

**RFP Response
for
Guaranteed Energy Savings Performance
Contracts
for
Kentucky Educational Development Corporation**



Submitted to:

Kentucky Educational Development Corporation
904 Rose Road
Ashland, KY 41102

Submitted by:



August 15, 2018

Mechanical | Electrical | Energy Solutions
www.cmtaegr.com

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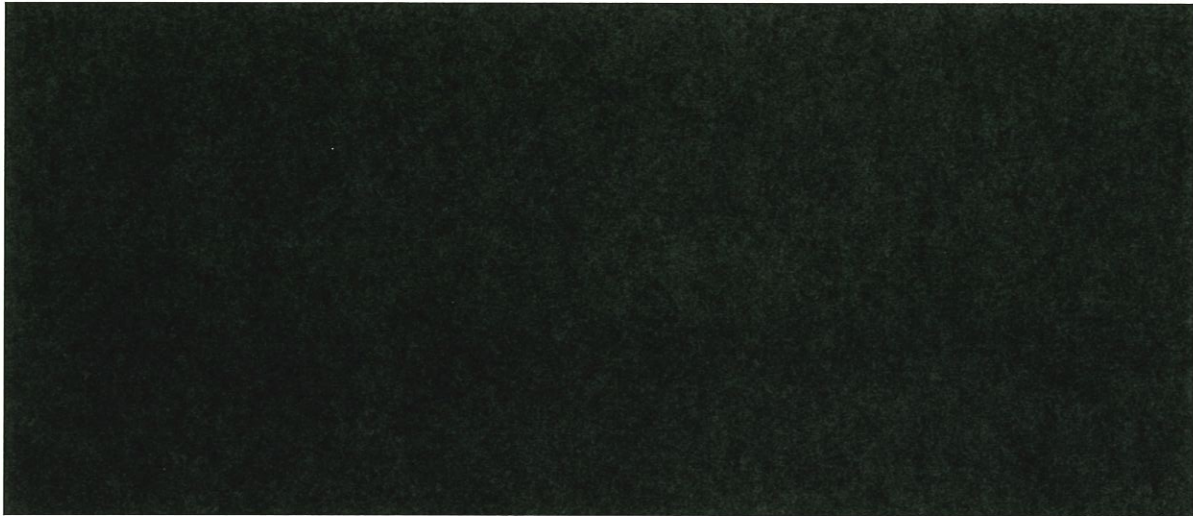
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CMTA is a national leader in the design and operation of high performing buildings. Our experience with design, commissioning, and performance contracting makes CMTA uniquely positioned to excel at providing The Kentucky Educational Development Corporation (KEDC) with the most practical and comprehensive guaranteed energy savings performance contracts. We have a long track record of successful guaranteed energy savings projects where we provide a holistic approach and deliver a project that is on time and within the budget.



While providing these high-performance projects, CMTA also provides a high level of service, serving as a partner to the agencies we work with. We encourage you to read our letters of recommendation and speak with our clients. This project will get the full attention and dedication of CMTA's resources so that this project can be an absolute success at all levels for everyone involved. ***That is our commitment to KEDC and we take it very seriously.*** We have never had a dissatisfied client. Don't take our word for it, please check our references, call our clients, and hear from them how CMTA Energy Solutions exceeded their expectations.



Sincerely,

A handwritten signature in blue ink that reads "Jeremy Kelly".

Jeremy Kelly, PE, CEM, LEED AP
Principal, CMTA

1. Company name:

CMTA Inc.

2. Address:

10411 Meeting Street Prospect, Kentucky 40059

3. Telephone Number:

(502) 326-3085

4. Fax Number:

(502) 409-4604

5. Contact person(s) for this proposal:

Jeremy Kelly

6. Email address:

JKelly@cmta.com

7. Lead Personnel

- a. List the Lead Personnel employed by the RESPONDENT involved in this proposal and future contracts with member school districts.**

CMTA's Energy Solutions Division is led by Jeremy Smith, PE, Jeremy Kelly, PE, and Adam Pierce, PE. One of the three will serve as the principal in charge for each project. In addition, CMTA has (14) experienced project managers on staff dedicated to guaranteed energy savings contracts. Each project manager below is capable of managing any K-12 project in KY.

Matt Branham, PE
Jason Volz, PE
Jon Gasser, PE
Brian Duvall, PE
Tom Nicholas, PE
Trevor Combs, PE
Andrew Survant, PE
Ben Buckner, PE
Theo Milford, PE
Roger Maybrier, PE
Chad Riggs – Mech. Engineer

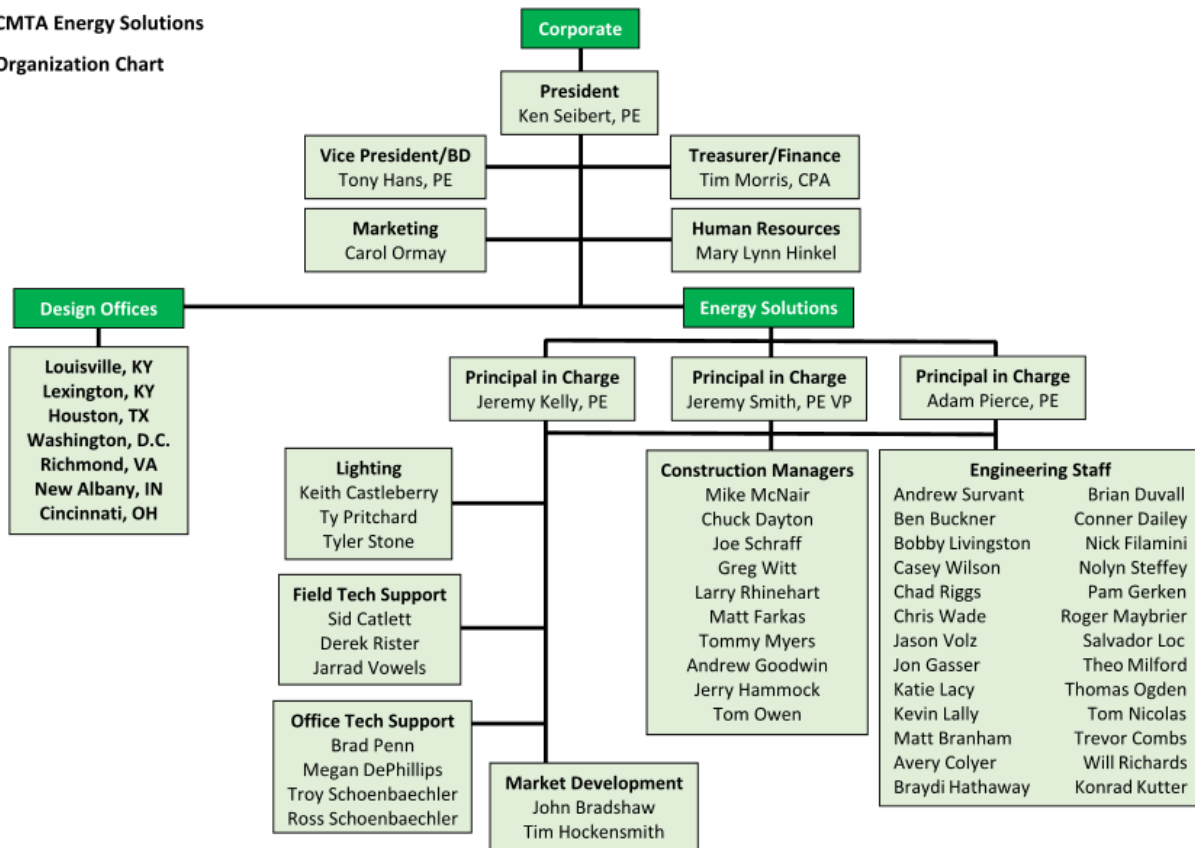
Casey Wilson – Mech. Engineer
 Salvador Loc – Mech. Engineer
 Pam Gerken – Mech. Engineer

- b. List key team members and contractors (both labor and material) that will be part of your design and installation team.**

CMTA does not have any partners or agreements in place with subcontractors or material suppliers. All labor and equipment is competitively bid on each project. CMTA has relationships with contractors in every region of KY and are willing to work with preferred local subcontractors for any given school district.

- c. Provide your company’s corporate organizational chart.**

CMTA Energy Solutions
 Organization Chart



8. References

- a. Complete list of ESPC’s implemented over the past 10 years with public school districts in which the RESPONDENT held the contract with the school district and guaranteed**



energy savings. This list shall be a summary sheet listing to include the school district, contact name/title/phone number, project cost, year ECMs were implemented, guaranteed energy savings and actual energy savings to date.

CMTA Energy Solutions - Project Guarantee History	
Construction Completion	Year
Henry Co	2013
Whitley Co	2013
Bell County	2014
Nelson County	2014
Elliott County	2014
Marion County	2015
Middlesboro Ind.	2015
Morgan County	2016
McCreary County	2016
Berkeley County WV	2017
Powell County	2017
Nelson County (Phase 2)	2017
Kenton County	2017

9. Energy Savings Results

- a. In addition to the energy savings information requested above in 8.a., provide a list of all Energy Star label K-12 schools that have resulted from energy efficiency gained from ESPC implemented by the RESPONDENT. Included year of certification and rating from EPA.

ENERGY STAR Rating	District	School	Address	Phone Number	Principal	Contact Information	Principal Email
94	Berkeley	Back Creek Valley Elementary	662 Back Creek Valley Rd. Heddesville, WV 25427	2021 229-1975	Steve Dellinger	sdellin@k12.wv.us	
99	Berkeley	Bedington Elementary	649 Bedington Rd. Martinsburg, WV 25404	3041 274-2535	Kim Azee	kaeze@k12.wv.us	
99	Berkeley	Bunker Hill Elementary	58 Happy School Avenue, Bunker Hill, WV 25413	3041 229-1980	Talitha Campbell	tcampsb@k12.wv.us	
99	Berkeley	B34 School House Drive, Heddesville, WV 25427	3041 754-3313	Elizabeth Adams	erceden@k12.wv.us		
99	Berkeley	Marlowe Elementary	3580 Williamson Pike, Falline Water, WV 25419	3041 274-2291	Amanda Stevens	amstev@k12.wv.us	
92	Berkeley	Martinsburg South Middle School	150 Bullfinch Boulevard, Martinsburg, WV 25401	3041 267-3545	Josh Clark	jclark@k12.wv.us	
100	Berkeley	Mill Creek Intermediate	6785 Winchester Avenue, Bunker Hill, WV 25413	3041 228-4570	Elizabeth McCoy	emccoy@k12.wv.us	
100	Berkeley	Opesuan Elementary	395 East Road, Martinsburg, WV 25404	3041 267-3550	Fana Burkhart	burkhart@k12.wv.us	
83	Berkeley	Potomack Intermediate	5308 Williamson Pike, Martinsburg, WV 25404	3041 274-6592	Amanda Billmeyer	abillmeyer@k12.wv.us	
100	Berkeley	Valley View Elementary	640 Nadenbousch Lane, Martinsburg, WV 25405	3041 229-1970	Brent Sherrard	bscherrar@k12.wv.us	
82	Elliott	Elliott County High School	687 Main Street, Sandy Hook, KY 41171	6061 738-8052	Sandy Holbrook	sandy.holbrook@elliott.kyschools.us	
84	Elliott	Isomville Elementary	5980 South KY 32, Isomville, KY 41149	6061 738-8152	Amelia Campbell	amelia.campbell@elliott.kyschools.us	
79	Elliott	Wicksdale Elementary	155 Wicksdale School Rd, Sandy Hook, KY 41171	6061 738-8202	Megan West	megan.west@elliott.kyschools.us	
99	Henry	Eastern Elementary	6908 Bethshem Rd, Fleasburg, KY 40057	5021 845-8640	Amie Denny	amie.denny@henry.kyschools.us	
82	Henry	Henry County High School	1120 Eminence Rd, New Castle, KY 40050	5021 845-8670	Shannon Saezer	Shannon.Saezer@henry.kyschools.us	
95	Henry	Moran County Middle School	1174 Eminence Rd, New Castle, KY 40050	5021 845-8650	Lucia Hughes	lucia.hughes@henry.kyschools.us	
88	Henry	New Castle Elementary	187 S. Property Rd., New Castle, KY 40050	5021 845-8650	Austin Hunsaker	Assistant Principal: Phillie Guthrie Phillie.Guthrie@henry.kyschools.us	
88	Marion	Galvarv Elementary	8345 Hwy 208, Lebanon, KY 40033	2701 692-3676	Paul Terrell	paul.terrell@marion.kyschools.us	
88	Marion	Glasscock Elementary	773 East Main Street, Lebanon, KY 40033	2701 692-3273	Annie Akers	annie.akers@marion.kyschools.us	
87	Marion	Lebanon Elementary	320 W Main St, Lebanon, KY 40033	2701 692-3883	Donna Joyce	Donna.Joyce@marion.kyschools.us	
85	Marion	Marion County High School	958 E Main St, Lebanon, KY 40033	2701 692-6066	Brad Emore	brad.emore@marion.kyschools.us	
100	Marion	Marion County Knight Academy	200 Corporate Drive, Lebanon, KY 40033	2701 692-3441	Sara Brady	sara.brady@marion.kyschools.us	
96	Marion	West Marion Middle School	1155 Hwy 327, St. Charles, KY 40033	2701 692-4578	Buff Mann	buff.mann@marion.kyschools.us	
80	Marion	West Marion Elementary	1175 Loretto Rd, Loretto, KY 40037	2701 692-4320	Bobby Peterson	bobby.peterson@marion.kyschools.us	
95	Middlesboro	Middlesboro Independent Middle/High School	1404 West Cumberland Avenue, Middlesboro, KY 40965	6061 242-8800 / (606) 242-8820	Bill Jones / Bobby Bennett	bill.jones@mboro.kyschools.us / bobby.bennett@mboro.kyschools.us	
99	Middlesboro	Middlesboro Independent West End Elementary	1404 West Cumberland Avenue, Middlesboro, KY 40965	6061 242-8800 / (606) 242-8820	Bill Jones / Bobby Bennett	bill.jones@mboro.kyschools.us / bobby.bennett@mboro.kyschools.us	
100	Morgan	East Valley Elementary	2585 Rt 172, West Liberty, KY 41472	6061 572-8152	Amanda Lee	amanda.lee@morgan.kyschools.us	
94	Morgan	East Elementary	81 Walnut Street, East, KY 41425	6061 572-8202	Carol Emore	carol.emore@morgan.kyschools.us	
100	Morgan	Morgan Central Elementary	1201 U.S. 460 W, West Liberty, KY 41472	6061 743-8557	Shelby Palfrey	shelby.palfrey@morgan.kyschools.us	
100	Morgan	Morgan County Middle School	380 Road To Success, West Liberty, KY 41472	6061 743-8102	Terry Whit	terry.whit@morgan.kyschools.us	
99	Nelson	Bloomfield Elementary	360 Arnold Lane, Bloomfield, KY 40008	5021 349-7211	Stephanie Smith	stephanie.smith@nelson.kyschools.us	
100	Nelson	Bloomfield Middle School	36 Arnold Ln, Bloomfield, KY 40008	5021 349-7201	Rodney Morzeson	rodney.morzeson@nelson.kyschools.us	
97	Nelson	Boston School	130 Wilson Creek Road, Boston, KY 40107	5021 350-2200	Dana Cull	dana.cull@nelson.kyschools.us	
100	Nelson	Cox's Creek Elementary	5635 Louisville Rd, Cox's Creek, KY 40013	5021 349-7050	Haley Vickery	haley.vickery@nelson.kyschools.us	
100	Nelson	East Heights Elementary	211 East Muir Avenue, Bardstow, KY 40004	5021 349-7030	Jeremy Hill	jeremy.hill@nelson.kyschools.us	
95	Nelson	Nelson County High School	1070 Bloomfield Road, Bardstow, KY 40004	5021 349-7010	Dana Juva	dana.juva@nelson.kyschools.us	
92	Nelson	New Haven School	489 High Street, New Haven, KY 40051	5021 349-7232	Leah Hardin	leah.hardin@nelson.kyschools.us	
99	Nelson	Old Kentucky Home Middle	301 Wildcat Lane, Bardstow, KY 40004	5021 349-7040	Robin Handloser	robin.handloser@nelson.kyschools.us	
89	Powell	Bowen Elementary	5099 Cameton Rd, Stanton, KY 40380	6061 663-3313	Julie Foster	julie.foster@powell.kyschools.us	
87	Powell	Clay City Elementary	4501 Main Street, Clay City, KY 40312	6061 663-3404	Suzanne Meadows	suzanne.meadows@powell.kyschools.us	
85	Powell	Powell County Middle School	700 West College Ave, Stanton, KY 40380	6061 663-3308	Shelby Randall	shelby.randall@powell.kyschools.us	
85	Powell	Stanton Elementary	651 Breckenridge St, Stanton, KY 40380	6061 663-3311	James Crase	james.crase@powell.kyschools.us	

- b. The RESPONDENT must identify any ESPC completed within the last 10 years in which they did not meet the annual energy savings guarantee. A detailed explanation must be provided for any shortfall.**

There are no ESPCs ever completed where CMTA Inc. did not meet the annual energy savings guarantee.

- c. A third-party guarantee is available. It is the owner's option. The ESCO will provide an estimate for this guarantee.**

If an owner desires a third-party guarantee, CMTA will help to solicit proposals from other companies.

10. Litigation

- a. List any ESPCs in which the RESPONDENT has entered into litigation or arbitration with a public school during the past 10 years. Provide a brief summary detailing the litigation/arbitration. Omission of any past litigation will result in disqualification.**

CMTA has no litigation or arbitration pending.

11. Marketing Plan

- a. Provide a marketing plan for promoting the KPC contract. This plan shall cover all areas and states applicable. Demonstrate how the KPC contract will be used as a primary contract offering to participating agencies. Encouraging participating agencies to circumvent the contract by purchasing directly from Vendor will result in suspension or termination of contract.**

CMTA believes in complete transparency with school districts and will discuss the KPC contract approach along with a traditional RFP process with each school where CMTA initiates the contact. If CMTA is notified a district is interested in the KPC contract approach, we will not try to convince them to go with a traditional RFP. CMTA is in constant contact with school districts all throughout the state both in marketing CMTA's guaranteed energy savings approach as well as traditional design services.

1. **Installation:** Describe how the RESPONDENT intends to implement the installation phase of the project in terms of approach, priorities, philosophies, timelines, scope changes by school district, and commissioning.



2. **Commissioning:** Describe in detail the commissioning processes that the RESPONDENT intends to utilize to commission the building for optimal learning environments and energy efficiency. In the RESPONDENTS Proposal provide an actual commissioning document from a past project where this same approach was utilized.



3. **Project Management:** Describe how the RESPONDENT plans on organizing and managing the project team members. Provide detail on how the project team will communicate with the school district and how the managers of the project will guide team collaboration to best serve the owner. Provide a one-page (or less) Excel bi-weekly spread sheet report (weekly reports preferred) to Owner and KPC representatives outlining potential project risks and responsibilities, and a summary for any changes in contract time or cost. Bi-weekly or weekly contractor reports should be brief and only include the above. Contractor's may develop their own format and may substitute typical reports as long as they capture existing and potential risks with responsible parties.



1. **Training:** Explain the RESPONDENT's plan for providing training and support services to the school district. Describe the range of services being offered, such as maintenance, training, follow-ups, auditing, etc.

CMTA will provide on-site, hands-on training for the operation of each system installed to teachers, custodians, and other individuals identified by the Project Manager.

2. **Performance Assurance:** Described in detail the performance assurance processes that the RESPONDENT intends to utilize to insure the building operates at peak performance both at the completion of the installation phase and throughout the contract term. In the Appendix of the REPONDENTS Proposal, provide an actual guaranteed savings annual report from a past project where this same approach was utilized showing how both energy and operational savings where reported.

