

Oregon Department of Energy
Request for Statements of Qualification
RFQ 09-16 – Energy Service Companies

Attachment E: Key Personnel Resumes

Jordan Lerner

Director – West Coast

Education

B.S. Architectural Engineering
University of Kansas, 1991

Professional Memberships / Certifications

- American Society of Heating, Refrigeration & Air-Conditioning Engineers (ASHRAE)
- National Fire Protection Agency (NFPA)
- Electric League
- Society of American Military Engineers (SAME)
- National Association of Industrial and Office Properties (NAIOP)
- Washington State Society for Healthcare Engineering (WSSHE)

Experience

TAC Americas

1991-2000, 2002 to Present

- *Energy Solutions Sales Director* - Responsible for managing, training, accelerating and maximizing the performance of salespeople on an individual basis. Responsible for sales and business development efforts to ensure the department meets or exceeds Booking and Booked Gross Margin budgets.
- *Energy Solutions, Director of Consulting Engineering* - Contributed to divisional and department strategic planning. Developed consulting engineering strategies, goals, and objectives, and ensured achievement. Developed consulting engineering budgets and ensured their attainment. Interviewed, hired, trained, mentored, evaluated personnel or made related recommendations. Developed and grew consulting engineering and design engineering workload in cooperation with divisional sales and marketing departments. Managed the consulting engineering department to ensure projects were completed according to established goals and objectives, including design engineering, engineering analysis and studies, and construction phase support. Enhanced the image of the company through a balanced combination of high quality professional work, responsive service, sustained profitability, inspirational leadership, and commitment to the profession. Developed and maintained positive relationships with internal and external customers, and fostered an attitude of cooperation among divisional groups and staff. Established and maintained consulting engineering quality assurance system.
- *Associate/Senior Electrical Engineer* - Prepared plans and specifications, and studied reports to accomplish project goals and objectives. Planned, organized and monitored efforts to execute engineering responsibilities. Assists in securing projects; seeks opportunities to obtain additional work. Handled construction administration duties for assigned projects. Developed plans in accordance with established graphic conventions and procedures. Performed field work as necessary.

GPW & Associates, LLC

2001-2002

- *Project Manager/Electrical Engineer*

Henderson Engineers, Inc.

2000-2001

- *Project Manager/Electrical Engineer*

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Accomplishments

Jordan has 17 years of experience in project management, electrical engineering, and project development at facilities including:

- **Central Washington University** Ellensburg, Washington
 - *Dean Hall* - Pre-design study for the renovation of a former science education building. Included programming, preliminary design, and cost estimates.
 - *Nicholson Pavilion* - The phase one: women's locker room; phase two: remodel of upper gym basketball hoops, men's PE/team/laundry rooms, lobby, training room and weight room. Provided design for the plumbing, HVAC, electrical power, lighting, communications and fire alarm systems in both phases.
 - *Music Practice Area* - Electrical engineering services, including the site lighting.
- **University of Washington** Seattle, Washington
 - *Emergency Power System Expansion Phase 2* - Project manager for the conversion from 2.4kV to a 4.16kV system and reconfiguration of medium voltage distribution scheme.
 - *Magnuson Health Science Center Chilled Water Pre-design* - Services included providing the mechanical schematic design and estimated costs for the selected alternative.
 - *Data Center Pre-design* - Development of the program, evaluation of site alternatives and all recommendations to the university for the pre-design study.
 - *4545 Data Center Renovation* – Mechanical and fire protection systems design.
- **University of Washington/Cascadia Community College** Bothell, Washington
 - *Security System Recommissioning* - Medium voltage power distribution, central plant design, voice data/video distribution infrastructure, cable plant, raceways, cable trays, outlets and floor boxes.
- **Seattle University** Seattle, Washington
 - *Sullivan Hall School of Law* - Extended the existing medium voltage distribution system to a new building vault transformer via a new four-compartment pad mounted switch.
- **Pacific Lutheran University** Tacoma, Washington
 - *Campus Sustainability Master Plan* – High-efficiency clustered central plant equipment, direct digital controls (DDC) and campus-wide energy management controls system.
- **South Puget Sound Community College** Olympia, Washington
 - *Humanities Building Commissioning* – Design and bid document review, onsite construction inspection and punch-list activities of the theatre wing and ceramics studio, new technologies, and other classroom and office spaces in a classroom wing.
- **Bellevue Community College** Bellevue, Washington
 - *Building D Renovation* - The HVAC pre-design analysis defined systems requirements and potential design issues for the renovations. Addressed structural seismic upgrades, life safety upgrades, overall renovation of interior finishes, consolidate program functions, and add additional program space.
- **Port of Everett** Everett, Washington
 - *Security Surveillance System* – Project developer for the installation of a continuous surveillance capability at critical locations within port properties.

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Professional Training

- AMDP, Americas Management Development Program
- Electrical Training Courses: Grounding, Power Quality, Lighting
- Sales Training Course
- Coaching Course

David Palmer, LEED AP

Client Representative

Education

BA Business Administration
Washington State University, 2006.

AA Business Administration
Western Baptist College, 2004.

Professional Memberships/ Certifications

- Toastmasters International
- US Green Building Council LEED Accredited Professional – Existing Buildings

Experience

TAC Americas July 2006 – Present

- *Energy Solutions Sales* - Primary duties include developing customer relations for energy conservation projects, serving as the main contact within TAC to insure the proper implementation of the energy conservation measures, and conducting preliminary energy audits of facilities for project feasibility. Secondary area of expertise is to understand the issues at hand and assisting the project development group with creative and realistic ways of implementing solutions. Also, thoroughly understand, solicit, and assist in the selection of qualified financing.

