



# **Western Riverside Council of Governments WRCOG Executive Committee**

## **AGENDA**

**Monday, February 3, 2025  
2:00 PM**

**County of Riverside Administrative Center  
4080 Lemon Street, 1st Floor, Board Chambers  
Riverside, CA 92501**

**1. CALL TO ORDER (Brenda Dennstedt, Chair)**

**2. PLEDGE OF ALLEGIANCE**

**3. ROLL CALL**

**4. PUBLIC COMMENTS**

At this time members of the public can address the Committee regarding any items within the subject matter jurisdiction of the Committee that are not separately listed on this agenda. Members of the public will have an opportunity to speak on agenda items at the time the item is called for discussion. No action may be taken on items not listed on the agenda unless authorized by law. Whenever possible, lengthy testimony should be presented to the Committee in writing and only pertinent points presented orally.

**5. CLOSED SESSION**

**CONFERENCE WITH REAL PROPERTY NEGOTIATORS**

Property: APN # 210081002

Agency negotiator: Executive Director

Negotiating parties: Lee & Associates

Under negotiation: Price and Terms of payment

**6. WELCOME NEW EXECUTIVE COMMITTEE MEMBERS**

**7. CONSENT CALENDAR**

All items listed under the Consent Calendar are considered to be routine and may be enacted by one motion. Prior to the motion to consider any action by the Committee, any public comments on any of the Consent Items will be heard. There will be no separate action unless members of the Committee request specific items be removed from the Consent Calendar.

**A. Action Minutes from the December 2, 2024, Meeting of the Executive Committee**

**Requested Action(s):**

1. Approve the Action Minutes from the December 2, 2024,

meeting of the Executive Committee.

**B. Action Minutes from the January 10, 2025, Special Meeting of the Executive Committee**

**Requested Action(s):** 1. Approve the Action Minutes from the January 10, 2025, Special Meeting of the Executive Committee.

**C. I-REN Monthly Activities Update**

**Requested Action(s):** 1. Receive and file.

**D. Approval of Professional Services Agreement for On-Call Planning Services with Iteris and First Amendments to Professional Services Agreements for On-Call Planning Services with Fehr & Peers and Michael Baker International, Inc.**

**Requested Action(s):**

1. Authorize the Executive Director to execute an On-Call Professional Services Agreement between WRCOG and Iteris for support to WRCOG and its member agencies with transportation planning activities and advisory services in an amount not-to-exceed \$150,000, for a term through June 30, 2026. Any changes to the attached draft are subject to consultation by legal counsel.
2. Authorize the Executive Director to execute a First Amendment to the On-Call Professional Services Agreement between WRCOG and Fehr & Peers for support to WRCOG and its member agencies with transportation planning activities and advisory services, and to increase the total not-to-exceed amount from \$400,000 to \$550,000. Any changes to the attached draft are subject to consultation by legal counsel.
3. Authorize the Executive Director to execute a First Amendment to the On-Call Professional Services Agreement between WRCOG and Michael Baker International for support to WRCOG and its member agencies with planning and transportation planning activities and advisory services, and to increase the total not-to-exceed amount from \$100,000 to \$400,000. Any changes to the attached draft are subject to consultation by legal counsel.

**E. Fiscal Activities Update and Mid-Year Budget Amendment**

**Requested Action(s):** 1. Approve the Fiscal Year 2024/2025 Mid-Year Budget Amendment.

**F. TUMF Program Activities Update: Two TUMF Reimbursement Agreements and Four TUMF Reimbursement Agreement Amendments**

**Requested Action(s):** 1. Authorize the Executive Director to execute a TUMF Reimbursement Agreement with the County of Riverside for the Planning and Right-of-Way Phases of the Gilman Springs Road Widening Project from SR-60 to Bridge Street, in an amount not to exceed \$3,000,000.

2. Authorize the Executive Director to execute a TUMF Reimbursement Agreement with the County of Riverside for the Planning Phase of the Butterfield Stage Road Project between Pourroy Road and Auld Road, in an amount not to exceed \$500,000.
3. Authorize the Executive Director to execute a TUMF Reimbursement Agreement Amendment with the County of Riverside for an increase in funding for the Wood Road Widening Project from Cajalco Road to Krameria Avenue, by \$947,000 to an amount not to exceed \$1,347,000.
4. Authorize the Executive Director to execute a TUMF Reimbursement Agreement Amendment with the County of Riverside for an increase in funding for the Rancho California Road-Calle Contento Roundabout Project by \$2,600,000 to an amount not to exceed \$5,100,000.
5. Authorize the Executive Director to execute a TUMF Reimbursement Agreement Amendment with the County of Riverside for an increase in funding for the Cajalco Road Widening Project from Alexander Street to I-215, project by \$3,848,000 to an amount not to exceed \$6,261,338.
6. Authorize the Executive Director to execute a TUMF Reimbursement Agreement Amendment with the City of Calimesa for an increase in funding for the I-10 / Singleton Road Interchange Project by \$3,000,000 to an amount not to exceed \$8,000,000.

**G. Approval of a Professional Services Agreement with AECOM Technical Services, Inc.**

**Requested Action(s):**

1. Approve a Professional Services Agreement with AECOM Technical Services, Inc., for microgrid and community resilience center feasibility studies in an amount not to exceed \$175,000.

**H. Appointment of WRCOG Representatives to Various Outside Committees**

**Requested Action(s):**

1. Appoint Brian Tisdale as the primary and Chris Barajas as the alternate representative to the California Association of Councils of Governments for a term commencing January 1, 2025, and ending December 31, 2026.
2. Appoint Linda Krupa as the primary number one representative and Greg Newton as the primary number two representative, and Chris Barajas as the alternate representative for primary one and Joseph Morabito as the alternate representative for primary two, to the Riverside County Solid Waste Advisory Council / Local Task Force for a term commencing January 1, 2025, and ending December 31, 2026.
3. Appoint Wes Speake as the representative to the Santa Ana Watershed Project Authority's One Water One Watershed Steering Committee for a term commencing January 1, 2025, and ending December 31, 2026.

4. Appoint Colleen Wallace as the primary representative to the San Diego Association of Governments' Borders Committee for a term commencing January 1, 2025, and ending December 31, 2026.
5. Appoint the following representatives to the listed SCAG Policy Committees for a term commencing January 1, 2025, and ending December 31, 2026:
  - i. Joseph Morabito (Wildomar) - Community, Economic & Human Development Policy Committee
  - ii. Dale Welty (Canyon Lake) - Energy & Environment Policy Committee
  - iii. Colleen Wallace (Banning) - Transportation Policy Committee
  - iv. Linda Krupa (Hemet) - Transportation Policy Committee
  - v. Wes Speake (Corona) - Transportation Policy Committee
  - vi. Crystal Ruiz (San Jacinto) - Transportation Policy Committee

## 8. REPORTS / DISCUSSION

Members of the public will have an opportunity to speak on agendized items at the time the item is called for discussion.

### A. Authorization to Purchase Real Property Located at 1955 Chicago Avenue, Riverside, CA

#### Requested Action(s):

1. Authorize the Executive Director to conduct all necessary actions related to the purchase of the property located at 1955 Chicago Avenue, Riverside, CA 92507 (APN 210-081-002) in the amount of \$6,734,545 plus various costs related to due diligence, closing costs, space planning, experts, and legal services for a total Not To Exceed amount of \$7,000,000.
2. Authorize the Executive Director to sublease the existing office space and any available vacant space in the proposed building to be purchased, subject to consent from the Real Estate Ad Hoc Committee.

### B. Recap and Summary of the January 10, 2025, Strategic Planning Session

#### Requested Action(s):

1. Receive and file.

### C. I-REN Energy Workforce Gaps Assessment and Memorandums of Understanding with Riverside and San Bernardino Counties' Workforce Development Departments

#### Requested Action(s):

1. Authorize the WRCOG Executive Director to execute Memorandums of Understanding with Riverside County and San Bernardino County separately, and authorize him, or his designee, to enter into discussions with both Counties to develop contracts to implement programs related to these Memorandums of Understanding, for consideration by the I-REN Executive Committee and both Counties.



#### **D. Member Dues Exploration**

**Requested Action(s):**

1. Approve the adjustment of member dues based on the local January-to-January Consumer Price Index starting from the 2008 total member dues of \$345,480 through present.
2. Approve the adjustment of member dues annually based on the local January-to-January Consumer Price Index.

**9. REPORT FROM THE TECHNICAL ADVISORY COMMITTEE CHAIR**

Clara Miramontes, City of Perris

**10. REPORT FROM COMMITTEE REPRESENTATIVES**

*CALCOG, Brian Tisdale*

*SANDAG Borders Committee, Crystal Ruiz*

*SAWPA OWOW Steering Committee, Wes Speake*

*SCAG Regional Council and Policy Committee Representatives*

*WRCOG Ad Hoc Committees*

*I-REN Executive Committee*

**11. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR**

Brenda Dennstedt, Western Water

**12. REPORT FROM THE EXECUTIVE DIRECTOR**

Dr. Kurt Wilson

Access the report [here](#).

**13. ITEMS FOR FUTURE AGENDAS**

Members are invited to suggest additional items to be brought forward for discussion at future Committee meetings.

**14. GENERAL ANNOUNCEMENTS**

Members are invited to announce items / activities which may be of general interest to the Committee.

**15. NEXT MEETING**

The next Executive Committee meeting is scheduled for Monday, March 3, 2025, at 2:00 p.m., in the County of Riverside Administrative Center, 4080 Lemon Street, 1st Floor, Board Chambers, Riverside.

**16. ADJOURNMENT**

# WRCOG Executive Committee

## Action Minutes

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### 1. CALL TO ORDER

The meeting of the WRCOG Executive Committee was called to order by Chair Rita Rogers at 2:02 p.m. on December 2, 2024, at the Riverside County Administrative Center, 1st Floor Board Chambers.

### 2. PLEDGE OF ALLEGIANCE

Committee member Kevin Jeffries led the Committee members and guests in the Pledge of Allegiance.

### 3. ROLL CALL

- City of Banning - Sheri Flynn
- City of Beaumont - Mike Lara
- City of Calimesa - Wendy Hewitt
- City of Canyon Lake - Dale Welty
- City of Corona - Jacque Casillas
- City of Eastvale - Christian Dinco\*
- City of Hemet - Jackie Peterson
- City of Jurupa Valley - Chris Barajas
- City of Lake Elsinore - Brian Tisdale
- City of Menifee - Bob Karwin
- City of Moreno Valley - Elena Baca-Santa Cruz\*
- City of Murrieta - Ron Holliday
- City of Norco - Kevin Bash
- City of Perris - Rita Rogers (Chair)
- City of Riverside - Chuck Conder
- City of San Jacinto - Crystal Ruiz
- City of Temecula - James Stewart
- City of Wildomar - Joseph Morabito
- County, District 1 - Kevin Jeffries
- County, District 2 - Karen Spiegel
- County, District 3 - Chuck Washington
- County, District 5 - Yxstian Gutierrez
- Eastern Municipal Water District (EMWD) - Phil Paule
- Western Water - Brenda Dennstedt

Absent:

- Riverside Co. Superintendent of Schools

### 4. PUBLIC COMMENTS

There were no public comments.

## **5. SPECIAL RECOGNITION**

### **A. Recognition of Outgoing Executive Committee Members**

#### **Action:**

1. None.

### **B. Regional Food Rescue Activities and Recognition**

#### **Action:**

1. None.

## **6. CONSENT CALENDAR**

|                  |                                                                                                                                                                                                                                                                   |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>RESULT:</b>   | <b>APPROVED AS RECOMMENDED</b>                                                                                                                                                                                                                                    |
| <b>MOVER:</b>    | Western Water                                                                                                                                                                                                                                                     |
| <b>SECONDER:</b> | Wildomar                                                                                                                                                                                                                                                          |
| <b>AYES:</b>     | Banning, Beaumont, Calimesa, Canyon Lake, Corona, Eastvale, Hemet, Jurupa Valley, Lake Elsinore, Menifee, Moreno Valley, Murrieta, Norco, Perris, Riverside, San Jacinto, Temecula, Wildomar, District 1, District 2, District 3, District 5, EMWD, Western Water |

### **A. Action Minutes from the November 4, 2024, Meeting of the Executive Committee**

#### **Action:**

1. Approved the Action Minutes from the November 4, 2024, meeting of the Executive Committee.

### **B. Fiscal Activities Update**

#### **Action:**

1. Received and filed.

### **C. WRCOG Committees and Agency Activities Update**

#### **Action:**

1. Received and filed.

### **D. Report out of WRCOG Representatives on Various Committees**

#### **Action:**

1. Received and filed.

### **E. I-REN Monthly Activities Update**

#### **Action:**

1. Received and filed.

**F. TUMF Program Activities Update: Approval of Two TUMF Reimbursement Agreements and One TUMF Reimbursement Agreement Amendment**

**Actions:**

1. Authorized the Executive Director to execute a TUMF Reimbursement Agreement with the City of Hemet for the Planning Phase of the Warren Road, Road Widening Project in an amount not to exceed \$1,000,000.
2. Authorized the Executive Director to execute a TUMF Reimbursement Agreement with the City of Perris for the construction Phase of the Ethanac Road Extension Project in an amount not to exceed \$13,898,000.
3. Authorized the Executive Director to execute a TUMF Reimbursement Agreement Amendment with the City of Banning for the PA&ED, PS&E, Construction Phase of Sun Lakes Boulevard Extension Project where the project funding will be increased by \$12,000,000 in an amount not to exceed \$13,000,000.

**G. Approval of a Memorandum of Understanding between WRCOG and SCAG for the Regional Early Action Planning 2.0 Grant Subregional Partnership Program**

**Actions:**

1. Authorized the Executive Director to execute a Memorandum of Understanding, substantially as to form, with SCAG for the Regional Early Action Planning 2.0 Subregional Partnership 2.0 Program Grant.
2. Adopted Resolution Number 31-24; A Resolution of the Executive Committee of the Western Riverside Council of Governments approving an agreement to receive funding from the Regional Early Action Planning Grant Program of 2021.

**H. I-REN Activities Update: Inland Economic Growth and Opportunity Memorandum of Understanding**

**Action:**

1. Authorized the Executive Director to execute a Memorandum of Understanding between WRCOG and Inland Economic Growth & Opportunity in an amount not-to-exceed \$30,000 annually through December 2027.

**I. I-REN Energy Fellowship Program Agreement**

**Action:**

1. Authorized the Executive Director to enter into an Agreement with Public Health Institute to support the I-REN Energy Fellowship and to identify, recruit, and place up to 27 Fellows within the I-REN service territory for program services years through 2027.

**J. On-Call Professional Services Agreements for I-REN Education & Outreach Services**

**Actions:**

1. Authorized the Executive Director to execute a new OnCall Professional Services Agreement between WRCOG and Burke Rix Communications to support I-REN with Education & Outreach services in an amount not-to-exceed \$250,000, for a term through December 2027.

2. Authorized the Executive Director to execute a new OnCall Professional Services Agreement between WRCOG and Chino Valley Chamber of Commerce to support I-REN with Education & Outreach services in an amount not-to-exceed \$250,000, for a term through December 2027.
3. Authorized the Executive Director to execute a new OnCall Professional Services Agreement between WRCOG and Costin Public Outreach Group, Inc., to support I-REN with Education & Outreach services in an amount not-to-exceed \$250,000, for a term through December 2027.
4. Authorized the Executive Director to execute a new OnCall Professional Services Agreement between WRCOG and CV Strategies to support I-REN with Education & Outreach services in an amount not-to-exceed \$250,000, for a term through December 2027.
5. Authorized the Executive Director to execute a new OnCall Professional Services Agreement between WRCOG and OPR Communications to support I-REN with Education & Outreach services in an amount not-to-exceed \$250,000, for a term through December 2027

**K. Letter of Support for Metropolitan Water District of Southern California's Funding Agreement for the Delta Conveyance Project**

**Action:**

1. Approved the attached letter of support for Metropolitan's funding agreement with the California Department of Water Resources and authorize its submission.

**L. Climate Action Plan for Transportation Infrastructure Public Comment Period and Proposed Comment Letter**

**Action:**

1. Authorized the Executive Director to submit a comment letter to the California State Transportation Agency regarding the update of the Climate Action Plan for Transportation Infrastructure.

**7. REPORTS / DISCUSSION**

**A. Amending the Administration Agreement for the Greenworks Commercial PACE Program, Increasing Maximum Bond Authorization for the Program, and Making Certain Required Disclosures**

|                  |                                                                                                                                                                                                                                                         |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>RESULT:</b>   | <b>APPROVED AS RECOMMENDED</b>                                                                                                                                                                                                                          |
| <b>MOVER:</b>    | District 3                                                                                                                                                                                                                                              |
| <b>SECONDER:</b> | Lake Elsinore                                                                                                                                                                                                                                           |
| <b>AYES:</b>     | Banning, Beaumont, Calimesa, Canyon Lake, Corona, Eastvale, Hemet, Jurupa Valley, Lake Elsinore, Menifee, Moreno Valley, Norco, Perris, Riverside, San Jacinto, Temecula, Wildomar, District 1, District 2, District 3, District 5, EMWD, Western Water |
| <b>ABSTAIN:</b>  | Murrieta                                                                                                                                                                                                                                                |

**Actions:**

1. Adopted Resolution Number 30-24; A Resolution of the Executive Committee of the Western Riverside Council of Governments approving the form of a Second Amendment to the Administration Agreement for Greenworks Commercial PACE Program, increasing the maximum bonded indebtedness for such Program and approving other actions in connection thereto.

2. Any future projects are to be agendized as an individual item separate from any budget approval.

## **B. Discussion Regarding Potential Impacts of Local Elections**

### **Action:**

1. Received and filed.

## **8. REPORT FROM THE TECHNICAL ADVISORY COMMITTEE (TAC) CHAIR**

TAC Chair Clara Miramontes reported that the TAC received an update on the Energy Resilience Plan 2.0. There are a number of candidate sites throughout various cities for either a Community Resiliency Center or a microgrid. The goal is to have at least one of these at each of the participating cities. There will be agency and community workshops in the coming weeks before the final selection of these sites. The TAC also received an informational presentation on AI streamlining strategies from the Chief Information Officer from the City of Corona.

## **9. REPORT FROM COMMITTEE REPRESENTATIVES**

Committee member Dale Welty reported that SCAG's Energy & Environment Policy Committee is working on Transportation Plan. Committee member Welty encouraged Committee members to go on SCAG's website and search for grants to see a list of possible funding opportunities. Additionally, the Energy & Environment Policy Committee talked about urban greening, which stressed planting the right tree in the right place. Environmentally, palm trees are not ideal, and recommended large shade trees that are right for the area.

## **10. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR**

Chair Rogers reported that it has been an honor to have served on this Committee for the last 18 years, and is happy to pass the baton to the new Chair, Brenda Dennstedt, and new Vice-Chair, Jacque Casillas.

## **11. REPORT FROM THE EXECUTIVE DIRECTOR**

Dr. Kurt Wilson had nothing to report.

## **12. ITEMS FOR FUTURE AGENDAS**

There were no items for future agendas.

## **13. GENERAL ANNOUNCEMENTS**

Committee member Kevin Bash announced that the City of Norco will be holding its annual Pearl Harbor Remembrance Ceremony at the Norco Memorial, and invited Committee members to attend. Committee member Bash thanked Supervisor Spiegel for support of this event over the last 18 years. Additionally, the Norco College Men's Soccer team is one game away from the State Championship.

Committee member Chuck Washington announced that Olivia Balderrama, a long time public servant for the County of Riverside and the City of Perris, has passed away, and requested to adjourn the meeting

in her honor.

Committee member Chuck Conder thanked Committee members that attended or sent a representative to the Inland Empire Homeless Forum held in November, which had 23 cities represented plus the Counties of Riverside and San Bernardino. The Forum provided a lot of good information and initiated relationships with various cities. The next meeting will take place in April 2025, and he is looking forward to accomplishing great things.

Vice-Chair Brenda Dennstedt thanked Chair Rogers and Committee member Kevin Jeffries for their service of their communities, and recognized their many years of contributions to this Committee, as well as their respective Cities. It is not a small feat, and has taken up a large portion of their lives, time, and attention. Vice-Chair Dennstedt has been inspired by them for many years, and is grateful to have worked with both.

#### **14. NEXT MEETING**

The next Executive Committee meeting is scheduled for Monday, February 3, 2025, at 2:00 p.m., at the Riverside County Administrative Center, 4080 Lemon Street, 1st Floor, Board Chambers, Riverside.

#### **15. CLOSED SESSION**

There was no report out on this item.

#### **16. ADJOURNMENT**

The meeting was adjourned at 3:32 p.m. in memory of Olivia Balderrama.

# WRCOG Executive Committee

## Action Minutes

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### 1. CALL TO ORDER

The Special Meeting of the WRCOG Executive Committee was called to order by Chair Brenda Dennstedt at 10:02 a.m. on January 10, 2025, at Western Water.

### 2. PLEDGE OF ALLEGIANCE

Committee member Mike Lara led the Committee members and guests in the Pledge of Allegiance.

### 3. ROLL CALL

- City of Banning - Sheri Flynn
- City of Beaumont - Mike Lara
- City of Canyon Lake - Dale Welty
- City of Corona - Jacque Casillas
- City of Eastvale - Christian Dinco
- City of Hemet - Carole Kendrick
- City of Jurupa Valley - Chris Barajas
- City of Lake Elsinore - Brian Tisdale
- City of Menifee - Bob Karwin
- City of Norco - Kevin Bash
- City of Riverside - Chuck Conder
- City of Wildomar - Joseph Morabito
- County, District 1 - Jose Medina
- County, District 2 - Karen Spiegel
- Western Water - Brenda Dennstedt

#### Absent:

- City of Calimesa
- City of Moreno Valley
- City of Murrieta
- City of Perris
- City of San Jacinto
- City of Temecula
- County, District 3
- County, District 5
- Eastern Municipal Water District
- Riverside Co. Superintendent of Schools

#### Others Present:



- Clara Miramontes, City of Perris,
- Jason Simpson, City of Lake Elsinore
- Ron Moreno, City of Temecula

#### **4. PUBLIC COMMENTS**

There were no public comments.

#### **5. WRCOG Review and Goal Setting Discussion Workshop**

Staff provided progress and accomplishments regarding WRCOG's 2022-2027 Strategic Plan.

#### **6. NEXT MEETING**

The next Executive Committee meeting is scheduled for Monday, February 3, 2025, at 2:00 p.m., at the Riverside County Administrative Center, 4080 Lemon Street, 1st Floor, Board Chambers, Riverside.

#### **7. ADJOURNMENT**

The meeting was adjourned at 2:00 p.m.



# Western Riverside Council of Governments

## WRCOG Executive Committee

### Staff Report

**Subject:** I-REN Monthly Activities Update  
**Contact:** Benjamin Druyon, Program Manager, [bdruyon@wrcog.us](mailto:bdruyon@wrcog.us), (951) 405-6727  
**Date:** February 3, 2025

#### **Recommended Action(s):**

1. Receive and file.

#### **Summary:**

The Inland Regional Energy Network (I-REN) is a coalition of three councils of government: the Western Riverside Council of Governments (WRCOG), the Coachella Valley Association of Governments (CVAG), and the San Bernardino Council of Governments (SBCOG), encompassing Riverside and San Bernardino Counties, and all their respective jurisdictions within the region. These organizations have joined to establish locally administered, designed, and delivered energy efficiency (EE) programs. This report will be provided at each meeting to inform the Committee of I-REN's progress.

#### **Purpose / WRCOG 2022-2027 Strategic Plan Goal:**

The purpose of this item is to provide regular updates on I-REN activities. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #6 (Develop and implement programs that support resilience for our region).

#### **Discussion:**

#### **Background**

In February 2021, I-REN applied for REN program administrator status to offer a portfolio of programs serving the Public, Codes & Standards, and Workforce Education & Training Sectors, with governance from WRCOG as the lead agency. In November 2021, I-REN was approved in Decision (D.) 21-11-013, Approval of Inland Regional Energy Network Energy Efficiency Business Plan, which funded I-REN to offer energy efficiency programs through program year 2027.

#### **Present Situation**

Public Sector (PS) Programs: I-REN offers two PS programs - the Technical Assistance and Strategic Energy Planning (TA) Program, and the Normalized Metered Energy Consumption (NMEC) Incentive Program. The TA Program helps agencies secure funding and financing to implement projects and

provide support through construction and project close-out. The NMEC Program (publicly known as Cash for Kilowatts) provides technical support such as eligibility screening and measurement & verification, as well as incentives for meter-based energy savings. Combined with technical assistance and reinforcement of operations and management best practices, public agencies will experience maximized savings for their communities. Below are some of the notable activities for the Public Sector this past month:

- Completed construction on first I-REN project (Colton Joint Unified School District) - December 2024.
- Conducted site visit of Ontario Toyota Arena - December 2024.
- Received first utility data transfer from SCE under the new CPUC Data Decision process - December 2024 & January 2025.
- Hosting Community Resilience Center (CRC) workshop - January 2025.
- I-REN is extending its "Cash for Kilowatts" enhanced incentives through December 2025.

Codes & Standards (C&S) Programs: The shared goal of I-REN's C&S Programs is to work closely with local building departments and the building industry to support, train, and enable long-term streamlining of energy code compliance. I-REN's programs will nurture the confidence, skills, and existing C&S knowledge of local building department staff, provide technical assistance to jurisdictions pursuing reach codes and local ordinances, and support building and construction industry actors to foster increased compliance. Below are some updates for the C&S Programs this past month.

- On December 12, 2024, I-REN hosted its final C&S training of 2024, Navigating the Energy Code. There were 15 registrants and nine attendees, a 60% registered-to-attended ratio.
- I-REN scheduled its first three trainings for 2025: Heat Pump Water Heaters for Building Departments, How the Energy Code Treats Electrification, and Residential Additions and Alterations.
- On January 14, 2025, I-REN held its first C&S training of 2025: Heat Pump Water Heaters for Building Departments. There were 25 registrants and 17 attendees, a 68% registered-to-attended ratio.
- I-REN created two permit guides, Single-Family Homes Additions / Alterations: Heating Ventilation Air Conditioning (HVAC) Heat Pumps, and Commercial HVAC Equipment Replacement Requirements, available for download on [iren.gov](http://iren.gov). In January 2025, these permit guides were downloaded for the first time, by the City of Moreno Valley's Building Department.
- The City of Riverside requested that I-REN develop an Electric Vehicle Charging Infrastructure and Commercial Photovoltaic Battery Storage Permit Guide, accessible to all who need it. This is the first Code Experts request of 2025.

Workforce Education & Training (WET) Programs: The goal of I-REN's WET cross-cutting sector activities is to ensure there is a trained workforce to support and realize Energy Efficiency (EE) savings goals across all market sectors. I-REN is committed to identifying the most effective and accessible ways to increase the number of skilled EE workers, especially those within underserved, hard-to-reach, tribal, and disadvantaged communities. Below are some updates for the WET Programs for this past month.

- On December 9, 10, and 11, 2024, I-REN hosted the second quarterly Workforce Roundtable at SBCOG, WRCOG, and CVAG, respectively. These roundtables brought together over 30 individuals from education institutions, workforce organization, chambers of commerce, and local

governments to discuss energy workforce needs in I-REN territory.

- I-REN developed a draft energy-focused Workforce Gaps Assessment that evaluated and develops recommendations for the future of I-REN workforce programs. The final Assessment will be made public in January 2025 after it is reviewed and discussed by the I-REN Executive committee.

The I-REN Executive Committee met on January 21, 2025 to discuss a revised meeting schedule to accommodate the need for quicker action on future items that the I-REN team is preparing for, such as the next Business Plan application. The I-REN Executive Committee decided that meeting every month with no meetings in March, June, September, and December would work best for 2025.

I-REN Events / Activities Around the Region: In the coming months, I-REN activities update reports will include member agency updates and spotlights on successes achieved throughout the I-REN territory.

Other Activities: [Sign up for I-REN updates](#) and learn more about all the programs, services, and resources I-REN has to offer by visiting [www.iren.gov](http://www.iren.gov) or emailing [info@iren.gov](mailto:info@iren.gov).

**Prior Action(s):**

None.

**Financial Summary:**

All costs associated with I-REN program activities are included in WRCOG's adopted Fiscal Year 2024/2025 Agency Budget under I-REN Program (Fund 180) in the Energy & Environmental Department.

**Attachment(s):**

None.



# Western Riverside Council of Governments

## WRCOG Executive Committee

### Staff Report

**Subject:** Approval of Professional Services Agreement for On-Call Planning Services with Iteris and First Amendments to Professional Services Agreements for On-Call Planning Services with Fehr & Peers and Michael Baker International, Inc.

**Contact:** Chris Tzeng, Program Manager, [ctzeng@wrcog.us](mailto:ctzeng@wrcog.us), (951) 405-6711

**Date:** February 3, 2025

#### **Recommended Action(s):**

1. Authorize the Executive Director to execute an On-Call Professional Services Agreement between WRCOG and Iteris for support to WRCOG and its member agencies with transportation planning activities and advisory services in an amount not-to-exceed \$150,000, for a term through June 30, 2026. Any changes to the attached draft are subject to consultation by legal counsel.
2. Authorize the Executive Director to execute a First Amendment to the On-Call Professional Services Agreement between WRCOG and Fehr & Peers for support to WRCOG and its member agencies with transportation planning activities and advisory services, and to increase the total not-to-exceed amount from \$400,000 to \$550,000. Any changes to the attached draft are subject to consultation by legal counsel.
3. Authorize the Executive Director to execute a First Amendment to the On-Call Professional Services Agreement between WRCOG and Michael Baker International for support to WRCOG and its member agencies with planning and transportation planning activities and advisory services, and to increase the total not-to-exceed amount from \$100,000 to \$400,000. Any changes to the attached draft are subject to consultation by legal counsel.

#### **Summary:**

WRCOG established its latest an on-call planning services consultant bench in 2022 to conduct planning activities as an agency and to provide direct technical assistance to its member agencies in an expedited fashion. One consultant, Iteris, qualified to serve on the consultant bench, and WRCOG would like to establish a Professional Services Agreement (PSA) to conduct transportation planning services to WRCOG and its member agencies. Two other consultants that qualified to serve on the consultant bench were Fehr & Peers (F&P) and Michael Baker International (MBI), and WRCOG and its member agencies have utilized the services of these consultants for various planning and transportation planning activities under the PSA since it was established in 2022. Based on the forecasted activities of WRCOG and the requests for technical assistance by member agencies in the coming months, staff is requesting an increase to the total not-to-exceed amount of the PSAs in order to fulfill these activities.

#### **Purpose / WRCOG 2022-2027 Strategic Plan Goal:**

The purpose of this item is to recommend that the Executive Committee authorize the Executive Director to enter into a PSA between WRCOG and Iteris and enter into a First Amendment of the PSA between WRCOG and Fehr & Peers and between WRCOG and Michael Baker International for on-call planning services to WRCOG and its member agencies. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #5 (To develop projects and programs that improve infrastructure and sustainable development in the subregion).

### **Discussion:**

### **Background**

WRCOG has historically received requests from its member agencies for assistance on a variety of disciplines related to jurisdictions' planning efforts. WRCOG identified disciplines (Grant Writing Assistance, Land Use / Housing Planning and Transportation Planning) to provide direct assistance to its member agencies and established its On-Call Planning consultant bench in 2017 based on the identified disciplines to enable WRCOG the ability to act quickly and provide continued assistance to the member agencies as requested. Twelve consultants were deemed qualified to serve on the initial consultant bench in 2017 and PSAs for these consultants were established in 2017. These PSAs expired in June 2022 in order to adhere to the WRCOG PSA policy.

WRCOG released a Request for Proposal for On-Call Planning Services in December 2021 to establish a new On-Call Planning consultant bench. WRCOG received the following number of responses for the respective disciplines:

- 10 submittals for Grant Writing Assistance
- 7 submittals for Land Use / Housing Planning
- 8 submittals for Transportation Planning

A total of 12 consultants were determined to be qualified to serve on the consultant bench for the variety of disciplines included on the consultant bench that was established in 2022, and PSAs were established accordingly based on WRCOG's work plan and requested work to consultants.

### **On-Call PSA Background**

On-Call PSAs are established with specific language stating that specific work is authorized through a task work order process, and that WRCOG is under no obligation to provide the funding as set in the On-Call Agreement. Under this process, the contract or contract amendments specify the maximum amount of work that is authorized. Staff then works with the various professional service providers to authorize work on specific tasks as needed throughout the fiscal year. As an On-Call Agreement, these contracts do not create an obligation that work will be assigned but rather set a maximum limit for work to be authorized. In the case that the need for this work does not arise, WRCOG is under no obligation to provide this funding to these professional service providers.

It is also important to note that the term of the PSAs to be executed are for three years from the date of award. This enables the PSAs to align with the Agency's updated PSA Policy as part of the updated Purchasing and Procurement Policy, which was approved by the Executive Committee at its August 2, 2021, meeting. The "Period of Performance" section (Section D) of the "Purchases over \$10,000" portion of the Purchasing and Procurement Policy document establishes that "Agreements shall be

written for a period not to exceed three years from the date of award with no more than two options to renew or amend. Contracts shall not exceed a period of five consecutive years without prior approval from the Executive Committee. Prior to obtaining this approval, the Executive Director shall provide written documentation to the Executive Committee regarding an extension of a contract beyond five years. No contract shall be extended beyond five years without Executive Committee approval."

Per WRCOG's policy, the Executive Director has single signature authority for contracts up to \$100,000. Contracts between \$100,001 and \$200,000 are to be reviewed by the Administration & Finance Committee (and approved only if the contract needs to be approved before the next scheduled Executive Committee meeting), and in general, contracts amounting to \$100,001 and larger are to be approved by the Executive Committee.

### **Present Situation**

#### **Funding Availability for On-Call Planning Activities:**

To date, activities that have utilized the On-Call Planning consultant bench have been funded through three main funding sources: the Transportation Uniform Mitigation Fee (TUMF) Program, the Local Transportation Fund (LTF), and the Regional Early Action Planning (REAP) Grant Program. An explanation of the funding sources is provided below.

- TUMF Program: Development in the subregion continues so the TUMF Program is generating revenue. The TUMF Program has revenues of over \$67M for the current fiscal year through March 2024. WRCOG receives a portion of these funds (4%) for administering the TUMF Program, including consultants. TUMF collections are anticipated to continue at a consistent pace through the forthcoming fiscal year. The TUMF Program also funds special projects and analyses that are needed to assist with the administration of TUMF and to provide relevant information to member agencies with regard to various aspects of the TUMF Program. TUMF Activities in Fiscal Year (FY) 2024/2025 are included in the proposed budget for adoption by the WRCOG General Assembly.
- LTF: WRCOG receives an annual allocation of funds from the Riverside County Transportation Commission (RCTC) through the Transportation Development Act (TDA) of 1971. One of the funding sources that TDA established is the LTF that provides funds for regional planning. WRCOG is receiving \$1,278,750 for FY 2024/2025 through RCTC. WRCOG will continue to utilize LTF funding to assist member agencies with grant writing assistance and to conduct studies that will benefit member agencies.
- REAP 2.0: WRCOG will receive an allocation of \$1.6M through the SCAG REAP 2.0 Subregional Partnership Program. This funding was provided by the State of California to SCAG, which is the Metropolitan Planning Organization for southern California, including Riverside County. WRCOG will utilize over \$1M of this funding to provide direct consultant technical assistance to jurisdictions aimed to increase housing production.

#### **Proposed PSA between WRCOG and Iteris:**

Iteris is one of the consultants determined to be qualified to serve on the Transportation Planning consultant bench. WRCOG has a desire to explore the concept of a regional traffic signal coordination / Intelligent Transportation Systems (ITS) and conduct an initial feasibility analysis. Elements of this study will include a review of comparable regional efforts and lessons learned, identifying expertise necessary

to plan, implement and maintain a regional system, the roles and responsibilities for various agencies for a regional system, identifying key milestones to implement and level of funding required. WRCOG requested a proposal from its bench of consultants and deemed Iteris as most qualified to conduct this study. This analysis is even more important as ITS has recently been added as an eligible TUMF expense and provides members another opportunity to leverage TUMF funding. The desire is to establish a PSA for a not-to-exceed amount of \$150,000, for this analysis. The entire amount will be funded with TUMF funds.

**Proposed First Amendment to PSA between WRCOG and Fehr & Peers (F&P):**

F&P is one of the consultants that WRCOG established a PSA with in June 2022, as part of the On-Call Planning consultant bench, in order to assist with activities and assistance conducted in the Transportation Planning discipline. The PSA established a not-to-exceed amount of \$400,000, with approximately \$250,000 of funding from LTF and \$150,000 from TUMF. Since the PSA was established, F&P has been requested to provide direct technical assistance on a variety of studies for WRCOG and its member agencies. F&P has assisted with the due diligence on a regional Vehicle Miles Traveled (VMT) Mitigation Program, and have assisted with the development of the necessary documents and materials for a proposed Program. F&P has also assisted WRCOG to ensure that the TUMF Program complies with Assembly Bill 602. WRCOG has conducted a number of big data analyses for member agencies with the help of F&P's expertise. WRCOG intends to continue these types of analyses and assistance to its members in the coming months. The activities covered by the proposed First Amendment between WRCOG and F&P are part of WRCOG's Fiscal Year 2024/2025 Work Plan and will be covered through LTF and TUMF funding.

**Proposed First Amendment to PSA between WRCOG and Michael Baker International (MBI):**

MBI is one of the consultants that WRCOG established a PSA with in June 2022, as part of the On-Call Planning consultant bench, in order to assist with activities and assistance conducted in the Transportation Planning and Land Use / Housing Planning disciplines. The PSA established a not-to-exceed amount of \$100,000, with the funding covered by the TUMF Program. Since the PSA was established, MBI has been requested to provide technical support on the TUMF Nexus Study update. MBI assisted with the update of cost assumptions to the TUMF network during the Nexus Study update, as well as establishing new cost estimates for ITS costs. MBI is also assisting WRCOG with its update of the TUMF Administration Plan. WRCOG intends to continue updating and implementing the recently adopted TUMF Nexus Study Update with the assistance of MBI. Lastly, MBI will assist member jurisdictions with technical assistance on housing implementation through REAP 2.0 funding. The activities covered by the proposed First Amendment between WRCOG and MBI are part of WRCOG's Fiscal Year 2024/2025 Work Plan and will be covered through LTF, REAP 2.0 and TUMF funding.

**Prior Action(s):**

**June 6, 2022:** The Executive Committee authorized the Executive Director to execute a new On-Call Professional Services Agreement between WRCOG and Fehr & Peers for support to WRCOG with transportation planning support activities and services in an amount not-to-exceed \$400,000, for a term of the Agreement through June 6, 2025, and execute a new On-Call Professional Services Agreement between WRCOG and Michael Baker for support to WRCOG with Land Use / Housing Planning and transportation planning support activities and services in an amount not-to-exceed \$100,000, for a term



of the Agreement through June 6, 2025,

**Financial Summary:**

The Transportation & Planning Department activities are included in the Agency's adopted FY 2024/2025 Budget under the Transportation Department. The specific source of these funds are prior year agency carry-over funds, annual TUMF administration budget, annual LTF funds, which is provided by RCTC to WRCOG for Transportation Planning purposes. In addition, some activities have, and may, utilize REAP Subregional Partnership Program grant funding.

**Attachment(s):**

[Attachment 1 - On-Call Professional Services Agreement between WRCOG and Iteris, Inc.](#)

[Attachment 2 - First Amendment to On-Call Professional Services Agreement between WRCOG and Fehr & Peers](#)

[Attachment 3 - First Amendment to On-Call Professional Services Agreement between WRCOG and Michael Baker International](#)

# Attachment

On-Call Professional Services  
Agreement between WRCOG and  
Iteris, Inc.

**WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS  
PROFESSIONAL SERVICES AGREEMENT  
FOR ON-CALL SERVICES  
FOR PLANNING  
CONTRACT NUMBER 2025-65-1148-001**

**1. PARTIES AND DATE.**

This Agreement is made and entered into this 3rd day of February, 2025, by and between the Western Riverside Council of Governments, a California public agency ("WRCOG"), and Iteris, Inc., a Delaware corporation, ("Consultant"). WRCOG and Consultant are sometimes individually referred to as "Party" and collectively as "Parties."

**2. RECITALS.**

**2.1 Consultant.**

Consultant desires to perform and assume responsibility for the provision of certain on-call professional services required by WRCOG on the terms and conditions set forth in this Agreement. Consultant represents that it is experienced in providing on-call transportation planning and advisory services to public clients, is licensed in the State of California, and is familiar with the plans of WRCOG.

**2.2 Project.**

WRCOG desires to engage Consultant to render such professional services on an on-call basis. Services shall be authorized by task order(s) to be issued pursuant to this Agreement for future projects (each project shall be designated a "Project" as set forth in this Agreement).

**3. TERMS.**

**3.1 Scope of Services and Term.**

3.1.1 General Scope of Services. Consultant promises and agrees to furnish to WRCOG all labor, materials, tools, equipment, services, and incidental and customary work necessary to fully and adequately supply professional transportation planning and advisory services to WRCOG ("Services"). The Services are generally described in Exhibit "A" attached hereto and incorporated herein by reference, and which are stated in the proposal to WRCOG and approved by WRCOG's Executive Committee. The Services shall be more particularly described in the individual Task Order issued by WRCOG or its designee. No services shall be performed unless authorized by a fully executed Task Order in the form attached hereto as Exhibit "B." All Services shall be subject to, and performed in accordance with, this Agreement, the exhibits attached hereto and incorporated herein by reference, and all applicable local, state and federal laws, rules and regulations.

3.1.2 Term. The term of this Agreement shall be from December 20, 2024 to June 30, 2026 unless earlier terminated as provided herein. WRCOG shall have the unilateral option, at its sole discretion, to renew this Agreement automatically for no more than one additional one-year term. Consultant shall complete the Services within the term of this Agreement and shall meet any other established schedules and deadlines. The Parties may, by

mutual, written consent, extend the term of this Agreement if necessary to complete the Services.

### **3.2 Responsibilities of Consultant.**

**3.2.1 Control and Payment of Subordinates; Independent Contractor.** The Services shall be performed by Consultant or under its supervision. Consultant will determine the means, methods, and details of performing the Services subject to the requirements of this Agreement. WRCOG retains Consultant on an independent contractor basis and not as an employee. Consultant retains the right to perform similar or different services for others during the term of this Agreement. Any additional personnel performing the Services under this Agreement on behalf of Consultant shall also not be employees of WRCOG and shall at all times be under Consultant's exclusive direction and control. Consultant shall pay all wages, salaries, and other amounts due such personnel in connection with their performance of Services under this Agreement and as required by law. Consultant shall be responsible for all reports and obligations respecting such additional personnel, including, but not limited to, social security taxes, income tax withholding, unemployment insurance, disability insurance, and workers' compensation insurance.

**3.2.2 Schedule of Services.** Consultant shall perform the Services expeditiously, and within the term of this Agreement. Consultant shall meet any other established schedules and deadlines set forth in each individual Task Order issued by WRCOG. Consultant represents that it has the professional and technical personnel required to perform the Services in conformance with such conditions. In order to facilitate Consultant's conformance with the Schedule, WRCOG shall respond to Consultant's submittals in a timely manner. Upon request of WRCOG, Consultant shall provide a more detailed schedule of anticipated performance to meet the Schedule of Services.

**3.2.3 Conformance to Applicable Requirements.** All work prepared by Consultant shall be subject to the approval of WRCOG.

**3.2.4 Substitution of Key Personnel.** Consultant has represented to WRCOG that certain key personnel will perform and coordinate the Services under this Agreement. Should one or more of such personnel become unavailable, Consultant may substitute other personnel of at least equal competence upon written approval of WRCOG. In the event that WRCOG and Consultant cannot agree as to the substitution of key personnel, WRCOG shall be entitled to terminate this Agreement for cause. As discussed below, any personnel who fail or refuse to perform the Services in a manner acceptable to WRCOG, or who are determined by the WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, or a threat to the safety of persons or property, shall be promptly removed from the Project by the Consultant at the request of the WRCOG. The key personnel for performance of this Agreement are as follows:

**Viggen Davidian, P.E.**

**3.2.5 WRCOG's Representative.** WRCOG hereby designates **Christopher Gray, Deputy Executive Director**, or his or her designee, to act as its representative for the performance of this Agreement ("WRCOG's Representative"). WRCOG's Representative shall have the power to act on behalf of WRCOG for all purposes under this Contract. Consultant shall not accept direction or orders from any person other than WRCOG's Representative or his or her designee.

3.2.6 Consultant's Representative. Consultant hereby designates **Steven Bradley, Regional Vice President**, or his or her designee, to act as its Representative for the performance of this Agreement ("Consultant's Representative"). Consultant's Representative shall have full authority to represent and act on behalf of the Consultant for all purposes under this Agreement. The Consultant's Representative shall supervise and direct the Services, using his best skill and attention, and shall be responsible for all means, methods, techniques, sequences, and procedures, and for the satisfactory coordination of all portions of the Services under this Agreement.

3.2.7 Coordination of Services. Consultant agrees to work closely with WRCOG staff in the performance of Services and shall be available to WRCOG's staff, consultants, and other staff at all reasonable times.

3.2.8 Standard of Care; Performance of Employees. Consultant shall perform all Services under this Agreement in a skillful and competent manner, consistent with the standards generally recognized as being employed by professionals in the same discipline in the State of California. Consultant represents and maintains that it is skilled in the professional calling necessary to perform the Services. Consultant warrants that all employees and sub- contractors shall have sufficient skill and experience to perform the Services assigned to them. Finally, Consultant represents that it, its employees, and sub-contractors have all licenses, permits, qualifications, and approvals of whatever nature that are legally required to perform the Services, and that such licenses and approvals shall be maintained throughout the term of this Agreement. As provided for in the indemnification provisions of this Agreement, Consultant shall perform, at its own cost and expense, and without reimbursement from WRCOG, any services necessary to correct errors or omissions which are caused by the Consultant's failure to comply with the standard of care provided for herein. Any employee of the Consultant or its sub-consultants who is determined by WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, a threat to the safety of persons or property, or any employee who fails or refuses to perform the Services in a manner acceptable to WRCOG, shall be promptly removed from the Project by the Consultant and shall not be re-employed to perform any of the Services or to work on the Project.

3.2.9 Laws and Regulations. Consultant shall keep itself fully informed of and in compliance with all local, state and federal laws, rules and regulations in any manner affecting the performance of the Project or the Services, including all Cal OSHA requirements, and shall give all notices required by law. Consultant shall be liable for all violations of such laws and regulations in connection with Services. If the Consultant performs any work knowing it to be contrary to such laws, rules, and/or regulations, and without giving written notice to WRCOG, Consultant shall be solely responsible for all costs arising therefrom. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers, and agents free and harmless, pursuant to the indemnification provisions of this Agreement, from any claim or liability arising out of any failure or alleged failure to comply with such laws, rules or regulations.

#### 3.2.10 Insurance.

3.2.10.1 Time for Compliance. Consultant shall not commence the Services under this Agreement until it has provided evidence satisfactory to WRCOG that it has secured all insurance required under this section, in a form and with insurance companies acceptable to WRCOG. In addition, Consultant shall not allow any sub-contractor to commence work on any subcontract until it has provided evidence satisfactory to WRCOG that the sub-contractor has secured all insurance required under this section.

3.2.10.2 Minimum Requirements. Consultant shall, at its expense, procure and maintain for the duration of the Agreement, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Agreement by the Consultant, its agents, representatives, employees or sub-contractors. Consultant shall also require all of its sub-contractors to procure and maintain the same insurance for the duration of the Agreement. Such insurance shall meet at least the following minimum levels of coverage:

(A) Minimum Scope of Insurance. Coverage shall be at least as broad as the latest version of the following: (1) *General Liability*: Insurance Services Office Commercial General Liability coverage (occurrence form CG 0001 or exact equivalent); (2) *Automobile Liability*: Insurance Services Office Business Auto Coverage (form CA 0001, code 1 (any auto) or exact equivalent); and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

(B) Minimum Limits of Insurance. Consultant shall maintain limits no less than: (1) *General Liability*: \$2,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with general aggregate limit is used, either the general aggregate limit shall apply separately to this Agreement / location or the general aggregate limit shall be twice the required occurrence limit; (2) *Automobile Liability*: \$1,000,000 per accident for bodily injury and property damage; and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation limits as required by the Labor Code of the State of California. Employer's Liability limits of \$1,000,000 per accident for bodily injury or disease.

3.2.10.3 Professional Liability. Consultant shall procure and maintain, and require its sub-consultants to procure and maintain, for a period of five (5) years following completion of the Services, errors and omissions liability insurance appropriate to their profession. Such insurance shall be in an amount not less than \$2,000,000 per claim. This insurance shall be endorsed to include contractual liability applicable to this Agreement and shall be written on a policy form coverage specifically designed to protect against acts, errors, or omissions of the Consultant. "Covered Professional Services" as designated in the policy must specifically include work performed under this Agreement. The policy must "pay on behalf of" the insured and must include a provision establishing the insurer's duty to defend.

3.2.10.4 Insurance Endorsements. The insurance policies shall contain the following provisions, or Consultant shall provide endorsements on forms supplied or approved by WRCOG to add the following provisions to the insurance policies:

(A) General Liability.

(i) Commercial General Liability Insurance must include coverage for (1) Bodily Injury and Property Damage; (2) Personal Injury / Advertising Injury; (3) Premises / Operations Liability; (4) Products / Completed Operations Liability; (5) Aggregate Limits that Apply per Project; (6) Explosion, Collapse and Underground (UCX) exclusion deleted; (7) Contractual Liability with respect to this Agreement; (8) Broad Form Property Damage; and (9) Independent Consultants Coverage.

(ii) The policy shall contain no endorsements or provisions limiting coverage for (1) contractual liability; (2) cross liability exclusion for claims or suits by one insured against another; or (3) contain any other exclusion contrary to the Agreement.

(iii) The policy shall give WRCOG, its Directors, officials, officers, employees, volunteers and agents insured status using ISO endorsement forms 20 10 01 and 20 37 10 01, or endorsements providing the exact same coverage.

(iv) The additional insured coverage under the policy shall be "primary and non-contributory" and will not seek contribution from WRCOG's insurance or self-insurance and shall be at least as broad as CG 20 01 04 13, or endorsements providing the exact same coverage.

(B) Automobile Liability.

(i) The automobile liability policy shall be endorsed to state that: (1) WRCOG, its Directors, officials, officers, employees, agents and volunteers shall be covered as additional insureds with respect to the ownership, operation, maintenance, use, loading or unloading of any auto owned, leased, hired, or borrowed by the Consultant or for which the Consultant is responsible; and (2) the insurance coverage shall be primary insurance as respects WRCOG, its Directors, officials, officers, employees, agents, and volunteers, or if excess, shall stand in an unbroken chain of coverage excess of the Consultant's scheduled underlying coverage. Any insurance or self-insurance maintained by WRCOG, its Directors, officials, officers, employees, agents, and volunteers shall be in excess of the Consultant's insurance and shall not be called upon to contribute with it in any way.

(C) Workers' Compensation and Employers Liability Coverage.

(i) Consultant certifies that he/she is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and he/she will comply with such provisions before commencing work under this Agreement.

(ii) The insurer shall agree to waive all rights of subrogation against WRCOG, its Directors, officials, officers, employees, agents, and volunteers for losses paid under the terms of the insurance policy which arise from work performed by the Consultant.

(D) All Coverages. Defense costs shall be payable in addition to the limits set forth hereunder. Requirements of specific coverage or limits contained in this section are not intended as a limitation on coverage, limits, or other requirement, or a waiver of any coverage normally provided by any insurance. It shall be a requirement under this Agreement that any available insurance proceeds broader than or in excess of the specified minimum insurance coverage requirements and/or limits set forth herein shall be available to WRCOG, its Directors, officials, officers, employees, volunteers and agents as additional insureds under said policies. Furthermore, the requirements for coverage and limits shall be (1) the minimum coverage and limits specified in this Agreement; or (2) the broader coverage and maximum limits of coverage of any Insurance policy or proceeds available to the named insured; whichever is greater.

(i) The limits of insurance required in this Agreement may be satisfied by a combination of primary and umbrella or excess insurance. Any umbrella or excess insurance shall contain or be endorsed to contain a provision that such coverage shall

also apply on a primary and non-contributory basis for the benefit of WRCOG (if agreed to in a written contract or agreement) before WRCOG's own insurance or self-insurance shall be called upon to protect it as a named insured. The umbrella / excess policy shall be provided on a "following form" basis with coverage at least as broad as provided on the underlying policy(ies).

(ii) Consultant shall provide WRCOG at least thirty (30) days prior written notice of cancellation of any policy required by this Agreement, except that the Consultant shall provide at least ten (10) days prior written notice of cancellation of any such policy due to non-payment of premium. If any of the required coverage is cancelled or expires during the term of this Agreement, the Consultant shall deliver renewal certificate(s) including the General Liability Additional Insured Endorsement to WRCOG at least ten (10) days prior to the effective date of cancellation or expiration.

(iii) The retroactive date (if any) of each policy is to be no later than the effective date of this Agreement. Consultant shall maintain such coverage continuously for a period of at least three years after the completion of the work under this Agreement. Consultant shall purchase a one (1) year extended reporting period A) if the retroactive date is advanced past the effective date of this Agreement; B) if the policy is cancelled or not renewed; or C) if the policy is replaced by another claims-made policy with a retroactive date subsequent to the effective date of this Agreement.

(iv) The foregoing requirements as to the types and limits of insurance coverage to be maintained by Consultant, and any approval of said insurance by WRCOG, is not intended to and shall not in any manner limit or qualify the liabilities and obligations otherwise assumed by the Consultant pursuant to this Agreement, including but not limited to, the provisions concerning indemnification.

(v) If at any time during the life of the Agreement, any policy of insurance required under this Agreement does not comply with these specifications or is canceled and not replaced, WRCOG has the right but not the duty to obtain the insurance it deems necessary, and any premium paid by WRCOG will be promptly reimbursed by Consultant or WRCOG will withhold amounts sufficient to pay premium from Consultant payments. In the alternative, WRCOG may cancel this Agreement. WRCOG may require the Consultant to provide complete copies of all insurance policies in effect for the duration of the Project.

(vi) Neither WRCOG nor any of its Directors, officials, officers, employees, volunteers, or agents shall be personally responsible for any liability arising under or by virtue of this Agreement.

3.2.10.5 Separation of Insureds; No Special Limitations. All insurance required by this Section shall contain standard separation of insureds provisions. In addition, such insurance shall not contain any special limitations on the scope of protection afforded to WRCOG, its Directors, officials, officers, employees, agents, and volunteers.

3.2.10.6 Deductibles and Self-Insurance Retentions. Any deductibles or self-insured retentions must be declared to and approved by WRCOG. Consultant shall guarantee that, at the option of WRCOG, either: (1) the insurer shall reduce or eliminate such deductibles or self-insured retentions as respects WRCOG, its Directors, officials, officers, employees, agents, and volunteers; or (2) the Consultant shall procure a bond guaranteeing payment of losses and related investigation costs, claims, and administrative and defense expenses.



3.2.10.7 Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, licensed to do business in California, and satisfactory to WRCOG.

3.2.10.8 Verification of Coverage. Consultant shall furnish WRCOG with original certificates of insurance and endorsements effecting coverage required by this Agreement on forms satisfactory to WRCOG. The certificates and endorsements for each insurance policy shall be signed by a person authorized by that insurer to bind coverage on its behalf and shall be on forms provided by WRCOG if requested. All certificates and endorsements must be received and approved by WRCOG before work commences. WRCOG reserves the right to require complete, certified copies of all required insurance policies, at any time.

3.2.10.9 Sub-consultant Insurance Requirements. Consultant shall not allow any sub-contractors or sub-consultants to commence work on any sub-contract until they have provided evidence satisfactory to WRCOG that they have secured all insurance required under this section. Policies of commercial general liability insurance provided by such sub-contractors or sub-consultants shall be endorsed to name WRCOG as an additional insured using ISO Form CG 20 38 04 13 or an endorsement providing the exact same coverage. If requested by Consultant, WRCOG may approve different scopes or minimum limits of insurance for particular sub-contractors or sub-consultants.

3.2.11 Safety. Consultant shall execute and maintain its work so as to avoid injury or damage to any person or property. In carrying out its Services, the Consultant shall at all times be in compliance with all applicable local, state, and federal laws, rules, and regulations, and shall exercise all necessary precautions for the safety of employees appropriate to the nature of the work and the conditions under which the work is to be performed. Safety precautions as applicable shall include, but shall not be limited to: (A) adequate life protection and life-saving equipment and procedures; (B) instructions in accident prevention for all employees and sub-contractors, such as safe walkways, scaffolds, fall protection ladders, bridges, gang planks, confined space procedures, trenching and shoring, equipment, and other safety devices, equipment and wearing apparel as are necessary or lawfully required to prevent accidents or injuries; and (C) adequate facilities for the proper inspection and maintenance of all safety measures.

### 3.3 Fees and Payments.

3.3.1 Compensation. Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Agreement at the rates set forth in Exhibit" C" attached hereto and incorporated herein by reference. The maximum compensation for Services to be provided pursuant to each Task Order shall be set forth in the relevant Task Order. The total compensation for all Task Orders issued hereunder shall not exceed **One-Hundred Fifty Thousand Dollars (\$150,000)** without written approval of WRCOG, as applicable. Extra Work may be authorized, as described below, and if authorized, will be compensated at the rates and manner set forth in this Agreement.

3.3.2 Payment of Compensation. Consultant shall submit to WRCOG a monthly itemized statement which indicates work completed and hours of Services rendered by Consultant. The statement shall contain the invoice number and date; remittance address; Agreement number **2025-65-1148-001**, and invoice total. The statement shall describe the amount of Services and supplies provided since the initial commencement date, or since the start

of the subsequent billing periods, as appropriate, through the date of the statement. WRCOG shall, within 45 days of receiving such statement, review the statement and pay all approved charges thereon.

3.3.3 Reimbursement for Expenses. Consultant shall not be reimbursed for any expenses unless authorized in writing by WRCOG.

3.3.4 Extra Work. At any time during the term of this Agreement, WRCOG may request that Consultant perform Extra Work. As used herein, "Extra Work" means any work which is determined by WRCOG to be necessary for the proper completion of the Project, but which the Parties did not reasonably anticipate would be necessary at the execution of this Agreement. Consultant shall not perform, nor be compensated for, Extra Work without written authorization from WRCOG's Representative.

3.3.5 Prevailing Wages. Consultant is aware of the requirements of California Labor Code Sections 1720, et seq., and 1770, et seq., as well as California Code of Regulations, Title 8, Section 16000, et seq., ("Prevailing Wage Laws"), which require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects. If the Services are being performed as part of an applicable "public works" or "maintenance" project, as defined by the Prevailing Wage Laws, and if the total compensation is \$1,000 or more, Consultant agrees to fully comply with such Prevailing Wage Laws. WRCOG shall provide Consultant with a copy of the prevailing rates of per diem wages in effect at the commencement of this Agreement. Consultant shall make copies of the prevailing rates of per diem wages for each craft, classification, or type of worker needed to execute the Services available to interested parties upon request, and post copies at the Consultant's principal place of business and at the project site. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers, and agents free and harmless from any claims, liabilities, costs, penalties or interest arising out of any failure or alleged failure to comply with the Prevailing Wage Laws.

### **3.4 Accounting Records.**

3.4.1 Maintenance and Inspection. Consultant shall maintain complete and accurate records with respect to all costs and expenses incurred under this Agreement. All such records shall be clearly identifiable. Consultant shall allow a representative of WRCOG during normal business hours to examine, audit, and make transcripts or copies of such records and any other documents created pursuant to this Agreement. Consultant shall allow inspection of all work, data, documents, proceedings, and activities related to the Agreement for a period of three (3) years from the date of final payment under this Agreement.

### **3.5 General Provisions.**

#### **3.5.1 Termination of Agreement.**

3.5.1.1 Grounds for Termination. WRCOG may, by written notice to Consultant, terminate the whole or any part of this Agreement at any time and without cause by giving written notice to Consultant of such termination, and specifying the effective date thereof, at least seven (7) days before the effective date of such termination. Upon termination, Consultant shall be compensated only for those services which have been adequately rendered to WRCOG, and Consultant shall be entitled to no further compensation. Consultant may not terminate this Agreement except for cause.

**3.5.1.2 Effect of Termination.** If this Agreement is terminated as provided herein, WRCOG may require Consultant to provide all finished or unfinished Documents and Data and other information of any kind prepared by Consultant in connection with the performance of Services under this Agreement. Consultant shall be required to provide such documents and other information within fifteen (15) days of the request.

**3.5.1.3 Additional Services.** In the event this Agreement is terminated in whole or in part as provided herein, WRCOG may procure, upon such terms and in such manner as it may determine appropriate, services similar to those terminated.

**3.5.2 Delivery of Notices.** All notices permitted or required under this Agreement shall be given to the respective Parties at the following address, or at such other address as the respective parties may provide in writing for this purpose:

**Consultant: Iteris, Inc.  
1700 Carnegie Ave.  
Santa Ana, CA 92705  
Attn: Iteris Legal Department**

**WRCOG: Western Riverside Council of Governments  
3390 University Avenue, Suite 200  
Riverside, CA 92501  
Attn: Christopher Gray**

Such notice shall be deemed made when personally delivered or when mailed, forty-eight (48) hours after deposit in the U.S. Mail, first class postage prepaid and addressed to the Party at its applicable address. Actual notice shall be deemed adequate notice on the date actual notice occurred, regardless of the method of service.

### **3.5.3 Ownership of Materials and Confidentiality.**

**3.5.3.1 Documents & Data; Licensing of Intellectual Property.** This Agreement creates a non-exclusive and perpetual license for WRCOG to copy, use, modify, reuse, or sub-license any and all copyrights, designs, and other intellectual property embodied in plans, specifications, studies, drawings, estimates, and other documents or works of authorship fixed in any tangible medium of expression, including but not limited to, physical drawings or data magnetically or otherwise recorded on computer diskettes, which are prepared or caused to be prepared by Consultant under this Agreement ("Documents & Data"). Consultant shall require all sub-contractors to agree in writing that WRCOG is granted a non-exclusive and perpetual license for any Documents & Data the sub-contractor prepares under this Agreement. Consultant represents and warrants that Consultant has the legal right to license any and all Documents & Data. Consultant makes no such representation and warranty in regard to Documents & Data which were prepared by design professionals other than Consultant or provided to Consultant by WRCOG. WRCOG shall not be limited in any way in its use of the Documents & Data at any time, provided that any such use not within the purposes intended by this Agreement shall be at WRCOG's sole risk.

**3.5.3.2 Intellectual Property.** In addition, WRCOG shall have and retain all right, title, and interest (including copyright, patent, trade secret, and other proprietary rights) in

all plans, specifications, studies, drawings, estimates, materials, data, computer programs or enhancements, documents, and any and all works of authorship fixed in any tangible medium or expression, including but not limited to, physical drawings or other data magnetically or otherwise recorded on computer media ("Intellectual Property") prepared or developed by or on behalf of Consultant under this Agreement as well as any other such Intellectual Property prepared or developed by or on behalf of Consultant under this Agreement.

WRCOG shall have and retain all right, title and interest in Intellectual Property developed or modified under this Agreement paid for wholly or in part by WRCOG. Consultant will execute separate written assignments of any and all rights to the above referenced Intellectual Property upon request of WRCOG.

Consultant shall also be responsible to obtain in writing separate written assignments from any sub-contractors or agents of Consultant of any and all right to the above referenced Intellectual Property. Should Consultant, either during or following termination of this Agreement, desire to use any of the above-referenced Intellectual Property, it shall first obtain the written approval of the WRCOG.

All materials and documents which were developed or prepared by the Consultant for general use prior to the execution of this Agreement and which are not the copyright of any other party or publicly available and any other computer applications, shall continue to be the property of the Consultant. However, unless otherwise identified and stated prior to execution of this Agreement, Consultant represents and warrants that it has the right to grant the exclusive and perpetual license for all such Intellectual Property as provided herein.

WRCOG further is granted by Consultant a non-exclusive and perpetual license to copy, use, modify or sub-license any and all Intellectual Property otherwise owned by Consultant which is the basis or foundation for any derivative, collective, insurrectional, or supplemental work created under this Agreement. Notwithstanding the foregoing, Consultant developed software prior to this Agreement is not included in this provision.

**3.5.3.3 Confidentiality.** All ideas, memoranda, specifications, plans, procedures, drawings, descriptions, computer program data, input record data, written information, and other Documents & Data either created by or provided to Consultant in connection with the performance of this Agreement shall be held confidential by Consultant. Such materials shall not, without the prior written consent of WRCOG, be used by Consultant for any purposes other than the performance of the Services. Nor shall such materials be disclosed to any person or entity not connected with the performance of the Services or the Project. Nothing furnished to Consultant which is otherwise known to Consultant or is generally known, or has become known, to the related industry shall be deemed confidential. Consultant shall not use WRCOG's name or insignia, photographs of the Project, or any publicity pertaining to the Services or the Project in any magazine, trade paper, newspaper, television, or radio production or other similar medium without the prior written consent of WRCOG.

**3.5.3.4 Infringement Indemnification.** Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers, and agents free and harmless, pursuant to the indemnification provisions of this Agreement, for any alleged infringement of any patent, copyright, trade secret, trade name, trademark, or any other proprietary right of any person or entity in consequence of the use on the Project by WRCOG of the Documents & Data, including any method, process, product, or concept specified or depicted.

3.5.4 Cooperation; Further Acts. The Parties shall fully cooperate with one another and shall take any additional acts or sign any additional documents as may be necessary, appropriate, or convenient to attain the purposes of this Agreement.

3.5.5 Attorney's Fees. If either Party commences an action against the other Party, either legal, administrative, or otherwise, arising out of or in connection with this Agreement, the prevailing party in such litigation shall be entitled to have and recover from the losing party reasonable attorney's fees and all other costs of such action.

3.5.6 Indemnification. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, consultants, employees, volunteers, and agents free and harmless from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury, in law or equity, to property or persons, including wrongful death, in any manner arising out of or incident to any alleged acts, omissions, or willful misconduct of Consultant, its officials, officers, employees, agents, consultants and contractors, arising out of or in connection with the performance of the Services, the Project or this Agreement, including without limitation the payment of all consequential damages and attorneys' fees and other related costs and expenses. Consultant shall defend, at Consultant's own cost, expense, and risk, any and all such aforesaid suits, actions, or other legal proceedings of every kind that may be brought or instituted against WRCOG, its Directors, officials, officers, consultants, employees, agents or volunteers. Consultant shall pay and satisfy any judgment, award, or decree that may be rendered against WRCOG or its Directors, officials, officers, consultants, employees, agents, or volunteers, in any such suit, action or other legal proceeding. Consultant shall reimburse WRCOG and its Directors, officials, officers, consultants, employees, agents, or volunteers, for any and all legal expenses and costs, including reasonable attorneys' fees, incurred by each of them in connection therewith or in enforcing the indemnity herein provided. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by WRCOG, its Directors, officials, officers, consultants, employees, agents, or volunteers. This section shall survive any expiration or termination of this Agreement. Notwithstanding the foregoing, to the extent Consultant's Services are subject to Civil Code Section 2782.8, the above indemnity shall be limited, to the extent required by Civil Code Section 2782.8, to claims that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant.

3.5.7 Entire Agreement. This Agreement contains the entire Agreement of the Parties with respect to the subject matter hereof, and supersedes all prior negotiations, understandings or agreements. This Agreement may only be modified by a writing signed by both Parties.

3.5.8 Governing Law. This Agreement shall be governed by the laws of the State of California. Venue shall be in Riverside County.

3.5.9 Time of Essence. Time is of the essence for each and every provision of this Agreement.

3.5.10 WRCOG's Right to Employ Other Consultants. WRCOG reserves the right to employ other consultants in connection with this Project.

3.5.11 Successors and Assigns. This Agreement shall be binding on the successors and assigns of the Parties.

3.5.12 Assignment or Transfer. Consultant shall not assign, hypothecate, or

transfer, either directly or by operation of law, this Agreement or any interest herein without the prior written consent of WRCOG. Any attempt to do so shall be null and void, and any assignees, hypothecates or transferees shall acquire no right or interest by reason of such attempted assignment, hypothecation or transfer.

3.5.13 Construction; References; Captions. Since the Parties or their agents have participated fully in the preparation of this Agreement, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any Party. Any term referencing time, days, or period for performance shall be deemed calendar days and not work days. All references to Consultant include all personnel, employees, agents, and sub-contractors of Consultant, except as otherwise specified in this Agreement. All references to WRCOG include its Directors, officials, officers, employees, agents, and volunteers except as otherwise specified in this Agreement. The captions of the various articles and paragraphs are for convenience and ease of reference only, and do not define, limit, augment, or describe the scope, content, or intent of this Agreement.

3.5.14 Amendment; Modification. No supplement, modification, or amendment of this Agreement shall be binding unless executed in writing and signed by both Parties.

3.5.15 Waiver. No waiver of any default shall constitute a waiver of any other default or breach, whether of the same or other covenant or condition. No waiver, benefit, privilege, or service voluntarily given or performed by a Party shall give the other Party any contractual rights by custom, estoppel, or otherwise.

3.5.16 No Third-Party Beneficiaries. There are no intended third-party beneficiaries of any right or obligation assumed by the Parties.

3.5.17 Invalidity; Severability. If any portion of this Agreement is declared invalid, illegal, or otherwise unenforceable by a court of competent jurisdiction, the remaining provisions shall continue in full force and effect.

3.5.18 Prohibited Interests. Consultant maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement. Further, Consultant warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, brokerage fee, gift, or other consideration contingent upon or resulting from the award or making of this Agreement. For breach or violation of this warranty, WRCOG shall have the right to rescind this Agreement without liability. For the term of this Agreement, no member, Director, officer, official, agent volunteer, or employee of WRCOG, during the term of his or her service with WRCOG, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

3.5.19 Equal Opportunity Employment. Consultant represents that it is an equal opportunity employer, and it shall not discriminate against any sub-contractor, employee, or applicant for employment because of race, religion, color, national origin, handicap, ancestry, sex, or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff, or termination. Consultant shall also comply with all relevant provisions of any of WRCOG's Minority Business Enterprise Program, Affirmative Action Plan, or other related programs or guidelines currently in effect or hereinafter enacted.

3.5.20 Labor Certification. By its signature hereunder, Consultant certifies that it is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Workers' Compensation, or to undertake self-insurance in accordance with the provisions of that Code, and agrees to comply with such provisions before commencing the performance of the Services.

3.5.21 Authority to Enter Agreement. Consultant has all requisite power and authority to conduct its business and to execute, deliver, and perform the Agreement. Each Party warrants that the individuals who have signed this Agreement have the legal power, right, and authority to make this Agreement and bind each respective Party.

3.5.22 Counterparts. This Agreement may be signed in counterparts, each of which shall constitute an original.

### 3.6 Subcontracting.

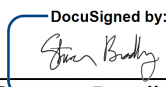
3.6.1 Prior Approval Required. Consultant shall not subcontract any portion of the work required by this Agreement, except as expressly stated herein, without prior written approval of WRCOG. Subcontracts, if any, shall contain a provision making them subject to all provisions stipulated in this Agreement.

IN WITNESS WHEREOF, the Parties hereby have made and executed this Agreement as of the date first written above.

WESTERN RIVERSIDE COUNCIL  
OF GOVERNMENTS

ITERIS, INC.

By: \_\_\_\_\_  
Dr. Kurt Wilson

By:  \_\_\_\_\_  
Steven Bradley

Title: Executive Director

Title: Regional Vice President

APPROVED AS TO FORM:

ATTEST:

By: \_\_\_\_\_  
Its General Counsel  
Best Best & Krieger LLP

By:  \_\_\_\_\_  
8046C2DF9B714F0...  
Vice President, Legal

\*A corporation requires the signatures of two corporate officers.

One signature shall be that of the Chairman of Board, the President or any Vice President, and the second signature (on the attest line) shall be that of the Secretary, any Assistant Secretary, the Chief Financial Officer or any Assistant Treasurer of such corporation.

If the above persons are not the intended signators, evidence of signature authority shall be provided to WRCOG.

**EXHIBIT “A”**  
**SCOPE OF SERVICES**

**[INSERT]**



**EXHIBIT "B"**

**SAMPLE TASK ORDER FORM**

Task Order No. \_\_\_\_\_

Agreement: [INSERT TITLE OF AGREEMENT]

Consultant: [INSERT NAME OF CONSULTANT]

**The Consultant is hereby authorized to perform the following services subject to the provisions of the Agreement identified above:**

**List any attachments:** (Please provide if any.)

**Dollar Amount of Task Order:** Not to exceed \$\_\_\_\_\_,\_\_\_\_\_.00

**Completion Date:** \_\_\_\_\_

The undersigned Consultant hereby agrees that it will provide all equipment, furnish all materials, except as may be otherwise noted above, and perform all services for the work above specified in accordance with the Agreement identified above and will accept as full payment therefore the amount shown above.

**City of** \_\_\_\_\_

[INSERT NAME OF CONSULTANT]

Dated: \_\_\_\_\_

Dated: \_\_\_\_\_

By: \_\_\_\_\_

By: \_\_\_\_\_

**EXHIBIT “C”**  
**COMPENSATION**  
**BILLING RATES**

| <b><u>Name</u></b> | <b><u>Title</u></b> | <b><u>Hourly Rate</u></b> |
|--------------------|---------------------|---------------------------|
|--------------------|---------------------|---------------------------|

**[INSERT]**

# Attachment

First Amendment to On-Call  
Professional Services Agreement  
between WRCOG and Fehr & Peers

**FIRST AMENDMENT TO  
PROFESSIONAL SERVICES AGREEMENT  
BETWEEN  
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS  
AND  
FEHR & PEERS**

**1. PARTIES AND DATE.**

This First Amendment is made and entered into this 3rd day of February, 2025, by and between the Western Riverside Council of Governments, a California public agency ("WRCOG") and Fehr and Peers, a California Sub Chapter S-Corporation ("Consultant"). WRCOG and Consultant are sometimes individually referred to as "Party" and collectively as "Parties."

**2. RECITALS.**

**2.1 Master Agreement.**

WRCOG and Consultant have entered into that certain Professional Services Agreement dated June 6, 2022 ("Master Agreement").

**2.2 First Amendment.**

WRCOG and Consultant desire to enter into this First Amendment for the purposes of providing additional compensation for Services.

**3. TERMS.**

**3.1 Additional Compensation.** Section 3.3.1 of the Master Agreement is hereby deleted and replaced as follows:

"Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Agreement at the rates set forth in Exhibit "C" attached hereto and incorporated herein by reference. The maximum compensation for Services to be provided pursuant to each Task Order shall be set forth in the relevant Task Order. The total compensation for all Task Orders issued hereunder shall not exceed **Five Hundred Fifty Thousand Dollars (\$550,000)** without written approval of WRCOG, as applicable. Extra work may be authorized, as described below, and if authorized, will be compensated at the rates and manner set forth in this Agreement."

**3.2 Continuation of Existing Provisions.**

Except as amended by this First Amendment, all provisions of the Master Agreement, including without limitation the indemnity and insurance provisions, shall remain in full force and effect and shall govern the actions of the Parties under this First Amendment.

### **3.3 Counterparts.**

This First Amendment may be executed in duplicate originals, each of which is deemed to be an original, but when taken together shall constitute one instrument.

### **3.4 Electronic Delivery of Amendment; Electronic Signatures.**

A manually signed copy of this First Amendment which is transmitted by facsimile, email or other means of electronic transmission shall be deemed to have the same legal effect as delivery of an original executed copy of this First Amendment for all purposes. This First Amendment may be signed using an electronic signature.

**[Signatures on the following page]**

**SIGNATURE PAGE TO  
FIRST AMENDMENT TO  
PROFESSIONAL SERVICES AGREEMENT  
BETWEEN  
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS  
AND  
FEHR & PEERS**

IN WITNESS WHEREOF, the Parties hereto have made and executed this First Amendment as of the date first written above.

**WRCOG**

WESTERN RIVERSIDE COUNCIL  
OF GOVERNMENTS

By: \_\_\_\_\_  
Dr. Kurt Wilson  
Executive Director

**CONSULTANT**

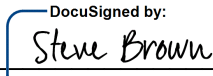
FEHR & PEERS  
a California Sub Chapter S-Corporation

By:  \_\_\_\_\_  
Chris Mitchell  
President

**APPROVED AS TO FORM:**

By: \_\_\_\_\_  
General Counsel  
Best Best & Krieger LLP

**ATTEST:**

By:  \_\_\_\_\_  
Steven J. Brown  
Senior Vice President

# Attachment

First Amendment to On-Call  
Professional Services Agreement  
between WRCOG and Michael Baker  
International

**FIRST AMENDMENT TO  
PROFESSIONAL SERVICES AGREEMENT  
BETWEEN  
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS  
AND  
MICHAEL BAKER INTERNATIONAL, INC.**

**1. PARTIES AND DATE.**

This First Amendment is made and entered into this 3rd day of February, 2025, by and between the Western Riverside Council of Governments, a California public agency ("WRCOG") and Michael Baker International, Inc., a Pennsylvania C-Corporation ("Consultant"). WRCOG and Consultant are sometimes individually referred to as "Party" and collectively as "Parties."

**2. RECITALS.**

**2.1 Master Agreement.**

WRCOG and Consultant have entered into that certain Professional Services Agreement dated June 29, 2022 ("Master Agreement").

**2.2 First Amendment.**

WRCOG and Consultant desire to enter into this First Amendment for the purposes of providing additional compensation for Services.

**3. TERMS.**

**3.1 Additional Compensation.** Section 3.3.1 of the Master Agreement is hereby deleted and replaced as follows:

"Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Agreement at the rates set forth in Exhibit "C" attached hereto and incorporated herein by reference. The maximum compensation for Services to be provided pursuant to each Task Order shall be set forth in the relevant Task Order. The total compensation for all Task Orders issued hereunder shall not exceed **Four Hundred Thousand Dollars (\$400,000)** without written approval of WRCOG, as applicable. Extra work may be authorized, as described below, and if authorized, will be compensated at the rates and manner set forth in this Agreement."

**3.2 Continuation of Existing Provisions.**

Except as amended by this First Amendment, all provisions of the Master Agreement, including without limitation the indemnity and insurance provisions, shall remain in full force and effect and shall govern the actions of the Parties under this First Amendment.



### **3.3 Counterparts.**

This First Amendment may be executed in duplicate originals, each of which is deemed to be an original, but when taken together shall constitute one instrument.

### **3.4 Electronic Delivery of Amendment; Electronic Signatures.**

A manually signed copy of this First Amendment which is transmitted by facsimile, email or other means of electronic transmission shall be deemed to have the same legal effect as delivery of an original executed copy of this First Amendment for all purposes. This First Amendment may be signed using an electronic signature.

**[Signatures on the following page]**

**SIGNATURE PAGE TO  
FIRST AMENDMENT TO  
PROFESSIONAL SERVICES AGREEMENT  
BETWEEN  
WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS  
AND  
MICHAEL BAKER INTERNATIONAL, INC.**

IN WITNESS WHEREOF, the Parties hereto have made and executed this First Amendment as of the date first written above.

**WRCOG**

WESTERN RIVERSIDE COUNCIL  
OF GOVERNMENTS

By: \_\_\_\_\_  
Dr. Kurt Wilson  
Executive Director

**CONSULTANT**

MICHAEL BAKER INTERNATIONAL,  
INC.  
a Pennsylvania C-Corporation

Signed by:  
By: Christopher Alberts  
Christopher Alberts  
Vice President / Office Executive

Approved to Form:

By: \_\_\_\_\_  
Steven C. DeBaun  
General Counsel



# Western Riverside Council of Governments

## WRCOG Executive Committee

### Staff Report

**Subject:** Fiscal Activities Update and Mid-Year Budget Amendment  
**Contact:** Andrew Ruiz, Chief Financial Officer, [aruiz@wrcog.us](mailto:aruiz@wrcog.us), (951) 405-6741  
**Date:** February 3, 2025

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#### **Recommended Action(s):**

1. Approve the Fiscal Year 2024/2025 Mid-Year Budget Amendment.
- 

#### **Summary:**

The Finance Department has completed the Fiscal Year 2023/2024 audit with an unmodified opinion, indicating no findings or concerns. Additionally, the mid-year budget review identified four budget items with revenue or expenditure levels different from the adopted levels, primarily due to new funding sources and lower-than-expected activity in the Inland Regional Energy Network (I-REN) Program. To ensure the budget accurately reflects our most current estimates of revenues and expenditures, a series of budget amendments are recommended. The combined revenue decreases equal \$1,482,865 and the combined expenditure decreases equal \$1,505,555 for a net decrease in expenditures of \$22,690.

#### **Purpose / WRCOG 2022-2027 Strategic Plan Goal:**

The purpose of this item is to provide information regarding Finance Department activities and to request approval of a mid-year budget amendment. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #3 (Ensure fiscal solvency and stability of the Western Riverside Council of Governments).

#### **Discussion:**

#### **Background**

The Finance Department provides regular updates to WRCOG Committees regarding the financial status of WRCOG and also provides summaries of on-going activities that might be of interest to member agencies. The financial reports document Agency revenues and expenditures through the current fiscal year, as reported by various programs, funds, and other administrative divisions. On-going activities include the preparation of the Agency audit, budget amendments, and preparation of the WRCOG budget for consideration and approval by WRCOG Committees.

The WRCOG annual budget is adopted prior to the start of each fiscal year. It reflects the anticipated revenue and spending levels of each fund based on information known at the time. Throughout the year,

staff tracks actual revenues and expenditures and compares them to the levels projected when the budget was adopted. The mid-year budget amendment process reflects updated assumptions for each fund.

## **Present Situation**

### **Mid-year Budget Amendment:**

**Inland Regional Energy Network (I-REN) Program:** The I-REN budget is fully funded by the California Public Utilities Commission for a 6-year total of \$65,577,932. Each fiscal year, some portion of that total is budgeted with the balance carrying forward throughout the 6-year period. For Fiscal Year 2024/2025, I-REN had a budget of approximately \$10.5M, spread across three sectors: 1) Public, 2) Workforce, Education & Training, and 3) Codes & Standards. Through December 2024, approximately \$2.6M in expenses have been incurred. The rate of spending continues to increase as the Program matures; however, the anticipated expenses across several categories in the current fiscal year budget are expected to be less than the budgeted amount by \$2,120,300. The deferred funds must be spent by 2027.

**Clean Cities Program:** The Clean Cities Program is projected to increase revenues by \$42,690, primarily due to the addition of the Cities of Norco and Riverside. Additionally, the Department of Energy has increased its funding by \$1,750 beyond the originally budgeted amount. On the expenditure side, legal costs associated with the California Air Resources Board grant are estimated to be approximately \$15,000, while consulting costs related to the grant are expected to add another \$5,000, for a total of \$20,000.

**Regional Energy Pathways (REP) Program:** The Regional Energy Pathways (REP) Program will see an increase in both revenues and expenditures by \$43,999, reflecting a rollover of unspent funds from Fiscal Year 2023/2024. The agreement with SoCal Gas is scheduled to conclude at the end of Fiscal Year 2024/2025.

**Regional Early Action Planning (REAP) Program:** In January 2024, Governor Newsom released the State budget proposal, which included several cuts to housing programs, including REAP 2.0. Due to the uncertainty at the time, REAP 2.0 funding was excluded from the Fiscal Year 2024/2025 budget. However, funding has since been restored, and WRCOG will proceed with providing assistance to the subregion's local jurisdictions beginning this fiscal year. A total of \$1.6M will be awarded to WRCOG for the grant, with \$550,746 in revenues and expenditures allocated for Fiscal Year 2024/2025 and the remainder for Fiscal Year 2025/2026.

In total, the proposed amendment package includes a \$594,745 increase in revenues and expenditures to WRCOG's General Fund (110). It also includes an increase of \$42,690 in revenues and \$20,000 expenditures in the Clean Cities Fund (120). There would be a decrease of \$2,120,300 in revenues and expenditures in the I-REN Fund (180). In total, the Agency budget will have a combined decrease in revenues of \$1,482,865 and the combined expenditure decreases equal \$1,505,555 for a net decrease in expenditures of \$22,690.

**Fiscal Year 2023/2024 Year-End Close:** The Fiscal Year 2023/2024 audit was successfully completed in December 2024 and received an unmodified opinion, indicating no findings or issues of concern were identified. Completing the audit within six months after the fiscal year-end is considered "on time" by the

Government Finance Officers Association (GFOA), marking the first time in five years that the Agency has achieved this milestone. The Agency has also applied for the GFOA Award for Excellence in Financial Reporting.

### **Financial Documents**

All of WRCOG's most recent financial statements, budget, monthly financials, amendments, etc., are located on the Agency's Fiscal Department's webpage [here](#).

### **Prior Action(s):**

None.

### **Financial Summary:**

Fiscal Department activities are included in the Agency's adopted Fiscal Year 2024/2025 Budget under the Finance Department under Fund 110. With respect to the budget amendment, in total, there will be a \$594,745 increase in revenues and expenditures to WRCOG's General Fund (110). It also includes an increase of \$42,690 in revenues and \$20,000 in expenditures in the Clean Cities Fund (120). There would be a decrease of \$2,120,300 in revenues and expenditures in the I-REN Fund (180). In total, the Agency budget will have a combined decrease in revenues of \$1,482,865 and the combined expenditure decreases equal \$1,505,555, for a net decrease in expenditures of \$22,690.

