Task Order LVJUSD Tariff Optimization & Shared Savings

Project # 5980824-1700604.00

This Task Order is pursuant to the Master Services Agreement ("MSA") between Sage Renewable Energy Consulting, Inc. dba NV5 ("NV5") and the Livermore Valley Joint Unified School District ("CLIENT") dated _____.

This Task Order must be mutually executed before work is commenced.

Project Name	LVJUSD Tariff Optimization & Shared Savings
Client	Livermore Valley Joint Unified School District
Project Location	LVJUSD
Estimated Start Date	November 1, 2024
Estimated End Date	December 30, 2024
Estimated Fees	Shared Savings, capped at $90,000

PROJECT CONTACTS

NV5		CLIENT	
Name:	Katie Crider	Name:	Kayla Wasley
Title:	Associate Principal	Title:	Assistant Superintendent of Business Services
Email:	Katie.Crider@NV5.com	Email:	kwasley@lvjusd.org
Phone:	215-518-7919	Phone:	925-606-3253
Address:	101 Lucas Valley Road, Suite 302 San Rafael, CA 94903	Address:	685 East Jack London Blvd. Livermore, CA 94551

SUMMARY OF WORK

Client has solar PV arrays installed at the following locations. During the Discovery phase NV5 will review the utility rate tariffs associated with each site and identify opportunities for the client to switch to a more financially beneficial tariff.

- Retroactive savings due to loss of grandfathering, incorrect utility billing, net energy metering (NEM) issues, and any other issues that arise during review

- Forward-looking savings due to opportunity to switch to a different tariff or rate

- Any additional changes that are evident upon review of utility data

NV5 will present these findings to the client in a Utility Savings and Fee Calculation Memo and assist the Client with the Tariff change request.

Site Name	SAID	Site Name	SAID
Christensen Play	4493199461	Arroyo Seco ES	4491367609
Christensen Main	4493199461	Marylin Ave ES	4496944344
Granada HS	4490538686	Mendenhall MS	4494502937
Livermore HS	4493918155	Lawrence ES	4493127206
Junction Ave K-8	4499821450	Rancho ES	4496400451
Leo R Croce ES	4491367960	Smith ES	4492191862
Altamont Creek ES	4496048354	Sunset ES	4491483784
Jackson Ave ES	4498602008	Vineyard HS	4495421719

SCOPE OF WORK

Task 1   Tariff Optimization

Discovery

1.1   Review utility rate tariffs, net metering schedule, and billings for each solar PV site SAID identified above.
1.2   Identify opportunities for retroactive billing credits or adjustments.
1.3   Identify opportunities for forward looking savings. Savings will assume solar PV is operating at 90% or greater.

Savings and Optimization

1.4   Prepare Utility Savings and Fee Calculation Memo and present to Client.
1.5   Submit tariff change requests to Utility on Client behalf – or – provide information for Client to submit to Utility.
1.6   Follow up with Utility to confirm tariff changes.

SCHEDULE AND DELIVERABLES

Task	Start Date	End Date	Deliverables
1 Tariff Optimization			
Discovery	Nov 2024	Nov 2024	- None
Savings and Optimization	Dec 2024	Dec 2024	- Utility Savings and Fee Calculation Memo

PROJECT REQUIREMENTS AND ASSUMPTIONS

1.   No Travel to CLIENT Sites.
2.   Client to provide NV5 with login credentials to online solar DAS platform capable of providing 15-minute energy interval data for download in one-year increments.

3. Client to provide NV5 with access to 15-minute utility interval data via UtilityAPI or login credentials to Client utility account.
4. Client to sign utility third party authorization form allowing NV5 to discuss client accounts with electric utility.
5. Client to request or authorize NV5 to request tariff changes with the Utility within 10 days of notice from NV5 of optimized rates.

FEE AND PAYMENT SCHEDULES

If NV5 does not identify any savings, no fee is due.

If NV5 identifies Tariff Optimization changes, the Fee due will be calculated in the Utility Savings and Fee Calculation Memo per the fee table below.

- Retroactive Savings will include all backwards looking savings identified.

- Forward Looking Savings will be calculated to include the 12-month period after the change has been implemented by the Utility.

- NV5's total fee will be capped at $90,000.

FEE TABLE

Task	No Savings Identified	Savings Identified	Fee Cap
Retroactive Tariff Optimization	$0	50% of Retroactive Savings	$60,000
Forward Looking Tariff Optimization	$0	50% of Year 1 Savings	$30,000

EXAMPLE:

NV5 identifies a site with a retroactive tariff optimization that will also yield forward-looking savings. The fee would be calculated as follows:

Savings Type	Value
Estimated Retroactive Savings	*$48,000*
Estimated Forward-Looking Savings (1 Year)	*$15,000*

Retroactive Shared Savings:

    Estimated Retroactive Savings x 50% = $48,000 x 50% = $24,000

    Billed upon confirmation of utility credit calculation.

Estimated Forward-Looking Savings:

    Estimated Forward-Looking Savings x 50% = $15,000 x 50% = $7,500

    Billed upon confirmation of tariff change request from Utility.

BILLING AND PAYMENT TERMS

NV5 invoices with terms of Net 30. Invoices for Retroactive Shared Savings will be billed upon confirmation of utility credit calculation. Invoices for Forward-Looking Savings will be billed upon confirmation of tariff change request from Utility.

IN WITNESS WHEREOF, authorized representatives of both NV5 and CLIENT have executed this agreement as of the date set forth below.

NV5	Client
Name: Katie Crider	Name:
Title: Associate Principal	Title:
Date:	Date:

Attachment 1: Sample Utility Savings and Fee Calculation Memo

SAMPLE UTILITY SAVINGS AND FEE CALCULATION MEMO

SAVINGS TABLE

Site Name	SAID	Estimated Retroactive Savings	Estimated Forward Savings
Total			

FEE CALCULATION

Savings Type	Total Savings	Multiplier	Fee
Estimated Retroactive Savings			
Estimated Forward-Looking Savings (1 Year)			
Total			

NV5	Client
Name: Katie Crider	Name:
Title: Associate Principal	Title:
Date:	Date: