subrogation, as required by written contract, as respects the Business Auto coverage.

Workers' Compensation:
Blanket Waiver of Subrogation, as required by written contract, as respects the Workers' Compensation coverage.

Umbrella:
Umbrella is follow form of the underlying liability coverages.