### **Attachment(s):**

[Attachment 1 - Fiscal Year 2024/2025 Mid-Year Budget Amendment](#)

# Attachment 1

WRCOG Fiscal Year  
2024/2025 Mid Year Budget  
Amendment

Western Riverside Council of Governments  
Fiscal Year 2024/2025 Mid-Year Budget Amendment  
As of December 31, 2024

| Fund                  | Dept | Account | Project | Description                      | Actual            | FY 25 Budget      | Variance          | Amendment        | New Budget        |
|-----------------------|------|---------|---------|----------------------------------|-------------------|-------------------|-------------------|------------------|-------------------|
|                       |      |         |         |                                  | Clean Cities      |                   |                   |                  |                   |
|                       |      |         |         |                                  | <b>Revenues</b>   |                   |                   |                  |                   |
| 120                   | 80   | 41402   | 1010    | Air Quality - Other Reimburse    | \$ 314,642        | \$ 491,120        | \$ 176,478        | \$ 42,690        | \$ 533,810        |
| <b>Total Revenues</b> |      |         |         |                                  | <b>\$ 314,642</b> | <b>\$ 491,120</b> | <b>\$ 176,478</b> | <b>\$ 42,690</b> | <b>\$ 533,810</b> |
|                       |      |         |         |                                  | <b>Expenses</b>   |                   |                   |                  |                   |
| 120                   | 80   | 60001   | 1010    | Salaries & Wages - Fulltime      | \$ 95,395         | \$ 233,873        | \$ 138,478        | \$ -             | \$ 233,873        |
| 120                   | 80   | 61000   | 1010    | Fringe Benefits                  | 44,062            | 106,138           | 62,076            | -                | 106,138           |
| 120                   | 80   | 63000   | 1010    | Overhead Allocation              | 69,673            | 86,119            | 16,446            | -                | 86,119            |
| 120                   | 80   | 65101   | 1010    | General Legal Services           | 6,936             | -                 | (6,936)           | 15,000           | 15,000            |
| 120                   | 80   | 73107   | 1010    | Event Support                    | 279               | 15,000            | 14,721            | -                | 15,000            |
| 120                   | 80   | 73115   | 1010    | Meeting Support Services         | -                 | 1,000             | 1,000             | -                | 1,000             |
| 120                   | 80   | 73204   | 1010    | Communications - Cellular Phones | 321               | 2,000             | 1,679             | -                | 2,000             |
| 120                   | 80   | 73601   | 1010    | Seminars/Conferences             | -                 | 2,000             | 2,000             | -                | 2,000             |
| 120                   | 80   | 73611   | 1010    | Travel - Mileage Reimbursement   | 23                | 306               | 284               | -                | 306               |
| 120                   | 80   | 73612   | 1010    | Travel - Ground Transportation   | 153               | 2,087             | 1,934             | -                | 2,087             |
| 120                   | 80   | 73613   | 1010    | Travel - Airfare                 | 518               | 7,046             | 6,528             | -                | 7,046             |
| 120                   | 80   | 73620   | 1010    | Travel - Lodging                 | 519               | 7,060             | 6,541             | -                | 7,060             |
| 120                   | 80   | 73630   | 1010    | Travel - Meals                   | -                 | -                 | -                 | -                | -                 |
| 120                   | 80   | 85101   | 1010    | Consulting Labor                 | 9,061             | 25,000            | 15,939            | 5,000            | 30,000            |
| <b>Total Expenses</b> |      |         |         |                                  | <b>\$ 226,939</b> | <b>\$ 487,630</b> | <b>\$ 260,691</b> | <b>\$ 20,000</b> | <b>\$ 507,630</b> |

Western Riverside Council of Governments  
Fiscal Year 2024/2025 Mid-Year Budget Amendment  
As of December 31, 2024

| Fund                                                  | Dept | Account | Project | Description                        | Actual              | FY 25 Budget        | Variance            | Amendment             | New Budget          |
|-------------------------------------------------------|------|---------|---------|------------------------------------|---------------------|---------------------|---------------------|-----------------------|---------------------|
| <b>Inland Regional Energy Network - Public Sector</b> |      |         |         |                                    |                     |                     |                     |                       |                     |
| <b>Revenues</b>                                       |      |         |         |                                    |                     |                     |                     |                       |                     |
| 180                                                   | 67   | 41480   | 2080    | IREN - Public Sector               | \$ 1,969,292        | \$ 6,244,237        | \$ 4,274,945        | \$ (1,038,000)        | \$ 5,221,084        |
|                                                       |      |         |         | <b>Total Revenues</b>              | <b>\$ 1,969,292</b> | <b>\$ 6,244,237</b> | <b>\$ 4,274,945</b> | <b>\$ (1,038,000)</b> | <b>\$ 5,221,084</b> |
| <b>Expenses</b>                                       |      |         |         |                                    |                     |                     |                     |                       |                     |
| 180                                                   | 67   | 60001   | 2080    | Salaries & Wages - Fulltime        | \$ 321,381          | \$ 787,162          | \$ 465,781          | \$ -                  | \$ 787,162          |
| 180                                                   | 67   | 61000   | 2080    | Fringe Benefits                    | 102,275             | 327,056             | 224,781             | -                     | 327,056             |
| 180                                                   | 67   | 63000   | 2080    | Overhead Allocation                | 211,659             | 543,519             | 331,860             | -                     | 543,519             |
| 180                                                   | 67   | 65101   | 2080    | General Legal Services             | 1,832               | 20,000              | 18,168              | (10,000)              | 10,000              |
| 180                                                   | 67   | 73102   | 2080    | Parking Validations                | 120                 | 2,000               | 1,880               | (1,500)               | 500                 |
| 180                                                   | 67   | 73107   | 2080    | Event Support                      | 18,168              | 50,000              | 31,832              | 20,000                | 70,000              |
| 180                                                   | 67   | 73108   | 2080    | Program/Office Supplies            | 89                  | 6,000               | 5,911               | (5,500)               | 500                 |
| 180                                                   | 67   | 73109   | 2080    | Computer Equipment/Supplies        | -                   | 8,000               | 8,000               | (8,000)               | -                   |
| 180                                                   | 67   | 73113   | 2080    | Membership Dues                    | 1,000               | 25,000              | 24,000              | (20,000)              | 5,000               |
| 180                                                   | 67   | 73117   | 2080    | Other Household Exp                | 180                 | -                   | (180)               | 500                   | 500                 |
| 180                                                   | 67   | 73120   | 2080    | Printing Services                  | -                   | 5,000               | 5,000               | (5,000)               | -                   |
| 180                                                   | 67   | 73204   | 2080    | Communications - Cellular Phones   | 1,023               | 5,000               | 3,977               | (2,500)               | 2,500               |
| 180                                                   | 67   | 73206   | 2080    | Communications - Computer Services | -                   | -                   | -                   | -                     | -                   |
| 180                                                   | 67   | 73209   | 2080    | Communications - Web Site          | -                   | -                   | -                   | -                     | -                   |
| 180                                                   | 67   | 73601   | 2080    | Seminars/Conferences               | 3,000               | 10,000              | 7,000               | (5,000)               | 5,000               |
| 180                                                   | 67   | 73611   | 2080    | Travel - Mileage Reimbursement     | 1,335               | 37,109              | 35,773              | (34,000)              | 3,109               |
| 180                                                   | 67   | 73612   | 2080    | Travel - Ground Transportation     | 112                 | 3,118               | 3,006               | (2,000)               | 1,118               |
| 180                                                   | 67   | 73613   | 2080    | Travel - Airfare                   | 769                 | 21,366              | 20,598              | (15,000)              | 6,366               |
| 180                                                   | 67   | 73620   | 2080    | Travel - Lodging                   | 3,181               | 88,407              | 85,226              | (80,000)              | 8,407               |
| 180                                                   | 67   | 73630   | 2080    | Travel - Meals                     | -                   | -                   | -                   | -                     | -                   |
| 180                                                   | 67   | 85100   | 2080    | Direct Costs                       | -                   | 400,000             | 400,000             | (320,000)             | 80,000              |
| 180                                                   | 67   | 85101   | 2080    | Consulting Labor                   | 1,112,860           | 2,905,500           | 1,792,640           | (150,000)             | 2,755,500           |
| 180                                                   | 67   | 85182   | 2080    | COG REN Reimbursement              | 186,895             | 1,000,000           | 813,105             | (400,000)             | 600,000             |
|                                                       |      |         |         | <b>Total Expenses</b>              | <b>\$ 1,965,880</b> | <b>\$ 6,244,237</b> | <b>\$ 4,278,357</b> | <b>\$ (1,038,000)</b> | <b>\$ 5,206,237</b> |



Western Riverside Council of Governments  
Fiscal Year 2024/2025 Mid-Year Budget Amendment  
As of December 31, 2024

| Fund                                                                     | Dept | Account | Project | Description                             | Actual            | FY 25 Budget        | Variance            | Amendment           | New Budget          |
|--------------------------------------------------------------------------|------|---------|---------|-----------------------------------------|-------------------|---------------------|---------------------|---------------------|---------------------|
| <b>Inland Regional Energy Network - Workforce Education and Training</b> |      |         |         |                                         |                   |                     |                     |                     |                     |
| <b>Revenues</b>                                                          |      |         |         |                                         |                   |                     |                     |                     |                     |
| 180                                                                      | 67   | 41480   | 2080    | IREN - Workforce Education and Training | \$ 354,129        | \$ 2,797,670        | \$ 2,443,541        | \$ (646,800)        | \$ 2,150,870        |
|                                                                          |      |         |         | <b>Total Revenues</b>                   | <b>\$ 354,129</b> | <b>\$ 2,797,670</b> | <b>\$ 2,443,541</b> | <b>\$ (646,800)</b> | <b>\$ 2,150,870</b> |
| <b>Expenses</b>                                                          |      |         |         |                                         |                   |                     |                     |                     |                     |
| 180                                                                      | 67   | 60001   | 2080    | Salaries & Wages - Fulltime             | 58,257            | \$ 171,317          | \$ 113,060          | \$ -                | \$ 171,317          |
| 180                                                                      | 67   | 61000   | 2080    | Fringe Benefits                         | 21,133            | 72,894              | 51,761              | -                   | 72,894              |
| 180                                                                      | 67   | 63000   | 2080    | Overhead Allocation                     | 39,663            | 133,292             | 93,629              | -                   | 133,292             |
| 180                                                                      | 67   | 65101   | 2080    | General Legal Services                  | 1,832             | 20,000              | 18,168              | (10,000)            | 10,000              |
| 180                                                                      | 67   | 73107   | 2080    | Event Support                           | 26,425            | 50,000              | 23,575              | -                   | 50,000              |
| 180                                                                      | 67   | 73108   | 2080    | Program/Office Supplies                 | -                 | 5,000               | 5,000               | (5,000)             | -                   |
| 180                                                                      | 67   | 73113   | 2080    | Membership Dues                         | 29,709            | 302,000             | 272,291             | (100,000)           | 202,000             |
| 180                                                                      | 67   | 73601   | 2080    | Seminars/Conferences                    | -                 | 5,000               | 5,000               | -                   | 5,000               |
| 180                                                                      | 67   | 73611   | 2080    | Travel - Mileage Reimbursement          | 385               | 13,651              | 13,265              | (12,000)            | 1,651               |
| 180                                                                      | 67   | 73612   | 2080    | Travel - Ground Transportation          | 30                | 1,062               | 1,032               | (800)               | 262                 |
| 180                                                                      | 67   | 73613   | 2080    | Travel - Airfare                        | 209               | 7,413               | 7,204               | (6,000)             | 1,413               |
| 180                                                                      | 67   | 73620   | 2080    | Travel - Lodging                        | -                 | -                   | -                   | -                   | -                   |
| 180                                                                      | 67   | 73630   | 2080    | Travel - Meals                          | 476               | 16,874              | 16,397              | (15,000)            | 1,874               |
| 180                                                                      | 67   | 73650   | 2080    | Training                                | -                 | 70,000              | 70,000              | (5,000)             | 65,000              |
| 180                                                                      | 67   | 73703   | 2080    | Supplies/Materials                      | 3,413             | -                   | (3,413)             | 7,000               | 7,000               |
| 180                                                                      | 67   | 85101   | 2080    | Consulting Labor                        | 95,247            | 1,679,167           | 1,583,920           | (500,000)           | 1,179,167           |
| 180                                                                      | 67   | 85182   | 2080    | COG REN Reimbursement                   | 77,350            | 250,000             | 172,650             | -                   | 250,000             |
|                                                                          |      |         |         | <b>Total Expenses</b>                   | <b>\$ 354,129</b> | <b>\$ 2,797,670</b> | <b>\$ 2,443,541</b> | <b>\$ (646,800)</b> | <b>\$ 2,150,870</b> |
| <b>Inland Regional Energy Network - Codes and Standards</b>              |      |         |         |                                         |                   |                     |                     |                     |                     |
| <b>Revenues</b>                                                          |      |         |         |                                         |                   |                     |                     |                     |                     |
| 180                                                                      | 67   | 41480   | 2080    | IREN - Codes and Standards              | \$ 295,498        | \$ 1,468,890        | \$ 1,173,392        | \$ (435,500)        | \$ 1,033,390        |
|                                                                          |      |         |         | <b>Total Revenues</b>                   | <b>\$ 295,498</b> | <b>\$ 1,468,890</b> | <b>\$ 1,173,392</b> | <b>\$ (435,500)</b> | <b>\$ 1,033,390</b> |
| <b>Expenses</b>                                                          |      |         |         |                                         |                   |                     |                     |                     |                     |
| 180                                                                      | 67   | 60001   | 2080    | Salaries & Wages - Fulltime             | 37,123            | 92,837              | 55,714              | \$ -                | \$ 92,837           |
| 180                                                                      | 67   | 61000   | 2080    | Fringe Benefits                         | 11,875            | 36,071              | 24,196              | -                   | 36,071              |
| 180                                                                      | 67   | 63000   | 2080    | Overhead Allocation                     | 24,480            | 61,482              | 37,002              | -                   | 61,482              |
| 180                                                                      | 67   | 65101   | 2080    | General Legal Services                  | 1,832             | 20,000              | 18,168              | (10,000)            | 10,000              |
| 180                                                                      | 67   | 73107   | 2080    | Event Support                           | -                 | 25,000              | 25,000              | (25,000)            | -                   |
| 180                                                                      | 67   | 73108   | 2080    | Program/Office Supplies                 | -                 | 5,000               | 5,000               | (5,000)             | -                   |
| 180                                                                      | 67   | 73611   | 2080    | Travel - Mileage Reimbursement          | -                 | -                   | -                   | -                   | -                   |
| 180                                                                      | 67   | 73612   | 2080    | Travel - Ground Transportation          | -                 | -                   | -                   | -                   | -                   |
| 180                                                                      | 67   | 73613   | 2080    | Travel - Airfare                        | 209               | -                   | (209)               | 500                 | 500                 |
| 180                                                                      | 67   | 73620   | 2080    | Travel - Lodging                        | -                 | -                   | -                   | -                   | -                   |
| 180                                                                      | 67   | 73630   | 2080    | Travel - Meals                          | -                 | -                   | -                   | -                   | -                   |
| 180                                                                      | 67   | 73703   | 2080    | Supplies/Materials                      | 3,413             | -                   | (3,413)             | 4,000               | 4,000               |
| 180                                                                      | 67   | 85101   | 2080    | Consulting Labor                        | 197,259           | 978,500             | 781,241             | (200,000)           | 778,500             |
| 180                                                                      | 67   | 85182   | 2080    | COG REN Reimbursement                   | 19,307            | 250,000             | 230,693             | (200,000)           | 50,000              |
|                                                                          |      |         |         | <b>Total Expenses</b>                   | <b>\$ 295,498</b> | <b>\$ 1,468,890</b> | <b>\$ 1,173,392</b> | <b>\$ (435,500)</b> | <b>\$ 1,033,390</b> |

Western Riverside Council of Governments  
Fiscal Year 2024/2025 Mid-Year Budget Amendment  
As of December 31, 2024

| Fund                                                       | Dept | Account | Project | Description                    | Actual           | FY 25 Budget     | Variance         | Amendment        | New Budget        |
|------------------------------------------------------------|------|---------|---------|--------------------------------|------------------|------------------|------------------|------------------|-------------------|
| <b>Regional Energy Pathways (REP) - Gas Co Partnership</b> |      |         |         |                                |                  |                  |                  |                  |                   |
| <b>Revenues</b>                                            |      |         |         |                                |                  |                  |                  |                  |                   |
| 110                                                        | 67   | 40605   | 2400    | Gas Co Partnership Revenue     | \$ 41,033        | \$ 75,000        | \$ 48,350        | \$ 43,999        | \$ 118,999        |
| <b>Total Revenues</b>                                      |      |         |         |                                | <b>\$ 41,033</b> | <b>\$ 75,000</b> | <b>\$ 48,350</b> | <b>\$ 43,999</b> | <b>\$ 118,999</b> |
| <b>Expenses</b>                                            |      |         |         |                                |                  |                  |                  |                  |                   |
| 110                                                        | 67   | 60001   | 2400    | Salaries & Wages               | \$ 21,038        | \$ 29,952        | \$ 8,914         | \$ 23,810        | \$ 53,762         |
| 110                                                        | 67   | 61000   | 2400    | Fringe Benefits                | 5,893            | 11,122           | 5,229            | 12,797           | 23,919            |
| 110                                                        | 67   | 63000   | 2400    | Overhead Allocation            | 13,455           | 25,581           | 12,126           | 13,228           | 38,809            |
| 110                                                        | 67   | 65101   | 2400    | General Legal Services         | 455              | 2,500            | 2,045            | (1,600)          | 900               |
| 110                                                        | 67   | 73102   | 2400    | Parking Validations            | -                | 100              | 100              | -                | 100               |
| 110                                                        | 67   | 73107   | 2400    | Event Support                  | -                | 2,000            | 2,000            | (2,000)          | -                 |
| 110                                                        | 67   | 73108   | 2400    | Program/Office Supplies        | -                | 500              | 500              | (400)            | 100               |
| 110                                                        | 67   | 73115   | 2400    | Meeting Support Services       | -                | 1,500            | 1,500            | (900)            | 600               |
| 110                                                        | 67   | 73116   | 2400    | Postage                        | -                | 100              | 100              | (100)            | -                 |
| 110                                                        | 67   | 73601   | 2400    | Seminars/Conferences           | -                | 350              | 350              | (350)            | -                 |
| 110                                                        | 67   | 73611   | 2400    | Travel - Mileage Reimbursement | 84               | 1,295            | 1,211            | (486)            | 809               |
| 110                                                        | 67   | 73612   | 2400    | Travel - Ground Transportation | -                | -                | -                | -                | -                 |
| 110                                                        | 67   | 73613   | 2400    | Travel - Airfare               | -                | -                | -                | -                | -                 |
| 110                                                        | 67   | 73620   | 2400    | Travel - Lodging               | -                | -                | -                | -                | -                 |
| 110                                                        | 67   | 73630   | 2400    | Travel - Meals                 | -                | -                | -                | -                | -                 |
| <b>Total Expenses</b>                                      |      |         |         |                                | <b>\$ 40,925</b> | <b>\$ 75,000</b> | <b>\$ 34,075</b> | <b>\$ 43,999</b> | <b>\$ 118,999</b> |

Western Riverside Council of Governments  
Fiscal Year 2024/2025 Mid-Year Budget Amendment  
As of December 31, 2024

| Fund                                      | Dept | Account | Project | Description                 | Actual      | FY 25 Budget | Variance    | Amendment         | New Budget        |
|-------------------------------------------|------|---------|---------|-----------------------------|-------------|--------------|-------------|-------------------|-------------------|
| Regional Early Action Planning (REAP) 2.0 |      |         |         |                             |             |              |             |                   |                   |
| <b>Revenues</b>                           |      |         |         |                             |             |              |             |                   |                   |
| 110                                       | 65   | 41606   | 2036    | REAP Revenue                | \$ -        | \$ -         | \$ -        | \$ 550,746        | \$ 550,746        |
|                                           |      |         |         | <b>Total Revenues</b>       | <b>\$ -</b> | <b>\$ -</b>  | <b>\$ -</b> | <b>\$ 550,746</b> | <b>\$ 550,746</b> |
| <b>Expenses</b>                           |      |         |         |                             |             |              |             |                   |                   |
| 110                                       | 65   | 60001   | 2036    | Salaries & Wages - Fulltime | \$ -        | \$ -         | \$ -        | \$ 129,806        | \$ 129,806        |
| 110                                       | 65   | 61000   | 2036    | Fringe Benefits             | -           | -            | -           | 6,386             | 6,386             |
| 110                                       | 65   | 63000   | 2036    | Overhead Allocation         | -           | -            | -           | 64,554            | 64,554            |
| 110                                       | 65   | 65101   | 2036    | General Legal Services      | -           | -            | -           | 5,000             | 5,000             |
| 110                                       | 65   | 85101   | 2036    | Consulting Labor            | -           | -            | -           | 345,000           | 345,000           |
|                                           |      |         |         | <b>Total Expenses</b>       | <b>\$ -</b> | <b>\$ -</b>  | <b>\$ -</b> | <b>\$ 550,746</b> | <b>\$ 550,746</b> |

### Summary

|                                                         |                |
|---------------------------------------------------------|----------------|
| General Fund (110) Revenue Increase (Decrease)          | \$ 594,745     |
| General Fund (110) Expenditure Increase (Decrease)      | \$ 594,745     |
| Clean Cities Fund (120) Revenue Increase (Decrease)     | \$ 42,690      |
| Clean Cities Fund (120) Expenditure Increase (Decrease) | \$ 20,000      |
| I-REN Fund (180) Revenue Increase (Decrease)            | \$ (2,120,300) |
| I-REN Fund (180) Expenditure Increase (Decrease)        | \$ (2,120,300) |
| Total Agency Revenue Increase (Decrease)                | \$ (1,482,865) |
| Total Agency Expenditure Increase (Decrease)            | \$ (1,505,555) |



## Western Riverside Council of Governments WRCOG Executive Committee

### Staff Report

**Subject:** TUMF Program Activities Update: Two TUMF Reimbursement Agreements and Four TUMF Reimbursement Agreement Amendments

**Contact:** Brian Piche-Cifuentes, Transportation Analyst I, [bpiche-cifuentes@wrcog.us](mailto:bpiche-cifuentes@wrcog.us), (951) 405-6705

**Date:** February 3, 2025

#### **Recommended Action(s):**

1. Authorize the Executive Director to execute a TUMF Reimbursement Agreement with the County of Riverside for the Planning and Right-of-Way Phases of the Gilman Springs Road Widening Project from SR-60 to Bridge Street, in an amount not to exceed \$3,000,000.
2. Authorize the Executive Director to execute a TUMF Reimbursement Agreement with the County of Riverside for the Planning Phase of the Butterfield Stage Road Project between Pourroy Road and Auld Road, in an amount not to exceed \$500,000.
3. Authorize the Executive Director to execute a TUMF Reimbursement Agreement Amendment with the County of Riverside for an increase in funding for the Wood Road Widening Project from Cajalco Road to Krameria Avenue, by \$947,000 to an amount not to exceed \$1,347,000.
4. Authorize the Executive Director to execute a TUMF Reimbursement Agreement Amendment with the County of Riverside for an increase in funding for the Rancho California Road-Calle Contento Roundabout Project by \$2,600,000 to an amount not to exceed \$5,100,000.
5. Authorize the Executive Director to execute a TUMF Reimbursement Agreement Amendment with the County of Riverside for an increase in funding for the Cajalco Road Widening Project from Alexander Street to I-215, project by \$3,848,000 to an amount not to exceed \$6,261,338.
6. Authorize the Executive Director to execute a TUMF Reimbursement Agreement Amendment with the City of Calimesa for an increase in funding for the I-10 / Singleton Road Interchange Project by \$3,000,000 to an amount not to exceed \$8,000,000.

#### **Summary:**

The County of Riverside and the City of Calimesa are requesting to enter into TUMF Reimbursement Agreements and TUMF Reimbursement Agreement Amendments with WRCOG. The County's initiatives involve an investment of \$10,895,000, which will be directed towards a variety of projects throughout the different zones in the County. The City of Calimesa's initiative involves an investment of \$3,000,000 towards I-10 / Singleton Road Interchange. These investments will improve the infrastructure, stimulate economic growth, reduce traffic congestion, and enhance the overall quality of life for residents and businesses within the county.

#### **Purpose / WRCOG 2022-2027 Strategic Plan Goal:**

The purpose of this item is to request the approval of two TUMF Reimbursement Agreements and four TUMF Reimbursement Agreement Amendments. This effort supports WRCOG's 2022-2027 Strategic Plan Goal #5 (Develop projects and programs that improve infrastructure and sustainable development in our subregion).

### **Discussion:**

### **Background**

WRCOG's TUMF Program is a subregional fee program designed to provide transportation and transit infrastructure that mitigates the impact of new growth in western Riverside County. A Reimbursement Agreement is a document between WRCOG and a member agency that allows WRCOG to provide funding for TUMF expenses incurred for the Planning, Design, Engineering, and/or Construction Phase(s) of a TUMF project. To enter into a Reimbursement Agreement, the funding for the project must first be allocated in the appropriate TUMF Zone Transportation Improvement Program (TIP). TUMF Agreements and Amendments are initiated by their respective agencies when that agency is ready for the infrastructure development.

### **Present Situation**

#### **TUMF Reimbursement Agreements:**

1. The Gilman Springs Road Widening project (23-CN-RCY-1198) set the amount of funding in the Planning and Right-of-Way Phases to an amount not to exceed \$3,000,000. The proposed project is located between SR-60 to Bridge Street.
2. The Butterfield Stage Road project (24-SW-RCY-1312) set the amount of funding in the Planning Phase to an amount not to exceed \$500,000. The proposed project is located between Pourroy Road and Auld Road.

#### **TUMF Reimbursement Agreement Amendment:**

1. The Wood Road Widening Project (21-NW-RCY-1303) set the funding in the Planning Phase to an amount not to exceed \$400,000. An increase in project funding has been requested by the County in an Amendment for \$947,000, for a total not to exceed \$1,347,000. The proposed project is located between Cajalco Road and Krameria Avenue.
2. The Rancho California Road - Calle Contento Roundabout Project (20-SW-RCY-1195) set the funding for the Right-of-Way and Construction Phases to an amount not to exceed \$2,500,000. An increase in project funding has been requested by the County in an Amendment for \$2,600,000, for a total not to exceed \$5,100,000.
3. The Cajalco Road Widening Project (06-CN-RCY-1103) set the funding for the Planning and Engineering Phases to an amount not to exceed \$2,413,338. An increase in project funding has been requested by the County in an Amendment for \$3,848,000, for a total not to exceed \$6,261,338. The proposed project is located between Alexander Street and I-215.
4. The I-10 / Singleton Road Interchange Project (20-PS-CAL-1208) set the funding for all Phases to an amount not to exceed \$5,000,000. An increase in project funding has been requested by the County in an Amendment for \$3,000,000, for a total not to exceed \$8,000,000.

**Prior Action(s):**

**May 21, 2024:** WRCOG and the City of Calimesa entered into a TUMF Reimbursement Agreement Amendment (#1) for the construction of I-10 / Singleton Road Interchange Project.

**May 9, 2022:** WRCOG and the County of Riverside entered into a TUMF Reimbursement Agreement for the construction of Wood Road Widening Project.

**November 2, 2021:** WRCOG and the City of Calimesa entered into a TUMF Reimbursement Agreement for the construction of I-10 / Singleton Road Interchange Project.

**June 16, 2020:** WRCOG and the County of Riverside enter into a TUMF Reimbursement Agreement for the construction of Rancho California Road - Calle Contento Roundabout Project.

**November 6, 2018:** WRCOG and the County of Riverside enter into a TUMF Reimbursement Agreement Amendment (#1) for the construction of Cajalco Road Widening Project.

**February 5, 2008:** WRCOG and the County of Riverside enter into a TUMF Reimbursement Agreement for the construction of Cajalco Road Widening Project.

**Financial Summary:**

The Reimbursement Agreements noted are consistent and included within the respective Zone TIP. These liabilities are reflected as fiduciary fund long-term debt in WRCOG's financials under the TUMF Fund.

**Attachment(s):**

[Attachment 1 - TUMF Reimbursement Agreement - 23-CN-RCY-1198 - Gilman Springs Road](#)

[Attachment 2 - TUMF Reimbursement Agreement - 24-SW-RCY-1312 - Butterfield Stage Rd](#)

[Attachment 3 - TUMF Reimbursement Agreement - Amendment 1 - 21-NW-RCY-1303 - Wood Road](#)

[Attachment 4 - TUMF Reimbursement Agreement - Amendment 1 - 20-SW-RCY-1195 - Rancho CA-Calle Contento Roundabout](#)

[Attachment 5 -TUMF Reimbursement Agreement - Amendment 2 - 06-CN-RCY-1103 - Cajalco Road Widening](#)

[Attachment 6 -TUMF Reimbursement Agreement Amendment 2 - 20-PS-CAL-1208 - I-10-Singleton Road Interchange](#)

# Attachment

TUMF Reimbursement  
Agreement – Gilman  
Springs Road Widening –  
Planning and Right-of-Way  
Phases

CLERK'S COPY

23-CN-RCY-1198  
to Riverside County Clerk of the Board, Stop 1010

Post Office Box 1147, Riverside, Ca 92502-1147

Thank you.

**TRANSPORTATION UNIFORM MITIGATION FEE PROGRAM  
AGREEMENT TO REIMBURSE TUMF FUNDS  
GILMAN SPRINGS ROAD WIDENING  
PLANNING (PLN) AND RIGHT-OF-WAY (ROW) PHASES**

THIS REIMBURSEMENT AGREEMENT ("Agreement") is entered into as of this 5 day of November, 2024, by and between the Western Riverside Council of Governments ("WRCOG"), a California joint powers authority and the County of Riverside, a political subdivision of the State of California ("AGENCY"). WRCOG and AGENCY are sometimes hereinafter referred to individually as "Party" and collectively as "Parties".

**RECITALS**

A. WRCOG is the Administrator of the Transportation Uniform Mitigation Fee Program of Western Riverside County ("TUMF Program").

B. WRCOG has identified and designated certain transportation improvement projects throughout Western Riverside County as projects of regional importance ("Qualifying Projects" or "Projects"). The Qualifying Projects are more specifically described in that certain WRCOG study titled "TUMF Nexus Study", as may be amended from time to time. Qualifying Projects can have Regional or Zonal significance as further described in the TUMF Nexus Study.

C. The TUMF Program is funded by TUMF fees paid by new development in Western Riverside County (collectively, "TUMF Program Funds"). TUMF Program Funds are held in trust by WRCOG for the purpose of funding the Qualifying Projects.

D. The AGENCY proposes to implement a Qualifying Project, and it is the purpose of this Agreement to identify the project and to set forth the terms and conditions by which WRCOG will release TUMF Program Funds.

**AGREEMENT**

NOW, THEREFORE, in consideration of the mutual covenants and subject to the conditions contained herein, the Parties hereby agree as follows:

1. Description of the Qualifying Project. This Agreement is intended to distribute TUMF Program Funds to the AGENCY for **GILMAN SPRINGS ROAD WIDENING**, (the "Project"), a Qualifying Project. The Work, including a timetable and a detailed scope of work, is more fully described in Exhibit "A" attached hereto and incorporated herein by reference and, pursuant to Section 20 below, is subject to modification if requested by the AGENCY and approved by WRCOG. The work shall be consistent with one or more of the defined WRCOG Call for Projects phases detailed herein as follows:

- 1) Planning (PLN)
- 2) Right of Way (ROW)



2. WRCOG Funding Amount. WRCOG hereby agrees to distribute to AGENCY, on the terms and conditions set forth herein, a sum not to exceed **THREE MILLION DOLLARS (\$3,000,000.00)**, to be used for reimbursing the AGENCY for eligible Project expenses as described in Section 3 herein ("Funding Amount"). The Parties acknowledge and agree that the Funding Amount may be less than the actual cost of the Project. Nevertheless, the Parties acknowledge and agree that WRCOG shall not be obligated to contribute TUMF Program Funds in excess of the maximum TUMF share identified in the TUMF Nexus Study ("Maximum TUMF Share"), as may be amended from time to time.

3. Project Costs Eligible for Advance/Reimbursement. The total Project costs ("Total Project Cost") may include the following items, provided that such items are included in the scope of work attached hereto as Exhibit "A" ("Scope of Work"): (1) AGENCY and/or consultant costs associated with direct Project coordination and support; (2) funds expended in preparation of preliminary engineering studies; (3) funds expended for preparation of environmental review documentation for the Project; (4) all costs associated with right-of-way acquisition, including right-of-way engineering, appraisal, acquisition, legal costs for condemnation procedures if authorized by the AGENCY, and costs of reviewing appraisals and offers for property acquisition; (5) costs reasonably incurred if condemnation proceeds; (6) costs incurred in the preparation of plans, specifications, and estimates by AGENCY or consultants; (7) AGENCY costs associated with bidding, advertising and awarding of the Project contracts; (8) construction costs, including change orders to construction contract approved by the AGENCY; (9) construction management, field inspection and material testing costs; and (10) any AGENCY administrative cost to deliver the Project.

4. Ineligible Project Costs. The Total Project Cost shall not include the following items which shall be borne solely by the AGENCY without reimbursement: (1) any AGENCY administrative fees attributed to the reviewing and processing of the Project; and (2) expenses for items of work not included within the Scope of Work in Exhibit "A".

5. Procedures for Distribution of TUMF Program Funds to AGENCY.

(a) Initial Payment by the AGENCY. The AGENCY shall be responsible for initial payment of all the Project costs as they are incurred. Following payment of such Project costs, the AGENCY shall submit invoices to WRCOG requesting reimbursement of eligible Project costs. Each invoice shall be accompanied by detailed consultant/contractor invoices, or other demands for payment addressed to the AGENCY, and documents evidencing the AGENCY's payment of the invoices or demands for payment. Documents evidencing the AGENCY'S payment of the invoices shall be retained for four (4) years and shall be made available for review by WRCOG. The AGENCY shall submit invoices not more often than monthly and not less often than quarterly.

(b) Review and Reimbursement by WRCOG. Upon receipt of an invoice from the AGENCY, WRCOG may request additional documentation or explanation of the Project costs for which reimbursement is sought. Undisputed amounts shall be paid by WRCOG to the AGENCY within thirty (30) days. In the event that WRCOG disputes the eligibility of the AGENCY for reimbursement of all or a portion of an invoiced amount, the Parties shall meet and confer in an attempt to resolve the dispute. If the meet and confer process is unsuccessful in

resolving the dispute, the AGENCY may appeal WRCOG's decision as to the eligibility of one or more invoices to WRCOG's Executive Director. The WRCOG Executive Director shall provide his/her decision in writing. If the AGENCY disagrees with the Executive Director's decision, the AGENCY may appeal the decision of the Executive Director to the full WRCOG Executive Committee, provided the AGENCY submits its request for appeal to WRCOG within ten (10) days of the Executive Director's written decision. The decision of the WRCOG Executive Committee shall be final. Additional details concerning the procedure for the AGENCY's submittal of invoices to WRCOG and WRCOG's consideration and payment of submitted invoices are set forth in Exhibit "B", attached hereto and incorporated herein by reference.

(c) Funding Amount/Adjustment. If a post Project audit or review indicates that WRCOG has provided reimbursement to the AGENCY in an amount in excess of the Maximum TUMF Share of the Project, or has provided reimbursement of ineligible Project costs, the AGENCY shall reimburse WRCOG for the excess or ineligible payments within 30 days of notification by WRCOG.

6. Increases in Project Funding. The Funding Amount may, in WRCOG's sole discretion, be augmented with additional TUMF Program Funds if the TUMF Nexus Study is amended to increase the maximum eligible TUMF share for the Project. Any such increase in the Funding Amount must be approved in writing by WRCOG's Executive Director. In no case shall the amount of TUMF Program Funds allocated to the AGENCY exceed the then-current maximum eligible TUMF share for the Project. No such increased funding shall be expended to pay for any Project already completed. For purposes of this Agreement, the Project or any portion thereof shall be deemed complete upon its acceptance by WRCOG's Executive Director which shall be communicated to the AGENCY in writing.

7. No Funding for Temporary Improvements. Only segments or components of the construction that are intended to form part of or be integrated into the Project may be funded by TUMF Program Funds. No improvement which is temporary in nature, including but not limited to temporary roads, curbs, tapers or drainage facilities, shall be funded with TUMF Program Funds, except as needed for staged construction of the Project.

8. AGENCY's Funding Obligation to Complete the Project. In the event that the TUMF Program Funds allocated to the Project represent less than the total cost of the Project, the AGENCY shall provide such additional funds as may be required to complete the Project.

9. AGENCY's Obligation to Repay TUMF Program Funds to WRCOG; Exception For PA&ED Phase Work. Except as otherwise expressly excepted within this paragraph, in the event that: (i) the AGENCY, for any reason, determines not to proceed with or complete the Project; or (ii) the Project is not timely completed, subject to any extension of time granted by WRCOG pursuant to the terms of this Agreement; the AGENCY agrees that any TUMF Program Funds that were distributed to the AGENCY for the Project shall be repaid in full to WRCOG, and the Parties shall enter into good faith negotiations to establish a reasonable repayment schedule and repayment mechanism. If the Project involves work pursuant to a PA&ED phase, AGENCY shall not be obligated to repay TUMF Program Funds to WRCOG relating solely to PA&ED phase work performed for the Project.

10. AGENCY's Local Match Contribution. AGENCY local match funding is not required, as shown in Exhibit "A" and as called out in the AGENCY's Project Nomination Form submitted to WRCOG in response to its Call for Projects."

11. Term/Notice of Completion. The term of this Agreement shall be from the date first herein above written until the earlier of the following: (i) the date WRCOG formally accepts the Project as complete, pursuant to Section 6; (ii) termination of this Agreement pursuant to Section 15; or (iii) the AGENCY has fully satisfied its obligations under this Agreement. All applicable indemnification provisions of this Agreement shall remain in effect following the termination of this Agreement.

12. Representatives of the Parties. WRCOG's Executive Director, or his or her designee, shall serve as WRCOG's representative and shall have the authority to act on behalf of WRCOG for all purposes under this Agreement. The AGENCY hereby designates **DENNIS ACUNA, DIRECTOR OF TRANSPORTATION**, or his or her designee, as the AGENCY's representative to WRCOG. The AGENCY's representative shall have the authority to act on behalf of the AGENCY for all purposes under this Agreement and shall coordinate all activities of the Project under the AGENCY's responsibility. The AGENCY shall work closely and cooperate fully with WRCOG's representative and any other agencies which may have jurisdiction over or an interest in the Project.

13. Expenditure of Funds by AGENCY Prior to Execution of Agreement. Nothing in this Agreement shall be construed to prevent or preclude the AGENCY from expending funds on the Project prior to the execution of the Agreement, or from being reimbursed by WRCOG for such expenditures. However, the AGENCY understands and acknowledges that any expenditure of funds on the Project prior to the execution of the Agreement is made at the AGENCY's sole risk, and that some expenditures by the AGENCY may not be eligible for reimbursement under this Agreement.

14. Review of Services. The AGENCY shall allow WRCOG's Representative to inspect or review the progress of the Project at any reasonable time in order to determine whether the terms of this Agreement are being met.

15. Termination.

(a) Notice. Either WRCOG or AGENCY may, by written notice to the other party, terminate this Agreement, in whole or in part, in response to a material breach hereof by the other Party, by giving written notice to the other party of such termination and specifying the effective date thereof. The written notice shall provide a 30 day period to cure any alleged breach. During the 30 day cure period, the Parties shall discuss, in good faith, the manner in which the breach can be cured.

(b) Effect of Termination. In the event that the AGENCY terminates this Agreement, the AGENCY shall, within 180 days, repay to WRCOG any unexpended TUMF Program Funds provided to the AGENCY under this Agreement and shall complete any portion or segment of work for the Project for which TUMF Program Funds have been provided. In the

event that WRCOG terminates this Agreement, WRCOG shall, within 90 days, distribute to the AGENCY TUMF Program Funds in an amount equal to the aggregate total of all unpaid invoices which have been received from the AGENCY regarding the Project at the time of the notice of termination; provided, however, that WRCOG shall be entitled to exercise its rights under Section 5(b), including but not limited to conducting a review of the invoices and requesting additional information. Upon such termination, the AGENCY shall, within 180 days, complete any portion or segment of work for the Project for which TUMF Program Funds have been provided. This Agreement shall terminate upon receipt by the non-terminating Party of the amounts due to it hereunder and upon completion of the segment or portion of Project work for which TUMF Program Funds have been provided.

(c) Cumulative Remedies. The rights and remedies of the Parties provided in this Section are in addition to any other rights and remedies provided by law or under this Agreement.

16. Prevailing Wages. The AGENCY and any other person or entity hired to perform services on the Project are alerted to the requirements of California Labor Code Sections 1770 et seq., which would require the payment of prevailing wages were the services or any portion thereof determined to be a public work, as defined therein. The AGENCY shall ensure compliance with these prevailing wage requirements by any person or entity hired to perform the Project. The AGENCY shall defend, indemnify, and hold harmless WRCOG, its officers, employees, consultants, and agents from any claim or liability, including without limitation attorneys, fees, arising from its failure or alleged failure to comply with California Labor Code Sections 1770 et seq.

17. Progress Reports. WRCOG may request the AGENCY to provide WRCOG with progress reports concerning the status of the Project.

18. Indemnification.

(a) AGENCY Responsibilities. In addition to the indemnification required under Section 16, the AGENCY agrees to indemnify and hold harmless WRCOG, its officers, agents, consultants, and employees from any and all claims, demands, costs or liability arising from or connected with all activities governed by this Agreement including all design and construction activities, due to negligent acts, errors or omissions or willful misconduct of the AGENCY or its subcontractors. The AGENCY will reimburse WRCOG for any expenditures, including reasonable attorneys' fees, incurred by WRCOG, in defending against claims ultimately determined to be due to negligent acts, errors or omissions or willful misconduct of the AGENCY.

(b) WRCOG Responsibilities. WRCOG agrees to indemnify and hold harmless the AGENCY, its officers, agents, consultants, and employees from any and all claims, demands, costs or liability arising from or connected with all activities governed by this Agreement including all design and construction activities, due to negligent acts, errors or omissions or willful misconduct of WRCOG or its sub-consultants. WRCOG will reimburse the AGENCY for any expenditures, including reasonable attorneys' fees, incurred by the AGENCY,



in defending against claims ultimately determined to be due to negligent acts, errors or omissions or willful misconduct of WRCOG.

(c) Effect of Acceptance. The AGENCY shall be responsible for the professional quality, technical accuracy and the coordination of any services provided to complete the Project. WRCOG's review, acceptance or funding of any services performed by the AGENCY or any other person or entity under this Agreement shall not be construed to operate as a waiver of any rights WRCOG may hold under this Agreement or of any cause of action arising out of this Agreement. Further, the AGENCY shall be and remain liable to WRCOG, in accordance with applicable law, for all damages to WRCOG caused by the AGENCY's negligent performance of this Agreement or supervision of any services provided to complete the Project.

19. Insurance. The AGENCY shall require, at a minimum, all persons or entities hired to perform the Project to obtain, and require their subcontractors to obtain, insurance of the types and in the amounts described below and satisfactory to the AGENCY and WRCOG. Such insurance shall be maintained throughout the term of this Agreement, or until completion of the Project, whichever occurs last.

(a) Commercial General Liability Insurance. Occurrence version commercial general liability insurance or equivalent form with a combined single limit of not less than \$1,000,000.00 per occurrence. If such insurance contains a general aggregate limit, it shall apply separately to the Project or be no less than two times the occurrence limit. Such insurance shall:

(i) Name WRCOG and AGENCY, and their respective officials, officers, employees, agents, and consultants as insured with respect to performance of the services on the Project and shall contain no special limitations on the scope of coverage or the protection afforded to these insured;

(ii) Be primary with respect to any insurance or self-insurance programs covering WRCOG and AGENCY, and/or their respective officials, officers, employees, agents, and consultants; and

(iii) Contain standard separation of insured provisions.

(b) Business Automobile Liability Insurance. Business automobile liability insurance or equivalent form with a combined single limit of not less than \$1,000,000.00 per occurrence. Such insurance shall include coverage for owned, hired and non-owned automobiles.

(c) Professional Liability Insurance. Errors and omissions liability insurance with a limit of not less than \$1,000,000.00 Professional liability insurance shall only be required of design or engineering professionals.

(d) Workers' Compensation Insurance. Workers' compensation insurance with statutory limits and employers' liability insurance with limits of not less than \$1,000,000.00 each accident.

20. Project Amendments. Changes to the characteristics of the Project, including the deadline for Project completion, and any responsibilities of the AGENCY or WRCOG may be requested in writing by the AGENCY and are subject to the approval of WRCOG's Representative, which approval will not be unreasonably withheld, provided that extensions of time for completion of the Project shall be approved in the sole discretion of WRCOG's Representative. Nothing in this Agreement shall be construed to require or allow completion of the Project without full compliance with the California Environmental Quality Act (Public Resources Code Section 21000 *et seq.*; "CEQA") and the National Environmental Policy Act of 1969 (42 USC 4231 *et seq.*), if applicable, but the necessity of compliance with CEQA and/or NEPA shall not justify, excuse, or permit a delay in completion of the Project.

21. Conflict of Interest. For the term of this Agreement, no member, officer or employee of the AGENCY or WRCOG, during the term of his or her service with the AGENCY or WRCOG, as the case may be, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

22. Limited Scope of Duties. WRCOG's and the AGENCY's duties and obligations under this Agreement are limited to those described herein. WRCOG has no obligation with respect to the safety of any Project performed at a job site. In addition, WRCOG shall not be liable for any action of AGENCY or its contractors relating to the condemnation of property undertaken by AGENCY or construction related to the Project.

23. Books and Records. Each party shall maintain complete, accurate, and clearly identifiable records with respect to costs incurred for the Project under this Agreement. They shall make available for examination by the other party, its authorized agents, officers or employees any and all ledgers and books of account, invoices, vouchers, canceled checks, and other records or documents evidencing or related to the expenditures and disbursements charged to the other party pursuant to this Agreement. Further, each party shall furnish to the other party, its agents or employees such other evidence or information as they may require with respect to any such expense or disbursement charged by them. All such information shall be retained by the Parties for at least four (4) years following termination of this Agreement, and they shall have access to such information during the four-year period for the purposes of examination or audit.

24. Equal Opportunity Employment. The Parties represent that they are equal opportunity employers and they shall not discriminate against any employee or applicant of reemployment because of race, religion, color, national origin, ancestry, sex or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff or termination.

25. Governing Law. This Agreement shall be governed by and construed with the laws of the State of California.

26. Attorneys' Fees. If either party commences an action against the other party arising out of or in connection with this Agreement, the prevailing party in such litigation shall be entitled to have and recover from the losing party reasonable attorneys' fees and costs of suit.

27. Time of Essence. Time is of the essence for each and every provision of this Agreement.

28. Headings. Article and Section Headings, paragraph captions or marginal headings contained in this Agreement are for convenience only and shall have no effect in the construction or interpretation of any provision herein.

29. Public Acknowledgement. The AGENCY agrees that all public notices, news releases, information signs and other forms of communication shall indicate that the Project is being cooperatively funded by the AGENCY and WRCOG TUMF Program Funds.

30. No Joint Venture. This Agreement is for funding purposes only and nothing herein shall be construed to make WRCOG a party to the construction of the Project or to make it a partner or joint venture with the AGENCY for such purpose.

31. Compliance With the Law. The AGENCY shall comply with all applicable laws, rules and regulations governing the implementation of the Qualifying Project, including, where applicable, the rules and regulations pertaining to the participation of businesses owned or controlled by minorities and women promulgated by the Federal Highway Administration and the Federal Department of Transportation.

32. Notices. All notices hereunder and communications regarding interpretation of the terms of this Agreement or changes thereto shall be provided by the mailing thereof by registered or certified mail, return receipt requested, postage prepaid and addressed as follows:

|               |                                                                                                                                                                                                                                      |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| If to AGENCY: | County of Riverside<br>Transportation Department<br>4080 Lemon Street, 8 <sup>th</sup> Floor<br>Riverside, CA 92501<br>Attention: Dennis Acuna, Director of Transportation<br>Telephone: (951) 955-6820<br>Facsimile: (951) 955-3198 |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|              |                                                                                                                                                                                                                                  |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| If to WRCOG: | Western Riverside Council of Governments<br>3390 University Avenue; Suite 200<br>Riverside, California 92501<br>Attention: Christopher Gray, Deputy Executive Director<br>Telephone: (951) 405-6710<br>Facsimile: (951) 223-9720 |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Any notice so given shall be considered served on the other party three (3) days after deposit in the U.S. mail, first class postage prepaid, return receipt requested, and addressed to the party at its applicable address. Actual notice shall be deemed adequate notice on the date actual notice occurred regardless of the method of service.

33. Integration; Amendment. This Agreement contains the entire agreement between the PARTIES. Any agreement or representation respecting matters addressed herein that are not expressly set forth in this Agreement is null and void. This Agreement may be amended only by mutual written agreement of the PARTIES.

34. Severability. If any term, provision, condition or covenant of this Agreement is held invalid or unenforceable, the remainder of this Agreement shall not be affected thereby.

35. Conflicting Provisions. In the event that provisions of any attached appendices or exhibits conflict in any way with the provisions set forth in this Agreement, the language, terms and conditions contained in this Agreement shall control the actions and obligations of the Parties and the interpretation of the Parties' understanding concerning the Agreement.

36. Independent Contractors. Any person or entities retained by the AGENCY or any contractor shall be retained on an independent contractor basis and shall not be employees of WRCOG. Any personnel performing services on the Project shall at all times be under the exclusive direction and control of the AGENCY or contractor, whichever is applicable. The AGENCY or contractor shall pay all wages, salaries and other amounts due such personnel in connection with their performance of services on the Project and as required by law. The AGENCY or consultant shall be responsible for all reports and obligations respecting such personnel, including, but not limited to: social security taxes, income tax withholding, unemployment insurance and workers' compensation insurance.

37. Effective Date. This Agreement shall not be effective until executed by both Parties. The failure of one party to execute this Agreement within forty-five (45) days of the other party executing this Agreement shall render any execution of this Agreement ineffective.

38. No Third Party Beneficiaries. There are no intended third party beneficiaries of any right or obligation assumed by the Parties.

39. Counterparts. This Agreement may be signed in counterparts, each of which shall constitute an original and which collectively shall constitute one instrument.

[SIGNATURES ON FOLLOWING PAGE]



**IN WITNESS WHEREOF**, the Parties have caused this Agreement to be executed by their duly authorized representatives to be effective on the day and year first above-written.

WESTERN RIVERSIDE COUNCIL  
OF GOVERNMENTS

COUNTY OF RIVERSIDE

RECOMMENDED FOR APPROVAL:

By: \_\_\_\_\_  
Dr. Kurt Wilson  
Executive Director

Director of Transportation

APPROVED TO FORM:

APPROVED AS TO FORM:

Minh C. Tran  
County Counsel

By: \_\_\_\_\_  
Steven C. DeBaun  
General Counsel

By:  
Deputy County Counsel

APPROVAL BY THE COUNTY BOARD  
OF SUPERVISORS:

By  
Chairman, County Board of Supervisors

ATTEST:  
Kimberly Rector  
Clerk of the Board

By:

**EXHIBIT "A"****SCOPE OF WORK**

The Project phases to be funded under this Agreement consist of Planning (PLN) and Right-of-Way Property Purchase for Mitigation Purpose (ROW).

The proposed project is located on Gilman Springs Road between State Route 60 (SR-60) to Bridge Street in the City of Moreno Valley in the unincorporated area of the County of Riverside. The proposed project will widen Gilman Springs Road from a two (2) lane facility to a four (4) lane facility.

The PLN phase will include concept/alternative development needed to establish a design footprint. Once the footprint is established, environmental studies and preliminary engineering can be performed to support a future environmental document to be funded in future phases of the Project. In addition, widening of the proposed roadway requires purchase mitigation property as a replacement property for any acquisition of the California Department of Fish and Wildlife Area land and to mitigate impacts to environmental resources in the vicinity of the Project.