[REDACTED]

We also provide an Annual Measurement and Verification Report to assure the energy and cost savings guaranteed through our GESC are authenticated. A sample of the Annual M&V Report is provided in this proposal as **Appendix D**.

We continually track the energy usage throughout the year and if we ever saw a building that was not on track to meet the guarantee, we would intervene and investigate the cause.

[REDACTED]

RFP EXCEPTIONS

The RESPONDENT must identify any exceptions they want to make to the RFP requirements on this “RFP Exception Form”. Exception may result in a rejection of the Proposal, reduction in Qualitative Scoring or neither, depending on the ENTITIES understanding of how harmful the exceptions will be to KPC on this project. KPC shall be the sole judge of the impact of any exceptions and shall not debate their determination with a RESPONDENT.

List all exception below including three components. First, state the language that is being accepted. Second, provide language the RESPONDENT would propose replace the excepted language. Lastly, provide an explanation for why the RESPONDENT is taking exception to the RFP language and how the proposed language will not be harmful to KPC.

RESPONDENT TAKES NO EXCEPTIONS:

I, _____, an authorized representative of the RESPONDENT, take no exceptions to the RFP requirements and hereby verify that we will comply with all terms, conditions and requirements contained within the RFP.

Signature

Date

Title

RESPONDENT TAKES EXCEPTIONS:

1. Page: Section 3.2 Payments and Administrative Fee:
 - a. Excepted Language: Item E. The fee is to be included in the contractor’s pricing, and cannot appear on the member’s invoice.
 - b. Proposed language: The fee is to be included in the contractor’s pricing.

- c. Explanation for excepted language: The KEDC Fee will be on the project schedule of values that is used for monthly invoicing.

2. Page: Section 3.2 Payments and Administrative Fee:

- a. Excepted language: Item F. Respondent must report all payments received from members including but not limited to maintenance agreements, lease agreements, and professional services as purchases. The administrative fee applies to the entire amount of any project administered under this contract. Including work performed by subcontractors, material suppliers, and others under this contract. Is the contract holders responsibility to report, collect, and remit all fees to KPC.
- b. Proposed language: Respondent must report all payments received from members for work associated with a GESC project that utilizes the KEDC procurement including but not limited to maintenance agreements, lease agreements, and professional services as purchases. The administrative fee applies to the entire amount of any project administered under this contract. Including work performed by subcontractors, material suppliers, and others under this contract. Is the contract holders responsibility to report, collect, and remit all fees to KPC.
- c. Explanation for excepted language: For the administrative fee, CMTA will include only services that are directly related to an Energy Services Contract that utilizes the KPC/KEDC procurement path.

3. Page: Section 3.2 Payments and Administrative Fee:

- a. Excepted language: Item G. In Consideration of receiving a KPC Preferred Vendor Contract, all sales to KPC members occur under this contract unless the respondent holds an individual contract with the member. The Respondent agrees to send a copy of all ESPC contracts executed with Kentucky public schools within two months of contract award.
- b. Proposed language: In Consideration of receiving a KPC Preferred Vendor Contract, all sales to KPC members utilizing the KPC/KEDC price contract occur under this contract unless the respondent holds an individual contract with the member. The Respondent agrees to send a copy of all ESPC contracts executed with Kentucky public schools utilizing the KEDC/KPC procurement within two months of contract award.

Explanation for excepted language: Only services which are directly related to

an energy savings contract that utilizes this KPC/KEDC agreement will be included in our agreement with KPC/KEDC. CMTA will not pay the administrative fee for GESC projects that utilize a traditional RFP process or for projects where CMTA provides design services through a traditional bid/spec procurement that are unrelated to the current KEDC RFP for energy savings contracts. CMTA will send all contracts within 2 months that utilize the KEDC procurement path. To further explain our position, prior to becoming a Preferred Vendor, CMTA has averaged over \$10 million in K-12 member GESC contracts (and additional fees secured through design services). It is CMTA's expectation for this to continue whether CMTA is a preferred vendor or not. Paying administrative fees for professional services unrelated to energy contracts, or for GESC work secured outside this procurement path, does not seem appropriate or fair to those customers and clients of CMTA and would put us at a competitive disadvantage to other companies competing for the project that would not have this cost.

I, Jeremy Kelly, an authorized representative of the RESPONDENT, understand that taking the exceptions identified above to the RFP requirements may our Proposal to be rejected or our Qualitative Score to be reduced. I understand that KPC will be the sole judge of the impact of the exceptions listed above and understand that KPC shall not debate their determination.

Signature 

Date 8/15/18

Title Principal

RFP COMPLIANCE VERIFICATION

Each RESPONDENT must acknowledge that they understand the following RFP requirements are the Minimum Requirements to be considered for Qualitative Scoring. Any proposals not including these Minimum Requirements will be rejected.

MINIMUM REQUIREMENTS:

1. RESPONDENT certifies that they have read the General Conditions and agrees to fully comply with the terms specified therein. Any exception that the RESPONDENT wishes to take the General Conditions shall be specifically listed on the attached RFP Exceptions form.
2. RESPONDENT has included a Base Bid offering including the Base Bid scope of work identified with the cost, energy savings and operational savings of each ECM. Omission of any component of the Base Bid scope of work or not providing the individual cost and savings per ECM will result in the Proposal being rejected.
3. RESPONDENT shall include a complete list of the RESPONDENTS most recent K-12 school performance contracts over the past ten years.
4. RESPONDENT shall identify any energy savings shortfalls with K-12 schools over the past ten years with an explanation for why the shortfalls occurred and how the shortfalls were remedied.
5. RESPONDENT shall include an explanation of all past arbitration or litigation with Kentucky K-12 schools over the past ten years. Omission of any of these events will result in rejection of the Proposal.
6. RESPONDENT shall include detailed drawings and an equipment list identifying all equipment being proposed on the Proposal. Equipment descriptions shall include manufacturer name, equipment type and size.
7. RESPONDENT shall include a completed Guarantee as an attachment to the Proposal including all calculations, energy and operational savings guaranteed amounts, terms, conditions and the cost to provide the services included in the Guarantee over the

Guarantee term. Omission of any of a completed Guarantee including these details will result in rejection of the Proposal.

VENDOR INFORMATION & CERTIFICATION

COMPANY: CMTA, INC.

Representative: Jeremy Kelly

email Address: JKelly@cmta.com

Address: 10411 MEETING ST. Prospect KY 40059

Phone: (502) 326-3085

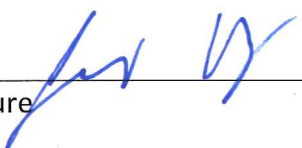
Payment Address: SAME

I have read the specifications and I understand the content and my firm's obligations with regard to providing the specified services and products. I hereby submit the attached proposal. The prices being submitted shall be binding on our firm until 90 days from the date proposals are due, or until I am notified that I am not a successful vendor, whichever comes first. If my firm is awarded a contract as a result of the quoted prices, or subsequently negotiated prices, I guarantee that the prices shall be the maximum amount that my firm may charge for the products identified.

I certify that I have the authority to sign this proposal and bind my firm to the prices specified and the obligations associated with the award of all or any part of the items so specified.

I acknowledge receipt of 0 supplements.

I acknowledge receipt of 1 addendum.

Signature 

Date 8/15/18

Title Principal


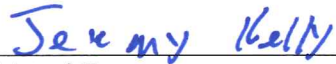
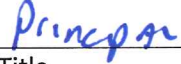



REQUIRED AFFIDAVIT FOR BIDDERS, OFFERORS AND CONTRACTORS
CLAIMING RESIDENT BIDDER STATUS

FOR BIDS AND CONTRACTS IN GENERAL:

The bidder or offeror hereby swears and affirms under penalty of perjury that, in accordance with KRS 45A.494(2), the entity bidding is an individual, partnership, association, corporation, or other business entity that, on the date the contract is first advertised or announced as available for bidding:

1. Is authorized to transact business in the Commonwealth;
2. Has for one year prior to and through the date of advertisement
 - a. Filed Kentucky corporate income taxes;
 - b. Made payments to the Kentucky unemployment insurance fund established in KRS 341.49; and
 - c. Maintained a Kentucky workers' compensation policy in effect.

The BIDDING AGENCY reserves the right to request documentation supporting a bidder's claim of resident bidder status. Failure to provide such documentation upon request shall result in disqualification of the bidder or contract termination.

 _____ Signature	 _____ Printed Name
 _____ Title	 _____ Date
 _____ Company Name	
 _____ Address	



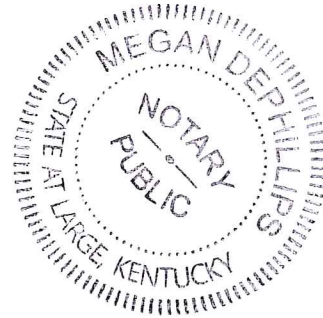
Subscribed and sworn to before me by Jeremy Kelly Principal
(Affiant) (Title)

of CMTA this 16th day of August, 2018
(Company Name)

Megan DePhillips

Notary Public
[seal of notary]

My commission expires: 6/10/2020



Support Services:

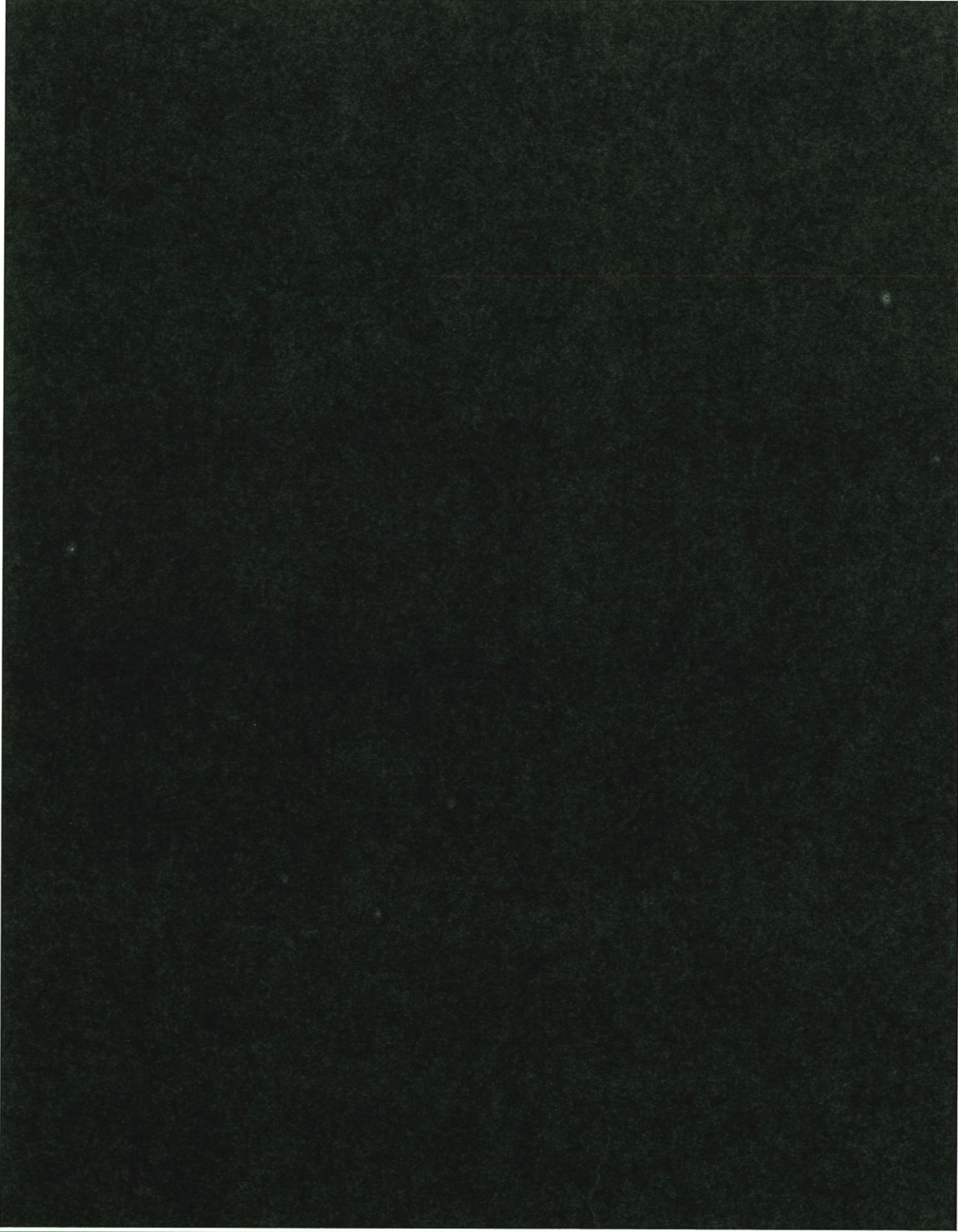
In coordination with *Exhibit E- Energy Savings Guarantee*, the Qualified Provider will perform the Measurement and Verification (M&V) offerings stated below and outlined in detail in *Exhibit E* each year of the contract life.

1. The Qualified Provider will provide quarterly site visits to verify system operation and building performance.
2. The Qualified Provider will review monthly utility bills for all schools affected by project.
3. The Qualified Provider will have access to the building automation system for all schools to continually review system operation. An engineer will review system operation at least monthly and more often as necessitated by the building energy performance.
4. The Qualified Provider will provide an annual reconciliation report to Marion County Public Schools outlining the performance of the energy conservation measures for the last year.
5. The cost schedule for the M&V Services is included in the project cash flow, but not in the bond sale. Therefore, this fee will be billed each July for years 2 through 20. The cost will be escalated 2.5% per year as seen in the below table.

Year	M&V
2015	\$ -
2016	\$ 3,000
2017	\$ 3,075
2018	\$ 3,152
2019	\$ 3,231
2020	\$ 3,311
2021	\$ 3,394
2022	\$ 3,479
2023	\$ 3,566
2024	\$ 3,655
2025	\$ 3,747
2026	\$ 3,840
2027	\$ 3,936
2028	\$ 4,035
2029	\$ 4,136
2030	\$ 4,239
2031	\$ 4,345
2032	\$ 4,454
2033	\$ 4,565
2034	\$ 4,679