Accomplishments

David has contributed to TAC PC efforts at facilities including:

- Lamar University (assisted in installation efforts)
- Pendleton School District (took over client relationships during M&V phase)

Professional Training

- Hardware and Controls for HVAC
- Certified Energy Manager (CEM) Certification Preparation
- Open Systems Training
- ISO Quality Systems Training
- HVAC Basics Training
- Professional Selling Skills
- USGBC LEED

Jeff Coles, PE

Project Development Manager

Education

B.S. Mechanical Engineering
University of Washington, 1992

Professional Memberships/ Certifications

- Professional Engineer (Mechanical): Washington

Experience

TAC Americas January 2005 to Present

- *Energy Solutions Project Development Manager* – Manage, plan, organize, and participate in performing preliminary and detailed project development audits; develop projects that meet or exceed the divisional goals and objectives; review and ensure savings projections are plausible and financial risk is identified.

Coles Consultants L.L.C. 1997 - 2004

- *Mechanical Engineer* – Performed project and construction management duties, start-up and commissioning.

Abacus Engineered Systems/TAC Americas 1989 - 1996

- *Mechanical Engineer* - Calculation of heating and cooling loads by hand and with the aid of computer programs. Sizing, selection, and layout of HVAC and hydronic equipment including coordination of space, maintenance access, and code-required clearances with other disciplines. Technical specification writing. Creation of sequence of operations. Cost estimating. Predict the energy use of existing and new buildings with varying types of HVAC and lighting systems installed. Analysis of electric, gas, and water conservation measures.
- *Mechanical Designer* - Employed part-time while in engineering school; also worked as a CAD drafter, general office assistant, and computer programmer.

Accomplishments

Jeff has managed projects at facilities including:

- Central Washington University
- Hiram G. Andrews Medical Center
- Virginia Commonwealth University
- Providence St. Peter Hospital

Jeff also has extensive experience in each of the following areas:

- HVAC & Hydronic Piping Design
- Plumbing Design
- Specialty Piping Design
- Energy Analysis
- Testing, Adjusting, Balancing, Startup, and Commissioning
- Construction Administration
- Construction Management
- Project Management Systems Development

Fred McCandless, CMVP

Construction Manager and Performance Assurance Consultant

Education

- B.A. English
Seattle University, 1980
- Cum laude

Professional Memberships/ Certifications

- Toastmasters International
- President, 1999-2000
- Division Governor, 1995-1996
- Area Governor, 1993-1994

Experience

TAC Americas 1993 – 1997, 2002 to Present

- *Energy Solutions PASS System Specialist* - In-depth knowledge of control systems/systems analysis, outstanding diagnostic and computer skills, and a collaborative management style; effectively analyzes risks and develops solutions. Responsible for setting and applying standards in the design and installation of projects and/or phases of projects. Increases productivity by training, process improvement, and documenting standards.
- *Energy Conservation Engineer/Customer Service Manager* – Developed, designed and implemented energy conservation monitoring and conservation programs for multiple projects.

Jones Lang LaSalle 1997-2002

- *Regional Technical Services Director* – Directed all functions and staff involved in managing Technical Services in three states for international financial institution.

Wright, Runstad & Company 1985-1993

- *Automation Systems Manager* – Managed technical and support staff providing automation system repair and maintenance service for 5 million+ square feet. Engineered, designed, installed, programmed, repaired, and troubleshot multiple automation systems controlling HVAC, fire alarm, and access control/security systems.

Bouillon, Christofferson & Shirer Engineers 1983-1985

- *Energy Management System Design Engineer/Commissioning Agent* – Designed energy management systems. Performed field-testing and balancing of air and hydronic systems for multiple projects.
- *Control Systems Specialist* – Designed control systems.

Accomplishments

Fred has over 20 years of experience in facilities management, energy conservation, and engineering. Some recent projects that Fred has worked on include:

- **Central Washington University** - Ellensburg, WA
Campus-Wide Energy Conservation Services - A valued client for more than ten years, the university is committed to providing a student-centered approach to education. Our services create safe, comfortable, and efficient facilities for both faculty and students. A \$23 million investment in ESCO projects has occurred over the past eight years. Services

Fred McCandless, CMVP

Construction Manager and Performance Assurance Consultant

include complete energy audits to identify energy conservation measures; engineering design for recommended measures; construction/implementation of measures; construction management; testing and operation training; and performance monitoring and verification.

- **State University of New York** – Delhi, NY

Energy And Utility Conservation Services - TAC Energy Solutions provided campus-wide energy efficiency services for the State University of New York (SUNY) at Delhi. The project included a complete energy audit of approximately 1,000,000 sq. ft. spread out over 40 buildings. The energy conservation measures converted the majority of electric heat to fossil fuel heating. Electric baseboard was converted to hydronic and constant volume air handlers were converted to variable volume systems. A new web-based energy management system is installed as well as a web-based preventative maintenance system. Water conservation devices such as low flow toilets, aerators and shower heads are also part of the overall energy savings strategy. Expected savings are in the range of \$450,000 to \$600,000 per year.

- **Four Seasons Olympic Hotel** – Seattle, WA

Energy Conservation Services - A full range of engineering and construction services were provided by TAC to replace the chilled water plant, upgrade the lighting systems, and improve the end-use energy management system at this luxury hotel in downtown Seattle. In addition to the main chilled water plant modifications and new pumping strategies, TAC provided highly efficient lighting to replace old fluorescent lighting technologies in the hotel back-of-house and parking garage.