**EXHIBIT "A-1"****ESTIMATE OF COST**

| <b>Phase</b>              | <b>TUMF</b>    | <b>LOCAL</b> | <b>TOTAL</b>   |
|---------------------------|----------------|--------------|----------------|
| <b>PLANNING (PLN)</b>     | \$1,000,000.00 | \$0          | \$1,000,000.00 |
| <b>ENGINEERING (ENG)</b>  |                |              |                |
| <b>RIGHT OF WAY (ROW)</b> | \$2,000,000.00 | \$0          | \$2,000,000.00 |
| <b>CONSTRUCTION (CON)</b> |                |              |                |
| <b>TOTAL</b>              | \$3,000,000.00 | \$0          | \$3,000,000.00 |

**EXHIBIT "A-2"**  
**PROJECT SCHEDULE**

| <b>Phase</b> | <b>Estimated<br/>Completion Date</b> | <b>Estimated Cost</b> | <b>Comments</b> |
|--------------|--------------------------------------|-----------------------|-----------------|
| <b>PLN</b>   | FY 26/27                             | \$1,000,000.00        |                 |
| <b>ENG</b>   |                                      |                       |                 |
| <b>ROW</b>   | FY 24/25                             | \$2,000,000.00        |                 |
| <b>CON</b>   |                                      |                       |                 |
| <b>TOTAL</b> |                                      | \$3,000,000.00        |                 |

## Elements of Compensation

### EXHIBIT "B"

#### PROCEDURES FOR SUBMITTAL, CONSIDERATION AND PAYMENT OF INVOICES

1. For professional services, WRCOG recommends that the AGENCY incorporate this Exhibit "B-1" into its contracts with any subcontractors to establish a standard method for preparation of invoices by contractors to the AGENCY and ultimately to WRCOG for reimbursement of AGENCY contractor costs.
2. Each month the AGENCY shall submit an invoice for eligible Project costs incurred during the preceding month. The original invoice shall be submitted to WRCOG's Executive Director with a copy to WRCOG's Project Coordinator. Each invoice shall be accompanied by a cover letter in a format substantially similar to that of Exhibit "B-2".
3. For jurisdictions with large construction projects (with the total construction cost exceeding \$10 million) under construction at the same time, may with the approval of WRCOG submit invoices to WRCOG for payment at the same time they are received by the jurisdiction. WRCOG must receive the invoice by the 5<sup>th</sup> day of the month in order to process the invoice within 30 days. WRCOG will retain 10% of the invoice until all costs have been verified as eligible and will release the balance at regular intervals not more than quarterly and not less than semi-annually. If there is a discrepancy or ineligible costs that exceed 10% of the previous invoice WRCOG will deduct that amount from the next payment.
4. Each invoice shall include documentation from each contractor used by the AGENCY for the Project, listing labor costs, subcontractor costs, and other expenses. Each invoice shall also include a monthly progress report and spreadsheets showing the hours or amounts expended by each contractor or subcontractor for the month and for the entire Project to date. Samples of acceptable task level documentation and progress reports are attached as Exhibits "B-4" and "B-5". All documentation from the Agency's contractors should be accompanied by a cover letter in a format substantially similar to that of Exhibit "B-3".
5. If the AGENCY is seeking reimbursement for direct expenses incurred by AGENCY staff for eligible Project costs, the AGENCY shall provide the same level of information for its labor and any expenses as required of its contractors pursuant to Exhibit "B" and its attachments.
6. Charges for each task and milestone listed in Exhibit "A" shall be listed separately in the invoice.
7. Each invoice shall include a certification signed by the AGENCY Representative or his or her designee which reads as follows:

"I hereby certify that the hours and salary rates submitted for reimbursement in this invoice are the actual hours and rates worked and paid to the contractors or subcontractors listed.

Signed \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

Invoice No. \_\_\_\_\_

8. WRCOG will pay the AGENCY within 30 days after receipt by WRCOG of an invoice. If WRCOG disputes any portion of an invoice, payment for that portion will be withheld, without interest, pending resolution of the dispute, but the uncontested balance will be paid.
9. The final payment under this Agreement will be made only after: (I) the AGENCY has obtained a Release and Certificate of Final Payment from each contractor or subcontractor used on the Project; (ii) the AGENCY has executed a Release and Certificate of Final Payment; and (iii) the AGENCY has provided copies of each such Release to WRCOG.

**EXHIBIT "B-1"**  
**[Sample for Professional Services]**

For the satisfactory performance and completion of the Services under this Agreement, Agency will pay the Contractor compensation as set forth herein. The total compensation for this service shall not exceed (\_\_\_\_INSERT WRITTEN DOLLAR AMOUNT\_\_\_\_) (\$\_\_\_\_INSERT NUMERICAL DOLLAR AMOUNT\_\_\_\_) without written approval of Agency's City Manager [or applicable position] ("Total Compensation").

**1. ELEMENTS OF COMPENSATION.**

Compensation for the Services will be comprised of the following elements: 1.1 Direct Labor Costs; 1.2 Fixed Fee; and 1.3 Additional Direct Costs.

**1.1 DIRECT LABOR COSTS.**

Direct Labor costs shall be paid in an amount equal to the product of the Direct Salary Costs and the Multiplier which are defined as follows:

**1.1.1 DIRECT SALARY COSTS**

Direct Salary Costs are the base salaries and wages actually paid to the Contractor's personnel directly engaged in performance of the Services under the Agreement. (The range of hourly rates paid to the Contractor's personnel appears in Section 2 below.)

**1.1.2 MULTIPLIER**

The Multiplier to be applied to the Direct Salary Costs to determine the Direct Labor Costs is \_\_\_\_\_, and is the sum of the following components:

**1.1.2.1 Direct Salary Costs**

\_\_\_\_\_

**1.1.2.2 Payroll Additives**

\_\_\_\_\_

*The Decimal Ratio of Payroll Additives to Direct Salary Costs.* Payroll Additives include all employee benefits, allowances for vacation, sick leave, and holidays, and company portion of employee insurance and social and retirement benefits, all federal and state payroll taxes, premiums for insurance which are measured by payroll costs, and other contributions and benefits imposed by applicable laws and regulations.

**1.1.2.3 Overhead Costs**

\_\_\_\_\_

*The Decimal Ratio of Allowable Overhead Costs to the Contractor Firm's Total Direct Salary Costs.* Allowable Overhead Costs include general, administrative and overhead costs of maintaining and operating established offices, and consistent with established firm policies, and as defined in the Federal Acquisitions Regulations, Part 31.2.

Total Multiplier  
(sum of 1.1.2.1, 1.1.2.2, and 1.1.2.3) \_\_\_\_\_

## 1.2 FIXED FEE.

1.2.1 The fixed fee is \$ \_\_\_\_\_.

1.2.2 A pro-rata share of the Fixed Fee shall be applied to the total Direct Labor Costs expended for services each month, and shall be included on each monthly invoice.

## 1.3 ADDITIONAL DIRECT COSTS.

Additional Direct Costs directly identifiable to the performance of the services of this Agreement shall be reimbursed at the rates below, or at actual invoiced cost.

Rates for identified Additional Direct Costs are as follows:

| <u>ITEM</u>      | <u>REIMBURSEMENT RATE</u> |
|------------------|---------------------------|
|                  | <u>[ insert charges ]</u> |
| Per Diem         | \$ /day                   |
| Car mileage      | \$ /mile                  |
| Travel           | \$ /trip                  |
| Computer Charges | \$ /hour                  |
| Photocopies      | \$ /copy                  |
| Blueline         | \$ /sheet                 |
| LD Telephone     | \$ /call                  |
| Fax              | \$ /sheet                 |
| Photographs      | \$ /sheet                 |

Travel by air and travel in excess of 100 miles from the Contractor's office nearest to Agency's office must have Agency's prior written approval to be reimbursed under this Agreement.



## 2. DIRECT SALARY RATES

Direct Salary Rates, which are the range of hourly rates to be used in determining Direct Salary Costs in Section 1.1.1 above, are given below and are subject to the following:

- 2.1 Direct Salary Rates shall be applicable to both straight time and overtime work, unless payment of a premium for overtime work is required by law, regulation or craft agreement, or is otherwise specified in this Agreement. In such event, the premium portion of Direct Salary Costs will not be subject to the Multiplier defined in Paragraph 1.1.2 above.
- 2.2 Direct Salary Rates shown herein are in effect for one year following the effective date of the Agreement. Thereafter, they may be adjusted annually to reflect the Contractor's adjustments to individual compensation. The Contractor shall notify Agency in writing prior to a change in the range of rates included herein, and prior to each subsequent change.

|                                   |                              |
|-----------------------------------|------------------------------|
| <u>POSITION OR CLASSIFICATION</u> | <u>RANGE OF HOURLY RATES</u> |
|-----------------------------------|------------------------------|

[ sample ]

|                          |                      |
|--------------------------|----------------------|
| Principal                | \$ .00 - \$ .00/hour |
| Project Manager          | \$ .00 - \$ .00/hour |
| Sr. Engineer/Planner     | \$ .00 - \$ .00/hour |
| Project Engineer/Planner | \$ .00 - \$ .00/hour |
| Assoc. Engineer/Planner  | \$ .00 - \$ .00/hour |
| Technician               | \$ .00 - \$ .00/hour |
| Drafter/CADD Operator    | \$ .00 - \$ .00/hour |
| Word Processor           | \$ .00 - \$ .00/hour |

- 2.3 The above rates are for the Contractor only. All rates for subcontractors to the Contractor will be in accordance with the Contractor's cost proposal.

## 3. INVOICING.

- 3.1 Each month the Contractor shall submit an invoice for Services performed during the preceding month. The original invoice shall be submitted to Agency's Executive Director with two (2) copies to Agency's Project Coordinator.
- 3.2 Charges shall be billed in accordance with the terms and rates included herein, unless otherwise agreed in writing by Agency's Representative.
- 3.3 Base Work and Extra Work shall be charged separately, and the charges for each task and Milestone listed in the Scope of Services, shall be listed separately. The charges for each individual assigned by the Contractor under this Agreement shall be listed separately on an attachment to the invoice.

- 3.4 A charge of \$500 or more for any one item of Additional Direct Costs shall be accompanied by substantiating documentation satisfactory to Agency such as invoices, telephone logs, etc.
- 3.5 Each copy of each invoice shall be accompanied by a Monthly Progress Report and spreadsheets showing hours expended by task for each month and total project to date.
- 3.6 If applicable, each invoice shall indicate payments to DBE subcontractors or supplies by dollar amount and as a percentage of the total invoice.
- 3.7 Each invoice shall include a certification signed by the Contractor's Representative or an officer of the firm which reads as follows:

I hereby certify that the hours and salary rates charged in this invoice are the actual hours and rates worked and paid to the employees listed.

Signed \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

Invoice No. \_\_\_\_\_

#### **4. PAYMENT**

- 4.1 Agency shall pay the Contractor within four to six weeks after receipt by Agency of an original invoice. Should Agency contest any portion of an invoice, that portion shall be held for resolution, without interest, but the uncontested balance shall be paid.
- 4.2 The final payment for Services under this Agreement will be made only after the Contractor has executed a Release and Certificate of Final Payment.

**EXHIBIT B-2**  
**Sample Cover Letter to WRCOG**

Date

Western Riverside Council of Governments  
 3390 University Avenue; Suite 450  
 Riverside, California 92501  
 Attention: Deputy Executive Director  
 ATTN: Accounts Payable

Re: Project Title - Invoice #\_\_

Enclosed for your review and payment approval is the AGENCY's invoice for professional and technical services that was rendered by our contractors in connection with the 2002 Measure "A" Local Streets and Roads Funding per Agreement No. \_\_\_\_\_ effective (Month/Day/Year). The required support documentation received from each contractor is included as backup to the invoice.

Invoice period covered is from Month/Date/Year to Month/Date/Year.

|                                    |                |
|------------------------------------|----------------|
| Total Authorized Agreement Amount: | \$0,000,000.00 |
| Total Invoiced to Date:            | \$0,000,000.00 |
| Total Previously Invoiced:         | \$0,000,000.00 |
| Balance Remaining:                 | \$0,000,000.00 |

|                                 |                       |
|---------------------------------|-----------------------|
| <b>Amount due this Invoice:</b> | <b>\$0,000,000.00</b> |
|---------------------------------|-----------------------|

I certify that the hours and salary rates charged in this invoice are the actual hours and rates worked and paid to the contractors listed.

By: \_\_\_\_\_  
 Name  
 Title

cc:

**EXHIBIT B-3**  
**Sample Letter from Contractor to AGENCY**

Month/Date/Year

Western Riverside Council of Governments  
 3390 University Avenue; Suite 200  
 Riverside, California 92501  
 Attention: Deputy Executive Director  
 Attn: Accounts Payable

Invoice # \_\_\_\_\_

For **[type of services]** rendered by **[contractor name]** in connection with **[name of project]**  
 This is per agreement No. XX-XX-XXX effective Month/Date/Year.

Invoice period covered is from Month/Date/Year to Month/Date/Year.

|                                       |              |
|---------------------------------------|--------------|
| Total Base Contract Amount:           | \$000,000.00 |
| Authorized Extra Work (if Applicable) | \$000,000.00 |

|                                   |              |
|-----------------------------------|--------------|
| TOTAL AUTHORIZED CONTRACT AMOUNT: | \$000,000.00 |
|-----------------------------------|--------------|

|                          |              |
|--------------------------|--------------|
| Total Invoice to Date:   | \$000,000.00 |
| Total Previously Billed: | \$000,000.00 |
| Balance Remaining:       | \$000,000.00 |

|                          |              |
|--------------------------|--------------|
| Amount Due this Invoice: | \$000,000.00 |
|--------------------------|--------------|

I certify that the hours and salary rates charged in this invoice are the actual hours and rates worked and paid to the employees listed,

By: \_\_\_\_\_  
 Name  
 Title

**EXHIBIT B-4**  
**SAMPLE TASK SUMMARY SCHEDULE**  
**(OPTIONAL)**

**EXHIBIT B-5**  
**Sample Progress Report**

REPORTING PERIOD: Month/Date/Year to Month/Date/Year

PROGRESS REPORT: #1

**A. Activities and Work Completed during Current Work Periods**

**TASK 01 – 100% PS&E SUBMITTAL**

1. Responded to Segment 1 comments from Department of Transportation
2. Completed and submitted Segment 1 final PS&E

**B. Current/Potential Problems Encountered & Corrective Action**

| Problems | Corrective Action |
|----------|-------------------|
| None     | None              |

**C. Work Planned Next Period**

**TASK 01 – 100% PS&E SUBMITTAL**

1. Completing and to submit Traffic Signal and Electrical Design plans
2. Responding to review comments

# Attachment

TUMF Reimbursement  
Agreement – Butterfield  
Stage Road

**TRANSPORTATION UNIFORM MITIGATION FEE PROGRAM  
AGREEMENT TO REIMBURSE TUMF FUNDS  
BUTTERFIELD STAGE ROAD  
PLANNING (PLN) PHASE**

THIS REIMBURSEMENT AGREEMENT (“Agreement”) is entered into as of this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_, by and between the Western Riverside Council of Governments (“WRCOG”), a California joint powers authority and the County of Riverside, a political subdivision of the State of California (“AGENCY”). WRCOG and AGENCY are sometimes hereinafter referred to individually as “Party” and collectively as “Parties”.

**RECITALS**

A. WRCOG is the Administrator of the Transportation Uniform Mitigation Fee Program of Western Riverside County (“TUMF Program”).

B. WRCOG has identified and designated certain transportation improvement projects throughout Western Riverside County as projects of regional importance (“Qualifying Projects” or “Projects”). The Qualifying Projects are more specifically described in that certain WRCOG study titled “TUMF Nexus Study”, as may be amended from time to time. Qualifying Projects can have Regional or Zonal significance as further described in the TUMF Nexus Study.

C. The TUMF Program is funded by TUMF fees paid by new development in Western Riverside County (collectively, “TUMF Program Funds”). TUMF Program Funds are held in trust by WRCOG for the purpose of funding the Qualifying Projects.

D. The AGENCY proposes to implement a Qualifying Project, and it is the purpose of this Agreement to identify the project and to set forth the terms and conditions by which WRCOG will release TUMF Program Funds.

**AGREEMENT**

NOW, THEREFORE, in consideration of the mutual covenants and subject to the conditions contained herein, the Parties hereby agree as follows:

1. Description of the Qualifying Project. This Agreement is intended to distribute TUMF Program Funds to the AGENCY for **BUTTERFIELD STAGE ROAD**, (the “Project”), a Qualifying Project. The Work, including a timetable and a detailed scope of work, is more fully described in Exhibit “A” attached hereto and incorporated herein by reference and, pursuant to Section 20 below, is subject to modification if requested by the AGENCY and approved by WRCOG. The work shall be consistent with one or more of the defined WRCOG Call for Projects phases detailed herein as follows:

1) Planning (PLN)



2. WRCOG Funding Amount. WRCOG hereby agrees to distribute to AGENCY, on the terms and conditions set forth herein, a sum not to exceed **FIVE HUNDRED THOUSAND DOLLARS (\$500,000.00)**, to be used for reimbursing the AGENCY for eligible Project expenses as described in Section 3 herein (“Funding Amount”). The Parties acknowledge and agree that the Funding Amount may be less than the actual cost of the Project. Nevertheless, the Parties acknowledge and agree that WRCOG shall not be obligated to contribute TUMF Program Funds in excess of the maximum TUMF share identified in the TUMF Nexus Study (“Maximum TUMF Share”), as may be amended from time to time.

3. Project Costs Eligible for Advance/Reimbursement. The total Project costs (“Total Project Cost”) may include the following items, provided that such items are included in the scope of work attached hereto as Exhibit “A” (“Scope of Work”): (1) AGENCY and/or consultant costs associated with direct Project coordination and support; (2) funds expended in preparation of preliminary engineering studies; (3) funds expended for preparation of environmental review documentation for the Project; (4) all costs associated with right-of-way acquisition, including right-of-way engineering, appraisal, acquisition, legal costs for condemnation procedures if authorized by the AGENCY, and costs of reviewing appraisals and offers for property acquisition; (5) costs reasonably incurred if condemnation proceeds; (6) costs incurred in the preparation of plans, specifications, and estimates by AGENCY or consultants; (7) AGENCY costs associated with bidding, advertising and awarding of the Project contracts; (8) construction costs, including change orders to construction contract approved by the AGENCY; (9) construction management, field inspection and material testing costs; and (10) any AGENCY administrative cost to deliver the Project.

4. Ineligible Project Costs. The Total Project Cost shall not include the following items which shall be borne solely by the AGENCY without reimbursement: (1) any AGENCY administrative fees attributed to the reviewing and processing of the Project; and (2) expenses for items of work not included within the Scope of Work in Exhibit “A”.

5. Procedures for Distribution of TUMF Program Funds to AGENCY.

(a) Initial Payment by the AGENCY. The AGENCY shall be responsible for initial payment of all the Project costs as they are incurred. Following payment of such Project costs, the AGENCY shall submit invoices to WRCOG requesting reimbursement of eligible Project costs. Each invoice shall be accompanied by detailed contractor invoices, or other demands for payment addressed to the AGENCY, and documents evidencing the AGENCY’s payment of the invoices or demands for payment. Documents evidencing the AGENCY’S payment of the invoices shall be retained for four (4) years and shall be made available for review by WRCOG. The AGENCY shall submit invoices not more often than monthly and not less often than quarterly.

(b) Review and Reimbursement by WRCOG. Upon receipt of an invoice from the AGENCY, WRCOG may request additional documentation or explanation of the Project costs for which reimbursement is sought. Undisputed amounts shall be paid by WRCOG to the AGENCY within thirty (30) days. In the event that WRCOG disputes the eligibility of the AGENCY for reimbursement of all or a portion of an invoiced amount, the Parties shall meet and confer in an attempt to resolve the dispute. If the meet and confer process is unsuccessful in

resolving the dispute, the AGENCY may appeal WRCOG's decision as to the eligibility of one or more invoices to WRCOG's Executive Director. The WRCOG Executive Director shall provide his/her decision in writing. If the AGENCY disagrees with the Executive Director's decision, the AGENCY may appeal the decision of the Executive Director to the full WRCOG Executive Committee, provided the AGENCY submits its request for appeal to WRCOG within ten (10) days of the Executive Director's written decision. The decision of the WRCOG Executive Committee shall be final. Additional details concerning the procedure for the AGENCY's submittal of invoices to WRCOG and WRCOG's consideration and payment of submitted invoices are set forth in Exhibit "B", attached hereto and incorporated herein by reference.

(c) Funding Amount/Adjustment. If a post Project audit or review indicates that WRCOG has provided reimbursement to the AGENCY in an amount in excess of the Maximum TUMF Share of the Project, or has provided reimbursement of ineligible Project costs, the AGENCY shall reimburse WRCOG for the excess or ineligible payments within 30 days of notification by WRCOG.

6. Increases in Project Funding. The Funding Amount may, in WRCOG's sole discretion, be augmented with additional TUMF Program Funds if the TUMF Nexus Study is amended to increase the maximum eligible TUMF share for the Project. Any such increase in the Funding Amount must be approved in writing by WRCOG's Executive Director. In no case shall the amount of TUMF Program Funds allocated to the AGENCY exceed the then-current maximum eligible TUMF share for the Project. No such increased funding shall be expended to pay for any Project already completed. For purposes of this Agreement, the Project or any portion thereof shall be deemed complete upon its acceptance by WRCOG's Executive Director which shall be communicated to the AGENCY in writing.

7. No Funding for Temporary Improvements. Only segments or components of the construction that are intended to form part of or be integrated into the Project may be funded by TUMF Program Funds. No improvement which is temporary in nature, including but not limited to temporary roads, curbs, tapers or drainage facilities, shall be funded with TUMF Program Funds, except as needed for staged construction of the Project.

8. AGENCY's Funding Obligation to Complete the Project. In the event that the TUMF Program Funds allocated to the Project represent less than the total cost of the Project, the AGENCY shall provide such additional funds as may be required to complete the Project.

9. AGENCY's Obligation to Repay TUMF Program Funds to WRCOG; Exception For PA&ED Phase Work. Except as otherwise expressly excepted within this paragraph, in the event that: (i) the AGENCY, for any reason, determines not to proceed with or complete the Project; or (ii) the Project is not timely completed, subject to any extension of time granted by WRCOG pursuant to the terms of this Agreement; the AGENCY agrees that any TUMF Program Funds that were distributed to the AGENCY for the Project shall be repaid in full to WRCOG, and the Parties shall enter into good faith negotiations to establish a reasonable repayment schedule and repayment mechanism. If the Project involves work pursuant to a PA&ED phase, AGENCY shall not be obligated to repay TUMF Program Funds to WRCOG relating solely to PA&ED phase work performed for the Project.

10. AGENCY's Local Match Contribution. AGENCY local match funding is not required, as shown in Exhibit "A" and as called out in the AGENCY's Project Nomination Form submitted to WRCOG in response to its Call for Projects."]

11. Term/Notice of Completion. The term of this Agreement shall be from the date first herein above written until the earlier of the following: (i) the date WRCOG formally accepts the Project as complete, pursuant to Section 6; (ii) termination of this Agreement pursuant to Section 15; or (iii) the AGENCY has fully satisfied its obligations under this Agreement. All applicable indemnification provisions of this Agreement shall remain in effect following the termination of this Agreement.

12. Representatives of the Parties. WRCOG's Executive Director, or his or her designee, shall serve as WRCOG's representative and shall have the authority to act on behalf of WRCOG for all purposes under this Agreement. The AGENCY hereby designates **DENNIS ACUNA, DIRECTOR OF TRANSPORTATION**, or his or her designee, as the AGENCY's representative to WRCOG. The AGENCY's representative shall have the authority to act on behalf of the AGENCY for all purposes under this Agreement and shall coordinate all activities of the Project under the AGENCY's responsibility. The AGENCY shall work closely and cooperate fully with WRCOG's representative and any other agencies which may have jurisdiction over or an interest in the Project.

13. Expenditure of Funds by AGENCY Prior to Execution of Agreement. Nothing in this Agreement shall be construed to prevent or preclude the AGENCY from expending funds on the Project prior to the execution of the Agreement, or from being reimbursed by WRCOG for such expenditures. However, the AGENCY understands and acknowledges that any expenditure of funds on the Project prior to the execution of the Agreement is made at the AGENCY's sole risk, and that some expenditures by the AGENCY may not be eligible for reimbursement under this Agreement.

14. Review of Services. The AGENCY shall allow WRCOG's Representative to inspect or review the progress of the Project at any reasonable time in order to determine whether the terms of this Agreement are being met.

15. Termination.

(a) Notice. Either WRCOG or AGENCY may, by written notice to the other party, terminate this Agreement, in whole or in part, in response to a material breach hereof by the other Party, by giving written notice to the other party of such termination and specifying the effective date thereof. The written notice shall provide a 30 day period to cure any alleged breach. During the 30 day cure period, the Parties shall discuss, in good faith, the manner in which the breach can be cured.

(b) Effect of Termination. In the event that the AGENCY terminates this Agreement, the AGENCY shall, within 180 days, repay to WRCOG any unexpended TUMF Program Funds provided to the AGENCY under this Agreement and shall complete any portion or segment of work for the Project for which TUMF Program Funds have been provided. In the

event that WRCOG terminates this Agreement, WRCOG shall, within 90 days, distribute to the AGENCY TUMF Program Funds in an amount equal to the aggregate total of all unpaid invoices which have been received from the AGENCY regarding the Project at the time of the notice of termination; provided, however, that WRCOG shall be entitled to exercise its rights under Section 5(b), including but not limited to conducting a review of the invoices and requesting additional information. Upon such termination, the AGENCY shall, within 180 days, complete any portion or segment of work for the Project for which TUMF Program Funds have been provided. This Agreement shall terminate upon receipt by the non-terminating Party of the amounts due to it hereunder and upon completion of the segment or portion of Project work for which TUMF Program Funds have been provided.

(c) Cumulative Remedies. The rights and remedies of the Parties provided in this Section are in addition to any other rights and remedies provided by law or under this Agreement.

16. Prevailing Wages. The AGENCY and any other person or entity hired to perform services on the Project are alerted to the requirements of California Labor Code Sections 1770 et seq., which would require the payment of prevailing wages were the services or any portion thereof determined to be a public work, as defined therein. The AGENCY shall ensure compliance with these prevailing wage requirements by any person or entity hired to perform the Project. The AGENCY shall defend, indemnify, and hold harmless WRCOG, its officers, employees, consultants, and agents from any claim or liability, including without limitation attorneys' fees, arising from its failure or alleged failure to comply with California Labor Code Sections 1770 et seq.

17. Progress Reports. WRCOG may request the AGENCY to provide WRCOG with progress reports concerning the status of the Project.

18. Indemnification.

(a) AGENCY Responsibilities. In addition to the indemnification required under Section 16, the AGENCY agrees to indemnify and hold harmless WRCOG, its officers, agents, consultants, and employees from any and all claims, demands, costs or liability arising from or connected with all activities governed by this Agreement including all design and construction activities, due to negligent acts, errors or omissions or willful misconduct of the AGENCY or its subcontractors. The AGENCY will reimburse WRCOG for any expenditures, including reasonable attorneys' fees, incurred by WRCOG, in defending against claims ultimately determined to be due to negligent acts, errors or omissions or willful misconduct of the AGENCY.

(b) WRCOG Responsibilities. WRCOG agrees to indemnify and hold harmless the AGENCY, its officers, agents, consultants, and employees from any and all claims, demands, costs or liability arising from or connected with all activities governed by this Agreement including all design and construction activities, due to negligent acts, errors or omissions or willful misconduct of WRCOG or its sub-consultants. WRCOG will reimburse the AGENCY for any expenditures, including reasonable attorneys' fees, incurred by the AGENCY,

in defending against claims ultimately determined to be due to negligent acts, errors or omissions or willful misconduct of WRCOG.

(c) Effect of Acceptance. The AGENCY shall be responsible for the professional quality, technical accuracy and the coordination of any services provided to complete the Project. WRCOG's review, acceptance or funding of any services performed by the AGENCY or any other person or entity under this Agreement shall not be construed to operate as a waiver of any rights WRCOG may hold under this Agreement or of any cause of action arising out of this Agreement. Further, the AGENCY shall be and remain liable to WRCOG, in accordance with applicable law, for all damages to WRCOG caused by the AGENCY's negligent performance of this Agreement or supervision of any services provided to complete the Project.

19. Insurance. The AGENCY shall require, at a minimum, all persons or entities hired to perform the Project to obtain, and require their subcontractors to obtain, insurance of the types and in the amounts described below and satisfactory to the AGENCY and WRCOG. Such insurance shall be maintained throughout the term of this Agreement, or until completion of the Project, whichever occurs last.

(a) Commercial General Liability Insurance. Occurrence version commercial general liability insurance or equivalent form with a combined single limit of not less than \$1,000,000.00 per occurrence. If such insurance contains a general aggregate limit, it shall apply separately to the Project or be no less than two times the occurrence limit. Such insurance shall:

(i) Name WRCOG and AGENCY, and their respective officials, officers, employees, agents, and consultants as insured with respect to performance of the services on the Project and shall contain no special limitations on the scope of coverage or the protection afforded to these insured;

(ii) Be primary with respect to any insurance or self-insurance programs covering WRCOG and AGENCY, and/or their respective officials, officers, employees, agents, and consultants; and

(iii) Contain standard separation of insured provisions.

(b) Business Automobile Liability Insurance. Business automobile liability insurance or equivalent form with a combined single limit of not less than \$1,000,000.00 per occurrence. Such insurance shall include coverage for owned, hired and non-owned automobiles.

(c) Professional Liability Insurance. Errors and omissions liability insurance with a limit of not less than \$1,000,000.00 Professional liability insurance shall only be required of design or engineering professionals.

(d) Workers' Compensation Insurance. Workers' compensation insurance with statutory limits and employers' liability insurance with limits of not less than \$1,000,000.00 each accident.

20. Project Amendments. Changes to the characteristics of the Project, including the deadline for Project completion, and any responsibilities of the AGENCY or WRCOG may be requested in writing by the AGENCY and are subject to the approval of WRCOG's Representative, which approval will not be unreasonably withheld, provided that extensions of time for completion of the Project shall be approved in the sole discretion of WRCOG's Representative. Nothing in this Agreement shall be construed to require or allow completion of the Project without full compliance with the California Environmental Quality Act (Public Resources Code Section 21000 *et seq.*; "CEQA") and the National Environmental Policy Act of 1969 (42 USC 4231 *et seq.*), if applicable, but the necessity of compliance with CEQA and/or NEPA shall not justify, excuse, or permit a delay in completion of the Project.

21. Conflict of Interest. For the term of this Agreement, no member, officer or employee of the AGENCY or WRCOG, during the term of his or her service with the AGENCY or WRCOG, as the case may be, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

22. Limited Scope of Duties. WRCOG's and the AGENCY's duties and obligations under this Agreement are limited to those described herein. WRCOG has no obligation with respect to the safety of any Project performed at a job site. In addition, WRCOG shall not be liable for any action of AGENCY or its contractors relating to the condemnation of property undertaken by AGENCY or construction related to the Project.

23. Books and Records. Each party shall maintain complete, accurate, and clearly identifiable records with respect to costs incurred for the Project under this Agreement. They shall make available for examination by the other party, its authorized agents, officers or employees any and all ledgers and books of account, invoices, vouchers, canceled checks, and other records or documents evidencing or related to the expenditures and disbursements charged to the other party pursuant to this Agreement. Further, each party shall furnish to the other party, its agents or employees such other evidence or information as they may require with respect to any such expense or disbursement charged by them. All such information shall be retained by the Parties for at least four (4) years following termination of this Agreement, and they shall have access to such information during the four-year period for the purposes of examination or audit.

24. Equal Opportunity Employment. The Parties represent that they are equal opportunity employers and they shall not discriminate against any employee or applicant of reemployment because of race, religion, color, national origin, ancestry, sex or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff or termination.

25. Governing Law. This Agreement shall be governed by and construed with the laws of the State of California.

26. Attorneys' Fees. If either party commences an action against the other party arising out of or in connection with this Agreement, the prevailing party in such litigation shall be entitled to have and recover from the losing party reasonable attorneys' fees and costs of suit.

27. Time of Essence. Time is of the essence for each and every provision of this Agreement.

28. Headings. Article and Section Headings, paragraph captions or marginal headings contained in this Agreement are for convenience only and shall have no effect in the construction or interpretation of any provision herein.

29. Public Acknowledgement. The AGENCY agrees that all public notices, news releases, information signs and other forms of communication shall indicate that the Project is being cooperatively funded by the AGENCY and WRCOG TUMF Program Funds.

30. No Joint Venture. This Agreement is for funding purposes only and nothing herein shall be construed to make WRCOG a party to the construction of the Project or to make it a partner or joint venture with the AGENCY for such purpose.

31. Compliance With the Law. The AGENCY shall comply with all applicable laws, rules and regulations governing the implementation of the Qualifying Project, including, where applicable, the rules and regulations pertaining to the participation of businesses owned or controlled by minorities and women promulgated by the Federal Highway Administration and the Federal Department of Transportation.

32. Notices. All notices hereunder and communications regarding interpretation of the terms of this Agreement or changes thereto shall be provided by the mailing thereof by registered or certified mail, return receipt requested, postage prepaid and addressed as follows:

If to AGENCY: County of Riverside  
 Transportation Department  
 4080 Lemon Street, 8<sup>th</sup> Floor  
 Riverside, CA 92501  
 Attention: Dennis Acuna, Director of Transportation  
 Telephone: (951) 955-6820  
 Facsimile: (951) 955-3198

If to WRCOG: Western Riverside Council of Governments  
 3390 University Avenue; Suite 200  
 Riverside, California 92501  
 Attention: Christopher Gray, Deputy Executive Director  
 Telephone: (951) 405-6710  
 Facsimile: (951) 223-9720

Any notice so given shall be considered served on the other party three (3) days after deposit in the U.S. mail, first class postage prepaid, return receipt requested, and addressed to the party at its applicable address. Actual notice shall be deemed adequate notice on the date actual notice occurred regardless of the method of service.

33. Integration; Amendment. This Agreement contains the entire agreement between the PARTIES. Any agreement or representation respecting matters addressed herein that are not expressly set forth in this Agreement is null and void. This Agreement may be amended only by mutual written agreement of the PARTIES.

34. Severability. If any term, provision, condition or covenant of this Agreement is held invalid or unenforceable, the remainder of this Agreement shall not be affected thereby.

35. Conflicting Provisions. In the event that provisions of any attached appendices or exhibits conflict in any way with the provisions set forth in this Agreement, the language, terms and conditions contained in this Agreement shall control the actions and obligations of the Parties and the interpretation of the Parties' understanding concerning the Agreement.

36. Independent Contractors. Any person or entities retained by the AGENCY or any contractor shall be retained on an independent contractor basis and shall not be employees of WRCOG. Any personnel performing services on the Project shall at all times be under the exclusive direction and control of the AGENCY or contractor, whichever is applicable. The AGENCY or contractor shall pay all wages, salaries and other amounts due such personnel in connection with their performance of services on the Project and as required by law. The AGENCY or consultant shall be responsible for all reports and obligations respecting such personnel, including, but not limited to: social security taxes, income tax withholding, unemployment insurance and workers' compensation insurance.

37. Effective Date. This Agreement shall not be effective until executed by both Parties. The failure of one party to execute this Agreement within forty-five (45) days of the other party executing this Agreement shall render any execution of this Agreement ineffective.

38. No Third Party Beneficiaries. There are no intended third party beneficiaries of any right or obligation assumed by the Parties.

39. Counterparts. This Agreement may be signed in counterparts, each of which shall constitute an original and which collectively shall constitute one instrument.

[SIGNATURES ON FOLLOWING PAGE]



**IN WITNESS WHEREOF**, the Parties have caused this Agreement to be executed by their duly authorized representatives to be effective on the day and year first above-written.

WESTERN RIVERSIDE COUNCIL  
OF GOVERNMENTS

COUNTY OF RIVERSIDE

RECOMMENDED FOR APPROVAL:

By: \_\_\_\_\_  
Dr. Kurt Wilson  
Executive Director

By: \_\_\_\_\_  
Dennis Acuna  
Director of Transportation

APPROVED TO FORM:

APPROVED AS TO FORM:  
Minh C. Tran  
County Counsel

By: \_\_\_\_\_  
Steven C. DeBaun  
General Counsel

By: \_\_\_\_\_  
Stephanie Nelson  
Deputy County Counsel

APPROVAL BY THE COUNTY BOARD  
OF SUPERVISORS:

By: \_\_\_\_\_  
  
Chairman, County Board of Supervisors

ATTEST:  
Kimberly Rector  
Clerk of the Board

By: \_\_\_\_\_  
  
Deputy

**EXHIBIT “A”****SCOPE OF WORK**

The Project phase to be funded under this Agreement consists of Planning (PLN) Phase.

The Butterfield Stage Road Project (Project) is in the French Valley and Temecula Area in the unincorporated area of the County of Riverside (County). The proposed Project will study a new four-lane roadway between Murrieta Hot Springs Road to Pourroy Road and the widening of the existing two-lane roadway of Pourroy Road between Auld Road to 0.9 miles south of Auld Road.

The PLN phase will include concept/alternative development needed to establish a design footprint. Once the footprint is established, environmental studies and preliminary engineering can be performed to support the environmental document. PLN phase will also include determination of utility conflicts, establishing a Right of Way Requirements Map, and aerial and field surveys, among other things to support the future Engineering (ENG) Phase.

**EXHIBIT “A-1”****ESTIMATE OF COST**

| <b>Phase</b>              | <b>TUMF</b>  | <b>LOCAL</b> | <b>TOTAL</b> |
|---------------------------|--------------|--------------|--------------|
| <b>PLANNING (PLN)</b>     | \$500,000.00 | \$0          | \$500,000.00 |
| <b>ENGINEERING (ENG)</b>  |              |              |              |
| <b>RIGHT OF WAY (ROW)</b> |              |              |              |
| <b>CONSTRUCTION (CON)</b> |              |              |              |
| <b>TOTAL</b>              | \$500,000.00 | \$0          | \$500,000.00 |

**EXHIBIT “A-2”**  
**PROJECT SCHEDULE**

| <b>Phase</b> | <b>Estimated<br/>Completion Date</b> | <b>Estimated Cost</b> | <b>Comments</b> |
|--------------|--------------------------------------|-----------------------|-----------------|
| <b>PLN</b>   | FY 27/28                             | \$500,000.00          |                 |
| <b>ENG</b>   |                                      |                       |                 |
| <b>ROW</b>   |                                      |                       |                 |
| <b>CON</b>   |                                      |                       |                 |
| <b>TOTAL</b> |                                      | \$500,000.00          |                 |

## Elements of Compensation

### EXHIBIT “B”

#### PROCEDURES FOR SUBMITTAL, CONSIDERATION AND PAYMENT OF INVOICES

1. For professional services, WRCOG recommends that the AGENCY incorporate this Exhibit “B-1” into its contracts with any subcontractors to establish a standard method for preparation of invoices by contractors to the AGENCY and ultimately to WRCOG for reimbursement of AGENCY contractor costs.
2. Each month the AGENCY shall submit an invoice for eligible Project costs incurred during the preceding month. The original invoice shall be submitted to WRCOG’s Executive Director with a copy to WRCOG’s Project Coordinator. Each invoice shall be accompanied by a cover letter in a format substantially similar to that of Exhibit “B-2”.
3. For jurisdictions with large construction projects (with the total construction cost exceeding \$10 million) under construction at the same time, may with the approval of WRCOG submit invoices to WRCOG for payment at the same time they are received by the jurisdiction. WRCOG must receive the invoice by the 5<sup>th</sup> day of the month in order to process the invoice within 30 days. WRCOG will retain 10% of the invoice until all costs have been verified as eligible and will release the balance at regular intervals not more than quarterly and not less than semi-annually. If there is a discrepancy or ineligible costs that exceed 10% of the previous invoice WRCOG will deduct that amount from the next payment.
4. Each invoice shall include documentation from each contractor used by the AGENCY for the Project, listing labor costs, subcontractor costs, and other expenses. Each invoice shall also include a monthly progress report and spreadsheets showing the hours or amounts expended by each contractor or subcontractor for the month and for the entire Project to date. Samples of acceptable task level documentation and progress reports are attached as Exhibits “B-4” and “B-5”. All documentation from the Agency’s contractors should be accompanied by a cover letter in a format substantially similar to that of Exhibit “B-3”.
5. If the AGENCY is seeking reimbursement for direct expenses incurred by AGENCY staff for eligible Project costs, the AGENCY shall provide the same level of information for its labor and any expenses as required of its contractors pursuant to Exhibit “B” and its attachments.
6. Charges for each task and milestone listed in Exhibit “A” shall be listed separately in the invoice.
7. Each invoice shall include a certification signed by the AGENCY Representative or his or her designee which reads as follows:

"I hereby certify that the hours and salary rates submitted for reimbursement in this invoice are the actual hours and rates worked and paid to the contractors or subcontractors listed.

Signed \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

Invoice No. \_\_\_\_\_

8. WRCOG will pay the AGENCY within 30 days after receipt by WRCOG of an invoice. If WRCOG disputes any portion of an invoice, payment for that portion will be withheld, without interest, pending resolution of the dispute, but the uncontested balance will be paid.
9. The final payment under this Agreement will be made only after: (I) the AGENCY has obtained a Release and Certificate of Final Payment from each contractor or subcontractor used on the Project; (ii) the AGENCY has executed a Release and Certificate of Final Payment; and (iii) the AGENCY has provided copies of each such Release to WRCOG.

**EXHIBIT “B-1”**  
**[Sample for Professional Services]**

For the satisfactory performance and completion of the Services under this Agreement, Agency will pay the Contractor compensation as set forth herein. The total compensation for this service shall not exceed (\_\_\_\_INSERT WRITTEN DOLLAR AMOUNT\_\_\_\_) (\$\_\_INSERT NUMERICAL DOLLAR AMOUNT\_\_) without written approval of Agency’s City Manager [or applicable position] (“Total Compensation”).

**1. ELEMENTS OF COMPENSATION.**

Compensation for the Services will be comprised of the following elements: 1.1 Direct Labor Costs; 1.2 Fixed Fee; and 1.3 Additional Direct Costs.

**1.1 DIRECT LABOR COSTS.**

Direct Labor costs shall be paid in an amount equal to the product of the Direct Salary Costs and the Multiplier which are defined as follows:

**1.1.1 DIRECT SALARY COSTS**

Direct Salary Costs are the base salaries and wages actually paid to the Contractor's personnel directly engaged in performance of the Services under the Agreement. (The range of hourly rates paid to the Contractor's personnel appears in Section 2 below.)

**1.1.2 MULTIPLIER**

The Multiplier to be applied to the Direct Salary Costs to determine the Direct Labor Costs is \_\_\_\_\_, and is the sum of the following components:

1.1.2.1 Direct Salary Costs \_\_\_\_\_

1.1.2.2 Payroll Additives \_\_\_\_\_

*The Decimal Ratio of Payroll Additives to Direct Salary Costs.* Payroll Additives include all employee benefits, allowances for vacation, sick leave, and holidays, and company portion of employee insurance and social and retirement benefits, all federal and state payroll taxes, premiums for insurance which are measured by payroll costs, and other contributions and benefits imposed by applicable laws and regulations.

1.1.2.3 Overhead Costs \_\_\_\_\_

*The Decimal Ratio of Allowable Overhead Costs to the Contractor Firm's Total Direct Salary Costs.* Allowable Overhead Costs include general, administrative and overhead costs of maintaining and operating established offices, and consistent with established firm policies, and as defined in the Federal Acquisitions Regulations, Part 31.2.

Total Multiplier  
(sum of 1.1.2.1, 1.1.2.2, and 1.1.2.3) \_\_\_\_\_

## **1.2 FIXED FEE.**

1.2.1 The fixed fee is \$\_\_\_\_\_.

1.2.2 A pro-rata share of the Fixed Fee shall be applied to the total Direct Labor Costs expended for services each month, and shall be included on each monthly invoice.

## **1.3 ADDITIONAL DIRECT COSTS.**

Additional Direct Costs directly identifiable to the performance of the services of this Agreement shall be reimbursed at the rates below, or at actual invoiced cost.

Rates for identified Additional Direct Costs are as follows:

| <u>ITEM</u>      | <u>REIMBURSEMENT RATE</u>   |
|------------------|-----------------------------|
|                  | <u>[__insert charges__]</u> |
| Per Diem         | \$ /day                     |
| Car mileage      | \$ /mile                    |
| Travel           | \$ /trip                    |
| Computer Charges | \$ /hour                    |
| Photocopies      | \$ /copy                    |
| Blueline         | \$ /sheet                   |
| LD Telephone     | \$ /call                    |
| Fax              | \$ /sheet                   |
| Photographs      | \$ /sheet                   |

Travel by air and travel in excess of 100 miles from the Contractor's office nearest to Agency's office must have Agency's prior written approval to be reimbursed under this Agreement.



## 2. DIRECT SALARY RATES

Direct Salary Rates, which are the range of hourly rates to be used in determining Direct Salary Costs in Section 1.1.1 above, are given below and are subject to the following:

- 2.1 Direct Salary Rates shall be applicable to both straight time and overtime work, unless payment of a premium for overtime work is required by law, regulation or craft agreement, or is otherwise specified in this Agreement. In such event, the premium portion of Direct Salary Costs will not be subject to the Multiplier defined in Paragraph 1.1.2 above.
- 2.2 Direct Salary Rates shown herein are in effect for one year following the effective date of the Agreement. Thereafter, they may be adjusted annually to reflect the Contractor's adjustments to individual compensation. The Contractor shall notify Agency in writing prior to a change in the range of rates included herein, and prior to each subsequent change.

| <u>POSITION OR CLASSIFICATION</u> | <u>RANGE OF HOURLY RATES</u> |
|-----------------------------------|------------------------------|
|-----------------------------------|------------------------------|

[\_\_sample\_\_]

|                          |                      |
|--------------------------|----------------------|
| Principal                | \$ .00 - \$ .00/hour |
| Project Manager          | \$ .00 - \$ .00/hour |
| Sr. Engineer/Planner     | \$ .00 - \$ .00/hour |
| Project Engineer/Planner | \$ .00 - \$ .00/hour |
| Assoc. Engineer/Planner  | \$ .00 - \$ .00/hour |
| Technician               | \$ .00 - \$ .00/hour |
| Drafter/CADD Operator    | \$ .00 - \$ .00/hour |
| Word Processor           | \$ .00 - \$ .00/hour |

- 2.3 The above rates are for the Contractor only. All rates for subcontractors to the Contractor will be in accordance with the Contractor's cost proposal.