Overall Savings Summary





ALL MARION CO SCHOOLS 2015/2016 COMBINED kWh PERFORMANCE





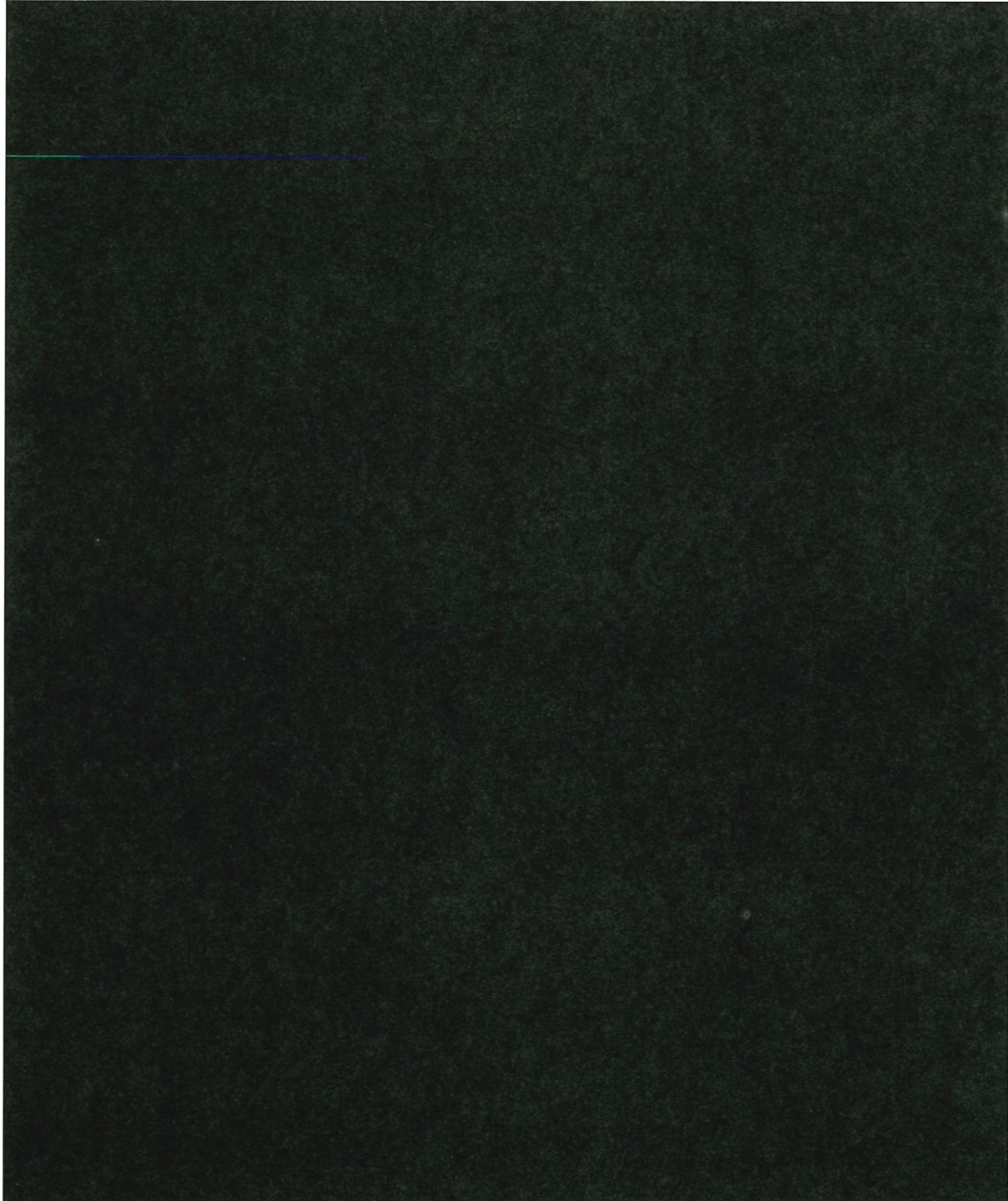
Lebanon Middle School



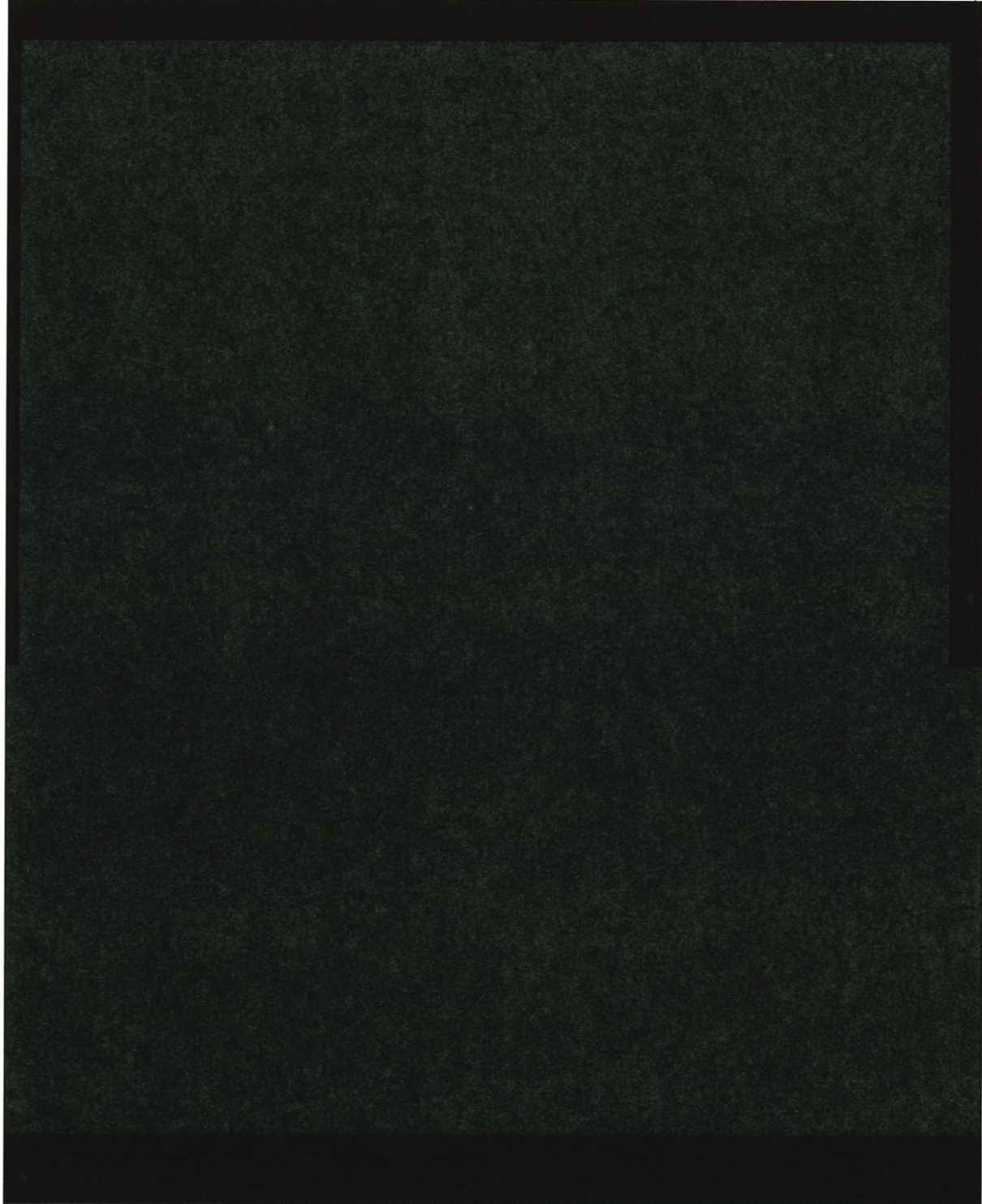
Lebanon Middle k W h Tracker



Marion County High School

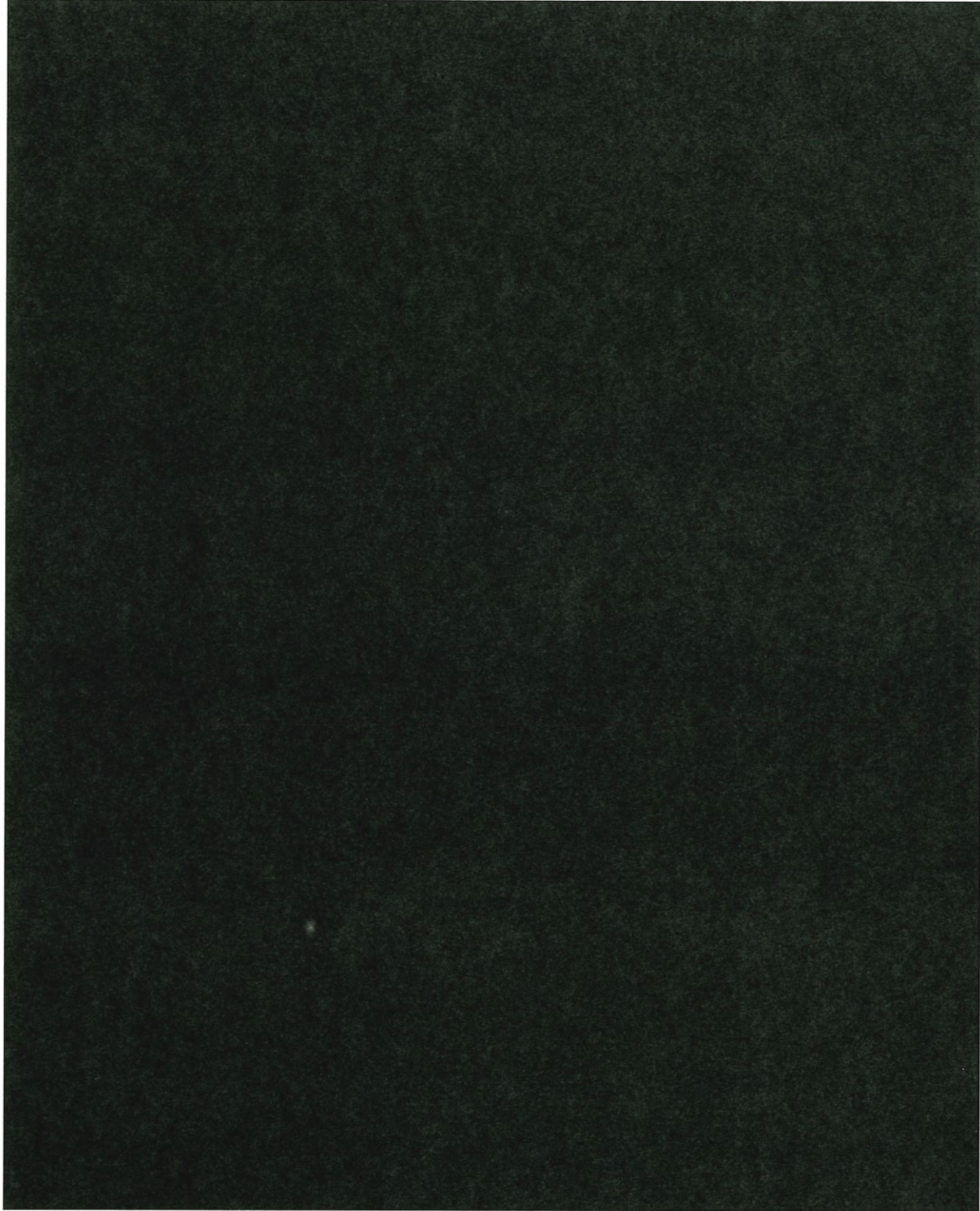


Marion High kWh Tracker





St. Charles Middle School



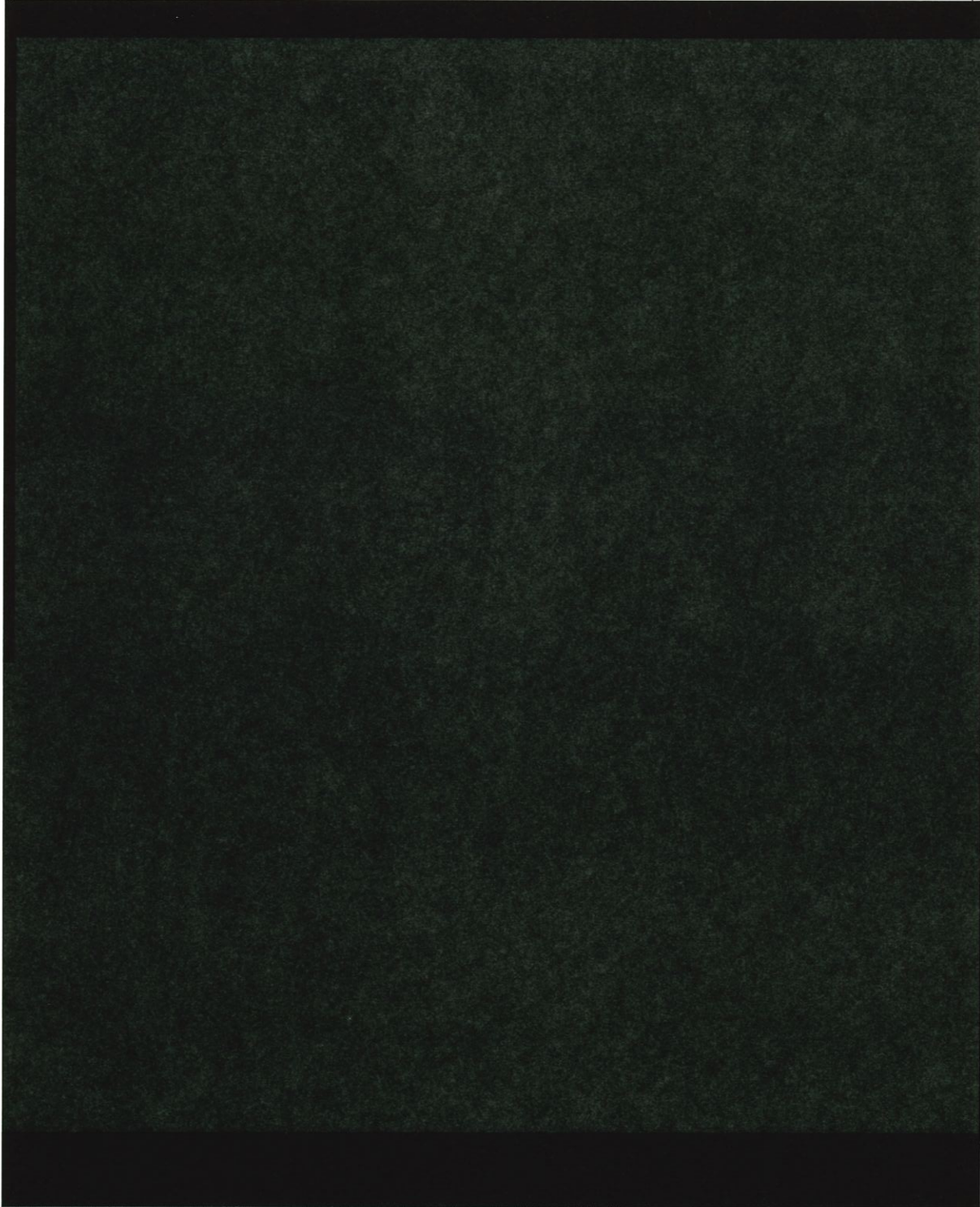
St. Charles k W h Tracker



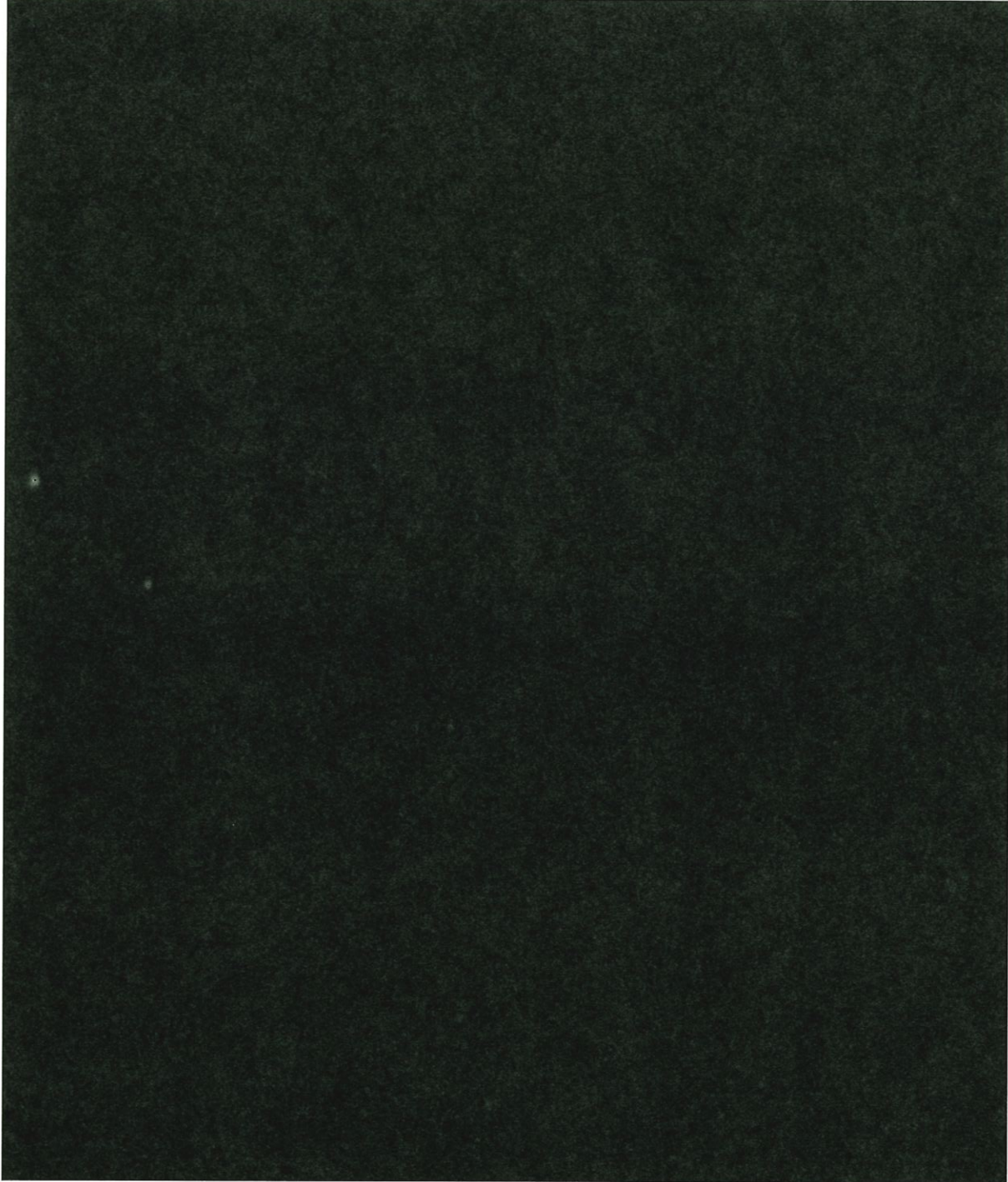
Glasscock Elementary School



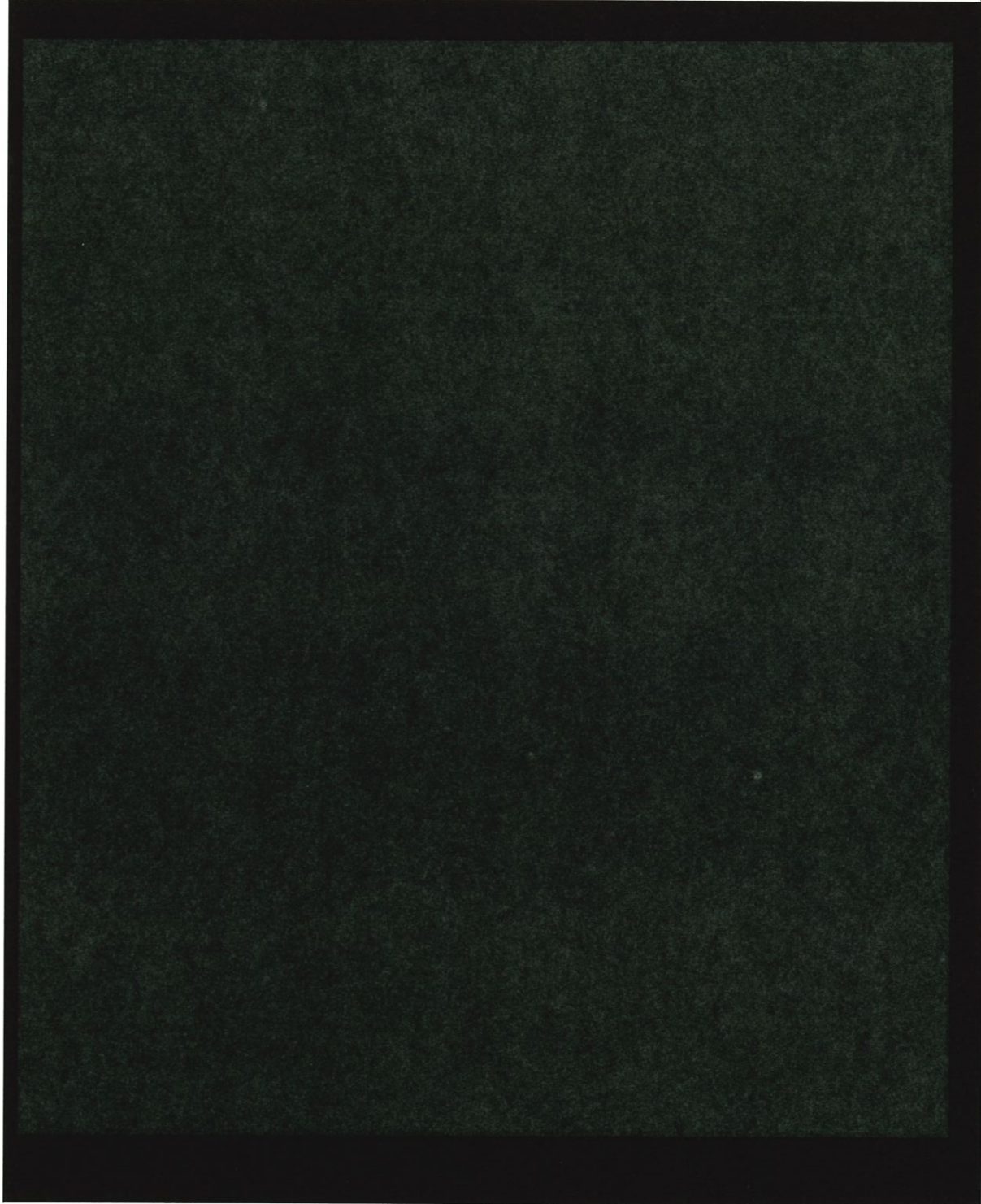
Glasscock k W h Tracker



Lebanon Elementary School



Lebanon Elem k W h Tracker



Calvary Elementary School





Calvary Elem k W h Tracker



West Marion Elementary School



West Marion kWh Tracker



Central Office

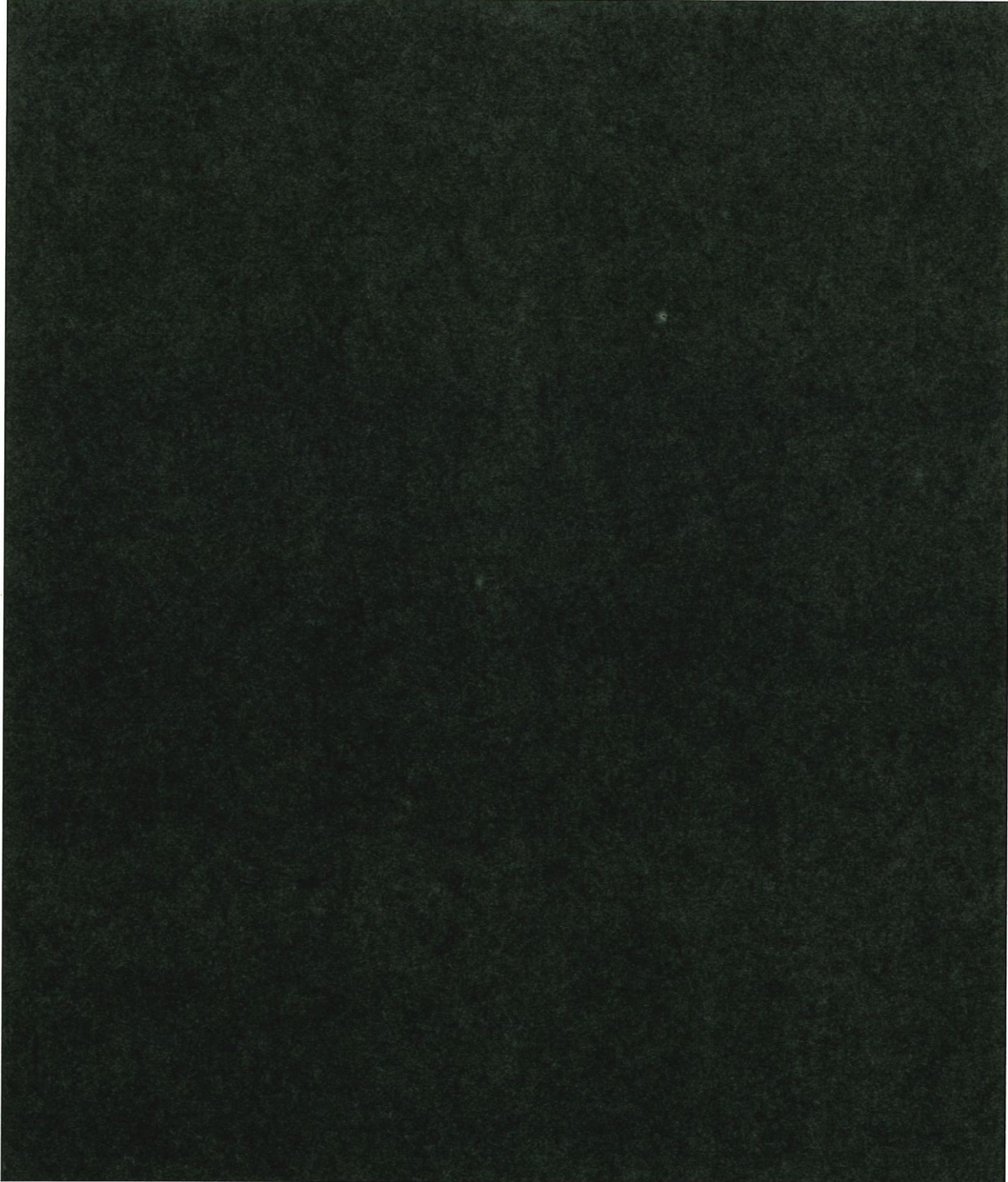


Central Office k W h Tracker





Bus Garage





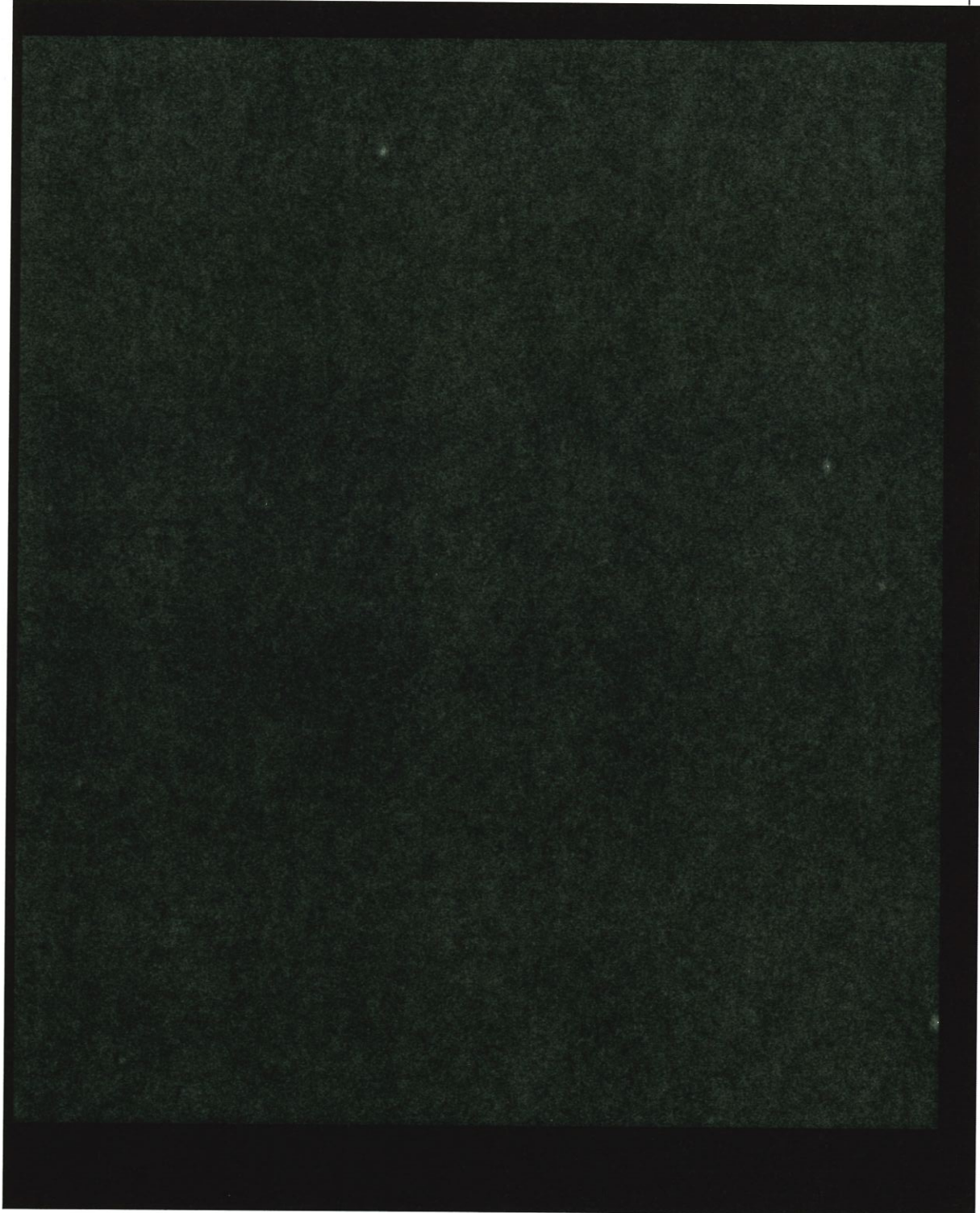
Bus Garage kWh Tracker



Fitness Center



Fitness Center kWh Tracker





Nelson County Board of Education

288 WILDCAT LANE, BARDSTOWN, KY 40004
(502) 349-7000 www.nelson.kyschools.us (502) 349-7004 FAX

Quality Education Now - Learning for Life

Frank Hall
Nicky Rapier
Damon Jackey
Larry Pate
Diane Berry

Superintendent
Anthony Orr

October 20, 2014

To Whom it May Concern:

I have been with the Nelson County Schools for over sixteen years. I was first contacted by companies proposing performance contract services very early on in my time here and I was very skeptical. My opinion has always been that numbers can be manipulated to say what you want them to say and in our case, we had the bond potential to meet the needs of the district. Over the last several years with low or no local assessment growth, our bond potential situation became more problematic and we had facilities with issues that needed to be addressed.

I contacted CMTA to pursue consulting services on a smaller project we were able to pay for in cash which afforded me the opportunity to discuss larger issues where cash payment was not an option. It was then where they made me aware of the performance contracting opportunity with them. I was intrigued by the possibility of the project as CMTA is not in the business of selling equipment, just design. They had also recently completed projects for us that are by far our two most efficient schools and two of the more efficient in all of Kentucky.

We worked with their staff to identify a potential project with the primary focus being an HVAC replacement at Cox's Creek Elementary, a school we had literally spent hundreds of thousands of dollars over the previous ten years or so to essentially band aid the situation. One critical component of our project was the timeline, the bulk of the work had to be completed over an abbreviated summer, less than two months. We were concerned but confident in CMTA based on their track record in Nelson County. We made the recommendation to our board and they approved after a several meetings and many questions being answered.

In the end, CMTA did exactly what they said they would do, the project was largely complete by the start of school and we are on pace to far exceed the savings they projected in order to fund our project. CMTA is a fantastic partner to our district, they answer questions promptly and accurately and continue to look out for our district even when there is not a fee involved, we are very happy with the project and would highly recommend them to anyone.

Please feel free to contact me if you need anything further.

Sincerely,

Tim Hockensmith
Chief Operating Officer

Elliott County Board of Education

C. Thomas Potter II, Superintendent
Sandy Hook, Kentucky 41171

PHONE 606-738-8002

FAX 606-738-8050

carl.potter@elliott.kyschools.us

SUSAN PRESTON, Chairman
NANCY WHITE, Vice Chairman

JOE SALYERS, Board Member
LAURA JENKINS, Board Member
BRENDA SHEETS, Board Member

Mr. Jeremy Kelly, PE
CMTA Energy Solutions
10411 Meeting Street,
Louisville, KY

Dear Mr. Kelly:

On behalf of the Elliott County Board of Education, I want to express my sincerest appreciation to you and to CMTA for your recent assistance with our Energy Conservation Project in which you and CMTA made it possible for our district to take advantage of a \$500,000.00 matching grant from KU. Had it not been for CMTA's proposal to initiate a guaranteed energy savings contract (Performance Contracting Initiative) our district would not have been fortunate enough to receive the KU Grant.