## 3. INVOICING.

- 3.1 Each month the Contractor shall submit an invoice for Services performed during the preceding month. The original invoice shall be submitted to Agency's Executive Director with two (2) copies to Agency's Project Coordinator.
- 3.2 Charges shall be billed in accordance with the terms and rates included herein, unless otherwise agreed in writing by Agency's Representative.
- 3.3 Base Work and Extra Work shall be charged separately, and the charges for each task and Milestone listed in the Scope of Services, shall be listed separately. The charges for each individual assigned by the Contractor under this Agreement shall be listed separately on an attachment to the invoice.

- 3.4 A charge of \$500 or more for any one item of Additional Direct Costs shall be accompanied by substantiating documentation satisfactory to Agency such as invoices, telephone logs, etc.
- 3.5 Each copy of each invoice shall be accompanied by a Monthly Progress Report and spreadsheets showing hours expended by task for each month and total project to date.
- 3.6 If applicable, each invoice shall indicate payments to DBE subcontractors or supplies by dollar amount and as a percentage of the total invoice.
- 3.7 Each invoice shall include a certification signed by the Contractor's Representative or an officer of the firm which reads as follows:

I hereby certify that the hours and salary rates charged in this invoice are the actual hours and rates worked and paid to the employees listed.

Signed \_\_\_\_\_  
 Title \_\_\_\_\_  
 Date \_\_\_\_\_  
 Invoice No. \_\_\_\_\_

#### **4. PAYMENT**

- 4.1 Agency shall pay the Contractor within four to six weeks after receipt by Agency of an original invoice. Should Agency contest any portion of an invoice, that portion shall be held for resolution, without interest, but the uncontested balance shall be paid.
- 4.2 The final payment for Services under this Agreement will be made only after the Contractor has executed a Release and Certificate of Final Payment.

**EXHIBIT B-2**  
**Sample Cover Letter to WRCOG**

Date  
Western Riverside Council of Governments  
3390 University Avenue; Suite 450  
Riverside, California 92501  
Attention: Deputy Executive Director  
ATTN: Accounts Payable

Re: Project Title - Invoice #\_\_

Enclosed for your review and payment approval is the AGENCY’s invoice for professional and technical services that was rendered by our contractors in connection with the 2002 Measure “A” Local Streets and Roads Funding per Agreement No. \_\_\_\_\_ effective  (Month/Day/Year) . The required support documentation received from each contractor is included as backup to the invoice.

Invoice period covered is from  Month/Date/Year  to  Month/Date/Year .

|                                    |                |
|------------------------------------|----------------|
| Total Authorized Agreement Amount: | \$0,000,000.00 |
| Total Invoiced to Date:            | \$0,000,000.00 |
| Total Previously Invoiced:         | \$0,000,000.00 |
| Balance Remaining:                 | \$0,000,000.00 |

|                                 |                                |
|---------------------------------|--------------------------------|
| <b>Amount due this Invoice:</b> | <b>\$0,000,000.00</b><br>===== |
|---------------------------------|--------------------------------|

I certify that the hours and salary rates charged in this invoice are the actual hours and rates worked and paid to the contractors listed.

By: \_\_\_\_\_  
Name  
Title

cc:

**EXHIBIT B-3**  
**Sample Letter from Contractor to AGENCY**

Month/Date/Year

Western Riverside Council of Governments  
3390 University Avenue; Suite 200  
Riverside, California 92501  
Attention: Deputy Executive Director  
Attn: Accounts Payable

Invoice # \_\_\_\_\_

For **[type of services]** rendered by **[contractor name]** in connection with **[name of project]**  
This is per agreement No. XX-XX-XXX effective Month/Date/Year .

Invoice period covered is from Month/Date/Year to Month/Date/Year .

|                                       |              |
|---------------------------------------|--------------|
| Total Base Contract Amount:           | \$000,000.00 |
| Authorized Extra Work (if Applicable) | \$000,000.00 |
|                                       | -----        |
| TOTAL AUTHORIZED CONTRACT AMOUNT:     | \$000,000.00 |
| <br>                                  |              |
| Total Invoice to Date:                | \$000,000.00 |
| Total Previously Billed:              | \$000,000.00 |
| Balance Remaining:                    | \$000,000.00 |
| <br>                                  |              |
| Amount Due this Invoice:              | \$000,000.00 |
|                                       | =====        |

I certify that the hours and salary rates charged in this invoice are the actual hours and rates worked and paid to the employees listed,

By: \_\_\_\_\_  
Name  
Title

**EXHIBIT B-4  
SAMPLE TASK SUMMARY SCHEDULE  
(OPTIONAL)**

**EXHIBIT B-5**  
**Sample Progress Report**

REPORTING PERIOD: Month/Date/Year to Month/Date/Year  
 PROGRESS REPORT: #1

A. Activities and Work Completed during Current Work Periods

TASK 01 – 100% PS&E SUBMITTAL

1. Responded to Segment 1 comments from Department of Transportation
2. Completed and submitted Segment 1 final PS&E

B. Current/Potential Problems Encountered & Corrective Action

| Problems | Corrective Action |
|----------|-------------------|
| None     | None              |

C. Work Planned Next Period

TASK 01 – 100% PS&E SUBMITTAL

1. Completing and to submit Traffic Signal and Electrical Design plans
2. Responding to review comments

# Attachment

## TUMF Reimbursement Agreement Amendment #1 – Wood Road Widening

**AMENDMENT NO. 1 TO TRANSPORTATION UNIFORM MITIGATION FEE  
PROGRAM AGREEMENT**

**WOOD ROAD WIDENING**

This Amendment No. 1 to Transportation Uniform Mitigation Fee Program Agreement (“Amendment No. 1”) is entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by and between the **WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS** (“WRCOG”) and **COUNTY OF RIVERSIDE** (“AGENCY”). WRCOG and the AGENCY are sometimes referred to individually as “Party” and collectively as “Parties.”

**RECITALS**

A. WRCOG and AGENCY have entered into an agreement titled “Transportation Uniform Mitigation Fee Program Agreement” that is dated **May 9, 2022** (“Agreement”). The Agreement provides the terms and conditions, scope of work, schedule and funding amount for the construction of the **Wood Road Widening** (hereinafter the “Project”).

B. The Parties desire to amend the Agreement by increasing the funding amount pursuant to Section 6 of the Agreement.

C. The funding amount specified in the Agreement is being amended to match the funding amount shown in the current Northwest Zone 5-year Transportation Improvement Plan (TIP) for this project. Funds are being increased for this Project because new funding has become available.



## AGREEMENT

NOW, THEREFORE, in consideration of the mutual covenants and subject to the conditions contained herein, the Parties hereby agree as follows:

1. The Funding Amount contained in Section 2 of the Agreement is hereby increased by **Nine Hundred Forty-Seven Thousand Dollars (\$947,000.00)** from **Four Hundred Thousand Dollars (\$400,000.00)** to an amount not to exceed **One Million Three Hundred Forty-Seven Thousand Dollars (\$1,347,000.00)** for the Project Planning (PLN) phase.

2. The foregoing increase in the Funding Amount is within the Maximum TUMF Share.

3. AGENCY's Local Match Contribution. AGENCY funding is not required, as shown in Exhibit "A" attached hereto.

4. Exhibits "A", "A-1", and "A-2" of the Agreement are hereby replaced in their entirety by Exhibits "A", "A-1", and "A-2" of this Amendment No. 1, which are attached hereto and incorporated by reference.

5. The above-stated Recitals are hereby fully incorporated into this Amendment No. 1.

6. Except to the extent specifically modified or amended hereunder, all of the terms, covenants and conditions of the Agreement as amended, shall remain in full force and effect between the Parties hereto.

[SIGNATURES ON FOLLOWING PAGE]

IN WITNESS WHEREOF, the Parties have caused this Amendment No. 1 to be executed by their duly authorized representatives to be effective on the day and year first written above.

WESTERN RIVERSIDE COUNCIL  
OF GOVERNMENTS

COUNTY OF RIVERSIDE

By: \_\_\_\_\_  
Kurt Wilson  
Executive Director

By: \_\_\_\_\_  
Dennis Acuna  
Director of Transportation

Approved to Form:

Approved to Form:  
Mihn C. Tran  
County Counsel

By: \_\_\_\_\_  
Steven C. DeBaun  
General Counsel

By: \_\_\_\_\_  
Stephanie Nelson  
Deputy County Counsel

APPROVAL BY THE COUNTY BOARD  
OF SUPERVISORS

By: \_\_\_\_\_

Chairman, County Board of Supervisors

Attest:  
Kimberly Rector  
Clerk of the Board

By: \_\_\_\_\_

Deputy

**Exhibit A****SCOPE OF SERVICES****Wood Road Widening****SCOPE OF WORK:**

The proposed Project will complete the Project Planning Phase (PLN) to widen Wood Road from a two lane facility to a four lane facility between Cajalco Road to Krameria Avenue. Wood Road connects two key east-west corridors; Van Buren Boulevard and Cajalco Road which both provide connectivity between I-15 and I-215. The communities of Mead Valley and Woodcrest have experienced significant growth as well as nearby communities and cities which have generated additional commuter traffic that require additional capacity on Wood Road.

The Planning (PLN) Phase will include concept/alternative development needed to establish a design footprint. Once the footprint is established, environmental studies and preliminary engineering can be performed to support the environmental document. The preliminary engineering will also include determination of utility conflicts, establishing a Right of Way Requirements Map, and aerial and field surveys, among other things to support the future Engineering (ENG) Phase.

**EXHIBIT “A-1”**  
**ESTIMATE OF COST**

| <b>Phase</b> | <b>TUMF</b>    | <b>LOCAL</b> | <b>TOTAL</b>   |
|--------------|----------------|--------------|----------------|
| <b>PLN</b>   | \$1,347,000.00 | \$0          | \$1,347,000.00 |
| <b>ENG</b>   |                |              |                |
| <b>ROW</b>   |                |              |                |
| <b>CON</b>   |                |              |                |
| <b>TOTAL</b> | \$1,347,000.00 | \$0          | \$1,347,000.00 |

**EXHIBIT “A-2”**

**PROJECT SCHEDULE**

| <b>Phase</b> | <b>Estimated<br/>Completion Date</b> | <b>Estimated Cost</b> | <b>Comments</b> |
|--------------|--------------------------------------|-----------------------|-----------------|
| <b>PLN</b>   | FY 25/26                             | \$1,347,000.00        |                 |
| <b>ENG</b>   |                                      |                       |                 |
| <b>ROW</b>   |                                      |                       |                 |
| <b>CON</b>   |                                      |                       |                 |
| <b>TOTAL</b> |                                      | \$1,347,000.00        |                 |

# Attachment

TUMF Reimbursement  
Agreement Amendment #1  
– Rancho California Road –  
Calle Contento  
Roundabout

**AMENDMENT NO. 1 TO TRANSPORTATION UNIFORM MITIGATION FEE  
PROGRAM AGREEMENT**

**RANCHO CALIFORNIA ROAD-CALLE CONTENTO ROUNDABOUT**

This Amendment No. 1 to Transportation Uniform Mitigation Fee Program Agreement (“Amendment No. 1”) is entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_, by and between the **WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS** (“WRCOG”) and the **COUNTY OF RIVERSIDE** (“AGENCY”). WRCOG and the AGENCY are sometimes referred to individually as “Party” and collectively as “Parties.”

**RECITALS**

A. WRCOG and AGENCY have entered into an agreement titled “Transportation Uniform Mitigation Fee Program Agreement” that is dated **June 16, 2020** (“Agreement”). The Agreement provide the terms and conditions, scope of work, schedule and funding amount for the construction of the **Rancho California Road-Calle Contento Roundabout** (hereinafter the “Project”).

B. The Parties desire to amend the Agreement by increasing the funding amount pursuant to Section 6 of the Agreement.

C. The funding amount specified in the Agreement is being amended to match the funding amount shown in the current Southwest Zone 5-year Transportation Improvement Plan (TIP) for this Project. Funds are being increased for this Project because new funding has become available.

## AGREEMENT

NOW, THEREFORE, in consideration of the mutual covenants and subject to the conditions contained herein, the Parties hereby agree as follows:

1. The Funding Amount contained in Section 2 of the Agreement is hereby increased by **Two Million Six Hundred Thousand Dollars (\$2,600,000)** from **Two Million Five Hundred Thousand Dollars (\$2,500,000)** to an amount not to exceed **Five Million One Hundred Thousand Dollars (\$5,100,000)** for Right-of-Way (ROW) and Construction (CON) Phases.

2. The foregoing increase in the Funding Amount is within the Maximum TUMF Share.

3. AGENCY's Local Match Contribution. AGENCY funding is not required, as shown in Exhibit "A" attached hereto.

4. Exhibits "A", "A-1", and "A-2" of the Agreement is hereby replaced in their entirety by Exhibits "A", "A-1", and "A-2" of this Amendment No. 1, which are attached hereto and incorporated by reference.

5. The above-stated Recitals are hereby fully incorporated into this Amendment No. 1.

6. Except to the extent specifically modified or amended hereunder, all of the terms, covenants and conditions of the Agreement as amended, shall remain in full force and effect between the Parties hereto.



[SIGNATURES ON FOLLOWING PAGE]

IN WITNESS WHEREOF, the Parties have caused this Amendment No. 1 to be executed by their duly authorized representatives to be effective on the day and year first written above.

WESTERN RIVERSIDE COUNCIL  
OF GOVERNMENTS

COUNTY OF RIVERSIDE  
  
RECOMMENDED FOR APPROVAL

By: \_\_\_\_\_  
Kurt Wilson  
Executive Director

By: \_\_\_\_\_  
Dennis Acuna  
Director of Transportation

Approved as to Form:

Approved as to Form:  
Minh C. Tran  
County Counsel

By: \_\_\_\_\_  
Steven C. DeBaun  
General Counsel

By: \_\_\_\_\_  
Stephanie Nelson  
Deputy County Counsel

APPROVAL BY THE COUNTY BOARD  
OF SUPERVISORS

By: \_\_\_\_\_

Chairman, County Board of Supervisors

Attest:  
Kimberly Rector  
Clerk of the Board

By: \_\_\_\_\_

Deputy

**Exhibit A**

**SCOPE OF SERVICES**

**Rancho California Road-Calle Contento Roundabout**

**SCOPE OF WORK:**

The proposed Rancho California Road-Calle Contento Roundabout (Project) consists of the construction of a roundabout at the intersection of Rancho California Road and Calle Contento in the Temecula Valley Wine Country, an unincorporated community in the County of Riverside.

The scope of improvements will include the construction of roadway, curb and gutter, walkways, driveways, drainage facilities, fences/walls, utility relocation, pavement marking, and signage improvements to complement the rural setting of the Temecula Valley Wine Country.

The Project's construction of a roundabout, instead of a conventional all-way stop or traffic signal controlled intersection, will inherently improve traffic circulation, improve safety, and benefit the environment through lower greenhouse gas emissions, while maintaining the rural character of the wine country.

The Project phases to be funded under this Agreement consist of ROW and CON phases only.

**EXHIBIT “A-1”**  
**ESTIMATE OF COST**

| <b>Phase</b>              | <b>TUMF</b> | <b>LOCAL</b> | <b>TOTAL</b> |
|---------------------------|-------------|--------------|--------------|
| <b>PLANNING (PLN)</b>     |             |              |              |
| <b>ENGINEERING (ENG)</b>  |             |              |              |
| <b>RIGHT OF WAY (ROW)</b> | \$1,275,000 | \$0          | \$1,275,000  |
| <b>CONSTRUCTION (CON)</b> | \$3,825,000 | \$0          | \$3,825,000  |
| <b>TOTAL</b>              | \$5,100,000 | \$0          | \$5,100,000  |

**EXHIBIT “A-2”**

**PROJECT SCHEDULE**

| <b>Phase</b>              | <b>Estimated<br/>Completion Date</b> | <b>Estimated Cost</b> | <b>Comments</b> |
|---------------------------|--------------------------------------|-----------------------|-----------------|
| <b>PLANNING (PLN)</b>     |                                      |                       |                 |
| <b>ENGINEERING (ENG)</b>  |                                      |                       |                 |
| <b>RIGHT OF WAY (ROW)</b> | FY 26/27                             | \$1,275,000           |                 |
| <b>CONSTRUCTION (CON)</b> | FY 27/28                             | \$3,825,000           |                 |
| <b>TOTAL</b>              |                                      | \$5,100,000           |                 |

# Attachment

## TUMF Reimbursement Agreement Amendment #2 – Cajalco Road Widening Project

**AMENDMENT NO. 2 TO TRANSPORTATION UNIFORM MITIGATION FEE  
PROGRAM AGREEMENT**

**CAJALCO ROAD WIDENING PROJECT  
(ALEXANDER STREET TO I-215)**

This Amendment No. 2 to Transportation Uniform Mitigation Fee Program Agreement (“Amendment No. 2”) is entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_, by and between the **WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS** (“WRCOG”) and **COUNTY OF RIVERSIDE** (“AGENCY”). WRCOG and the AGENCY are sometimes referred to individually as “Party” and collectively as “Parties.”

**RECITALS**

A. WRCOG and AGENCY have entered into an agreement titled “Transportation Uniform Mitigation Fee Program Agreement” that is dated **February 5, 2008** (“Agreement”) and Amendment No.1 Transportation Uniform Mitigation Fee Program Agreement that is dated **November 6, 2018** (“Amendment No. 1). The Agreement and Amendment No. 1 (“Agreements”) provide the terms and conditions, scope of work, schedule and funding amount for the construction of the **Cajalco Road Widening Project** (hereinafter the “Project”).

B. The Parties desire to amend the Agreements by increasing the funding amount pursuant to Sections 6 and 35 of the Agreement.

C. The funding amount specified in the Agreements are being amended to match the funding amount shown in the current Central Zone 5-year Transportation Improvement Plan (TIP) for this Project. Funds are being increased for this Project because new funding has become available.

## AGREEMENT

NOW, THEREFORE, in consideration of the mutual covenants and subject to the conditions contained herein, the Parties hereby agree as follows:

1. The Funding Amount contained in Section 1 of the Amendment No. 1 is hereby increased by **Three Million Eight Hundred Forty-Eight Thousand Dollars (\$3,848,000.00)** from **Two Million Four Hundred Thirteen Thousand Three Hundred Thirty-Eight Dollars (\$2,413,338.00)** to an amount not to exceed **Six Million Two Hundred Sixty-One Thousand Three Hundred Thirty-Eight Dollars (\$6,261,338.00)** for Planning (PLN) and Engineering (ENG) Phases.

2. The foregoing increase in the Funding Amount is within the Maximum TUMF Share.

3. AGENCY's Local Match Contribution. AGENCY funding is not required, as shown in Exhibit "A" attached hereto.

4. Exhibits "A", "A-1", and "A-2" of the Agreement, as previously amended by Amendment No. 1 are hereby replaced in their entirety by Exhibits "A", "A-1", and "A-2" of this Amendment No. 2, which are attached hereto and incorporated by reference.

5. The above-stated Recitals are hereby fully incorporated into this Amendment No. 2

6. Except to the extent specifically modified or amended hereunder, all of the terms, covenants and conditions of the Agreement as amended, shall remain in full force and effect between the Parties hereto.



[SIGNATURES ON FOLLOWING PAGE]

IN WITNESS WHEREOF, the Parties have caused this Amendment No. 2 to be executed by their duly authorized representatives to be effective on the day and year first written above.

WESTERN RIVERSIDE COUNCIL  
OF GOVERNMENTS

COUNTY OF RIVERSIDE

By: \_\_\_\_\_  
Kurt Wilson  
Executive Director

By: \_\_\_\_\_  
Dennis Acuna  
Director of Transportation

Approved to Form:

Approved to Form:  
Minh C. Tran  
County Counsel

By: \_\_\_\_\_  
Steven C. DeBaun  
General Counsel

By: \_\_\_\_\_  
Stephanie Nelson  
Deputy County Counsel

APPROVAL BY THE COUNTY BOARD  
OF SUPERVISORS

By: \_\_\_\_\_

Chairman, County Board of Supervisors

Attest:  
Kimberly Rector  
Clerk of the Board

By: \_\_\_\_\_

Deputy

**Exhibit A**

**SCOPE OF SERVICES**

**Cajalco Road Widening Project  
Alexander Street to I-215**

Description and Scope of Work:

The proposed Cajalco Road Widening Project (Project) is a vital link in the overall east-west regional Cajalco Road Corridor that connects I-15 to the west and I-215 to the east. This segment of Cajalco Road is located in an unincorporated area of Riverside County, just west of the City of Perris.

The proposed Project will widen Cajalco Road from two lanes to four lanes on existing alignments between Alexander Street and I-215 for a total of about 3 miles.

The Project phases to be funded under this Agreement consist of Planning (PLN) and Engineering (ENG).

**EXHIBIT “A-1”**

**ESTIMATE OF COST**

| <b>Phase</b> | <b>TUMF</b>    | <b>LOCAL</b> | <b>TOTAL</b>   |
|--------------|----------------|--------------|----------------|
| <b>PLN</b>   | \$4,761,338.00 | N/A          | \$4,761,338.00 |
| <b>ENG</b>   | \$1,500,000.00 | N/A          | \$1,500,000.00 |
| <b>ROW</b>   | \$TBD          | N/A          | \$TBD          |
| <b>CON</b>   | \$TBD          | N/A          | \$TBD          |
| <b>TOTAL</b> | 6,261,338.00   |              | \$6,261,338.00 |

**EXHIBIT “A-2”**

**PROJECT SCHEDULE**

| <b>Phase</b> | <b>Estimated Completion Date</b> | <b>Estimated Cost</b> |
|--------------|----------------------------------|-----------------------|
| <b>PLN</b>   | FY 24/25                         | \$4,761,338.00        |
| <b>ENG</b>   | FY 26/27                         | \$1,500,000.00        |
| <b>ROW</b>   | FY 26/27                         | \$TBD                 |
| <b>CON</b>   | FY 28/29                         | \$TBD                 |

# Attachment

## TUMF Reimbursement Agreement Amendment #2 – I-10/Singleton Road Interchange

**AMENDMENT NO. 2 TO TRANSPORTATION UNIFORM MITIGATION FEE  
PROGRAM AGREEMENT TO REIMBURSE TUMF FUNDS**

**I-10/SINGLETON ROAD INTERCHANGE PROJECT**

This Amendment No. 2 to Transportation Uniform Mitigation Fee Program Agreement (“Amendment No. 2”) is entered into this \_\_\_\_\_ day of \_\_\_\_\_, 2024, by and between the **WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS (“WRCOG”)** and **CITY OF CALIMESA (“AGENCY”)**. **WRCOG** and the **AGENCY** are sometimes referred to individually as “**PARTY**” and collectively as “**PARTIES**.”

**RECITALS**

A. **WHEREAS, WRCOG** and the **AGENCY** have entered into an agreement titled “Transportation Uniform Mitigation Fee Program Agreement to Reimburse TUMF Funds” that is dated November 2, 2021 (“**AGREEMENT**”) and executed Amendment No. 1 dated May 21, 2024 (“Amendment No. 1”). The **AGREEMENT** and **AMENDMENT NO. 1** provides the terms and conditions, scope of work, schedule and funding amount for each phase of the **I-10/SINGLETON ROAD INTERCHANGE PROJECT** (hereinafter the “**PROJECT**”),

B. **WHEREAS, WRCOG** and Pass Zone Members approved the FY’24-’25 Pass Zone 5-Year Transportation Improvement Program (TIP) designating \$8 million for the **PROJECT**, \$5 million for FY’24-’25 and \$3 million for FY’25-’26.

C. **WHEREAS, the AGENCY** desires to amend the **AGREEMENT** to add the ’25-’26 construction funding amounts, and

D. **WHEREAS, pursuant to Section 33 of the AGREEMENT, the PARTIES** mutually agree to amend the **AGREEMENT**.

**AGREEMENT**

**NOW, THEREFORE**, in consideration of the mutual covenants and subject to the conditions contained herein, the **PARTIES** hereby agree as follows:

1. The Funding Amount contained in Section 2 of the **AGREEMENT**, as previously amended, is hereby increased by three million dollars (\$3,000,000) from five million dollars (\$5,000,000) to an amount not to exceed eight million dollars (\$8,000,000).
2. The foregoing increase in the Funding Amount is within the Maximum TUMF Share.
3. Exhibits “A”, “A-1”, and “A-2” of the **AGREEMENT** are hereby replaced in their entirety by Exhibits “A”, “A-1”, and “A-2” of this **AMENDMENT NO. 2**, which are attached hereto and incorporated by reference.
4. The **AGENCY** desires to receive reimbursement for amounts to be expended and will continue to invoiced in accordance with the **AGREEMENT**, as amended..
5. The above-stated Recitals are hereby fully incorporated into this **AMENDMENT NO. 2**.
6. Except to the extent specifically modified or amended hereunder, all of the terms, covenants and conditions of the **AGREEMENT** shall remain in full force and effect between the **PARTIES** hereto.



**IN WITNESS WHEREOF**, the **PARTIES** have caused this **AMENDMENT NO. 2** to be executed by their duly authorized representatives to be effective on the day and year first written above.

WESTERN RIVERSIDE COUNCIL  
OF GOVERNMENTS

CITY OF CALIMESA

By: \_\_\_\_\_  
Dr. Kurt Wilson, Executive Director

By: \_\_\_\_\_  
William Davis, Mayor

Approved to Form:

Approved to Form:

By: \_\_\_\_\_  
Steven C. DeBaun  
General Counsel

By: \_\_\_\_\_  
Quinn Borrow  
City Attorney

Attest:

By: \_\_\_\_\_  
Darlene Gerdes,  
City Clerk

## Exhibit A

**SCOPE OF SERVICES**

1. **SCOPE OF WORK:** The **AGENCY**, in coordination with Caltrans, proposes to complete a partial interchange at Interstate 10/Singleton Road Interchange to improve traffic circulation and provide traffic congestion relief. The project proposes to add westbound entrance ramp and an eastbound exit ramp to complete the interchange. The project includes installation of traffic signals, right turn lanes, drainage system improvements, and retaining walls. Funds will be used for PA&ED, PS&E, Right-of-Way, and Construction.

**EXHIBIT “A-1”**  
**ESTIMATE OF COST**

| <b>Phase</b>        | <b>TUMF</b> | <b>LOCAL</b> | <b>TOTAL</b> |
|---------------------|-------------|--------------|--------------|
| <b>PA&amp;ED</b>    | \$300,000   | \$0          | \$300,000    |
| <b>PS&amp;E</b>     | \$600,000   | \$0          | \$600,000    |
| <b>RIGHT OF WAY</b> | \$2,100,000 | \$0          | \$2,100,000  |
| <b>CONSTRUCTION</b> | \$5,000,000 | \$5,000,000  | \$10,000,000 |
| <b>TOTAL</b>        | \$8,000,000 | \$5,000,000  | \$13,000,000 |

**EXHIBIT “A-2”****PROJECT SCHEDULE****TIMETABLE:**

| <b>Phase</b>        | <b>Estimated<br/>Completion Date</b> | <b>Estimated Cost</b> | <b>Comments</b> |
|---------------------|--------------------------------------|-----------------------|-----------------|
| <b>PA&amp;ED</b>    | Jul ‘25                              | \$300,000             |                 |
| <b>PS&amp;E</b>     | Oct ‘25                              | \$600,000             |                 |
| <b>RIGHT OF WAY</b> | Apr ‘25                              | \$2,100,000           |                 |
| <b>CONSTRUCTION</b> | Mar ‘26                              | \$10,000,000          |                 |
| <b>TOTAL</b>        |                                      | \$13,000,000          |                 |



## Western Riverside Council of Governments WRCOG Executive Committee

### Staff Report

**Subject:** Approval of a Professional Services Agreement with AECOM Technical Services, Inc.

**Contact:** Daniel Soltero, Program Manager, [dsoltero@wrcog.us](mailto:dsoltero@wrcog.us), (951) 405-6738

**Date:** February 3, 2025

#### **Recommended Action(s):**

1. Approve a Professional Services Agreement with AECOM Technical Services, Inc., for microgrid and community resilience center feasibility studies in an amount not to exceed \$175,000.

#### **Summary:**

WRCOG is developing an Energy Resilience Plan (ERP) 2.0 that will assist member agencies with assessing feasibility of implementing microgrids and resilience centers at key facilities. The ERP 2.0 will be a guidance document that member agencies can use to plan for investments into existing buildings to reduce impacts from power outages and improve community resilience towards climate issues and emergency events.

#### **Purpose / WRCOG 2022-2027 Strategic Plan Goal:**

The purpose of this item is to authorize a Professional Services Agreement with AECOM in order to prepare the feasibility studies for microgrids and community resilience centers and develop a financing / business plan and implementation plan for feasible projects. This work will be delivered as the Energy Resilience Plan 2.0. This item aligns with WRCOG's 2022-2027 Strategic Plan Goal #5 (Develop projects and programs that improve infrastructure and sustainable development in our subregion).

#### **Discussion:**

#### **Background**

In 2023, WRCOG was awarded an Adaptation Planning Grant through the Integrated Climate Adaptation and Resiliency Program administered by the Governor's Office of Land Use and Climate Innovation (formerly the Office of Planning and Research). The \$471,000 grant is funding the development of the ERP 2.0 which will assist member agencies with improving facilities and community resilience towards emergencies and power outages by providing feasibility studies for microgrids and resilience centers.

In 2024, WRCOG coordinated with member agencies to gather a list of buildings and sites to propose as candidates for a microgrid or community resilience center. Staff analyzed the sites to identify known

climate hazards that impact the sites and social vulnerabilities for populations that either surround the site or that are served by the sites. Currently, staff are working on a second round of surveys to help gather remaining information to help finalize the site selection. Given that multiple sites are being proposed from each member agency, a prioritization will take place to help member agencies select one site that will receive a microgrid or resilience center feasibility study. Upon site selection, staff will work with member agencies and the consultant to prepare a feasibility study. Concurrently, staff will work with member agencies and its grant partner, Grid Alternatives, to conduct community workshops at sites being proposed for a community resilience center to seek input on programs and services that could be provided from these sites.

### **Present Situation**

On November 8, 2024, WRCOG released a Request for Proposals (RFP) seeking a consultant to provide feasibility studies for microgrids and community resilience centers at existing buildings owned and operated by member agencies. The proposals were due on December 16, 2024, via WRCOG's procurement platform, PlanetBids. WRCOG notified 228 vendors from various industries including electrical contractors, engineering services, electric power distribution, and technical consulting services. At the closing of the RFP, five proposals in total were submitted by: AECOM Technical Services (AECOM), Alternative Energy Systems Consulting (AESC), EcoMotion, S&C Electric Company, and Thornton Tomasetti.

WRCOG formed a Proposal Review Committee consisting of WRCOG staff and staff from the County of Riverside's Facilities Management division, the City of Menifee, and the City of Norco. The Proposal Review Committee reviewed and scored the proposals based on the criteria outlined in the RFP. Upon completion of the review and scoring of proposals, AECOM emerged as the top proposer and the Proposal Review Committee is recommending awarding a contract to AECOM.

AECOM's proposal meets all requested services outlined in the RFP, which include completing feasibility studies for microgrids and community resilience centers at member agency-owned sites, developing a financing / business plan, and preparing an implementation plan (Attachment 1). The microgrid feasibility studies will include review of energy consumption data, identify size and sources of electric power generation and battery energy storage systems, and evaluate system resilience and integration with current infrastructure. A market and financial assessment will also be completed as part of the microgrid feasibility studies to identify a rough order of magnitude cost estimate for the project and to evaluate potential funding/financing strategies.

The feasibility studies for community resilience centers will take a narrative approach to address various categories including building suitability, operation plans, power and water requirements, communications, and identifying services and programs that can assist residents with improving adaptability and resilience towards climate issues and emergency events. A review of all building and architectural drawings will allow AECOM to assess the building for suitability to serve as a resilience center, and data from the microgrid feasibility studies will allow the team to assess power and water requirements. Throughout the microgrid and community resilience center feasibility studies, member agency engagement will take place to validate the evaluations and fill remaining data gaps. Community engagement completed by WRCOG and Grid Alternatives will help inform the services and programs that can be provided to residents from these sites.

Building off the funding strategies identified in the initial Energy Resilience Plan, AECOM will develop a

financing / business plan that outlines funding and financing strategies to specifically support implementation of the microgrids and community resilience centers. The deliverable will identify funding sources and provide a menu of options such as grants, third party financing, utility programs, incentives, and tax credits. AECOM will develop a detailed, actionable Implementation Plan to support WRCOG member agencies in advancing the microgrids and community resilience centers identified in the feasibility studies. This Implementation Plan will serve as a practical roadmap, enabling member agencies to navigate the complex processes required to bring these projects into realization.

The agreement amount shall not exceed \$175,000 and will be funded by the Adaptation Planning Grant. The services contracted through this agreement are anticipated to be completed by December 2025.

**Prior Action(s):**

**January 16, 2025:** The Technical Advisory Committee recommended the Executive Committee approve the Professional Services Agreement with AECOM Technical Services, Inc., for microgrid and community resilience center feasibility studies in an amount not to exceed \$175,000.

**Financial Summary:**

The budget related to consulting activities in this item for the Energy Resilience Plan (ERP) 2.0 will be amended in the upcoming Fiscal Year 2024/2025 mid-year budget amendment that will be brought forward to the Executive Committee in February 2025.

**Attachment(s):**

[Attachment 1 - AECOM Technical Services Proposal](#)

[Attachment 2 - Draft WRCOG Professional Services Agreement with AECOM Technical Services, Inc.](#)

# Attachment

AECOM Technical Services, Inc.  
Proposal



Proposal for

# Feasibility Studies for Microgrids and Community Resilience Centers

Submitted to: Western Riverside Council of Governments

Date: December 16, 2024

**RFP NUMBER: No. 24-13**

**TITLE OF THE PROJECT:** Western Riverside County Energy Resiliency Plan

**NAME AND ADDRESS OF PROPOSING FIRM:**

**AECOM Technical Services, Inc.**  
999 Town and Country Rd, Orange, CA 92868

**PHONE/FAX OF PROPOSER:**

Phone: (714) 567-2400  
Fax: (714) 567-2594

**PRIMARY CONTACT PERSON:**

**Calum Thompson, PE, CEM, LEED AP, ENV SP**  
999 Town and Country Rd, Orange, CA 92868  
Email: Calum.Thompson@aecom.com  
M: (310) 467-7083

**AUTHORIZED SIGNATORY:**

  
**Garrett Harper | Vice President, Managing Principal**  
Email: garrett.harper@aecom.com  
M: (312) 373-7601

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AECOM  
999 Town and Country Rd  
Orange, CA 92868

T (714) 567-2400  
F (714) 567-2594  
www.aecom.com

December 16, 2024

**Western Riverside Council of Governments**

Attn: Janis Leonard  
Administrative Services Manager  
3390 University Avenue, Suite 200  
Riverside, California 92501  
jleonard@wrcog.us

**Reference: WRCOG Feasibility Studies for Microgrids and Community Resilience Centers  
RFP Number 24-13**

Dear Janis and members of the selection committee,

Western Riverside Council of Governments (WRCOG) is committed to supporting its member agencies to be better prepared in coming years for climate change impacts including extreme heat, wildfires, and related power outages. This is evidenced by the development of this scope of work which builds upon the framework of the Energy Resilience Plan (ERP) and takes another step towards enhancing community resilience through additional microgrid feasibility studies and an assessment of community resilience center viability. We understand that through this RFP that WRCOG is looking to serve each of its member agencies with the definition of a resilience project and a clear roadmap of the actions required and resources available to successfully implement it.

In working with WRCOG in the development of the Energy Resilience Plan, the AECOM Technical Services, Inc. (AECOM) team has gained an understanding of the diverse stakeholder groups that WRCOG serve, its mission to connect and equitable support its members, and subsequently, the importance of maximize the value of this effort across for the WRCOG members within a limited budget.

In recognition of this, our proposal looks to right-size the effort across all scope elements, ensuring all member agencies are served with at least one microgrid feasibility assessment and that nine community facilities can be assessed as resilience centers. We therefore propose to meet the full goals of the RFP and include all requested facilities. We propose to do this by applying a bespoke assessment and feasibility methodology which relies on our integrated team of CA-based individuals covering the breadth of expertise required and applying it to the right level of detail to inform the next steps for implementation.

The proposed AECOM team has been working together on energy and climate resilience projects in California for over a decade and has a deep understanding of the climate threats and applicable adaptation solutions from current and recent experience working on resilience projects in Southern California including projects for WRCOG, UC Riverside, City of Rialto, LA Metro, LA County, Metrolink and San Diego. We have further strengthened the team that successfully supported WRCOG in the development of the ERP with additional microgrid project development and community asset resilience expertise to better deliver this scope of work. Since the completion of the ERP, our team has conducted feasibility assessments and/or the design of microgrids for Cities of San Jose, Santa Rosa, Santa Clara, and Rialto. We have conducted asset resilience assessments for the County of Santa Clara, assessed over 1,000 CA buildings for ADA compliance, and developed Southern California Association of Governments Regional Resilience Framework.

Alex Mitoma, our proposed project manager based in Orange, CA, has led climate and energy resilience programs over the past two years which included the development of over 20 microgrid projects. Alex recently managed our team's work with UC Riverside and through these engagements worked extensively with our core team. Cal Thompson, our project director, continues his role from the ERP and brings both personal familiarity with WRCOG and this initiative and over a decades' experience in leading energy planning projects across California and the US. Alex and Cal will work together with our core team

comprised of experts in microgrid development, community resilience, and project funding and financing to deliver a high-quality product that serves WRCOG members today and into the future.

We feel we are the best team to continue to support WRCOG's community resilience journey because:

- Our previous experience in developing the ERP provides us a unique knowledge and perspective of the drivers and intent of this effort.
- Our team has the blend of microgrid and asset assessment technical expertise and the experience in developing community resilience and funding plans necessary to successfully deliver this scope of work.
- We have developed an approach to this effort which will allow WRCOG, through this effort, to provide to all of its members with clear steps forward to enhance facility resilience, within the allocated budget.
- Our local management team is passionate about supporting efforts to improve regional community resilience. We are enthusiastic to continue our collaboration with the WRCOG team to make this happen.

We acknowledge Addendum No.1 issued on 2nd of December for this RFP. We have included requested markups to the WRCOG standard Professional Services Agreement for your consideration. These are the same as the ones accepted and agreed upon under our previous Energy Resilience Planning contact.

We confirm that AECOM will be the prime, responsible for all project work and deliverables and that I am the designated individual responsible for all project performance.

We feel strongly that our team's blend of WRCOG experience, project understanding, comprehensive expertise across all scope elements, and commitment to improving our local community, differentiates us as the ideal partner for WRCOG in this effort.

Please let us know if you have any questions, and we look forward to an opportunity to discuss our proposal in more detail.

Sincerely,



---

**Garrett Harper** (*Authorized Signatory*)

Vice President, Managing Principal

312-373-7601

garrett.harper@aecom.com



# Firm Capabilities

The proposed AECOM team has over a decade of experience collaborating on energy and climate resilience projects across California. Our deep understanding of climate threats and effective adaptation strategies is rooted in recent and ongoing work on resilience initiatives in Southern California, including projects for WRCOG, UC Riverside, the City of Rialto, LA Metro, LA County, Metrolink, and San Diego. Working with this diverse range of clients has provided our team with an understanding of how to deliver these projects to meet multiple stakeholder needs, and key to this is a commitment to ongoing engagement throughout the project life.

Building on the expertise that successfully supported WRCOG in developing the ERP, we have further enhanced our team with additional expertise in microgrid project development and community asset resilience to better address the scope of work. Since completing the ERP, our team has conducted microgrid feasibility assessments and designs for the cities of San Jose, Santa Rosa, Santa Clara, and Rialto. These studies have been fundamental in development of our process that will deliver WRCOG member agencies actionable feasibility studies for microgrids and CRCs. We have also performed asset resilience assessments for the County of Santa Clara, evaluated several California buildings for ADA compliance, and developed the Southern California Association of Governments' Regional Resilience Framework.

A key aspect in these experiences has been the developing actionable methods to finance and implement projects and our team is well versed in development of strategies to address the concerns of government agencies. For the City of Santa Rosa our microgrid study included strategies to finance, along with implementation support. Similarly, our work with the San Diego Airport Authority required support throughout implementation, providing valuable insight into how resiliency projects are delivered within California.

# Relevant Experience Matrix

We have chosen a selection of projects to demonstrate how our team's experience meets the criteria set out in the RFP as shown in the below project matrix. Additional project information has been provided for those projects identified with a green star on the proceeding pages.

★ Project description included

| PROJECT NAME                                                                                                      | Similar Governmental Entities | Similar Disciplines and Tasks |                |                 |                                                 |                             |                       |                      |                     |
|-------------------------------------------------------------------------------------------------------------------|-------------------------------|-------------------------------|----------------|-----------------|-------------------------------------------------|-----------------------------|-----------------------|----------------------|---------------------|
|                                                                                                                   |                               | Microgrid Feasibility Studies |                |                 | Community Resilience Center Feasibility Studies |                             |                       | Financing Strategies | Implementation Plan |
|                                                                                                                   |                               | Feasibility                   | Concept Design | 30%/100% Design | ADA Assessment                                  | Asset Resilience Assessment | Services and Programs |                      |                     |
| WRCOG Energy Resilience Plan ★                                                                                    | ●                             | ●                             | ●              |                 |                                                 |                             |                       | ●                    |                     |
| City of Santa Clara, Renewable Energy Microgrid Feasibility Study and Services ★                                  | ●                             | ●                             | ●              | ●               |                                                 |                             |                       |                      | ●                   |
| City of Santa Rosa, City-wide Resiliency, Decarbonization and Distributed Energy Resources Study ★                | ●                             | ●                             | ●              |                 |                                                 | ●                           |                       | ●                    | ●                   |
| City of Berkeley Energy Assurance Transformation Project (BEAT) ★                                                 | ●                             | ●                             | ●              |                 |                                                 |                             | ●                     | ●                    | ●                   |
| GLO - Regional Economic Strategy and Diversification Plan ★                                                       | ●                             |                               |                |                 |                                                 | ●                           | ●                     |                      |                     |
| LACCD Integrated Energy Resource Plans                                                                            | ●                             | ●                             | ●              |                 |                                                 |                             |                       | ●                    | ●                   |
| City of Rialto, Wastewater Treatment Plant Microgrid - Veolia of North America ★                                  | ●                             | ●                             | ●              | ●               |                                                 |                             |                       |                      | ●                   |
| San Diego Airport Solar and BESS Support                                                                          | ●                             | ●                             |                |                 |                                                 | ●                           |                       | ●                    | ●                   |
| City of San Jose, Large Scale Deployment of Distributed Energy Resources and Microgrids on Municipal Facilities ★ | ●                             | ●                             | ●              |                 |                                                 | ●                           |                       |                      | ●                   |
| Santa Clara County, Energy Resilience Assessment                                                                  | ●                             |                               |                |                 | ●                                               | ●                           |                       |                      |                     |
| SCAG - Regional Resilience Framework                                                                              | ●                             |                               |                |                 |                                                 | ●                           | ●                     |                      |                     |
| US Air Force Intallation Energy Plans (IEPs)                                                                      |                               | ●                             | ●              |                 |                                                 | ●                           | ●                     |                      | ●                   |
| AVAIO Capital Economic Feasibility Study                                                                          |                               | ●                             |                |                 |                                                 |                             |                       |                      |                     |
| Beaumont Unified School District ESPC                                                                             | ●                             | ●                             |                |                 |                                                 |                             |                       |                      | ●                   |
| Buena Vista Horace Mann K-8 School Modernization Construction Management                                          |                               |                               |                |                 |                                                 |                             |                       |                      | ●                   |
| Commonwealth Edison (ComEd), Microgrid and Smart City Support - Bronzeville                                       |                               | ●                             |                |                 |                                                 |                             |                       |                      |                     |
| LA County - Deferred Maintenance Program Management                                                               | ●                             |                               |                |                 | ●                                               | ●                           |                       |                      |                     |
| LA County- General Hospital Move Management Strategy Stud                                                         | ●                             |                               |                |                 | ●                                               | ●                           |                       |                      | ●                   |
| Silicon Valley 2.0                                                                                                |                               |                               |                |                 |                                                 | ●                           | ●                     |                      |                     |
| Town of Hempstead, Microgrid Feasibility Study                                                                    | ●                             | ●                             | ●              |                 |                                                 |                             |                       | ●                    | ●                   |
| UC Merced, Energy Master Plan                                                                                     | ●                             | ●                             | ●              |                 |                                                 |                             |                       |                      | ●                   |

# WRCOG Energy Resiliency Plan

RIVERSIDE, CA



**CLIENT:** WRCOG

**PROJECT DATES:**  
2020 - Ongoing

**PROJECT COST:** \$150,000

**RELEVANCE:**

- Work with a similar governmental entity
- Microgrid feasibility of municipal community support facilities
- Microgrid design and procurement
- Funding and financing strategy development

AECOM supported the Western Riverside Council of Governments (WRCOG) with the development of an energy resiliency plan. This Plan was developed by WRCOG's members in response to power interruptions resulting from events such as wildfires, extreme heat, or Public Safety Power Shutoffs (PSPS). WRCOG is a joint powers authority with representatives from eighteen (18) cities in Western Riverside County, the County of Riverside, Morongo Band of Mission Indians and the Eastern and Western Municipal Water Districts and represents a population of over 2,000,000 people.

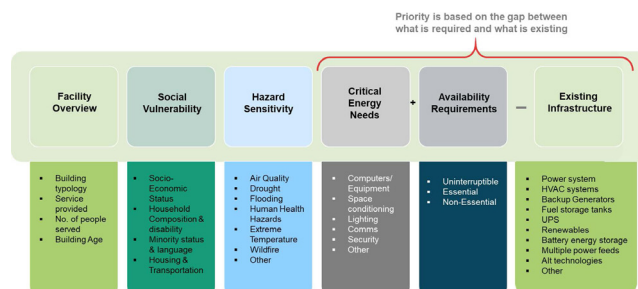
The WRCOG Energy Resiliency Plan contributes to resilience in the region by developing a blueprint for energy resiliency technologies, projects, and applications for its member jurisdictions. The Plan identifies critical infrastructure and loads in each member jurisdiction and identify projects and strategies to maintain power supply during power interruptions.

The Energy Resiliency Plan is a toolkit for the implementation of energy resiliency technologies, projects, and applications for WRCOG's member jurisdictions. The Plan developed a prioritization methodology for the ranking of facilities requiring intervention and identification of appropriate projects and strategies for these facilities to maintain power supply during power interruptions from environmental events or PSPS. The figure below summarizes the factors considered in the prioritization of facilities for intervention.

The resilience strategies covered in the Plan range from energy conservation

and controls upgrades to development of local solar-powered microgrids and energy independent 'islands' across the subregion. The three highest ranked facilities from the prioritization evaluation were selected for further project scoping through concept design. These included a fire station, a water treatment plant, and a community shelter. The AECOM team has developed site-specific concept designs including solar, energy storage and controls upgrades.

A crucial component of the toolkit is the mapping of strategies to appropriate funding mechanisms and technical resources to empower the municipalities to implement identified projects. Stakeholder engagement, not just with WRCOG's member agencies but with stakeholders such as University of California Riverside's (UCR) Center for Environmental Research and Technology (CE-CERT) and local utilities, is a fundamental component of the plan development so it is truly reflective of the challenges and opportunities in the region.



Factors that were weighted and applied to the WRCOG asset list to identify priority facilities for improvements



# City of Santa Clara Renewable Energy Microgrid Feasibility Study and Services

SANTA CLARA, CA



**CLIENT:** City of Santa Clara, CA

**PROJECT DATES:** 2021 - 2023

**PROJECT COST:** \$154,000

**RELEVANT SERVICES:**

- Work with a similar governmental entity
- Microgrid feasibility of municipal community support facilities
- Microgrid design and procurement
- Action-focused implementation plan and/or guidance

AECOM was awarded the contract to provide a renewable energy microgrid feasibility study and design services for Fire Station #1 and Fire Station #2 in the City of Santa Clara.

The changing energy landscape requires new solutions to address the critical issue of increasing instability of utility power due to aging infrastructure, climate change, and rising cyber-attacks. As part of a plan to address this need for clean, resilient power, The City of Santa Clara awarded AECOM with a contract to provide a renewable energy microgrid feasibility study and design services for two fire stations: Fire Station #1 and #2.

In support of Silicon Valley Power (SVP), the City of Santa Clara is taking steps to develop behind-the-meter renewable microgrids to better serve its customers and community

AECOM's scope of work included, as part of the feasibility study, the identification and economic and technical qualification for two renewable energy microgrids to be located at the City's critical services facilities. This Phase 1 work involved identifying the ideal location, analyzing the most sustainable mix of Distributed Energy Resources (DER) to supply the microgrids and completing a power system study to comply with SVP's interconnection guidelines.

This scope has been completed and AECOM is currently working to complete the 60% design study for these microgrids.



# Santa Rosa, City-wide Resiliency, Decarbonization and Distributed Energy Resources Study

SANTA ROSA, CA



**CLIENT:** City of Santa Rosa, CA

**PROJECT DATES:** 2023 - 2024

**PROJECT COST:** \$58,000

**RELEVANCE:**

- Work with a similar governmental entity
- Microgrid feasibility of municipal community support facilities
- Microgrid design and procurement
- Facility physical resilience assessments
- Funding and financing strategy development
- Action-focused implementation plan and/or guidance

The project explored the potential for integrating solar photovoltaic (PV) systems into Santa Rosa Water's operations through a detailed feasibility study. It investigated the viability of implementing renewable energy solutions at the Utility Field Office (UFO) and the Laguna Water Treatment Plant (LTP).

The study assessed the energy needs of these facilities, proposing a 330 kW solar PV system for the UFO to fully offset its annual energy consumption and a 9.5 MW floating solar installation at the LTP to address 61% of its energy demand. Advanced tools like Homer Grid, PVsyst, and Helioscope were utilized to analyze system designs, predict energy outputs, and evaluate the technical and financial implications.

By comparing city-owned solar systems and Power Purchase Agreements (PPAs), the project provided a comprehensive analysis of potential cost savings, return on investment, and

operational benefits. It also examined regulatory factors like NEM 3.0 and highlighted strategies for reducing greenhouse gas emissions. This feasibility study laid the groundwork for future renewable energy initiatives, offering a roadmap for Santa Rosa Water to enhance sustainability, control energy costs, and improve resilience.

AECOM conducted feasibility studies for two customer sites, analyzing the technical challenges and financial strategies required for deploying two microgrids. These studies outlined the optimal approaches for financing and maximizing the return on investment (ROI) of the systems. The findings were presented to the council representatives, ultimately securing funding for the project.

# Berkeley Energy Assurance Transformation (BEAT) Project

BERKELEY, CA



**CLIENT:** City of Berkeley, CA

**PROJECT DATES:** 2016 - 2018

**PROJECT COST:** \$400,000

**RELEVANCE:**

- Work with a similar governmental entity
- Microgrid feasibility of municipal community support facilities
- Microgrid design and procurement
- Identification and/or development of community resilience programs
- Funding and financing strategy development
- Action-focused implementation plan and/or guidance

The Berkeley Energy Assurance Transformation (BEAT) project explored how to develop a clean energy microgrid to increase community resilience in a dense urban city center. The BEAT project analyzed the feasibility of designing a Clean Energy Microgrid Community (CEMC) that uses solar and energy storage to share power between existing buildings. A microgrid system can better regulate day-to-day energy supply, and in the case of a power outage, can “island” itself from the main utility and provide clean back-up power for critical buildings.

The BEAT microgrid’s primary objective is to utilize solar and battery storage for back-up power at critical facilities and minimize diesel generator use for up to a 7-day outage caused by a major natural disaster.

The BEAT team conducted a series of coordinated regulatory, technical and financial analyses to determine the feasibility of building a multi-facility CEMC in downtown Berkeley. These analyses informed site feasibility, optimal configurations, operation criteria, financing strategies, and

lessons learned. The BEAT project team then developed three shovel-ready prototypes that range in scope, cost, ownership-model, and complexity to help advance the adoption of CEMCs. These scalable prototypes will serve as replicable models for other communities.

Funded by a grant through the California Energy Commission (CEC), this pilot study was intended to uncover roadblocks and opportunities in financing and policy for microgrids with a community benefit, by initiating a feasibility study of a real-world project. The results of this study were shared with the CEC and have informed state-level policy to advance the development of microgrids for community benefit.



# Regional Economic Strategy and Diversification Plan

## LOWER RIO GRANDE VALLEY, SOUTH TEXAS



**CLIENT:** Texas General Land Office (GLO)

**PROJECT DATES:** 2019 - 2021

**PROJECT COST:** \$950,000

**RELEVANCE:**

- Work with a similar governmental entity
- Facility physical resilience assessments
- Identification and/or development of community resilience programs

AECOM was engaged by the Texas General Land Office (GLO) to complete an Economic Resilience and Diversification Study for the Lower Rio Grande Valley counties of Cameron, Hidalgo, and Willacy. The study emerged from the impacts of 2019 severe storms, COVID-19, Hurricane Hannah in 2020, and winter storms in 2021, along with unique border region economic challenges.

In Phase 1, we identified assets, resources, and deficits in the economy, job market, and consumption of goods and services. We analyzed business climate, target markets, workforce, local government fiscal capacity, housing, transportation infrastructure, and quality of life. In Phase 2, we developed a draft regional economic diversification strategy, and in Phase 3, we formalized an action plan for implementation.

Our work was guided by a multi-pronged stakeholder engagement process, involving the Core Team, County Judges, Lower Rio Grande Valley Development Council (LRGVDC), and the RGV Partnership. These organizations provided stakeholder input and will play key roles in implementing the final strategy.

Our analysis showed the LRGV's rapid growth, with a 3% population CAGR from 1990-2010, presenting infrastructure

challenges. While transportation manufacturing struggled in Cameron County, SpaceX-related engineering research grew. We also considered global trends like reshoring and foreign direct investment, reinforcing the LRGV's role as a North American freight gateway. We interviewed port operators and railroads to understand freight issues.

Core strategies focused on:

- Strengthening organizational capacity and regional partnerships for resilience and market access.
- Promoting growth through strategic transportation and infrastructure projects.
- Encouraging housing investment for workforce growth, affordability, and flood risk mitigation.
- Fostering economic inclusion and diversification for stability.
- Improving quality of life through community enhancements and environmental protection.

The Economic Development Strategy & Diversification Study will outline goals, objectives, and strategies for the region, breaking them down into achievable tasks, implementation steps, strategy influencers, and potential funding sources.

# City of Rialto Wastewater Treatment Plant Microgrid

RIALTO, CA



**CLIENT:** Veolia North America

**PROJECT DATES:** 2021 - Ongoing

**PROJECT COST:** \$530,000

**RELEVANCE:**

- Work with a similar governmental entity
- Microgrid feasibility of municipal community support facilities
- Microgrid design and procurement
- Action-focused implementation plan and/or guidance

The Rialto Wastewater Treatment Plant (RWTP) Microgrid Project, located in Bloomington, California, is a transformative initiative designed to enhance energy efficiency, resilience, and sustainability. Operated by Rialto Water Services (RWS) in partnership with the City of Rialto, the project leverages renewable energy resources to power the plant while reducing its environmental footprint.

The project incorporates a Combined Heat and Power (CHP) unit fueled by biogas—a byproduct of wastewater treatment—to generate electricity and recover heat for digester operations, reducing reliance on natural gas. Solar photovoltaic (PV) arrays will generate additional renewable energy, and a battery energy storage system (BESS) will store excess energy for use during peak demand periods or grid outages. These systems are managed by a microgrid controller that ensures optimal performance and allows the plant to operate independently of the

utility grid during outages, enhancing reliability.

The project takes advantage of California’s Self-Generation Incentive Program (SGIP) to secure rebates for biogas utilization and energy storage. The initiative reduces energy costs, greenhouse gas emissions, and operational risks while providing a model for sustainable energy integration in municipal wastewater treatment facilities.

AECOM conducted the feasibility study and developed the 30%, 60%, and 90% designs for the microgrid control system, electrical systems, and civil engineering components. These designs encompass power generation technologies, including gas, solar, battery energy storage systems (BESS), and diesel. AECOM also carried out equipment sizing studies, managed procurement processes, and will provide support for the commissioning of the site, ensuring a seamless transition to operational readiness.



# Large Scale Deployment of Distributed Energy Resources and Microgrids on Municipal Facilities

SAN JOSE, CA



**CLIENT:** City of San Jose  
Public Works

**PROJECT DATES:** 2023 - Ongoing

**PROJECT COST:** \$240,000

**RELEVANCE:**

- Work with a similar governmental entity
- Microgrid feasibility of municipal community support facilities
- Microgrid design and procurement
- Facility physical resilience assessments
- Action-focused implementation plan and/or guidance

The San Jose Microgrid Project is a cutting-edge energy initiative focused on enhancing resilience, sustainability, and efficiency for two key municipal sites: Happy Hollow Park & Zoo (HHPZ) and the Rooftop Community Center (RCC). This project combines advanced energy technologies to integrate solar photovoltaic (PV) arrays, battery energy storage systems (BESS), and utility connections, managed by state-of-the-art microgrid controllers (MGCs).

At HHPZ, the microgrid includes a 2100 kWh BESS and a total solar capacity of 525 kWAC, designed to ensure uninterrupted power through seamless transitions between grid-connected and islanded modes. The RCC site complements this with additional solar integration, leveraging existing infrastructure while expanding storage and operational capacity. Both sites utilize the MGCs to optimize energy distribution, prioritize critical loads, and maintain compliance with industry standards such as IEEE 2030.7.

The project emphasizes sustainability by reducing greenhouse gas emissions and improving energy efficiency, while its scalable design ensures adaptability to future energy demands. By integrating real-time analytics and advanced control systems, the microgrids provide a reliable and independent power supply, supporting critical municipal functions. Together, HHPZ and RCC demonstrate San Jose's commitment to innovative, sustainable energy solutions that align with regional climate goals and set a benchmark for urban microgrid projects.

AECOM conducted feasibility studies across multiple customer sites, identifying the two most optimal locations for implementing the microgrid system. Based on the results, AECOM developed the 30%, 60%, and 90% designs for power generation, control systems, and civil engineering components. Additionally, AECOM will help with the procurement of the necessary equipment to support the project's implementation.

# Team Structure

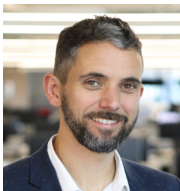
AECOM focuses its expertise as needed for projects of all scales, assembling the combination of staff and experience that best suits the project. We blend global knowledge, local experience, technical excellence, innovation, and creativity to offer our clients unparalleled possibilities. We have assembled a best-in-class team and organization to

provide the WRCOG with quality professionals and a proven approach to assist with delivering this project. Bios for each key person based on their roles are included as follows. Complete resumes for all team members, highlighting their relevant experience, are provided in Appendix B.

## WRCOG KEY STAFF ROLES



**ALEX MITOMA**, our proposed project manager based in Orange, CA, is a licensed engineer with a background in resilience planning, climate adaptation, and industry energy transitions. Has led a federal climate and energy resilience programs over the past two years which included the development of over 20 microgrid projects. Alex recently managed our team's work with UC Riverside and through these engagements worked extensively with our core team. Alex will be supported by Lilian Nguyen in project coordination, data management, and project delivery.



**CAL THOMPSON**, our project director, also based in Orange, CA, continues his role from the ERP and brings both personal familiarity with WRCOG and this initiative and over a decades' experience in leading energy planning projects across California and the US. Alex and Cal will work together to direct and support our core team of experts in microgrid development, community resilience, and project funding and financing to deliver a high-quality product that serves WRCOG members today and into the future.



**EDGAR ZAVALA** is a microgrid solutions architect with 15 years of experience assessing and designing complex power systems projects. Leading the feasibility assessments and subsequent design for microgrids for the cities of Santa Rosa, Santa Clara, San Jose and Rialto. Edgar brings a deep understanding how microgrids can serve and be realized at types of facilities that are the target of this study. Edgar will be leading the microgrid feasibility task. Edgar will be supported by Salim Moslehi in the microgrid modeling, reprising his role from the first Energy Resilience Plan. Abinet Eseye and Chris Houck are specialists in the design and implementation of microgrids and will providing addition technical input in review and implementation strategies.



**TATUM LAU** is AECOM's Social Value and Equity lead for the West. She is an experienced facilitator, bringing diverse interests together to co-create solutions that are ecologically sensitive, encourage economic prosperity and are equitable for communities. She has worked with state, regional, and city governments, as well as non-profits and the development community across climate action, and resilience including developing regional resilience plans and programs for SCAG and for the Texas General Land Office. Tatum will be bringing that knowledge of community resilience planning to WRCOG in leading the Resilience Center Feasibility task supported by Chris Hyun, an architect and asset assessor with experience in ADA assessments.



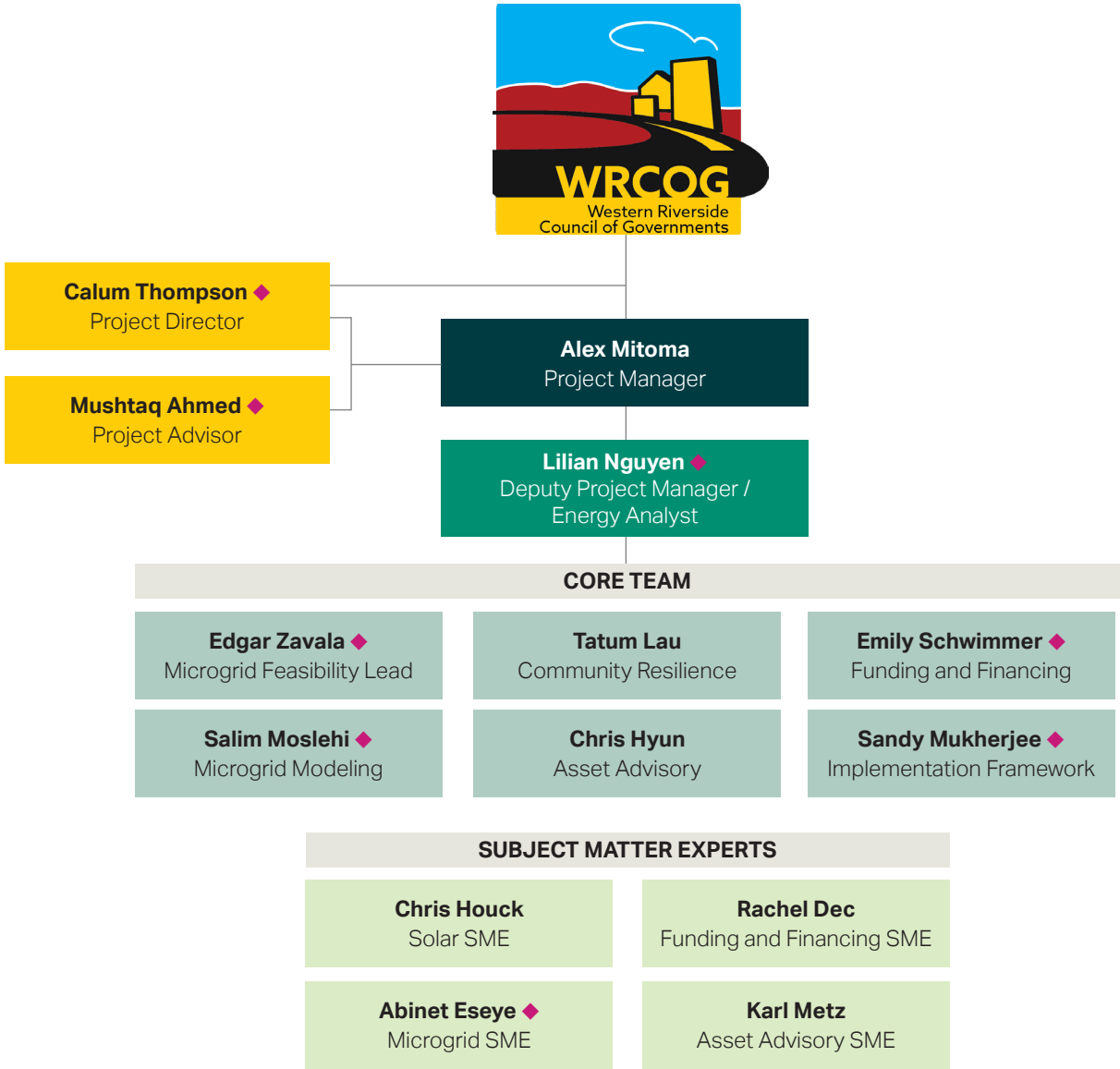
**EMILY SCHWIMMER** is an urban planner and economist with over ten years' experience working with public agencies, non-profits, and private sector organizations to fund, finance, and implement programs and capital improvement projects that aim to protect the environment, address socio-economic inequities, and improve the resiliency of communities. As with the development of the WRCOG Energy Resilience Plan, Emily will lead the funding and financing strategies identification. Emily will be supported by Rachel Dec, and economic analyst and researcher with a background in government policy development.



**SANANDA MUKHERJEE** leads AECOM’s sustainability practice and has worked with various municipal, government and state level agencies as well as utility companies to establish buildings and infrastructure sustainability policies and guidance. Similar to the development of the WRCOG Energy Resilience Plan, Sandy will lead the development of the community resilience framework.

# Organizational Chart

The following organizational chart shows our proposed project team structure and identifies our project director, project manager, and all personnel who will be assigned to work on this project. WRCOG is very familiar with most of our core team members as most have worked on the WRCOG ERP. We will not change any key personnel without prior WRCOG approval.



◆ Worked on the WRCOG ERP

# Company Information

## At AECOM, we're delivering a better world.

AECOM is a globally established and recognized sustainability consulting firm. We are one of the industry's leading providers of consulting services related to sustainability, planning, design, construction, and operations of airport, seaport and commercial real estate infrastructure and facilities. We are also one of the world's largest and most comprehensive sustainability implementation firms, supporting our clients with a range of sustainability services including sustainability management plans, stakeholder engagement and technical analysis and studies.

We pride ourselves on being a service oriented, socially responsible, and diverse firm. We are a leader in technical excellence, technical innovation, and sustainability. Our sustainability vision is to positively contribute to the wellbeing of people and planet by enabling a culture of caring. At AECOM, sustainability is at the core of what we do and how we operate, and we have chosen to base our Sustainability Strategy around an Environmental, Social and Governance (ESG) framework. This was developed following consultation across our operations, end markets and geographies and was felt to best frame our approach to sustainability including our actions and how we report against those actions. One of our recent achievements was that **AECOM became the first United States-based engineering company to have approved emissions reductions targets backed by climate science through the Science Based Targets Initiative (SBTi).**

Learn more about AECOM's sustainable legacies and ESG strategy:  
[Sustainable Legacies.](#)

Whether AECOM is reducing greenhouse gas emissions, developing new ways to conserve water or promoting renewable energy, our commitment to sustainability drives innovation, resilience, risk reduction and provides attractive project life cycle returns on investment for our clients and our own operations. **AECOM remains atop Engineering News-Record's (ENR's) list of the Top 500 design firms.** Our multidisciplinary team is strategically deployed in offices across the Americas and worldwide. AECOM's unique perspective brings together global resources with local expertise. Our goal is to provide exceptional and high quality professional and technical services using creative solutions for all challenges, large and small. We live and work where our clients do, and whether it's a big city or small community, we are committed to creating a better world.

### AECOM's Equal Employment Opportunity and Nondiscrimination Policies

AECOM is committed to providing equal employment opportunity, without discrimination, to all employees and qualified applicants for employment without regard to race, sex, pregnancy, age, ancestry, military or veteran status, color, religion, creed, disability, marital status, medical condition, genetic information, national origin, gender, gender identity, gender expression, sexual orientation, citizenship status or any characteristic protected by applicable state, federal or local laws.

Equal employment opportunity applies to all terms, conditions and privileges of employment, including, but not limited to, recruitment, hiring, compensation, training, promotion, demotion, transfer, termination, benefits, transfers to standby or part-time variable status, and retirement. For further reference, please visit [US Employee Handbook.](#)

### ABOUT AECOM

*AECOM Technical Services, Inc.,* a corporation, is a fully integrated professional and technical services firm with 51,000 employees in 150 offices. **AECOM is the global infrastructure leader, committed to delivering a better world. As a trusted professional services firm powered by deep technical abilities, we solve our clients' complex challenges in water, environment, energy, transportation and buildings. Our teams partner with public- and private-sector clients to create innovative, sustainable and resilient solutions throughout the project lifecycle – from advisory, planning, design and engineering to program and construction management.** AECOM is a Fortune 500 firm that had revenue of \$16.1 billion in fiscal year 2024. Learn more at [aecom.com](http://aecom.com).

**Ownership:** **AECOM Technical Services, Inc. is a wholly owned indirect subsidiary of AECOM,** a Delaware corporation whose stock is publicly traded on the New York Stock Exchange (ACM/NYSE).

**Legal Entity Name:**  
AECOM Technical Services, Inc.

**Legal Organization:** Corporation

**Federal Tax ID:**  
95-2661922

**State and Date of Incorporation:**  
California - September 29, 1970

**Corporate Address:**  
300 South Grand Avenue, 9th Floor  
Los Angeles, CA 90071

**Local Business Address (office responsible for providing services):**  
999 Town and Country Rd  
Orange, CA 92868

**Main Point of Contact:**  
Calum Thompson, PE, CEM, LEED AP, ENV SP  
Associate Principal, High Performance Buildings + Communities  
310-467-7083  
[calum.thompson@aecom.com](mailto:calum.thompson@aecom.com)

**Authorized Representative:**  
Garrett Harper  
Vice President, Managing Principal  
312-373-7601  
[garrett.harper@aecom.com](mailto:garrett.harper@aecom.com)



# AECOM's Pledge to Equity, Diversity and Inclusion

Equity, Diversity & Inclusion (ED&I) is central to AECOM's vision: **A world where infrastructure creates opportunity for everyone.**

Equity, diversity and inclusion are core to our vision — a world where infrastructure creates opportunity for everyone. Our commitment to equity, diversity and inclusion enables us to help our communities and drive innovation that propels our industry forward and allows us to THRIVE.



**Equity:** We recognize that we don't all start from the same place because advantages and barriers exist. We aim to correct the imbalance, ensuring that everyone has access to the same opportunities for professional development, career advancement and business opportunities.

**Diversity:** We strive to be as unique as the communities we serve. Diversity of ideas, perspectives and backgrounds is critical for business success. The ways in which we differ (visible & invisible) fuel innovation and give us competitive advantage.

**Inclusion:** We are fostering an environment of respect and belonging, where we are free to be our whole selves, every voice is welcome and valued and we are enabled to do our best work.

## TAKING ACTION

**Building Diverse Talent:** To tackle the world's most complex challenges, we attract, hire, and develop talented people of all backgrounds, and ensure inclusivity and fairness in our sourcing, interview and hiring processes. Through our partnerships with nonprofit organizations and universities, we offer robust internships, graduate development programs and volunteer opportunities that help give underserved populations access to STEAM education.

**Expanding Understanding:** To help every employee feel valued and included, we're creating an inclusive workplace through community- building, training and family-friendly benefit policies. We conduct regular employee surveys and "real talk" discussions to understand our employees' experiences and provide a forum for deeper understanding and empathy. Our employee resource groups create a sense of belonging and lead community outreach, and strategic mentorships promote ongoing dialogue and heightened awareness.

**Enriching Communities:** Our Blueprint for a Better World platform reflects our responsibility to champion equity, diversity and inclusion in our communities through pro-bono work, volunteerism, philanthropy and strategic partnerships with global nonprofit organizations like Engineers Without Borders and Water for People. We deepen our engagement with communities through our commitment to supplier diversity, providing leadership to ensure that diverse-owned businesses are supported and successful.

**Thinking Without Limits:** Fostering equity, diversity and inclusion can't be done in a silo. By cultivating a workforce that more closely represents our clients and the communities we serve, we are able to better anticipate and respond to their needs. Further, we prioritize the social impact and benefits of equity, diversity and inclusion, factoring in these considerations into every project we pursue and the innovative solutions we deliver.

## FEMALE RECRUITMENT EFFORTS

At AECOM we continue to make progress on gender diversity targets, including the achievement of our 20% target for women in leadership roles, while continuing to progress against our 35% target for our overall workforce.

AECOM's current women representation of executives and C-suite employees, are shown the following chart. Some additional information it's available online at [Board of Directors](#).

|       | Women    | Overall    | % Women        |
|-------|----------|------------|----------------|
| Total | 33<br>31 | 156<br>156 | 21.2%<br>19.9% |
| SEC16 | 1<br>2   | 4<br>6     | 25.0%<br>33.3% |
| E     | 32<br>29 | 152<br>150 | 21.1%<br>19.3% |

Please refer to Appendix C, for any other additional information and relevant factors that should be considered by WRCOG in evaluating the Proposal.



# Approach & Understanding of the Scope of Work Plan

## UNDERSTANDING OF THE PROJECT AND WRCOG NEEDS AND REQUIREMENTS

The Western Riverside Council of Governments operates as a collaborative regional body addressing critical issues affecting its member agencies, including cities, county entities, and utilities. Faced with mounting challenges such as climate change, population growth, and the increasing frequency of power outages caused by extreme weather events, WRCOG is committed to advancing energy resilience and community preparedness. This proposal by AECOM responds to the four critical areas of focus that align with WRCOG's strategic priorities: Microgrid Feasibility Studies, Community Resilience Center Feasibility Studies, Financing Strategies, and an Implementation Plan.

### Microgrid Feasibility Studies

Microgrids are integral to WRCOG's vision of enhancing energy resilience for its member agencies. These localized energy systems can operate independently or in conjunction with the main power grid, providing a reliable power source during outages. The feasibility studies will identify the technical, operational, and economic viability of implementing microgrids at critical facilities owned by WRCOG's member agencies. Our approach highlighted below will address WRCOG members concerns of the impacts that power outages have on critical facilities, ensuring member agencies are provided with a feasibility study that will:

- Assess the existing infrastructure and its suitability for integrating renewable energy sources and battery storage systems.
- Evaluate the potential energy demand, system design requirements, and environmental considerations.
- Prioritize facilities based on their operational importance, social vulnerability, and exposure to physical hazards.

### Community Resilience Center Feasibility Studies

Recognizing the need to support residents during both normal operations and disasters, WRCOG seeks to establish Community Resilience Centers (CRCs). These centers would provide essential services, shelter, and access to energy resources during emergencies. To address these requirements AECOM will develop feasibility studies for

individual CRCs, ensuring the following key criteria areas are included:

- Analyze the capacity of existing member agency-owned facilities to serve as CRCs.
- Evaluate site-specific requirements, including retrofitting needs, energy generation potential, and accessibility considerations.
- Identify the resources and services required to support vulnerable populations during extreme events.

### Funding and Financing Strategies

We understand that WRCOG's resilience plans are only as good as its ability to implement them. Implementing microgrids and CRCs will require member agencies to consider new and, potentially, innovative approaches to funding, financing, and project implementation. As a key requirement of WRCOG's mission to provide solutions to meet member agencies critical needs, including support with resources, AECOM will provide a financing strategy that will:

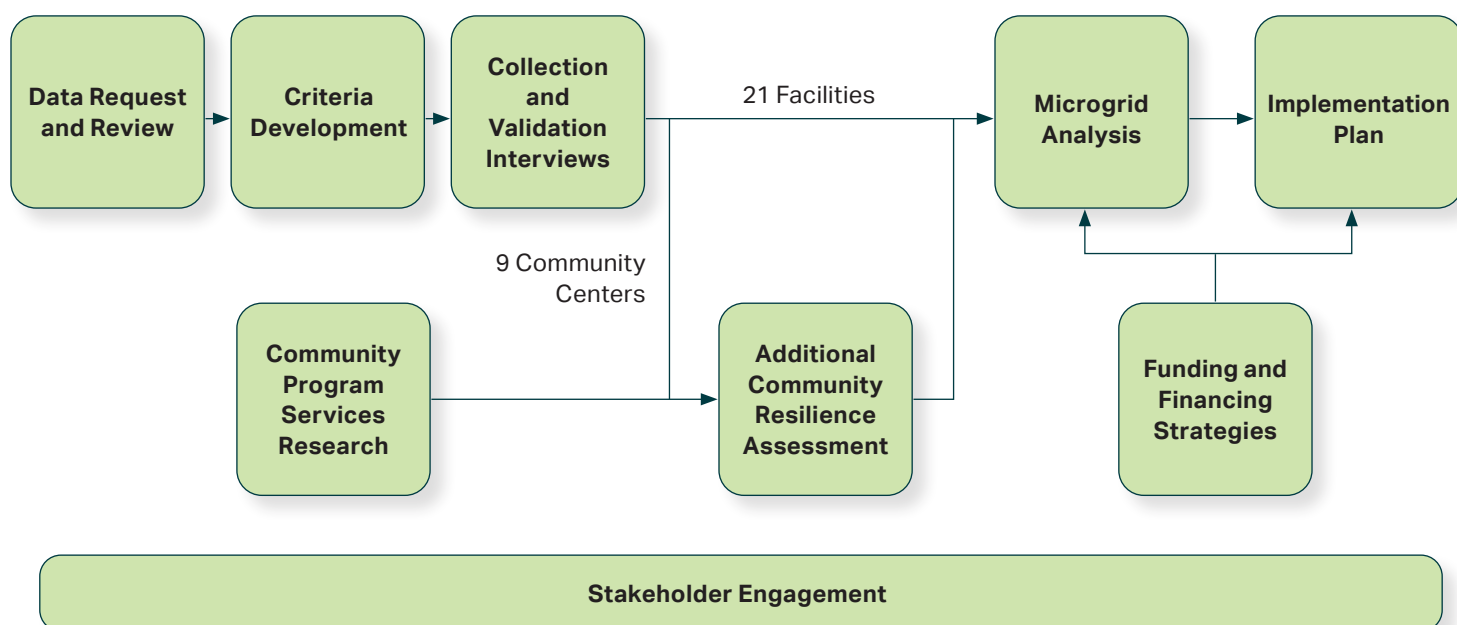
- Identify relevant funding opportunities, including federal and state grants, public-private partnerships, and low-interest financing options.
- Explore cost-sharing models that equitably distribute expenses across stakeholders.
- Develop a roadmap for leveraging utility incentives and renewable energy credits to offset costs.

### Implementation Plan

To translate feasibility studies and financing strategies into actionable outcomes, WRCOG requires a comprehensive implementation plan. This plan must:

- Outline a phased approach to project execution, detailing timelines, responsibilities, and milestones.
- Incorporate stakeholder engagement strategies that align with community needs and priorities.
- Establish monitoring and evaluation frameworks to track progress and measure the impact of implemented solutions.
- Provide guidance on scaling successful projects across the WRCOG subregion.

Our approach to completing these tasks is summarized in the following diagram:



To meet the challenges posed by this project, our work plan is built on a detailed approach that will deliver each member agency actionable studies through combination of our engineering expertise, economics advisors, stakeholder engagement approach and regulatory experts. Although the focus is on the development of engineered feasibility studies, development of a solution to fund and implement these is critical and AECOM's approach will provide actionable studies with lay the groundwork for the effective implementation of microgrids & CRCs across member facilities.

## WORK PLAN APPROACH

### Task 1 – Microgrid Feasibility Studies

AECOM will provide a detailed and proven approach to develop microgrid feasibility studies that will cost effectively meet WRCOG needs. Our phased approach is proven to deliver successful studies, and has been utilized on multiple completed and ongoing projects, including our work with

A feasibility study evaluates both the technical and financial viability of a project. It begins with a request for key information, such as facility load data (8760 hours), utility tariffs, schematics, and system capacity (e.g., ampacity). Using this information, the study follows these general steps:

#### 1. Technical Analysis:

- Calculate potential energy generation based on existing technologies and available resources (e.g., solar PV and BESS, using tool software such as Homer Grid, Helioscope etc).

- Assess energy offset and identify potential energy excess for sale or storage.
- Evaluate system resilience, operability, and integration with current infrastructure and regulations (Rule 21, UL 1741, etc.).

#### 2. Market and Financial Assessment:

- Identify an appropriate energy market and utility tariff structure for the project.
- Evaluate applicable financial incentives (e.g., ITC, state programs like SGIP) and funding strategies (direct or indirect).
- Analyze the overall rough order of magnitude (ROM) project cost and calculate the return on investment (ROI).

#### 3. Final Conclusion:

- The study concludes by determining whether the project is technically and financially viable. If the analysis shows promising results, stakeholders can move forward with detailed design and implementation planning. Otherwise, the study advises against pursuing the project to avoid technical or financial challenges.

This structured approach ensures informed decision-making, balancing technical feasibility with financial sustainability.

## Stakeholder Interviews

To implement microgrids cost-effectively, AECOM will engage WRCOG member agencies to understand facility needs, key concerns, and goals. By collaborating with stakeholders, AECOM will gather insights into current and future operations, proposed solutions from those most familiar with existing operations, and identify Key Performance Indicators (KPIs) to use when assessing microgrid options. This approach allows the microgrid design to meet performance requirements and aligns with WRCOG's needs.

AECOM will begin with stakeholder questionnaires at project kickoff to identify priorities, followed by detailed interviews to refine operational requirements and understand existing resiliency threats that each microgrid must mitigate. This process captures diverse input while allowing focused assessments from those most familiar with facility needs.

## Performance Requirements

Through this collaboration with WRCOG member agencies the AECOM team will develop a comprehensive list of requirements that the microgrids must meet. These will include specifics such as what critical loads the microgrids must support, how long the microgrid must support these and whether there are any state and/or federal requirements that the microgrid must meet. These requirements become the criteria that the microgrids must operate to.

Microgrid integration rules vary by state, but California stands out with a well-established framework for microgrid deployment. This framework has served as a model for other states to follow.

## General California Technical Requirements for Microgrid Integration

- Rule 21: Governs interconnection, operation, and metering for distributed energy resources (DERs).
- UL 1741 SB: Certification for inverters ensuring advanced grid support capabilities.
- Smart Inverter Functions: Inverters must support autonomous grid functions like voltage regulation, frequency support, and ride-through, per the Smart Inverter Working Group (SIWG) recommendations.
- Communication Protocols: Must use IEEE 2030.5 for secure communication with utility systems.
- Utility Coordination: Follow interconnection procedures outlined by local utilities.

## Energy Load Analysis

The first step in our analysis is to evaluate existing energy loads and projected future demands for each facility. AECOM will analyze 15-minute electrical interval data to create detailed annual load profiles, providing a baseline for current usage. Recognizing that a successful microgrid must support future needs, we will also account for potential increases

in demand, such as all-electric buildings, EV charging, and renewable energy integration.

## Future Load Development

As our facilities evolve it is anticipated that electrical loads will shift greatly. Building electrification and EV charging will increase electrical loads, whilst incorporated Distributed Energy Resources (DERs) will reduce and shift building loads.

**Building Electrification:** our high-performance building will determine the impact that a future all-electric building will have on WRCOG facilities

**EV Charging Systems:** As WRCOG member agencies transition their fleets to all-electric and EVs are adopted by the wider community, providing necessary charging infrastructure will be critical to help meet the needs of the community. This adoption will greatly impact building electric loads, and AECOMs engineers will include the impact of these in future load profiles in the analysis

**Distributed Energy Resources:** As all-electric and EV charging systems increase electrical loads, introduction of DERs will shift and reduce loads. AECOM will identify potential solar photovoltaic (PV) system capacities at each site and estimate the annual generation from these through modeling software's such as Helioscope. Our energy engineers will take these generation profiles into our custom tools that will cost effectively size (kW and kWh) battery energy storage systems (BESS). Utility rate structure will be analyzed to assess how DER deployment will impact energy costs, along with their resilience and environmental impacts. An updated DER load profile will then be incorporated into the modeling to finalize the anticipated future asset energy demand profile.

## Critical Load Development

There is no universal rule for determining how much load and for how long a microgrid should support critical loads. However, guidelines exist to help define the critical loads that need to be supported, depending on the specific needs of the customer. Critical loads vary based on the site's priorities; for instance, an office building and a wastewater treatment plant will have distinct requirements that must be identified by local stakeholders.

Below are general guidelines and examples of typical critical loads:

- **NFPA 110:** Addresses emergency and standby power systems, including critical load considerations for essential infrastructure.
- **Federal Energy Management Program (FEMP):** Advises evaluating critical loads during microgrid design to ensure reliable power for essential functions.

Having identified the critical loads in earlier phases the AECOM team will quantify these and determine the overall

uninterruptable loads that the microgrid must serve. The outcome from this process will be an understanding of the load (kW) and energy (kWh) requirements that the microgrid system must be designed around

### Infrastructure Assessment

The feasibility and cost of integrating a microgrid largely depend on a facility's existing electrical infrastructure. Necessary upgrades may add complexity and existing infrastructure capabilities may guide optimal microgrid. AECOM will analyze electrical single-line diagrams and conduct site assessments to determine an effective configuration for powering critical loads and identify system limitations. This analysis will optimize DER integration, reduce costs, and provide recommendations for required infrastructure upgrades.

### Microgrid Modeling

Once future critical loads are determined the AECOM team will utilize a combination of microgrid modeling software and internal AECOM tools to simulate the operations of the microgrid during both regular and power outage periods. Through modeling different DER systems and critical facility loads, systems will be sized to meet the performance requirements of the microgrids. This analysis will include analysis of the facility during regular operations assist in sizing DERs to optimize financial performance through peak load shifting, whilst also meeting KPIs. Modeling will provide preferred design configurations that can proceed into conceptual design studies

An in-depth analysis of funding and financing opportunities will be undertaken during Task 3 and incorporated into the microgrid feasibility studies, which will include financial modeling in addition to microgrid energy modeling. The financial model of a microgrid begins with identifying the optimal market for energy trading, which depends on the state, utility regulations, applicable tariffs, and the volume of energy being traded. For small-scale microgrids, California's NEM 3.0 (Net Energy Metering) is often the more viable option, while larger producers may benefit from Corporate PPAs (Power Purchase Agreements).

By combining government incentives, state programs, and strategic market positioning, microgrid projects can be effectively financed to deliver both feasibility and long-term cost stability.

### Conceptual Design Options

With a detailed understanding of the requirements of the microgrid, the loads it must serve and the existing infrastructure, AECOM will determine conceptual microgrid options for each of the 21 facilities. Approximate DER system capacities and locations will be identified, and existing single line diagrams updated to reflect the necessary upgrades required to accommodate the microgrid. The conceptual

design narratives will provide system components, sizes, locations and detail the interconnectivity of the microgrid controller with existing building and utility infrastructure. Guidelines will also be provided on operational considerations during both normal operation and power outage conditions.

#### Task 1 Deliverables

- Draft and Final: Twenty-one microgrid feasibility studies providing conceptual solutions to meet WRCOG member agency resilience needs .

### Task 2 – Community Resilience Center Feasibility Studies

The AECOM team recognize that one of the key areas of focus for this effort is in furthering the resilience of facilities to maximize the benefit to the wider community. The focus of Task 2 is on community centers and expanding the resilience assessments beyond microgrid feasibility to include facility accessibility, physical resilience and to identify and evaluate the community support services and programs that the facility may provide.

The proposed AECOM core team includes specialists in asset advisory, climate adaptation and resilience and social equity, all of whom bring expansive applicable experience in each area of the community resilience feasibility studies. We have conducted over 1,000 buildings in California for ADA compliance and have provided facility resilience assessments across Santa Clara County's healthcare portfolio. Our experience includes developing community resilience frameworks and programs for government agencies including for Southern California Association of Governments (SCAG) and the Texas General Land Office (GLO). Together, our team has identified an integrated approach of review and engagement that will provide the breath of assessment with sufficient tangible project and program recommendations to inform the implementation plan.

Our approach to Task 2 for the nine targeted community centers will be conducted in parallel to the microgrid feasibility studies in Task 1, with several steps overlapping, such as the stakeholder engagement processes. To facilitate the resilience center feasibility assessment, the AECOM team will first develop a set of criteria, which will be validated with the WRCOG core team, which will be used aid the review of each facility and identify key gaps or existing issues. These reviews will be undertaken in two parts:

**Part 1: Data request and review** – In addition to the data requests for microgrid feasibility assessment, the community resilience center feasibilities studies will require a complete set of architectural building drawings to aid in the Building and Landscapes assessment. The physical facility criteria including ADA compliance (e.g. entryways and bathroom accessibility), HVAC system requirements, and physical hazard vulnerabilities will be initially evaluated by reviewing the



received drawing sets. As with Task 1, this desktop review will also determine the existing electrical and water infrastructure, and spatial availability and configuration for potential improvement projects.

**Part 2: Stakeholder interviews** – Following the data review, the stakeholder interviews will look to both validate the primary criteria evaluation and fill in the remaining data gaps. It is anticipated that the interview will provide the majority of the required operational requirements (including and existing power, water, and communication needs) and map them to the service levels that the facility could perform. The AECOM team will have specific questions to facilitate the required data collection in a consistent manner. This may be augmented by a pre-survey prior to the meeting.

The AECOM team will build on outcomes of the community engagement workshops conducted by WRCOG staff and Grid Alternatives and conduct research of applicable services and programs prior to these meetings. This will allow the interviews to also be leveraged as an opportunity to gather feedback on potential programs and services that could be provided at the facility.

The result of these efforts will be a comprehensive summary of existing performance and resilience gaps across criteria for the nine community centers. There will be a comparison matrix, summarizing their relative performance, and facility-specific memos which will lay out in more detail the findings of the assessment, the gaps and focus areas, and recommended projects.

#### **Task 2 Deliverables**

- A summarized community resilience memo for each assessed facility outlining performance against each resilience center feasibility criteria, summary of anticipated requirements and the gaps (and associated recommended initiatives) to close them.
- Draft and Final: Nine community resilience center feasibility studies

### **Task 3 – Financing Strategies**

Building off the Funding and Financing Strategies developed for the Energy Resilience Plan, AECOM will develop a Financing and Business Plan that outlines funding and financing strategies to specifically support implementation of the microgrids and CRCs. Microgrids are capital-intensive systems, but various funding opportunities can significantly offset costs:

1. **Tax Incentives:** The Investment Tax Credit (ITC) provides a 30% tax credit, with additional bonuses of up to 10% for using local labor or U.S.-made materials.

2. **State Programs:** Programs like California's Self-Generation Incentive Program (SGIP) can provide funding for battery energy storage systems (BESS).
3. **Private Financing through PPAs:** For projects capable of generating energy at competitive rates, private companies may finance the project through PPA contracts, offering variants that can fully fund the project while securing long-term, stable energy tariffs.

By combining government incentives, state programs, and strategic market positioning, energy and community resilience projects can be effectively financed to deliver both feasibility and long-term cost stability. With WRCOG members spanning multiple jurisdictions and with varying levels of resources, our team understands that one solution may not fit for all and will identify a diverse array of funding opportunities that will meet WRCOG member agency needs. This Plan will provide a menu of funding and financing strategies along with key considerations about prioritizing strategies, combining strategies, and phasing.

AECOM will consider the following:

- Local, state, and federal grants and incentives (and will highlight those that may be affected by recent state and federal ballot and election results)
- Utility-backed programs
- Private funding and financing, including energy savings performance contracting (ESPC)
- Local revenue sources, including potential of existing revenue sources
- Financing options, such as bonds and loans

#### **Task 3 Deliverable**

- Memo (up to 10 pages) outlining funding and financing strategies, including key considerations and steps for developing a tailored strategy for each project.

The Consultant will develop an Implementation Plan that can be used by WRCOG member agencies to implement the microgrids and community resilience centers identified in the Energy Resilience Plan 2.0. The intent of the Implementation Plan is to provide information and steps to WRCOG member agencies so they can implement the projects identified in the Energy Resilience Plan 2.0. The Implementation Plan should include enough information to help inform the WRCOG member agency in the development of solicitations for further studies, construction, and analysis necessary to develop construction documents. The Implementation Plan shall identify milestones and provide an outline of the multi-step development process of a microgrid, including approvals, agreements, contracting, construction stages, plans and procedures, reports and studies, and commissioning needed to implement the microgrids and community resilience centers. The Implementation Plan shall include a list of

potential contractors and/or consultants that are experienced with developing microgrids and/or community resilience centers.

#### Task 4 – Implementation Plan

AECOM will develop a detailed and actionable Implementation Plan to support WRCOG member agencies in advancing the microgrids and community resilience centers identified in the Energy Resilience Plan 2.0. This Implementation Plan will serve as a practical roadmap, enabling member agencies to navigate the complex processes required to bring these projects from concept to realization.

From experience, microgrids and similar projects are typically implemented via two pathways:

1. **Design Build:** Engineer provides schematic design documentation until a 30% level, at which the project is bid by a design-build contractor
2. **Design Bid Build:** Engineer provides fully permitted documentation to the 100% level, at which point the project is bid to contractors. Engineer supports construction through construction administration

AECOM has experience with both delivery methods, with the first being undertaken at Santa Rosa and the second for the Veolia Rialto Wastewater Treatment Plant, where AECOM is providing full design documentation. Both delivery methods however require close coordination between engineers, contractors and WRCOG, thus AECOM will provide WRCOG with an implementation plan that will outline the critical activities, resources, anticipated timeframes and case studies that its member agencies can reference for support during implementation. This will include a detailed overview of the key aspects at each stage of the implementation process, once the feasibility studies are complete. The plan will outline in clear detail the findings from Task 3, and provide additional context and resources to provide WRCOG member agencies staff training and programs required for the procurement and operations of complex systems.

#### General Assumptions

- This proposal is contingent upon successful negotiation of mutually acceptable terms between AECOM and WRCOG
- All cost estimates are high-level ROM.
- Preliminary cost estimates are for equipment and project deployment costs.
- Current Tariffs and Market Prices are based on the energy tariff and market prices available at the time of the feasibility study.

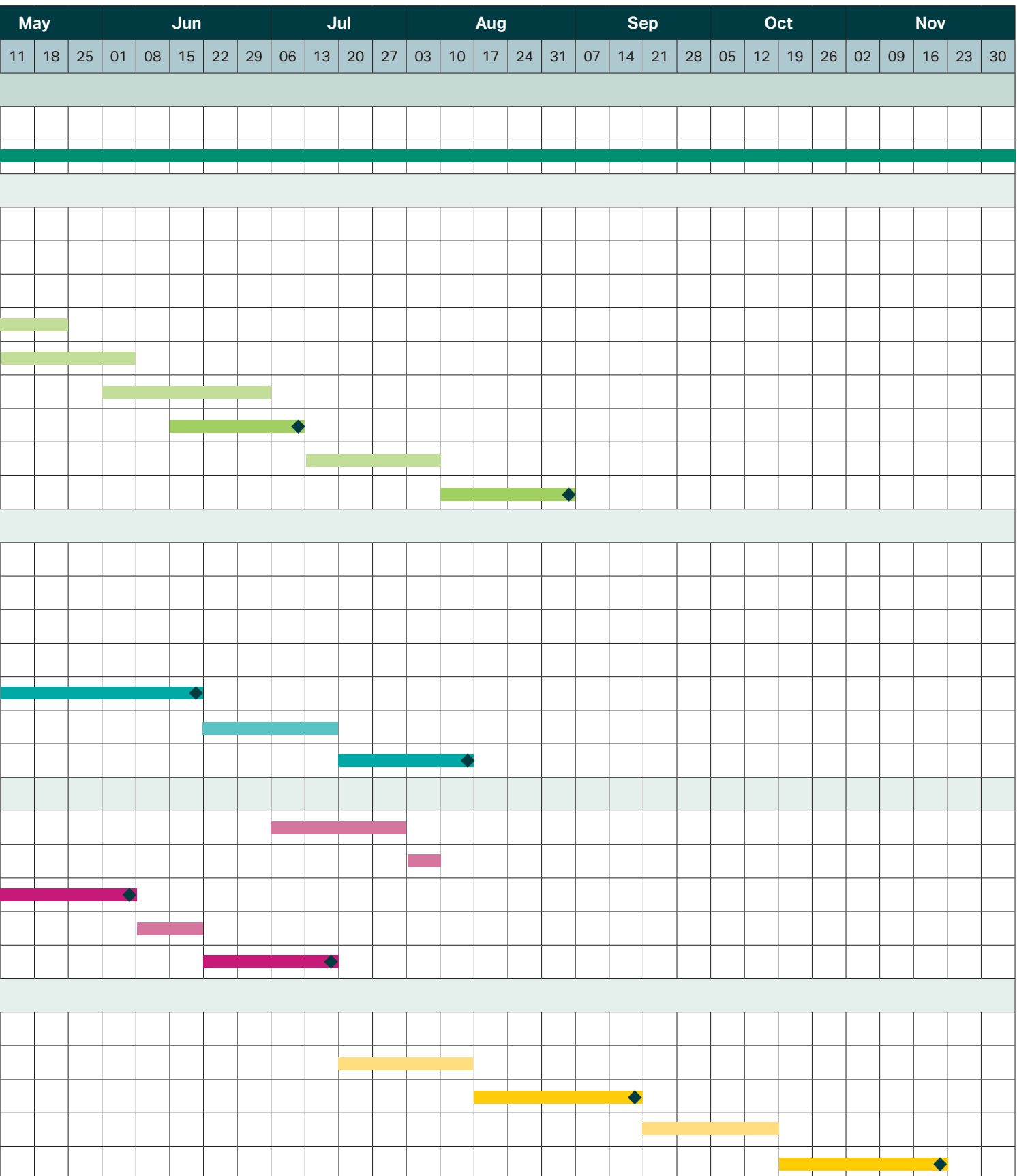
- Economic Trends will utilize available data on inflation and interest rate trends at the time of analysis.
- AECOM will not participate in community engagement workshops conducted by WRCOG staff.
- AECOM is entitled and will rely upon the accuracy, completeness, currency and non-infringement of information and data provided by WRCOG or obtained from generally accepted sources within the industry, except to the extent such verification by AECOM may be expressly required as a defined part of the services herein. AECOM will not be responsible for defects in its services attributable to its reliance upon or use of such information and data.
- The data provided for the Community Resilience Center assessments must be of sufficient quality for assessment, no additional time is assumed for site assessment or repeated follow-up over the time required for microgrid feasibility assessment site work
- No costing will be provided for the resilience interventions required outside of the microgrid feasibility.
- Funding and Financing analysis will be informed by desktop research
- Funding and financing strategies will be confirmed with the client before continuing research and evaluation.

# Project Schedule

| Project Details                                                               | Feb |    |    | Mar |    |    |    | Apr |    |    |    |    |    |
|-------------------------------------------------------------------------------|-----|----|----|-----|----|----|----|-----|----|----|----|----|----|
|                                                                               | 10  | 17 | 24 | 02  | 09 | 16 | 23 | 30  | 06 | 13 | 20 | 27 | 04 |
| <b>TASK 0: PROJECT MANAGEMENT</b>                                             |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Kick-off meeting                                                              | ◆   |    |    |     |    |    |    |     |    |    |    |    |    |
| Bi-weekly PM Meetings                                                         |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>TASK 1.0: MICROGRID FEASIBILITY STUDIES</b>                                |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Data Request & Review                                                         |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Stakeholder Interviews                                                        |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Energy Load Analysis                                                          |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Infrastructure Assessment                                                     |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Microgrid Modeling                                                            |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Conceptual Design Options                                                     |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>DRAFT Deliverable: (21) Microgrid Feasibility Studies</b>                  |     |    |    |     |    |    |    |     |    |    |    |    |    |
| WRCOG Review                                                                  |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>FINAL Deliverable: (21) Microgrid Feasibility Studies</b>                  |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>TASK 2: COMMUNITY RESILIENCE CENTER FEASIBILITY STUDIES</b>                |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Assessment Criteria Development                                               |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Data Request & Review                                                         |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Stakeholder Interviews                                                        |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Performance Documentation and Strategy Recommendations                        |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>DRAFT Deliverable: (9) Community Resilience Center Feasibility Studies</b> |     |    |    |     |    |    |    |     |    |    |    |    |    |
| WRCOG Review                                                                  |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>FINAL Deliverable: (9) Community Resilience Center Feasibility Studies</b> |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>TASK 3: FINANCING STRATEGIES</b>                                           |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Research and Literature Review                                                |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Stakeholder Interviews                                                        |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>DRAFT Deliverable: Funding and Financing Memo</b>                          |     |    |    |     |    |    |    |     |    |    |    |    |    |
| WRCOG Review                                                                  |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>FINAL Deliverable: Funding and Financing Memo</b>                          |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>TASK 4: IMPLEMENTATION PLAN</b>                                            |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Research and Literature Review                                                |     |    |    |     |    |    |    |     |    |    |    |    |    |
| Mapping Mechanisms and Action Plans to Projects                               |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>DRAFT Deliverable: Implementation Plan</b>                                 |     |    |    |     |    |    |    |     |    |    |    |    |    |
| WRCOG Review                                                                  |     |    |    |     |    |    |    |     |    |    |    |    |    |
| <b>FINAL Deliverable: Implementation Plan</b>                                 |     |    |    |     |    |    |    |     |    |    |    |    |    |



◆ **Key Milestone**



# Project Schedule (Continued)

| Overall Schedule                                                              | Alex Mitoma | Lilian Nguyen | Calum Thompson | Edgar Zavala |
|-------------------------------------------------------------------------------|-------------|---------------|----------------|--------------|
| <b>TASK 0: PROJECT MANAGEMENT</b>                                             |             |               |                |              |
| Kick-off meeting                                                              | •           | •             | •              | •            |
| Bi-weekly PM Meetings                                                         | •           | •             | •              |              |
| <b>TASK 1.0: MICROGRID FEASIBILITY STUDIES</b>                                |             |               |                |              |
| Data Request & Review                                                         |             |               |                | •            |
| Stakeholder Interviews                                                        |             | •             |                | •            |
| Energy Load Analysis                                                          |             |               |                | •            |
| Infrastructure Assessment                                                     |             |               |                | •            |
| Microgrid Modeling                                                            |             |               |                |              |
| Conceptual Design Options                                                     |             |               | •              | •            |
| <b>DRAFT Deliverable: (21) Microgrid Feasibility Studies</b>                  |             |               | •              | •            |
| WRCOG Review                                                                  |             |               |                |              |
| <b>FINAL Deliverable: (21) Microgrid Feasibility Studies</b>                  |             |               | •              | •            |
| <b>TASK 2: COMMUNITY RESILIENCE CENTER FEASIBILITY STUDIES</b>                |             |               |                |              |
| Assessment Criteria Development                                               |             |               | •              |              |
| Data Request & Review                                                         |             |               |                |              |
| Stakeholder Interviews                                                        |             | •             |                |              |
| Performance Documentation and Strategy Recommendations                        |             |               |                |              |
| <b>DRAFT Deliverable: (9) Community Resilience Center Feasibility Studies</b> |             |               | •              |              |
| WRCOG Review                                                                  |             |               |                |              |
| <b>FINAL Deliverable: (9) Community Resilience Center Feasibility Studies</b> |             |               |                |              |
| <b>TASK 3: FINANCING STRATEGIES</b>                                           |             |               |                |              |
| <b>Research and Literature Review</b>                                         |             |               |                |              |
| <b>Stakeholder Interviews</b>                                                 |             | •             |                |              |
| <b>DRAFT Deliverable: Funding and Financing Memo</b>                          |             |               |                |              |
| <b>WRCOG Review</b>                                                           |             |               |                |              |
| <b>FINAL Deliverable: Funding and Financing Memo</b>                          |             |               |                |              |
| <b>TASK 4: IMPLEMENTATION PLAN</b>                                            |             |               |                |              |
| Research and Literature Review                                                |             |               |                |              |
| Mapping Mechanisms and Action Plans to Projects                               |             |               |                | •            |
| <b>DRAFT Deliverable: Implementation Plan</b>                                 |             |               |                | •            |
| WRCOG Review                                                                  |             |               |                |              |
| <b>FINAL Deliverable: Implementation Plan</b>                                 |             |               |                |              |

| Key Staff     |              |             |           |            |           |                 |            |                   |
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| Salim Moslehi | Abinet Eseye | Chris Houck | Tatum Lau | Chris Hyun | Karl Metz | Emily Schwimmer | Rachel Dec | Sananda Mukherjee |
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# Quality Control

To support the City's Quality Control Plan, AECOM will provide the scope of professional services with a commitment to quality. Quality is an attitude, a culture and a way of life at AECOM. It is part of everything we do, every day. It is inherent in the way we plan, do, check and act to produce the work we perform for our clients, both internal and external.

AECOM offers the County of Los Angeles a proven quality management system (QMS) that is certified to the internationally renowned ISO 9001:2008 standard, yet sufficiently flexible to address the specific requirements of this project. Quality assurance and management is central to our project management approach and our project team includes individuals assigned to specific quality roles under our system. The general components of AECOM's approach to project quality assurance / management and the parties responsible for them, are depicted below.

**Initiating Quality.** Quality begins with AECOM's understanding of your project goals and objectives, emphasizing communication with the City of Mountain View and a thorough review of project inputs. Assigning technically qualified and experienced personnel to produce and review the work is an important next step. Our initial planning and scheduling activities, including defining the various project work tasks and associated quality activities, are foundational to a successful project.

**Producing Quality.** AECOM requires a project plan on all projects to define key parameters and guide the work of the team. The plan is discussed at the project team kickoff meeting and updated as needed to inform the team of new developments. As work proceeds, a number of critical quality assurance technical activities are undertaken, including

- Proper application of codes, standards and planning / design criteria, including County of LA and state requirements

- Ongoing oversight and supervision for accuracy and completeness as work proceeds
- Distribution of in-progress documents at defined intervals for quality review
- Coordination among disciplines
- Verification of compatibility and consistency among document types, such as policies, drawings and specifications
- Resolution and closure of in-progress review comments

**Confirming Quality.** While it is important to build quality into the work as it is performed, formal checking and review are critical QMS activities. Quality checking activities, which are all documented with two-level approvals, include:

- Checking studies / reports / documents for content, logic, clarity and soundness of recommendations, as well as grammar, punctuation and format
- Checking calculations to verify correctness and completeness, methodology, selection of software, application of standards and codes and general approach

**Delivering Quality.** All deliverables undergo a final verification check before they are submitted. A lead verifier evaluates the deliverable for completeness and consistency, adherence to quality requirements and resolution of comments. The lead verifier then signs a Technical Quality Review Record and transmits it to our Program Manager, who is then responsible for the final overlook, approval and submittal. This final independent evaluation assesses the submittal's state of readiness, without diminishing the Project Manager's accountability for the quality of the work being released. As a check-and-balance activity, this review pairing helps AECOM consistently deliver quality and value to our clients.



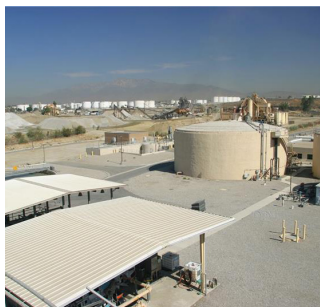
# F Detailed & Itemized Pricing

The below fee reflects the requested scope of work, inclusive of the 12 microgrid feasibility studies and the 9 community resilience center feasibility studies. We have not included the provided "Attachment E - Activities and Cost Matrix" because our scope of work is covered in our proposed the fee. However, AECOM can provide a fee for microgrid design services for any of the facilities, if requested at a later date.

| Task                                                           | Hours | Fee              |
|----------------------------------------------------------------|-------|------------------|
| <b>Task 0: Project Management</b>                              | 88    | \$15,521         |
| <b>Task 1: Microgrid Feasibility Studies</b>                   | 520   | \$102,524        |
| <b>Task 2: Community Resilience Center Feasibility Studies</b> | 172   | \$31,639         |
| <b>Task 3: Financing/Business Plan</b>                         | 60    | \$10,077         |
| <b>Task 4: Implementation Plan</b>                             | 108   | \$15,017         |
| <b>Total</b>                                                   |       | <b>\$174,778</b> |

AECOM can provide 30% / 100% design for any of the facilities for a fee to be scoped.

# References



## CITY OF RIALTO WASTEWATER TREATMENT PLANT MICROGRID

### **Chandrasekar Venkatraman (CV), P.E., PMP, CFE**

President of Capital Program Management

Municipal & Commercial Business

Veolia North America

4160 Temescal Canyon Road, Suite 311, Corona, CA 92883

Phone: 909-820-3771

Cell: 909-341-8246

Email: chandrasekar.venkatraman@veolia.com



## SANTA ROSA, CITY-WIDE RESILIENCY, DECARBONIZATION AND DISTRIBUTED ENERGY RESOURCES STUDY

### **Douglas A Williams**

Facilities Maintenance and Operations Coordinator

Transportation and Public Works Department

City of Santa Rosa

69 Stony Circle, Santa Rosa, CA 95401

Phone: (707) 543-3712

Email: dwilliams@srcity.org



## LARGE SCALE DEPLOYMENT OF DISTRIBUTED ENERGY RESOURCES AND MICROGRIDS ON MUNICIPAL FACILITIES

### **Keith Chow**

Associate Engineer

City Facilities Architectural Services Division

Department of Public Works

City of San Jose

200 East Santa Clara Street, City Hall, 6th Floor, San Jose, CA 95113

Cell: 408-535-8101

Email: Keith.Chow@SanJoseCA.Gov

# Project Team Staffing

We have created a team that has robust experience delivering the scope requested by WRCOG, and has a history of successfully Working on the WRCOG ERP.

The following pages contain resumes for our proposed staff highlighting their relevant experience and suitability to their role. For the best of our knowledge, we affirm that no employees working on the engagement have ever been convicted of a felony.



## Calum Thompson, PE, CEM, LEED AP BD+C, ENV SP PROJECT DIRECTOR

### Education

Master of Engineering Enviro-Mechanical Engineering,  
University of Strathclyde,  
Glasgow, Scotland

### Registrations/Certifications

Professional Engineer  
(Mechanical), CA, #M37038  
AEE Certified Energy Manager  
LEED Accredited Professional  
– Building Design and  
Construction  
ISI Envision Sustainability  
Professional

### Professional Affiliations

Californian Association of  
Professional Engineers,  
Geologists and Geophysicists  
Member, ASHRAE  
Member, U.S. Green Building  
Council (USGBC)

Calum Thompson leads AECOM's High Performance Buildings & Communities team in California. A licensed mechanical engineer, Calum specializes in strategic energy planning where he applies his technical background to the assessment of building energy demand, renewable energy, district energy, and microgrid systems at a campus and community scale.

Over the past decade Calum has led the development of energy plans for campuses, agencies, and governments across the US, including for These plans focus upon developing strategies that thread together both resilience and decarbonization to meet the unique requirements and aspirations of federal campuses. Calum has published some of these lessons learned in an ASHRAE paper entitled "Energy Master Planning for Resilient Public Communities --Best Practices from US Military Installations".

### Project experience

**Western Riverside County of Governments, Energy Resilience Plan, Riverside, CA.** Project Manager. AECOM assisted the Western Riverside Council of Governments (WRCOG) with the development of an energy resiliency plan to support their members in response to power interruptions resulting from events such as wildfires, extreme heat, or Public Safety Power Shutoffs (PSPS). The Project provides a framework that enables WRCOG and its member jurisdictions to identify and prioritize a combination of facility, community, and infrastructure investments such as local generation, microgrids, and energy storage systems to improve regional resilience. Calum was the Technical Director and Project Manager for this effort.

**City of Berkeley, Berkeley Energy Assurance Transformation, Berkeley, CA.** Technical Analysis Lead. Development of a microgrid in the City of Berkley, CA to improve resilience of public buildings. Calum led the technical feasibility assessment of the proposed microgrid by assessing the various combinations of distributed energy resources such as solar PV and diesel generators with a centralized battery system in order to identify the optimal configuration. The key performance goals were to meet critical demand and allow the public buildings to act as emergency shelters for extended periods during grid outages.

**University of California Merced, Energy Master Plan, Merced, CA.** Technical Lead and Project Manager. Calum led the development of an Energy Master Plan for UC Merced. UC Merced is striving to achieve its commitment of net zero energy, carbon, and waste and improve the resilience of its energy systems. AECOM was engaged by the university of develop a plan to support the achievement of these goals through the identification cost-effective infrastructure improvements (with a focus on a campus microgrid), energy conservation, and on-site generation strategies.

**University of California, Riverside, Campus Decarbonization Study, Riverside, CA.** Technical Lead. In response to University of California (UC) climate action goals, UC Riverside commissioned a decarbonization study to identify pathways to transition away from on-campus fossil fuel use, eliminating associated GHG emissions. Calum led the team in the evaluation of options to replace the existing campus steam system which included life cycle cost assessment and the development of a preferred phasing plant to achieve net zero emissions by 2045.

**U.S. Air Force, Installation Energy Plans.** Technical Lead The Air Force partnered with AECOM to develop their Installation Energy Plan (IEP) approach and subsequently run the program. The IEPs provide clear guidance on how installation energy resilience can be improved by focusing on mission resource needs, local threats, and key gaps in existing posture. Calum was technical lead in the development of resilience projects and the resultant roadmap for improved installation resilience. The effort included developing microgrid projects for over 10 installations.

**San Diego Gas and Electric, Net Zero Strategy, San Diego, CA. Project Manager.** The AECOM team, led by Calum, is supporting SDG&E Facilities team – consisting of 61 buildings over 17 locations - with the development of their first Net Zero Strategy. The strategy summarizes SDG&E's current facility operations and performance, articulates its goals and targets, quantifies energy, water, and waste strategies, describes regulatory and financial mechanisms for implementation, and develops a prioritized roadmap for implementation. Work included ASHRAE level II auditing, on- and off-solar feasibility assessment, and energy management planning.





## Mushtaq Ahmed

### PROJECT ADVISOR

#### Education

MS, Mechanical Engineering,  
Texas A&M University

BS, Mechanical Engineering,  
N.E.D University of Engineering  
and Technology (Karachi,  
Pakistan)

Mushtaq Ahmad has 20+ years of experience in the design, implementation, and construction of decarbonization, renewable energy and resiliency programs and projects for large industrial and commercial clients. He specializes in project development, business operations, design of energy/renewable energy systems, energy policy, building simulations, commissioning/ retrocommissioning, and building codes. He has extensive experience in working with California investor-owned utilities and municipalities to develop decarbonization offerings and projects.

#### Project experience

**Western Riverside Council of Governments, Energy Resiliency Plan.** Supporting a cross business line effort as a project advisor to develop a long-term energy resiliency plan for Western Riverside Council of Governments in Southern California which has more than 20 members. This project will assist the members in identifying energy related vulnerabilities and viable projects that can be deployed over the coming decade to increase operational resiliency and move the local community choice aggregator (CCA) to meet or exceed SB100 mandates.

**City of Rialto Wastewater Treatment Plant Microgrid, Engineering and Design Services.** Managed the implementation contract with the City of Rialto to develop and design a microgrid utilizing Solar PV, Batteries and digester gas engine as distributed energy resources. Once built, this \$26 million microgrid project will be able to provide 80% resiliency to the plant operation and will reduce the utility costs significantly. The microgrid comprises of 1.6MW of solar PV, 2.5MWh of lithium ion batteries and a 360 kW digester gas engine as well as a complete electrical infrastructure upgrade for the plant

**Confidential Client – Program Management and Design Services for Distribution Infrastructure and Resiliency Microgrid for mixed use development.** Led the business development efforts and overseeing the program management for a 12 million sq ft mixed used development in Silicon Valley. The project includes the deployment of more than 10 MW of solar and 20 MWh of batteries. Once at full load, this will be the largest all electric developments in the US with a district-wide microgrid providing resiliency and assisting in meeting the client's 24/7 clean energy goals.

#### **City of San Jose, Feasibility and Design of a two microgrids at a Zoo and a Community Center.**

Overseeing a consulting contract with the City of San Jose to conduct detailed feasibility studies and develop 100% design set for microgrids at the Happy Hollow Zoo and Roosevelt Community center. The design package includes solar PV, batteries and microgrid controllers with full islanding capabilities.

**City of Santa Rosa, Microgrid Feasibility and Citywide Energy Efficiency Audits.** Managing a consulting contract with the City of Santa Rosa to conduct detailed feasibility studies for deploying two microgrids for operational resiliency as well as analyzing more than 70 sites for the installation of renewables (solar PV), batteries and energy efficient infrastructure upgrades.

**Los Angeles County Sanitation Districts, Joint Water Pollution Control Plant Upgrades.** Led the business development efforts in securing a \$42 million design-build performance contract to construct a new oxygen generation plant at a 300 million gallons per day wastewater treatment plant in Carson, California. This is one of the largest wastewater treatment plant in the United States and this project, which is currently in construction, will result in saving the Los Angeles County Sanitation districts more than \$1.3 million in utility and maintenance costs per year and will significantly increase the resiliency and reliability of the plant operations.

**Sacramento Municipal Utility District (SMUD), eFuel (Charging as a Service) Program.** Led the business development efforts and currently managing the implementation of \$4 million charging as a service offering for SMUD's commercial, fleet and multi-family customers. this program is a true-turnkey offering which provides support from project inception through advisory services all the way to engineering, design, procurement and installation of electric vehicle charging infrastructure with no upfront cost for the customer.

*\* Experience prior to AECOM*



## Alex Mitoma, PE, ENVSP

### PROJECT MANAGER

#### Education

B.S. Environmental Engineering, B.A. English, University of Colorado Boulder

#### Registrations/Certifications

Professional Engineer, CA, 92604  
Envision Sustainability Professional, 52799

#### Professional Affiliations

Young Professionals in Energy, Los Angeles

Alex Mitoma is a member of AECOM's Climate Advisory Services practice. He is a licensed engineer with a background in resilience planning, climate adaptation, and industry energy transitions.

Alex was recently recognized by Trellis Group as a 30 Under 30 honoree for his resilience work at the Port of Long Beach.

#### Project experience

**Installation Energy Plans, U.S. Air Force, Various Locations. Program Manager, Technical Lead.** Alex managed the Installation Energy Plan (IEP) program under the U.S. Air Force Office of Energy Assurance. IEPs are designed as platforms for informed energy planning, of utilities and building systems at the facility-, district-, and installation-scale, for the ever-evolving energy landscape of the service. IEPs are developed on an individualized basis for installations across the world. Plan development includes comprehensive stakeholder engagement, integrated site data collection and analysis, and near-term and long-term resilience strategizing.

**Installation Energy Plans, Air National Guard, Various Locations. Program Manager, Technical Lead.** Alex manages the IEP program for the Air National Guard under the National Guard Bureau. For the Air National Guard, in addition to the IEP, AECOM develops preliminary resilience project concepts for each installation in a DD Form 1391. This has included microgrids of various scales (e.g., campus, district, facility) and distributed energy resources (e.g., generation, storage).

**Microgrid Design & Permitting, Confidential Client, CA.** Regulatory Strategy Lead. As part of broader design consultation services, Alex provided strategic guidance for how to establish and operate microgrids within various regulatory landscapes and utility service territories. In this case, regulatory agencies relevant to this project, and with whom Alex has extensive experience, include the California Public Utilities Commission, the California Independent System Operator, the California Energy Commission, the California Air Resources Board, and the Federal Energy Regulatory Commission.

**Infrastructure Modernization Program, Confidential Client, CA.** Technical Lead. In support of the once-in-a-generation project to enable a major international airport's operational and economic growth of the next 30 years, led a precursory effort of the infrastructure planning and climate

vulnerability assessment to identify and prioritize critical assets and their respective energy resource requirements.

**Pilot Microgrid, Port of Long Beach, CA.\*** Deputy Project Manager. Alex served as the deputy project manager of the Port's first-ever microgrid, funded in part by a grant from the California Energy Commission. The installation was purposed to augment the port authority's critical security headquarters with resilient, zero-emission power. Alex's role comprised oversight of system design and commissioning, as well as grant agency and contractor management.

**Clean Air Action Plan, Port of Long Beach, CA.\*** Program manager. With its Bureau of Planning & Environmental Affairs, Alex administered district-level energy planning programs, studies, and technology demonstrations in support of the Port's signature Clean Air Action Plan, the hallmark initiative for air quality improvements and sustainable freight movement. Contributions included a first-ever, district-level resilience appraisal of Harbor District electrical infrastructure, system design of the inaugural facility-scale microgrid at the Port, and management of grant-funded (state, federal) programs for demonstration of zero-emission (e.g., battery-electric, hydrogen fuel cell) stevedoring equipment.

**Technology Advancement Program, Port of Long Beach, CA.\*** Program Manager. Alex administered of the Port's program to coordinate funding, guidance, and staff support to test promising zero-emission technologies and associated infrastructure in a real-world port environment.

**Power Systems Resilience Assessment, Port of Long Beach, CA.\*** Project Manager. Alex oversaw the first-ever port-scale resilience and reliability assessment of Harbor District electricity infrastructure. This study was commissioned to assess infrastructure readiness for zero-emission operations pursuant to the Port's impending energy transition per the Clean Air Action Plan.

**Fleet Transition Planning Software, Port of Long Beach, CA.\*** Project Manager. Funded in part by a grant from the California Energy Commission, Alex supervised of development of an open-source software forecasting tool for use by terminal operators. Tool functions included projection fleet transition costs, electric vehicle supply equipment costs, and anticipated terminal load profile from transition to zero-emission operations.

*\*experience prior to AECOM*



## Lilian Nguyen, EIT, LEED AP BD+C, Ecodistricts AP, IAC Auditor DEPUTY PROJECT MANAGER / ENERGY ANALYST

### Education

BS, Energy Engineering (With Honors) Minor in Applied Mathematics, Indiana University-Purdue University Indianapolis

### Registrations/Certifications

Engineer in Training (EIT)  
LEED Accredited Professional (AP) BD+C  
EcoDistricts AP  
U.S. Department of Energy (DOE) Industrial Assessment Center Auditor

### Professional Affiliations

Society of American Military Engineers (SAME)  
Toastmasters International  
IAC Women for Energy Efficiency (WE2)

Lilian is a sustainability consultant with the High-Performance Building and Community team. She specializes in energy master and resilience planning and modeling. In addition, she focuses on community and building sustainability addressing the triple bottom line (environment, economy, society). She develops renewable energy strategies with micro-grid ideologies; models campus-wide energy profiles and building systems; quantifies energy conservation measures; verifies compliancy with sustainable rating systems and more aligned with her clients' goals. Lilian carries her passion and dedication for achieving the best set of solutions to today's sustainability concerns.

### Project experience

**Energy Master Plan, San Diego County Regional Airport Authority, San Diego, CA.** Energy Modeler and Analyst supporting San Diego's Airport Authority's energy program that envisioned to expand and improve in the near future. An energy master plan drew a roadmap of where the program currently is, where it can be in the future, and how that status can be achieved. The strategic plan emphasized how sustainable targets, related to resiliency, energy resources, and carbon emissions, can be achieved. Lilian modeled battery energy storage and solar PV strategies using an optimization tool that justified implementation. With additional sustainable practices, the plan ensured substantial capital and annual cost savings.

**Solar Photovoltaics Assessment, El Paseo Center South Gate, South Gate, CA.** Renewable Energy Modeler to justify implementing solar PV systems on the existing buildings and site at El Paseo South Gate Shopping Center. Iterations of calculations quantified initial capital costs, electricity savings, and a simple payback for various PV system arrangements on site. An optimization tool was used to determine a best-fit solar PV system.

**Sustainability Action Plan, Los Angeles World Airports, Los Angeles, CA.** Energy Analyst who supported LAWA's vision to become more sustainable for the environment, visitors, and airport operations at Los Angeles International Airport and Van Nuys Airport. The sustainability action plan highlighted the airports' current sustainability posture, then identified potential improvements and offered implementation strategies. Core strategies of this project included utility monitoring and controls, utility conservation, and onsite energy production while maintaining stable airport operations.

**Decarbonization Study, University of California, Riverside, Riverside, CA.** Technical Planner strategizing how the University of California, Riverside (UCR) achieves a 90% or greater reduction in Scope 1 emissions by 2040. Decarbonization Study includes suggesting how the campus transitions from large fossil fuel uses to electrified options to reduce emissions, especially with its centralized steam utility plant operating from natural gas. Other strategies entail addressing outlying decentralized HVAC systems and providing solutions for emissions reduction. High level estimates of total capital and operational costs and savings are provided to address the financial feasibility of implementation, and altogether, the Study illustrates glidepaths of necessary actions to take and when.

**Port of Seattle, Central Mechanical Plant Decarbonization and Resilience Study, Seattle, WA.** Technical Manager responsible for orchestrating the development of a plan to upgrade the existing heating and cooling systems of the central mechanical plant at Seattle-Tacoma International Airport to achieve net-zero carbon by 2040. The plan also included an all-hazards mitigation plan that incorporates solutions to lessen effects of natural and human-caused disasters, such as effects from climate change like extreme heat and drought.

**Energy Master Plan, University of Colorado, Boulder, Boulder, CO.** Energy Modeler and Researcher who modeled energy consumption and determined energy use intensity (EUI) baselines for an educational campus using Rosetta—a 2018 AECOM Global Challenge Winner energy modeling platform—and researched effective strategies of centralizing and electrifying energy for the campus with regards to local climate. The University of Colorado Boulder engaged AECOM to develop an Energy Master Plan for its campus. The plan intends to evaluate strategies and create a phasing plan that will enable the university to meet its current and future energy needs, achieve its greenhouse gas emissions goals, and enhance its resilience posture.

**Energy System Feasibility Study, Inglewood Basketball and Entertainment Center, LA Clippers, Inglewood, CA.** Energy Systems Analyst for new construction of a performance arena. Combinations of chillers, thermal energy storage, fuel cells, photovoltaics, and battery energy storage were evaluated for energy production and annual cost savings to address electricity and cooling demand efficiently. Feasibility for natural ventilation was also analyzed while upholding the unique, aesthetic façade features.



## Edgar Zavala

### MICROGRID FEASIBILITY LEAD

#### Education

BS of Engineering Mechanical & Electrical, Universidad Autónoma de Nuevo León (UANL)

#### Registrations/Certifications

IEEE Accredited Professional

Edgar is the Microgrid Solution Architect for the smart energy practice at AECOM and focuses on energy, sustainability, and resilient Microgrid infrastructure. He has over 14 years of experience managing complex projects for power systems.

Edgar has managed projects for heavy industries leading teams for the design, test and commission of power control systems, electrical substation operations, microgrid systems, control algorithms and automate industrial process in Middle East, Central Asia, Australia, North & South America, Europe, Africa. for Oil & Gas, wind farm, solar farm, Microgrid, industrial factories, city utilities, oil rigs, etc. fostering a positive, efficient work environment and motivating team members to exceed expectations

#### Project experience

**Salt Lake City Department of Public Utilities, UT.** Review the recent updates to the protection scheme for an electrical substation, stepping down from 138kV to 13.8kV, with a 12 MVA main feeder.

**San Francisco Public Utilities Company, CA.** Design and conduct a comprehensive review of various sections within the protection scheme for the electrical substation PC&M. This includes developing precise relay settings and preparing a detailed wiring schedule.

**BTM Air-Train Switchgear Renewable Energy Control CA.** Develop the protection scheme for the relays controlling power flow between the renewable energy stations and the utility's main point of interconnection, including the creation of the SCADA point list and communication paths.

**City of San Jose, CA.** Developed a comprehensive microgrid feasibility study, including BESS (Battery Energy Storage System) sizing, load profiling, utility interconnection evaluation, and detailed energy analysis.

**City of Santa Clara, Santa Clara CA.** Developed a microgrid project centered around a fire station building complex. The project includes a solar system and a Battery Energy Storage System (BESS), designed to operate parallel to a diesel generator system. This setup ensures autonomy during blackouts and contributes to reducing the utility's energy consumption. My role in this project involved developing the control and communication systems, which manage power generation and utility consumption under both islanded and non-islanded conditions.

**City Of Santa Rosa, Santa Rosa CA.** Executed a microgrid project for a group of complex buildings with available space for solar PV systems to generate renewable energy. The project's objective was to support the city's efforts in reducing its environmental impact and lowering energy costs. My role focused on conducting a feasibility study, analyzing both the technical and financial challenges the project might face.

**Tennessee Valley Authority, TN.** As the leader in system controls design for utility-grade solar farm initiatives, I am responsible for the phased design of control systems at 30%, 60%, and 90% completion stages. This includes the development of network configurations, cable pathways, interfaces, and services. The core objectives of this project involve controlling and monitoring solar panels and TESLA batteries to efficiently channel power into the utility grid.

**NREL.** This project involved creating a software for NREL to monitor real-time data and simulate various power conditions. My responsibility was to develop an algorithm capable of predicting the optimal power paths, based on the vertices and nodes connected to the loads and power sources.

**Toronto Island Water Treatment Plant, Canada.** Led the system controls for the microgrid control system efforts. Design of the sequence of operation and upgrade of the existing system controls. The objectives for the project are resiliency, and reduction of power consumption (called: Global adjustment Charges in Canada) through BESS and PV Solar System.

**Veolia Rialto Wastewater Treatment Plant, CA.** Led the system controls for the microgrid and BESS efforts. Analysis of vendor proposals. Specifications for BESS, diesel generator and Microgrid controls. Design the 90% of controls schematics and communications. Integration of the sequence of operations for the microgrid controller.

**Community Microgrid, CA.** Leading the communication and controls for the microgrid system. The project prospect to have a demand of 40 MW with a network of BESS and Solar PV system distributed in different buildings. The main goals for this project are: Reduce footprint, Resiliency, maximize energy consumption and production.

**Brookfield PV Solar, OR.** Edgar led the project analysis for five prospective PV solar sites, reviewing the Interconnection agreement, analysis of the proposed electrical engineering and proposed equipment.





## Tatum Lau, AICP, ENV SP

### COMMUNITY RESILIENCE

#### Education

MS, Urban Design, University of Texas at Austin.

MS, Community and Regional Planning, University of Texas at Austin.

MA, Architecture of Rapid Change & Scarce Resources, London Metropolitan University.

BAS, Architectural Studies, University of Witwatersrand.

#### Registrations/Certifications

American Institute of Certified Planners (AICP)

Envision Sustainability Professional (ENV SP)

#### Professional Affiliations

American Planning Association

Tatum is a Senior Associate with AECOM's Urbanism + Planning practice. She is an experienced facilitator, bringing diverse interests together to co-create solutions that are ecologically sensitive, encourage economic prosperity and are equitable for communities. She has supported public and private sector clients evaluate and develop policy, infrastructure and places that lead to equitable outcomes. She has worked with state, regional, and city governments, as well as non-profits and the development community across climate action, resilience, transportation and land use planning. As the Social Value and Equity lead in the U.S. West and an ED&I leader at AECOM, she centers equity in projects, in the workplace and her community.

#### Project experience

**Project Title in bold always followed by a period.** Empor si conse voluptur, sunt imperci liquidu citiost vendae. Onsequeminto essinti dunt. Tae nis re pratur, quassunt ex eariae voluptia qui nonserum aut offic tem il il enesenimenia qui disquib usaped ut fugit por am, quo te porest qui illaut andic tes sum eumquassi aut haruptu reperibusam quas pratqui opta quiae porerit, vendel esequ estenihitium la volutasperit et, ius et ut volupti re conecea sit est, cum voluptis id quis evelenda dolupienis endiorem iumendae.

**Regional Resilience Framework, Southern California Association of Governments (SCAG), Southern California, CA.** Social Resilience Lead. The AECOM team aimed to integrate climate and broader resilience thinking that is grounded in both local community and jurisdiction knowledge into the next Regional Transportation Plan/Sustainable Communities Strategy, and further develop Resilience Planning materials. The Regional Resilience Framework (RRF) is intended to guide the exploration of emerging and potential disruptions from public health, human-caused and natural hazards. The team is developing a toolkit to guide local decision-making and enable local jurisdictions to better plan for resilience.

**Lower Rio Grande Valley (LRGV) Economic Development Strategy and Diversification Study, Texas General Land Office (GLO), Lower Rio Grande Valley Region, TX.** Community Resilience Lead. AECOM is supporting the GLO to develop strategies that aim to strengthen regional resilience, primarily through economic diversification for three counties

in the Lower Rio Grande Valley region (Hidalgo, Willacy, and Cameron). This study identifies existing economic and community assets including workforce, education, housing, transportation, and tourism among others – and ultimately will identify priority actions to help regional stakeholders prepare for and recover from major disruptions such as frequent flooding and COVID19. The study includes extensive stakeholder engagement leveraging interviews and focus groups to guide the plan's vision, objectives and actions.

#### **Economic Resilience & Diversification Study, Texas General Land Office (GLO), Nine-County Regions, TX.**

Community Resilience Lead. An economic resilience strategy for a nine-county study area anchored by Corpus Christi, along the Gulf Coast of Texas. The need for the study was driven by accelerating impacts from major storms, specifically Hurricane Harvey in 2018. The analysis is focused on how strategies for economic diversification can be leveraged to also respond to broader resilience challenges currently facing this region. The study identified an inventory of regional strengths and weaknesses, strategies for improving resilience to hurricanes, storm events and economic downturns and an action plan for implementing these. Tatum supported the Texas GLO to complete an economic resilience strategy.

#### **Campus Decarbonization Plan. University of California Riverside. Riverside, CA.**

Equity and Engagement Lead. The University of California (UC) adopted new, stronger climate action goals that prioritize direct emission reductions, limit the use of carbon offsets and align UC's climate goals with those of the state of California. AECOM is conducting a comprehensive study of campus decarbonization for UC Riverside (UCR), culminating in strategic plan for reducing or eliminating campus Scope 1 greenhouse gas emissions in accordance with UC system requirements. The study also includes identification of climate justice and equity considerations related to campus decarbonization, such as assessments related to labor vulnerability and community impacts; analyses needed to conduct future climate action planning; and opportunities for collaborative involvement of students, faculty, and staff in planning and implementation of decarbonization strategies.



## Emily Schwimmer, AICP, ENV SP

### FUNDING AND FINANCING

#### Education

MSc, Urbanization & Development, The London School of Economics

Master of Urban Planning, Graduate School of Design, Harvard University

BA, Global Studies & Geography, University of California, Los Angeles

Envision Sustainability Professional (ENV SP)

#### Professional Affiliations

American Planning Association

Urban Land Institute

#### Registrations/Certifications

American Institute of Certified Planners

Emily Schwimmer is an urban planner and economist with over ten years' experience working with public agencies, non-profits, and private sector organizations to fund, finance, and implement programs and capital improvement projects that aim to protect the environment, address socio-economic inequities, and improve the resiliency of communities. These projects range from rail electrification to bike lanes to green infrastructure and environmental restoration projects. As a member of AECOM's Climate Advisory Services team, she has experience with economic, fiscal impact, and cost-effectiveness analyses; funding, financing and governance, strategies; resiliency planning; demographic and market research; and community engagement.

#### Project experience

**CleanPowerSF Net Billing Tariff (NBT) Analysis, San Francisco Public Utilities Commission (SFPUC), San Francisco, CA.** Project Manager. CleanPowerSF aims to develop a tool to determine the feasibility of creating an NBT-like tariff and to determine the appropriate levels for key components, especially the energy export credits. The tool will compare the impacts of various NBT rate options on CleanPowerSF customer groups by rate class, CARE/FERA customers, and other categories.

**Glen Canyon Dam Long-Term Experimental Monitoring Program – Economic Impact Analysis, Western Area Power Administration, Colorado.** Senior Associate AECOM assessed the financial impact of reduced power generated by the Glen Canyon Dam on WAPA's revenues and customers. We supported evaluation of four alternatives of proposed operational changes to flows out of Glen Canyon Dam and analyzing how the alternatives will adversely impact hydropower generation at the GCD.

**Residential Building Decarbonization Implementation Plan, Washington State Department of Commerce, Washington State.** Senior Associate. AECOM worked with Washington to develop an implementation plan for reaching its residential buildings emissions reduction targets. Emily led the landscape analysis detailing the suite of current residential building decarbonization programs and policies across local, state, and federal levels, and conducted a

subsequent gap analysis highlighting barriers and challenges, drawing heavily on interviews with stakeholders. Based on these findings, the team developed policy recommendations for a statewide residential decarbonization program. The final implementation plan established specific actions and timelines aligned with the three phases laid out in Operation 2030; establishes clear energy utilization targets and GHG emissions limits for buildings by type; determines roles and responsibilities for the client, state agencies, and other external stakeholders; and identifies the resources required to achieve the State's goals.

**San Jose Residential Building Decarbonization Analysis, City of San José, CA.** Project Manager. AECOM modeled the cost of various residential building decarbonization measures and researched available consumer-facing incentives offered by federal, state, and local governments. This analysis allowed AECOM to estimate the approximate gap in available funding for decarbonizing residences in San José. In a subsequent task, AECOM conducted an analysis of revenue-generation potential of gross receipts tax to fund a citywide program to support building electrification to single-family and multi-family homeowners in the City of San José and developed recommendations for how these findings may inform policy decisions.

**Systems Mapping to Support the Regional Multi-Hazard Adaptation Plan and Technical Assistance Program, Bay Area Regional Collaborative (BARC), San Francisco Bay Area, CA.** Project Manager. AECOM worked with BARC to develop a regional multi-hazard adaptation plan and technical assistance program for the San Francisco Bay Area. Using best practices in systems thinking, this project developed system maps illustrating how regional agencies currently address climate adaptation through their enabling legislation, roles, authorities, policies, practices, and available resources. Tasks included a landscape analysis to develop a framework of climate resilience roles and responsibilities by state, federal, and regional agencies in the Bay; stakeholder engagement; and regional agency research and interviews to map their policies, authorities, technical assistance programs, and available levers. The outcomes illustrate gaps between regional adaptation needs and existing programs and agency activities, and recommend next steps to address these gaps.



## Salim Moslehi, PhD, CEM

### MICROGRID MODELING

#### Education

Ph.D., Civil, Environmental and Sustainable Engineering, Arizona State University, Tempe, Arizona

MSc., Mechanical Engineering, Tarbiat Modares University, Tehran, Iran

BSc, Mechanical Engineering, Iran University of Science and Technology, Tehran, Iran

Dr. Salim Moslehi is a Senior Energy Planner focusing on decarbonization of energy systems, integration of renewable and sustainable energy technologies, and developing resilience enhancement planning. Salim has demonstrated history of working in industry, R&D, and academia. He specializes in developing energy master plans for cities, campuses, and communities to achieve their sustainability, decarbonization, and resilience goals where he applied his strong background in renewable energy technologies, distributed energy resources, heating-cooling systems, and simulation and modeling techniques. Over the past 8 years, he has been involved in several projects related to emerging energy technologies, integrated energy systems, and resilient energy infrastructure. Salim has more than 7 years of experience in various industries as designer and technical project manager/coordinator in microgrid design and optimization, solar photovoltaics design, district heating and cooling systems decarbonization, and energy infrastructures resilience enhancement planning.