The manner in which CMTA was able to replace the majority of the lighting in our schools across the district as well as the installation of a geothermal system replacing an outdated coal fire boiler at the High School has significantly reduced our utilities costs. In fact to date this project has performed well above the proposed savings initially guaranteed in your contract to our district.

Communication from start to finish was excellent, our board of education and myself felt as though we were well informed throughout the project. In fact our concerns entering into this project were the unknowns as far as Performance Contracting. You and your team quickly put those factors to rest with clear explanations and quick resolution of any concerns during the project. Another noted accomplishment for the project was the fact that there were no change orders to the district during the construction process due in part to effective and efficient planning prior to the construction phase.

Given the opportunity to employ CMTA for any future business in our district it would be considered an afterthought. I would recommend CMTA to anyone interested in conducting an energy savings initiative in their district and would be glad to discuss our progress and savings as it applies to our completed project.

Sincerely,



C. Thomas Potter II, Ed.D
Superintendent
Elliott County Schools.

326 SOUTH MAIN STREET
NEW CASTLE, KENTUCKY 40050



HENRY COUNTY
PUBLIC SCHOOLS

TELEPHONE (502) 845 - 8600
FAX (502) 845 - 8601

August 8, 2013

To Whom It May Concern:

The Henry County Board of Education entered a Guaranteed Energy Savings Contract (GESC) with CMTA Energy Solutions in the spring of 2013, our first experience with this type of creatively-financed project. The leadership, knowledge, and experience CMTA brings to a project of this type is immeasurable. Having been involved in several renovation projects during my tenure, I can truthfully say this project was, without a doubt, the smoothest and most pleasant I have experienced. Not only is their expertise in energy conservation second to none, they provided great on-site leadership during the entire renovation project. All work was done with the utmost integrity. I have found CMTA personnel to be very accessible, resourceful, and reliable. As Superintendent of the Henry County Public Schools, I highly recommend CMTA Energy Solutions. Please feel free to contact me for more specific information, if needed.

Sincerely,

A handwritten signature in black ink, appearing to read 'Tim Abrams', is written over a horizontal line.

Tim Abrams

Superintendent

MARION COUNTY PUBLIC SCHOOLS



Taylor Schlosser
Superintendent

Teresa Preston
Administrative Assistant

Tammy Newcome
Chief Academic Officer

Chris Brady
Chief Operations Officer

Tim Lyons
Director of Pupil Personnel
& Technology

Deborah Spalding
Early Childhood Director

Traci Sharpe
Exceptional Child
Education Director

Todd Farmer
Federal Programs Director

Lisa H. Caldwell
Finance Director

Troy Benningfield
Instructional
Supervisor/Special
Programs Director

Jennifer Osbourne
Personnel Director

Cathy Sparrow
School Nutrition Program
Director

Scott Spalding
Transportation &
Maintenance Director

BOARD
Michael Cecil, Chairman
Jerry Evans, Vice-Chair
DeLane Pinkston
Robert Cecil
Kaelin Reed

February 24, 2016

To Whom It May Concern:

On behalf of the Marion County Board of Education, I want to express how pleased we are with our Guaranteed Energy Savings Contract (GESC) with CMTA Energy Solutions.

At the beginning of my term as superintendent, there was a looming issue of an aging building, Lebanon Middle School, built in 1995 that had roof and HVAC problems. The other major issue was the fact that Marion County Public Schools had very little bonding potential.

Our district has a history of working towards Energy Star status for all buildings. Companies began to approach us about using Guaranteed Energy Savings as a means to address our needs, being good stewards of our environment and our lack of funding, we were willing to hear their proposals. Ultimately, CMTA was selected for the project to address the HVAC at Lebanon Middle School along with other energy needs throughout our district.

After being selected, CMTA immediately planned several work sessions with the school and central office staff, a project manager (CMTA hired), and a CMTA Engineer, to ensure that everyone was on the same page with the expectations and timeline. Adam Pierce, a CMTA Engineer, was our primary contact throughout the project. He worked closely alongside our staff and the contractors. Adam continued to find ways to save our district money and ensured that Lebanon Middle School would be one of the most energy efficient buildings in the state. It was a great working relationship with everyone involved with a common vision for our district.

CMTA was selected due to their price; however, the quality of their work during the project was top notch. More importantly, the end result could serve as a model across the state. The project was completed in a very timely manner—a short summer. The savings were immediate to our district in regards to the energy. If the opportunity arises to utilize CMTA in any capacity, there would be no doubt Marion County will partner with the outstanding staff and company of CMTA.

As the superintendent of Marion County Public Schools, I would highly recommend CMTA Energy Solutions. You are more than welcome to contact me with any specific details about our project and the savings to our district.

Sincerely,

Taylor Schlosser, Superintendent
Marion County Public Schools

MIDDLESBORO INDEPENDENT SCHOOLS

220 North 20th Street • Middlesboro, KY 40965
(606) 242-8800 • FAX (606) 242-8805

Steve Martin
Superintendent

Bill Johnson
Chairman

Kenny Pratt
Vice Chairman



Jeff Greene
Board Member

J. J. Jones
Board Member

Charlotte Webb
Board Member

February 22, 2016

To Whom It May Concern:

This letter is to share our overall experience with CMTA Energy Solutions and serve as a recommendation for anyone in need of commercial lighting or electrical service, from energy conservation to service to new construction.

The Middlesboro Independent School District has been using CMTA Energy Solutions for a few years now. During this time, we have found their service to be outstanding. Their ability to work quickly and with reliable materials has consistently proven to be of great importance to us.

CMTA is knowledgeable about many options available to you regarding energy conservation. There is no need to hire another energy conservation company, because I have personally experienced the service CMTA proposes and delivers.

In closing, on a more personal note I have gotten to know some of the CMTA employees and have worked closely with them on other concerns regarding our district. Their willingness to help goes beyond normal expectations. I have found their advice on other matters extremely beneficial.

Please feel free to contact me should you have any questions regarding the above.

Sincerely,

A handwritten signature in cursive script that reads "Steve Martin".

Steve Martin
Superintendent



Kenton County School District | It's about ALL kids

THE KENTON COUNTY BOARD OF EDUCATION

1055 EATON DRIVE, FORT WRIGHT, KENTUCKY 41017

TELEPHONE: (859) 344-8888 / FAX: (859) 344-1531

WEBSITE: www.kenton.kyschools.us

Dr. Henry Webb, Superintendent of Schools

November 6, 2017

To Whom It May Concern,

On behalf of the Kenton County School District, I am writing to express my full vote of confidence in CMTA Energy Solutions to assess and design an energy performance contract project that is capable of delivering energy saving solutions for any prospective agency. In addition to the competent design team, the construction arm of this company has delivered a fully coordinated and professionally installed product within the Kenton County School District.

I have been managing construction projects for the last twenty five years (25) in public education. Issues occur on each and every project no matter how hard you work to minimize problems. The difference between mediocre and superior companies is the way that they properly confront and quickly minimize any mishaps that occur from unforeseen problems. CMTA has defined themselves as a superior company as they have clearly owned every problem/issue The Kenton County School District has encountered throughout KCSD's recent project. As with all projects there were several construction issues that arose with respect to certain design aspects, installation, as well as scheduling constraints. The CMTA Staff properly managed and effectively completed each and every incident.

The Kenton County School District has successfully completed three (3) Guaranteed Energy Performance Contracts over the last 10 years. The first two (2) projects were fairly successful, however the most recent project was completed by CMTA Energy Solutions. This most recent project involved all eighteen (18) school buildings in the district and encompassed 2,000,000 square feet of building space. This was a major undertaking however the careful planning and coordination of the work made this project extremely effective.

Again, I have been managing school construction projects for a long time in Kentucky. I began using CMTA Engineering on the design side of capital construction approximately twenty (20) years ago. I am pleased that CMTA has launched the Energy Solutions Division. The engineering design model established for renovations and new construction by CMTA Engineering is a national leading program and a proven success. The newest division can certainly draw on the knowledge and experience secured through many years of designing and constructing the most energy efficient facilities in the world.

Please accept this letter as an official recommendation for CMTA Energy Solutions for it is my pleasure to offer this commendation. Additionally, I would be more than happy to discuss my working knowledge and experience with CMTA Energy Solutions. I can be reached at (859) 957-2619 or rob.haney@kenton.kyschools.us

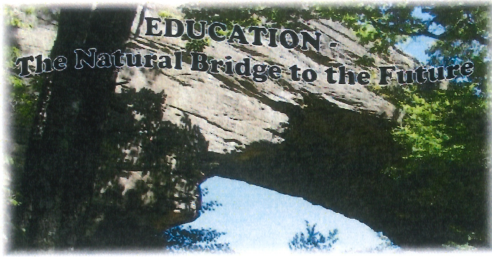
Sincerely,

A handwritten signature in black ink that reads "Rob Haney". The signature is written in a cursive style with a large, stylized "H".

Rob Haney
Executive Director of Support Operations and Finance

Kenton County Board of Education

Board Members: Carl Wicklund, Chairperson Karen L. Collins, Vice Chairperson Joshua Crabtree, Esq. Carla Egan Jessica Jehn
"The Kenton County Board of Education provides *Equal Education & Employment Opportunities.*"



Dr. Anthony Orr, Interim Superintendent

Powell County Schools

691 Breckinridge Street, P. O. Box 430

Stanton, Kentucky 40380

Phone: 606-663-3300 Fax: 606-663-3303

Board of Education

Kim Hall, Chair

John Brewer, Vice-Chair

John Barker

Diann Meadows

Mendel Tipton

Donna Hale, Board Attorney

The mission of the Powell County School System is commitment to preparing and inspiring all students to be life-long learners who are self-sufficient, responsible and productive members of our community.

February 1, 2018

To Whom It May Concern:

On behalf of the Powell County School District, I am writing to express my satisfaction in CMTA Energy Solutions to assess and design an energy performance contract project. While we have encountered minor issues within the project, CMTA has been excellent in assisting us with addressing any issues including those with sub-contractors within the project.

This is the first Guaranteed Energy Performance Contract the Powell County School District has successfully completed. While it has been a learning process for all of us involved, CMTA has assisted us every step of the way. When I contact CMTA representatives, they respond very efficiently and effectively. Casey Borst is absolutely amazing and I cannot say enough good things about her. We have been blessed to have her working on our project.

Please accept this letter as an official recommendation for CMTA Energy Solutions. If I can be of any assistance, I can be reached at (606) 663-3330 or tiffany.anderson2@powell.kyschools.us

Sincerely,

Tiffany Anderson
Powell County Director of Facilities Management



Morgan County Board Of Education
Guiding Children-Inspiring Futures

DEATRAH BARNETT ♦ SUPERINTENDENT ♦ 212 UNIVERSITY DRIVE
WEST LIBERTY, KY 41472 ♦ PHONE (606) 743-8002 ♦ FAX (606) 743-8050

April 6, 2017

To Whom it May Concern:

On behalf of the Morgan County Board of Education, I want to express how pleased we are with our Guaranteed Energy Savings Project that was completed in the summer of 2016.

The scope of this project was replacement of lighting and HVAC in Morgan Middle School, lighting and HVAC, including a geothermal well field at East Valley Elementary, lighting at Ezel Elementary, and lighting and HVAC commissioning at Morgan Central. New HVAC Controls were also installed at Morgan Middle, East Valley and Morgan Central Elementary along with low flow flush valves. This was a fast paced project that was completed on schedule allowing the school year to start on time.

Throughout the project, CMTA representatives Jeremy Kelly, Jon Gasser and Andrew Goodwin were extremely professional and easily accessible. The quality and supervision of the work was excellent. After eight months, utility expenses have nearly been cut in half for the buildings in this project. Kwh usage and utility costs have dropped considerably.

As the Facilities Director of Morgan County Schools, I would highly recommend CMTA Energy Solutions. Please contact me if interested in further information and or specific details about the project or the savings to our district.

Sincerely,

A handwritten signature in cursive script that reads "Darren Sparkman".

Darren Sparkman, Facilities Director
Morgan County Schools