#### Project experience

**Western Riverside County of Governments, Energy Resilience Plan, Riverside, CA.** Microgrid Modeling. AECOM is assisting the Western Riverside Council of Governments (WRCOG) with the development of an energy resiliency plan to support their members in response to power interruptions resulting from events such as wildfires, extreme heat, or Public Safety Power Shutoffs (PSPS). The Project will provide a framework that will enable WRCOG and its member jurisdictions to identify and prioritize a combination of facility, community, and infrastructure investments such as local generation, microgrids, and energy storage systems to improve regional resilience. In this effort, Salim is providing technical support on microgrid simulations for the case studies.

**San Diego International Airport (SAN), Central Utility Plant Electrification, San Diego, CA.** Energy Technical Analyst. Salim is providing technical support in the development of technical solutions and pathways to electrify the SAN central utility plant enabling the Sand Diego County Regional Airport Authority to progress towards its carbon neutrality goals set in the Strategic Energy Plan (STEP) and Carbon Neutrality Plan (CNP). The STEP provides a framework for developing energy-efficient and carbon-neutral airport facilities. It establishes long-term goals and strategies for best utilizing energy and conservation practices while aligning

with the Airport Development Plan and Capital Improvement Plan's vision. These goals will ultimately allow the airport to establish more dependable energy sources while offsetting GHG emissions. The STEP addresses key issues of energy efficiency and conservation; on-site energy generation and storage; enhanced monitoring of key energy metrics; and mechanisms through which to actively engage the broad spectrum of airport stakeholders.

#### Campus Data Mapping, National Research Lab

**[Confidential].** Energy Analyst. Salim provides technical support for a multi-phase effort to develop "digital twins" of utility infrastructure for two research campuses. The effort digitizes static asset and infrastructure data into common, interoperable schema. A key part of this effort is the development of a dynamic analysis dashboard to facilitate planning-level decision-making in charting a path towards net zero carbon campuses.

#### U.S. Air Force, Installation Energy Plans – Pilot, 7

**Locations across the U.S.** Technical Support. Salim is serving as technical support on the successful execution of a multi-year program to deliver IEPs for USAF and Air National Guard (ANG) installations. Salim has supported the delivery of 6 USAF and ANG installations to-date located across the US and in global locations. Resilience considerations include natural hazards such as coastal flooding, wildfires, hurricanes, earthquakes, and ice storms; identification of redundant power, heating, cooling, and water requirements, and maintenance considerations such as personnel or equipment availability to ensure rapid response time.

#### Greater Toronto Airports Authority, Environmental Master Plan, Toronto, ON. Energy Technical Analyst.

Salim is providing technical support in the development of the energy component of the greenhouse gas reduction program through electrification of the central utility plant. The Greater Toronto Airports Authority (GTAA) has an ambitious program to reduce energy consumption and greenhouse gas emissions by planning, designing, and delivering an optimized and comprehensive approach aimed at achieving the GTAA's facility decarbonization goals across three areas – lighting systems, clean heat energy services at its central utility plant, and deployment of on-site solar photovoltaic and electric vehicle charging at Toronto Pearson International Airport. Salim's work has been focused on identifying and developing strategic and technical planning toward more efficient and more robust heating and cooling systems.



## Chris Hyun, AIA, NCARB, LEED AP BD+C, WELL AP, Assoc. DBIA ASSET ADVISORY

### Education

MArch, Yale University

BArch, University of Southern California

### Registrations/Certifications

License Architect, California Architects Board, #C38151

NCARB Certified, National

Council of Architectural Registration Boards, #98401

LEED AP Building Design + Construction, U.S. Green Building Council & Green Business Certification, Inc., #11213225

WELL AP, International WELL

Building Institute & Green Business Certification, Inc., #WELL-AP-0000157708

Licensed Real Estate Agent, California Department of Real Estate, #02156297

Associate DBIA, Design-Build Institute of America, #AS-4044

Chris Hyun, a senior architecture designer of the Los Angeles Office of AECOM, has over 10 years of experience with projects ranging from skyscrapers to small-scale residential projects. He has experience in all project phases and various project types, including workspace, higher education, courthouse, healthcare, mixed-use high-rise residential, design-build competitions, high-level scenario planning and feasibility studies for public clients, etc. Chris has extensive experience in consultant collaboration using Building Information Modeling software, as well as the production of presentation drawings, renderings, architectural drawings documentation, and construction administration. Many projects he has worked on have won numerous design awards and are widely published. He serves as an examination subcommittee member for the National Council of Architectural Registration Boards (NCARB), where he writes and edits new items for the national Architectural Registration Exam (ARE).

### Project experience

**Deferred Maintenance Program Management 2012-2022 - Phase 3, Los Angeles County - Chief Executive Office, Los Angeles, CA.** Architect Consultant. AECOM is conducting facilities condition assessments and providing capital planning for the County of Los Angeles at over 24-million-square-feet in more than 1,149 county-owned and operated facilities. The assessments are used to identify deficiencies and developing maintenance, rehabilitation, repair and capital replacement projects.

**General Hospital Move Management Strategy Study, Los Angeles County, Los Angeles, CA.** Senior Architecture Designer. AECOM Strategy+ and Building and Places teams collaborated with the County to develop multiple move strategies to evacuate General Hospital and West Campus prior to the start of redevelopment activities. The study involved evaluating the site, analyzing space requirements, devising a move strategy, and creating a cost estimate and schedule analysis to support the recommended move strategy.

**Koreatown Gateway, LANI, Los Angeles, CA.\*** Project Designer. A winning entry for the Koreatown Gateway competition in Los Angeles. The project design consisted of two L-shaped posts with embedded lettering connected with a web of programmable LEDs. As a project designer,

produced architectural graphics content for client presentations. Worked on architectural documentation drawings using BIM.

### **Buena Vista Horace Mann K-8 School Modernization Construction Management, San Francisco Unified School District, San Francisco, CA.** Peer Review

Architect. AECOM is providing construction document phase design management and construction management services for the modernization of the 100-year old Buena Vista Horace Mann K-8 School, a dual-language Spanish Immersion Community School in the heart of the Mission District of San Francisco, California. The project is being funded under the 2016 Bond Program.

### **USC Campus Health Facility PM/CM Services, University of Southern California, Los Angeles, CA.**

Peer Review Architect. AECOM is providing project management/construction management for the USC Campus Health Facility under a traditional delivery with a GMP negotiated construction contract. As a peer reviewer, performed constructability review on the construction document drawings produced by the project's design team and facilitated design, bidding, and schedules of specific building systems. Anticipated construction budget of \$428M.

### **Providence Tarzana Medical Center, Providence, Tarzana, CA.\***

Project Designer/Architect. As a part of a master plan, the project includes a new, state-of-the-art patient care wing featuring all private rooms and a new emergency department. As one of the key team members, regularly attended the OAC meetings and closely coordinated with structural, MEP, civil, medical equipment, and landscape consultants to respond to the RFIs/ Submittals and produce architectural drawing sets. Also acted as an internal BIM lead.

### **JCC LAC Master Plan Study, JCC, Los Angeles, CA.**

Senior Architecture Designer. AECOM is providing criteria architect services for development of a long-range strategic plan for improving and modernizing superior court facilities of Los Angeles County.

*\* Experience prior to AECOM*





## Sandy Mukherjee, LEED AP BD+C, ENV SP

### IMPLEMENTATION FRAMEWORK

#### Education

Master of Building Science,  
Architecture, University of  
Southern California - Los  
Angeles

Bachelor of Architecture,  
Architecture, Jadavpur  
University, India

#### Registrations/Certifications

LEED Accredited Professional  
(AP) BD+C

Envision Sustainability  
Professional (ENV SP)

Sandy Mukherjee leads the Sustainability practice for Enterprise Capabilities. She has an international background in Architecture and is responsible for providing sustainable solutions for infrastructure projects as well as high performance buildings. Sandy has strong experience working with various municipal, government and state level agencies as well as utility companies. With over 9 years of experience as an Envision Consultant (ENV-SP) for infrastructure projects and LEED Consultant for buildings, she has leveraged her knowledge in sustainability across a multitude of projects with demonstrable experience in guiding design teams through the full certification process. Her skills in coordinating with multiple disciplines and consultants to integrate sustainability measures in the design and construction stages of a project, combined with her technical knowledge, means she is perfectly placed to provide leadership and oversight to ensure the project meets its sustainability targets.

#### Project experience

**WRCOG Energy Resilience Plan, Western Riverside Council of Governments, CA.** Technical excellence lead on the development of a blueprint for energy resiliency technologies, projects, and applications for WRCOG member jurisdictions. The Plan identifies critical infrastructure and loads in each member jurisdiction and identifies projects and strategies to maintain power supply during power interruptions.

**Sustainable Infrastructure Guidelines, Los Angeles County Department of Public Works, CA.** Sustainability specialist working with the County staff to develop infrastructure guidelines (SIG) for the County of Los Angeles. The guidelines apply Envision, LEED and custom guidelines to all of Los Angeles Public Work projects. The guidelines provide the County with specific strategies and action items for topics including Transportation, Climate Change, Resilience, Integrative Design, Site, Water, Energy, Materials, Construction and Operations and Maintenance. An interactive implementation and tracking tool to support the guidelines was also developed and a training program was deployed to train all design division staff on the customized SIG tool.

**U.S. Air Force Base Installation Energy Plan, U.S. Airforce.** Project Coordinator and Technical Reviewer, providing framework for resiliency requirements across multiple air force base campuses, as a pilot project that will inform other

bases on how to improve their robustness, redundancy, resourcefulness, response and recovery. This involved site visits to individual bases, multiple workshops with different mission set owners and ultimately forming an action plan based on the COA (Course of Action) workshops.

**SDG&E Net Zero Strategy, San Diego Gas and Electric, CA.** Technical excellence lead on the development of a comprehensive, portfolio-wide strategy that summarizes SDG&E's current facility operations and performance, articulates its goals and targets, quantifies energy, water, and waste strategies, describes regulatory and financial mechanisms for implementation and develops a prioritized roadmap for implementation. The effort involved ASHRAE Level 2 assessments to quantify existing performance and identify energy and water opportunities for improvement.

**Sustainability Action Plan Update, Town of Breckenridge, CO.** Technical lead responsible for reviewing current sustainability plan for the Town of Breckenridge and providing updated goals, targets and strategies that align with the ski town's vision for sustainability. The key focus areas included energy, water, material management, mobility and climate action. This also involved reviewing concurrent efforts within the community that relate to open space, wildlife, food system, child care and housing and consolidating the sustainability narrative, as well as designing a public facing website to showcase the Town's commitments and progress towards meeting their sustainability targets.

**University of Colorado, Boulder, Energy Master Plan, CO.** Technical excellence lead on the development of an energy master plan for CU Boulder. The plan lays out the strategic vision for the University's energy infrastructure and operations for the next 20 years in support of emission-reduction and resilience goals. The plan defines these goals and identify strategic, prioritized strategies to achieve them. The strategies include energy efficiency planning, conservation measures, continuous facility optimization, operations improvements, occupant engagement, and renewable energy.

**Detroit Green Building Standards, City of Detroit, MI.** Sustainability consultant, responsible for developing an initial draft for the City of Detroit to consider and implement a Green Building Standards program within the city, considering its historical context and current policies that are in place.



## Chris Houck

### SOLAR SME

#### Education

Sustainability, Energy Concentration, University of Vermont

Minor in green building & community design.

#### Registrations/Certifications

OSHA 30 Hour

Advanced Solar PV 40 Hour

Chris Houck is an innovative and knowledgeable project designer with 10+ years of experience in the energy field working on commercial, industrial PV, and battery energy storage systems as well as Electric Vehicle charging stations (EV). He brings a strong background in low and medium voltage grid systems.

Chris has also served as a portfolio manager for large name brand companies, delegating designs, equipment procurement, project timelines, and multi-department iterations to complete projects. Mr. Houck is an innovative and knowledgeable project designer with 10+ years of experience in the energy field working on commercial, industrial PV, and battery energy storage systems as well as Electric Vehicle charging stations (EV). He brings a strong background in low and medium voltage grid systems.

Chris has also served as a portfolio manager for large name brand companies, delegating designs, equipment procurement, project timelines, and multi-department iterations to complete projects.

#### Project experience

**HEB, Texas, United States\*.** Responsible for 40+ MW of roof projects. Oversaw program for 5 years.

**Home Depot, East Coast, United States\*.** Responsible for 5MW of projects. Oversaw Program for 2 years.

**Whole Foods, East Coast, United States.** Responsible for 1.5 MW of projects. Oversaw program for 1 year.

**TVA, Paducah Solar & BESS Project, Paducah, KY.** Project Design Lead of all teams for the 90% detailed design of a 114MW DC / 95MW AC PV system and a 100MW/400MWh BESS system, including MV Collection and SCADA systems, interconnecting directly at the TVA Shawnee Fossil Plant.

**Vieques Island, Puerto Rico, Confidential Client\*.** Lead Designer for conceptual Microgrid drawings of a 20MW DC PV and 12MWh Battery Energy Storage system, including a 15kV E-house substation.

**Confidential Client, Lanai, HI\*.** Lead Designer for conceptual Microgrid drawings of a 10MW DC PV array and 9MWh Battery Energy Storage System. Including plans to interconnect directly at the utility substation.

**Confidential Client, Molokai, HI.** Lead Designer for conceptual Microgrid drawings of a 2MW DC PV array and 800kWh Battery Energy Storage System to interconnect ahead of client loads and net meter to client while supplying utility directly.

**TVA Shawnee Plant Solar & BESS Project, Paducah, KY.** Lead of a 100MW landfill PV system and 100MW/ 400MWh BESS system, including MV collection and SCADA systems.

**Ulster County Landfill PV Array, Kingston, NY\*.** Lead Designer, for late stage redesign of the permit and construction drawings package for a 1.9MW DC ground mount PV system, Oversaw project design changes and RFI's until projects PTO.

**Montgomery County - Oaks Landfill PV Initiative, Gaithersburg, MD\*.** Took over as lead designer for a preliminary and permit drawings set of a 5.8MW DC PV Ground mounted array on the closed county landfill. Preliminary drawings moved into Permit drawings and then were sold to EPC at 60% level design for further development.

**Baltimore County Brownfield PV Array, Baltimore, MD\*.** Assistant Designer of the preliminary drawings of a 12MW DC PV array to go on Baltimore county's Southwest area park, Brownfield.

**County of Dutchess PV System, Dutchess, NY\*.** Lead designer on a 2.498MWDC PV array interconnected at 34.5KV. Designed the array with 4 different orientations to accommodate for landscape challenges, such as, protected wetlands and shallow bedrock. Performed glare study due to PV array's proximity to the Hudson Valley Regional Airport.

**TESLA Fremont Factory PV Project. Fremont, CA\*.** Lead designer of a 500kW roof mounted PV array on top of the Tesla Automotive manufacturing plant. Created permit and construction drawing package. Oversaw project progress to PTO. Site walked entire factory to identify an acceptable point of interconnection that would not interfere with ongoing manufacturing load demands as well as identify a roof that would not require major upgrades or reinforcements to install the array.

*\* Experience prior to AECOM*



## Rachel Dec

### FUNDING AND FINANCING SME

#### Education

MPP, The Harris School of Public Policy at the University of Chicago

BA, Political Science, Northeastern University

Rachel is an analyst with AECOM's Economics + Advisory and Sustainable Economics practice, building upon years conducting nonprofit, public, and academic research on effective public policy. Before joining AECOM, she focused on data-driven urban policy analysis, particularly on matters involving housing and transportation, for two nonpartisan nonprofit research groups. Her projects at AECOM focus on designing efficient policies and places that address the needs of their markets and communities. The scope of her work includes statistical data analysis and visualization, designing and executing qualitative campaigns, and market and demographic analysis.

#### Project experience

**Economic Impact Analysis, Confidential Autonomous Vehicle (AV) Client, San Francisco, CA.** Analyst. In partnership with an autonomous vehicle service provider, AECOM is assessing the economic impacts of their current operations within its current service area, in addition to potential expansion into other geographies. Rachel is developing an economic impact methodology and conducting the overall assessment of current and future services.

**EPA Community Change Grant Support, City of Austin.** Analyst. Provided grant-writing support to two Austin-based nonprofit organizations as they each pursued a federal EPA grant for climate resilience and workforce development projects in their communities.

**State Resiliency Plan, Texas Department of Transportation (TxDOT), Austin, TX.** Analyst. AECOM is supporting TxDOT in evaluating physical and technological infrastructure necessary for the operation of a resilient statewide multimodal transportation system including highways, bridges, railways, airports, maritime ports and waterways, bicycle and pedestrian facilities, transit, international border crossings, and intelligent transportation systems. Rachel is developing a funding and financing plan to help TxDOT plan for and implement projects and programs related to prioritized adaptation strategies; this includes the compilation of funding opportunities (i.e., grant programs), financing tools, and revenue generation tools.

**Typhoon Mawar Recovery Efforts, Guam.** Task Order Lead. Following Typhoon Mawar in 2023, AECOM is partnering with a federal agency to assess damages associated with buildings and structures throughout the island of Guam. Rachel led the development of numerous economic analyses that identify architectural, structural, electrical, and mechanical deficiencies and make recommendations for appropriate repairs to maintain operations.

**Rebuilding American Infrastructure with Sustainability and Equity (RAISE) Grant Support, Confidential Client, U.S.,** Analyst. Supported development of a multi-million dollar RAISE grant. Rachel wrote sections related to Sustainability and Resilience.

**EPA Grant Application Support, Climate Pollution Reduction Implementation Grant, Port Authority of New York and New Jersey, NY and NJ.** Analyst. Supported development of multi-million dollar federal infrastructure grant. Assisted in drafting language and ensuring compliance to EPA's objectives for the grant program.

**Ohio State Airport System Plan (OASP) Update, Ohio Department of Transportation, Statewide, OH.** Analyst. AECOM is providing services to update Ohio's statewide aviation plan. This includes developing an eComponent that supports public involvement through direct survey input, data gathering efforts, data analysis, and reporting by leverage existing data storage and analysis and presentation technology into an adaptable user ready presentation platform for all aspects of the SASP update. Report organizes research findings for economic trends across Ohio planning regions, particularly focusing on aviation industry and its connections to the state economy.

**Sustainability and Environmental Program Support, Department of Homeland Security (DHS), U.S.,** Analyst. Supported the Office of the Chief Readiness Support Officer Sustainability and Environmental Programs (SEP) to develop both compliance documents and strategy relating to operations and federal requirements.



## Abinet Eseye, PhD

### MICROGRID SME

#### Education

PhD, Electrical Power System Engineering & Automation, North China Electric Power University

M.Sc., Electrical Power Systems Engineering, Bahir Dar University

B.Sc., Electrical Engineering, Hawassa University

Dr. Abinet Eseye is a Microgrid Power Systems Lead Engineer within the Energy Services at AECOM and focuses on design/planning, modeling/analysis, control, and protection of microgrids (hybrid energy systems). He has over 14 years of R&D and engineering experience on microgrids, distributed generation and storage, renewable energy, and electric power system.

Abinet has delivered feasibility study, design and owner's engineering services for several microgrid, energy storage and renewable energy projects. He is a subject matter expert (SME) for microgrid and BESS project developments and detail designs. He prepares electrical portion of multi-discipline engineering services proposals.

He has developed several computational algorithms and tools, especially related to advanced optimization, scientific machine learning, protection schemes, and resilience strategies, to advance electric power systems and renewable energy applications. He has published over 30 scientific papers, granted/filed 7 invention patents, and released 3 open-source software records.

#### Project experience

**Stanley Rialto Wastewater Treatment Plant, CA.** Performed techno-economic modeling and analysis of distributed energy resources (DERs) including PV and BESS to validate the feasibility of a microgrid-based power supply for the plant.

**Veolia Rialto Wastewater Treatment Plant, CA.** Conducted power system studies for a microgrid-based power supply (PV + BESS + CHP + Diesel) for the plant. Also, developed microgrid control strategies and sequence of operation, and evaluated several equipment specifications and suppliers for the project.

**High-tech Client Community Microgrid, CA.** Technical lead (SME) for the microgrid and BESS scope. Performed techno-economic analysis, produced microgrid conceptual designs and calculated BESS sizes for a high-tech community (residential and non-residential) development with a total demand of 40MW via inter-connected PV plus BESS microgrids distributed across several buildings.

**Toronto Island Water Treatment Plant, Canada.** Technical lead (SME) for the microgrid and BESS scope of a microgrid targeted demand charge reduction (called global adjustment in Canada) and maximized resiliency for a water treatment facility via a PV plus BESS microgrid.

**Blackwell Zink Company (BZC), OK.** Renewable Energy Option Assessment Project. Led the renewable deployment option feasibility study aimed to reduce greenhouse gas (GHG) emissions by at least 50% through installation of renewable sources such solar PV and BESS and decommissioning existing diesel generators.

**North Kegley, IL.** Alternative Energy Evaluation Feasibility/Concept Study Project. Technical lead for the project. Performed/led the feasibility study for renewable energy deployment to meet sustainability goals. Developed and delivered the feasibility report.

**City of Burbank, CA.** Developed an EPC RFP for design/engineering, procurement, and construction of a PV plus BESS grid-connected energy system.

**Greater Toronto Airports Authority (GTAA), ON, Canada.** CoGen Decarbonization Feasibility Study Project. BESS SME for the project. Performed and led concept study for battery energy storage system deployment to meet sustainability and resiliency goals.

**Keller North America, VA, NC & FL.** Feasibility Study for Renewable Energy Deployments in Multiple Industrial Sites. Identified and compared utility net metering and wholesale market participation options to support the feasibility study to meet sustainability goal.

**Brigham Young University-Hawaii (BYU-Hawaii), HI.** Microgrid and BESS SME for the project. Reviewed microgrid sequence of operation developed by a third-party (Siemens). Conducted load and generation balance assessment. Performed power system studies including load flow, short circuit, arc flash, harmonic analysis, relay protection coordination, and power quality assessment. Produced and delivered load-generation balance assessment report and power system studies report.





## Karl Metz, RA, LEED AP, IAM

### ASSET ADVISORY SME

#### Education

Master of Architecture (MArch),  
Ohio State University

Bachelor of Arts (BA),  
Economics, Union College

#### Registrations/Certifications

Registered Architect- California

LEED Accredited Professional

IAM Certificate

Karl Metz is the AAS West Practice Lead and a senior project manager with 20 years of experience in the planning, design, and construction fields. Karl has worked on various building types including Stadiums, Corporate-Commercial, Healthcare, Industrial, Justice, and Sports/Recreation. With diverse project experience providing a solid foundation, Karl can anticipate unique field conditions and develop procedures for accurately managing large and complicated scopes.

#### Project experience

##### County of Los Angeles Deferred Maintenance Program

**Phase 3.** Program Manager, Technical Lead- AECOM was selected in 2010 to perform the County-wide Deferred Maintenance Program Services, and has successfully completed facility condition assessments, developed costed implementation projects and barcoded equipment for more than 50 million square feet of County-owned properties in over 3,500 buildings across 24 separate departments. The project included the assessment of County-owned venues such as the Hollywood Bowl, countywide recreation facilities, parking structures and surface parking lots.

##### County of Santa Clara- Continuity of Operations Study.

Program Manager- System Reliability Assessments for healthcare facilities, focused on redundancy and reliability in utility infrastructure and power systems. Configured custom data collection and reporting. Reports will highlight potential points of failure in assessed infrastructure and systems, prioritize assessed systems for repair and retrofit based on criticality, and provide possible resiliency and redundancy solutions.

##### Shell Global Building Safety Standards Assessments.

Program Manager- AECOM is currently performing health and safety code compliance assessments for Shell in their global office portfolio. This project will assist Shell in prioritizing actions for achieving a safe working environment for their office staff worldwide.

##### Kellogg's Global Headquarters Study. Technical Lead-

Using our digital assessment tools, AECOM performed facility assessments across Kellogg's Battle Creek HQ campus establishing the current condition, estimating the costs required to address deferred maintenance needs, and developed capital plans for Kellogg's to prioritize needed replacements/improvements.

##### Africa Basketball League. Project Manager, Technical

Lead- AECOM was selected by the National Basketball Association (NBA) to assist with the launch of their Africa Basketball League (BAL). The scope for this project included assessing venues in Egypt, Tunisia, Morocco, Nigeria for use by the League. As project manager, Mr. Metz coordinated the logistically complicated trip and lead multidisciplinary team in the field. The goal for this project was to evaluate each potential venue from the perspective of design professionals on behalf NBA so the League could make informed decisions on which venue would best fit their needs.

##### Golden 1 Center. Project Architect- AECOM was selected

to be the designer of the home to the Sacramento Kings in downtown Sacramento. In addition to creating a world-class sports facility and venue, the Golden 1 center is also an anchor of Sacramento's downtown revitalization plan which includes a new public plaza, destination shopping and 250 room hotel.

##### Barclays Center, Brooklyn, NY. Construction Administrator-

Constructed as a design-build partnership with Hunt Construction, the 18,000 seat Barclays Center arena is the first professional sports venue is the cornerstone of the Atlantic Yards development in Brooklyn.

# Company Overview

## At AECOM, we're delivering a better world.

**AECOM's global Buildings + Places business line brings together a versatile and collaborative team of planning, design and engineering professionals working to create livable, sustainable and equitable cities.**

As the world's trusted infrastructure consulting firm, we're committed to managing our business with the utmost responsibility and to always strive for better – whether by reducing emissions, creating social value or diversifying our senior leadership and workforce.

Our global portfolio of work comprises the design of iconic and award-winning buildings and landscapes. From strategic planning through to project realization, the connections we make among people and places provide sustainable outcomes for our clients and the communities we serve. We place a premium on investing in digital capabilities and innovations which bring a unique consistency and efficiency to our scalable work. Our extensive expertise covers urbanism and planning, architecture and interiors, building and systems engineering, and cost and project management.

Together with our clients, we are working to evolve and elevate the built environment across sectors including social infrastructure, transportation and civil infrastructure, technology and logistics, and commercial and corporate real estate, while focusing on solutions that promote long-term health and wellbeing for all.

# #1

**ENR 2024  
General Building**

# #2

**ENR 2024  
Top Design Firm**

# 2500

**Nationwide  
Buildings + Places  
Staff**



51,000 people



#1 by Fortune magazine  
as the World's Most  
Admired Company in its  
industry



100% Rating on Corporate  
Equality Index / Best  
Places to Work for LGBT  
Equality 2024

### ABOUT AECOM

**Ownership:** AECOM Technical Services, Inc. is a wholly owned indirect subsidiary of AECOM, a Delaware corporation whose stock is publicly traded on the New York Stock Exchange (ACM/NYSE).

**Legal Entity Name:**  
AECOM Technical Services, Inc.

**Legal Organization:** Corporation

**Federal Tax ID:**  
95-2661922

**State and Date of Incorporation:**  
California - September 29, 1970

**Dun & Bradstreet Number:**  
003184462

**Primary and secondary SEC numbers:**  
C0608461

**Corporate Address:**  
300 South Grand Avenue, 9th Floor  
Los Angeles, CA 90071

**Local Business Address (office responsible for providing services):**  
999 Town and Country Rd  
Orange, CA 92868

**Key Contact:**  
Calum Thompson, PE, CEM, LEED AP, ENV SP  
Associate Principal, High Performance  
Buildings + Communities  
310-467-7083  
calum.thompson@aecom.com

**Authorized Representative:**  
Garrett Harper  
Vice President, Managing Principal  
312-373-7601  
garrett.harper@aecom.com

# Our ESG Strategy

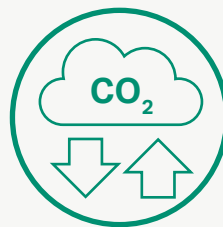
Our strategy is straightforward: Have a positive, lasting impact on our communities and planet. We are focused on creating a sustainable legacy that is built on responsibility in our operations and the work we do in partnership with our clients.



**Embed sustainable  
development and  
resilience across  
our work**



**Improve social  
outcomes**



**Achieve net-zero  
carbon emissions**



**Enhance  
governance**

It's more important than ever for organizations to adopt environmental, social and corporate governance (ESG) commitments, and take action to deliver a better world. We're here to partner with you at every stage, from concept to design and delivery.

Our ESG advisory team helps public and private sector leaders assess the environmental and social issues facing their organizations and develops strategies to address these for long-term business resilience. A high-level advisory service, our ESG advisory team help senior leaders direct the future of their business, guiding and aligning strategies and actions that will create sustainable legacies for generations to come. Our advisory service is complemented by a suite of technical services to help implement your vision.

Our ESG advisory service gives you:

- Better overview of risk
- Competitive advantage
- Investor confidence
- Partnership appeal
- Trust and brand loyalty

Our advisory offer spans risk analysis to strategy development, governance and measurement, encompassing implementation and program delivery for those who want help getting the job done.

Learn more about AECOM's ESG strategy:



# Equity, Diversity & Inclusion

We are committed to advancing equity, diversity and inclusion in our organization and within our industry. We build safe and respectful work environments where our employees are invited to bring their talents, backgrounds and expertise to bear on some of the world's most complex challenges and where everyone can thrive both personally and professionally.

The commitment to create a respectful, inclusive culture requires effort from all of us to remember that there are many points of view and tapping into this diversity of thought is what ultimately contributes to better outcomes. In 2021, we made it a priority for all employees to complete a global training on recognizing the negative impacts of unconscious bias and non-inclusive behaviors. In addition, we have established targets within each of our regions to advance our equity, diversity and inclusion goals.

We are advancing efforts globally in four key areas:

## **BUILDING DIVERSE TALENT**

To tackle the world's most complex challenges, we attract, hire, and develop talented people of all backgrounds, and ensure inclusivity and fairness in our sourcing, interview and hiring processes. Through our partnerships with nonprofit organizations and universities, we offer robust internships, graduate development programs and volunteer opportunities that help give underserved populations access to STEAM education.

## **EXPANDING UNDERSTANDING**

To help every employee feel valued and included, we're creating an inclusive workplace through community-building, training and family-friendly benefit policies.

We conduct regular employee surveys and "real talk" discussions to understand our employees' experiences and provide a forum for deeper understanding and empathy. Our employee resource groups create a sense of belonging and lead community outreach, and strategic mentorships promote ongoing dialogue and heightened awareness.

## **ENRICHING COMMUNITIES**

Our Blueprint for a Better World platform reflects our responsibility to champion equity, diversity and inclusion in our communities through pro-bono work, volunteerism, philanthropy and strategic partnerships with global nonprofit organizations like Engineers Without Borders and Water for People. We deepen our engagement with communities through our commitment to supplier diversity, providing leadership to ensure that diverse-owned businesses are supported and successful.

## **THINKING WITHOUT LIMITS**

Fostering equity, diversity and inclusion can't be done in a silo. By cultivating a workforce that more closely represents our clients and the communities we serve, we are able to better anticipate and respond to their needs. Further, we prioritize the social impact and benefits of equity, diversity and inclusion, factoring in these considerations into every project we pursue and the innovative solutions we deliver.

## What is AECOM doing to advance equity, diversity and inclusion?



### **DIVERSITY**

Ensuring our project teams reflect the diversity of the clients and communities we serve



### **WOMEN IN SENIOR LEADERSHIP**

Ensuring women comprise 20% of senior leadership and 35% of overall workforce by 2025



### **ENRICHING COMMUNITIES**

Ensuring that our work with clients and communities promotes social equity, diversity and inclusion



# Microgrids/Smart Grids

## Building for a Better Tomorrow

### Managing a System of Systems

At its core, microgrids, smart grids and smart cities are all about resource management and understanding resource balances and interdependencies. The key is to accurately model demand/supply information and integrate across buildings and infrastructure.

### AECOM'S MICROGRID AND SMART GRID PROGRAMS INCORPORATE ENERGY SAVING STRATEGIES FOR FACILITIES.

AECOM can provide a full suite of engineering design, program/construction management, and project delivery services to support a smart infrastructure architecture solution.

We focus on helping our clients reduce energy consumption, and develop renewable resources, cut carbon emissions and improve grid reliability. AECOM's comprehensive suite of energy services drives performance and produces innovative solutions.

At its core, microgrids, smart grids and smart cities are all about resource management and understanding resource balances and interdependencies. The key is to accurately model demand/supply information and integrate across buildings and infrastructure.

AECOM's multi-functional team of engineers, business analysts, policy experts, and marketing specialists offer exceptional delivery of energy programs that meet energy goals in a cost-effective manner.

AECOM capabilities includes:

- Asset management solutions (ISO 55000 compliant)
- Battery storage
- Building automation
- Communication network design, integration, and administration
- Data use and security
- Data use and technology
- Demand response
- Distribution automation
- Electric vehicles
- Energy management
- Infrastructure integration and optimization
- Microgrids
- Substation automation
- Supervisory control and data acquisition (SCADA) systems
- Volt/Var management

### Microgrid Functions and Capabilities



**AECOM BELIEVES THE SMART GRID OF THE FUTURE WILL CONSIST OF FLEETS OF MICROGRIDS, NETWORKED BY A MODERNIZED TRANSMISSION AND DISTRIBUTION SYSTEM.**

**AECOM's planners, economists, and utility market experts prepare case analyses for microgrid development. We address various ownership models: direct (maintain control of all aspects), joint (retain ownership and financing, but with third-party development, and operation), and third-party (outsource all to transfer risk). We have experience with various financing vehicles such as power purchase agreements, energy savings performance contracts, enhanced use leases, and direct financing.**

#### DESIGN

AECOM offers a team organized to provide functional integration and foster innovation for each aspect of design. Our deep bench of in-house engineers optimizes microgrid design across a complete spectrum of disciplines: conventional/renewable distributed energy sources, energy storage, microgrid control, cybersecurity, permitting, and utility interconnection.

#### CONSTRUCTION

Program and construction management professionals from AECOM's energy services group have delivered energy projects to utilities, government and private clients. Our project management team is organized to manage the risk inherent in the complex undertaking of microgrid implementation.

#### CONSERVATION AND EFFICIENCY

Microgrids provide energy security and they extract efficiencies from the interrelationship of energy assets that, individually, may already be operating most efficiently. Does the savings to investment ratio and payback justify the effort? Does the project compete financially with other organizational imperatives?

#### SECURITY

The ability to disconnect from the macrogrid when it becomes unstable and continues to serve one's critical load with internal resources is a primary mission of a microgrid.

#### MARKET PARTICIPATION

Microgrids have the ability to mitigate price volatility. The barriers to entry into this market can be high, but for the right facility, the benefits can be worth the cost. If the facility's generation or demand response capacity are significant, and its energy operations staff is capable, it may make financial sense to pursue the development of a more complex microgrid.

AECOM is the global infrastructure leader, committed to delivering a better world. As a trusted professional services firm powered by deep technical abilities, we solve our clients' complex challenges in water, environment, energy, transportation and buildings. Our teams partner with public- and private-sector clients to create innovative, sustainable and resilient solutions throughout the project lifecycle – from advisory, planning, design and engineering to program and construction management. AECOM is a Fortune 500 firm that had revenue of \$16.1 billion in fiscal year 2024. Learn more at [aecom.com](https://aecom.com).

# Attachment

WRCOG Professional Services  
Agreement with AECOM Technical  
Services, Inc.

# **WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS PROFESSIONAL SERVICES AGREEMENT**

## **1. PARTIES AND DATE.**

This Agreement is made and entered into this 3rd day of February, 2025, by and between the Western Riverside Council of Governments, a California public agency ("WRCOG"), and AECOM Technical Services, Inc. a California corporation ("Consultant"). WRCOG and Consultant are sometimes individually referred to as "Party" and collectively as "Parties."

## **2. RECITALS.**

### **2.1 Consultant.**

Consultant desires to perform and assume responsibility for the provision of certain professional services required by WRCOG on the terms and conditions set forth in this Agreement. Consultant represents that it is experienced in providing microgrid and asset assessment technical expertise and the experience in developing community resilience and funding plans necessary to successfully deliver this scope of work, is licensed in the State of California, and is familiar with the plans of WRCOG.

### **2.2 Project.**

WRCOG desires to engage Consultant to render such professional services for the Energy Resilience Plan 2.0 ("Project") as set forth in this Agreement.

## **3. TERMS.**

### **3.1 Scope of Services and Term.**

3.1.1 General Scope of Services. Consultant promises and agrees to furnish to WRCOG all labor, materials, tools, equipment, services, and incidental and customary work necessary to fully and adequately supply the Feasibility Studies for Microgrids and Community Resilience Centers, Funding Strategies, and Implementation Plan and related services necessary for the Project ("Services"). The Services are more particularly described in Exhibit "A" attached hereto and incorporated herein by reference, and which are stated in the proposal to WRCOG and approved by WRCOG's Executive Committee. All Services shall be subject to, and performed in accordance with, this Agreement, the exhibits attached hereto and incorporated herein by reference, and all applicable local, state and federal laws, rules and regulations.

3.1.2 Term. The term of this Agreement shall be from February 3, 2025 to January 31, 2026 unless earlier terminated as provided herein. Consultant shall complete the Services within the term of this Agreement and shall meet any other established schedules and deadlines.

### **3.2 Responsibilities of Consultant.**

3.2.1 Control and Payment of Subordinates; Independent Contractor. The Services shall be performed by Consultant or under its supervision. Consultant will determine the means, methods, and details of performing the Services subject to the requirements of this

Agreement. WRCOG retains Consultant on an independent contractor basis and not as an employee. Consultant retains the right to perform similar or different services for others during the term of this Agreement. Any additional personnel performing the Services under this Agreement on behalf of Consultant shall also not be employees of WRCOG and shall at all times be under Consultant's exclusive direction and control. Consultant shall pay all wages, salaries, and other amounts due such personnel in connection with their performance of Services under this Agreement and as required by law. Consultant shall be responsible for all reports and obligations respecting such additional personnel, including, but not limited to, social security taxes, income tax withholding, unemployment insurance, disability insurance, and workers' compensation insurance.

3.2.2 Schedule of Services. Consultant shall perform the Services expeditiously, within the term of this Agreement, and in accordance with the Schedule of Services set forth in Exhibit "B" attached hereto and incorporated herein by reference. Consultant represents that it has the professional and technical personnel required to perform the Services in conformance with such conditions. In order to facilitate Consultant's conformance with the Schedule, WRCOG shall respond to Consultant's submittals in a timely manner. Upon request of WRCOG, Consultant shall provide a more detailed schedule of anticipated performance to meet the Schedule of Services.

3.2.3 Conformance to Applicable Requirements. All work prepared by Consultant shall be subject to the approval of WRCOG.

3.2.4 Substitution of Key Personnel. Consultant has represented to WRCOG that certain key personnel will perform and coordinate the Services under this Agreement. Should one or more of such personnel become unavailable, Consultant may substitute other personnel of at least equal competence upon written approval of WRCOG. In the event that WRCOG and Consultant cannot agree as to the substitution of key personnel, WRCOG shall be entitled to terminate this Agreement for cause. As discussed below, any personnel who fail or refuse to perform the Services in a manner acceptable to WRCOG, or who are determined by the WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, or a threat to the safety of persons or property, shall be promptly removed from the Project by the Consultant at the request of the WRCOG. The key personnel for performance of this Agreement are as follows:

**Garrett Harper**  
**Calum Thompson**  
**Alex Mitoma**

3.2.5 WRCOG's Representative. WRCOG hereby designates **Daniel Soltero** or his or her designee, to act as its representative for the performance of this Agreement ("WRCOG's Representative"). WRCOG's Representative shall have the power to act on behalf of WRCOG for all purposes under this Contract. Consultant shall not accept direction or orders from any person other than WRCOG's Representative or his or her designee.

3.2.6 Consultant's Representative. Consultant hereby designates **Alex Mitoma**, or his or her designee, to act as its Representative for the performance of this Agreement ("Consultant's Representative"). Consultant's Representative shall have full authority to represent and act on behalf of the Consultant for all purposes under this Agreement. The Consultant's Representative shall supervise and direct the Services, using his best skill and attention, and shall be responsible for all means, methods, techniques, sequences, and procedures, and for the

satisfactory coordination of all portions of the Services under this Agreement.

3.2.7 Coordination of Services. Consultant agrees to work closely with WRCOG staff in the performance of Services and shall be available to WRCOG's staff, consultants, and other staff at all reasonable times.

3.2.8 Standard of Care; Performance of Employees. Consultant shall perform all Services under this Agreement in a skillful and competent manner, consistent with the standards generally recognized as being employed by professionals in the same discipline in the State of California. Consultant represents and maintains that it is skilled in the professional calling necessary to perform the Services. Consultant warrants that all employees and sub- contractors shall have sufficient skill and experience to perform the Services assigned to them. Finally, Consultant represents that it, its employees and sub-contractors have all licenses, permits, qualifications, and approvals of whatever nature that are legally required to perform the Services, and that such licenses and approvals shall be maintained throughout the term of this Agreement. As provided for in the indemnification provisions of this Agreement, Consultant shall perform, at its own cost and expense, and without reimbursement from WRCOG, any services necessary to correct errors or omissions which are caused by the Consultant's failure to comply with the standard of care provided for herein. Any employee of the Consultant or its sub-consultants who is determined by WRCOG to be uncooperative, incompetent, a threat to the adequate or timely completion of the Project, a threat to the safety of persons or property, or any employee who fails or refuses to perform the Services in a manner acceptable to WRCOG, shall be promptly removed from the Project by the Consultant and shall not be re-employed to perform any of the Services or to work on the Project.

3.2.9 Laws and Regulations. Consultant shall keep itself fully informed of and in compliance with all local, state and federal laws, rules and regulations in any manner affecting the performance of the Project or the Services, including all Cal OSHA requirements, and shall give all notices required by law. Consultant shall be liable for all violations of such laws and regulations in connection with Services. If the Consultant performs any work knowing it to be contrary to such laws, rules, and/or regulations, and without giving written notice to WRCOG, Consultant shall be solely responsible for all costs arising therefrom. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers and agents free and harmless, pursuant to the indemnification provisions of this Agreement, from any claim or liability arising out of any failure or alleged failure to comply with such laws, rules or regulations.

3.2.10 Insurance.

3.2.10.1 Time for Compliance. Consultant shall not commence the Services under this Agreement until it has provided evidence satisfactory to WRCOG that it has secured all insurance required under this section, in a form and with insurance companies acceptable to WRCOG. In addition, Consultant shall not allow any sub-contractor to commence work on any subcontract until it has provided evidence satisfactory to WRCOG that the sub-contractor has secured all insurance required under this section.

3.2.10.2 Requirements. Consultant shall, at its expense, procure and maintain for the duration of the Agreement, insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the Agreement by the Consultant, its agents, representatives, employees or sub-contractors. Consultant shall also require all of its sub-contractors to procure and maintain the same insurance for the duration of the Agreement. Such insurance shall meet at least the following levels of

coverage:

(A) Scope of Insurance. Coverage shall be at least as broad as the latest version of the following: (1) *General Liability*: Insurance Services Office Commercial General Liability coverage (occurrence form CG 0001 or exact equivalent); (2) *Automobile Liability*: Insurance Services Office Business Auto Coverage (form CA 0001, code 1 (any auto) or exact equivalent); and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation insurance as required by the State of California and Employer's Liability Insurance.

(B) Limits of Insurance. Consultant shall maintain limits of: (1) *General Liability*: \$1,000,000 per occurrence for bodily injury, personal injury and property damage. If Commercial General Liability Insurance or other form with general aggregate limit is used, either the general aggregate limit shall apply separately to this Agreement / location or the general aggregate limit shall be twice the required occurrence limit; (2) *Automobile Liability*: \$1,000,000 per accident for bodily injury and property damage; and (3) *Workers' Compensation and Employer's Liability*: Workers' Compensation limits as required by the Labor Code of the State of California. Employer's Liability limits of \$1,000,000 per accident for bodily injury or disease.

3.2.10.3 Professional Liability. Consultant shall procure and maintain, and require its sub-consultants to procure and maintain, for a period of five (5) years following completion of the Services, errors and omissions liability insurance appropriate to their profession. Such insurance shall be in an amount of \$2,000,000 per claim and in the aggregate. This insurance shall be endorsed to include contractual liability applicable to this Agreement and shall be written on a policy form coverage specifically designed to protect against negligent acts, errors, or omissions of the Consultant. "Covered Professional Services" as designated in the policy must specifically include work performed under this Agreement. The policy must "pay on behalf of" the insured and must include a provision establishing the insurer's duty to defend.

3.2.10.4 Insurance Endorsements. The insurance policies shall contain the following provisions, or Consultant shall provide endorsements on forms supplied or approved by WRCOG to add the following provisions to the insurance policies:

(A) General Liability.

(i) Commercial General Liability Insurance must include coverage for (1) Bodily Injury and Property Damage; (2) Personal Injury / Advertising Injury; (3) Premises / Operations Liability; (4) Products / Completed Operations Liability; (5) Aggregate Limits that Apply per Project; (6) Explosion, Collapse and Underground (UCX) exclusion deleted; (7) Contractual Liability with respect to this Agreement; (8) Broad Form Property Damage; and (9) Independent Consultants Coverage.

(ii) The policy shall contain no endorsements or provisions limiting coverage for (1) contractual liability; (2) cross liability exclusion for claims or suits by one insured against another; or (3) contain any other exclusion contrary to the Agreement.

(iii) The policy shall give WRCOG, its Directors, officials, officers, employees, and designated agents insured status using ISO endorsement forms 20 10 01 and 20 37 10 01, or endorsements providing the exact same coverage.

(iv) The additional insured coverage under the policy shall be "primary and non-contributory" and will not seek contribution from WRCOG's insurance or self-insurance and shall be at least as broad as CG 20 01 04 13, or endorsements providing

the exact same coverage.

(B) Automobile Liability.

(i) The automobile liability policy shall be endorsed to state that: (1) WRCOG, its Directors, officials, officers, employees, and designated agents shall be covered as additional insureds with respect to the ownership, operation, maintenance, use, loading or unloading of any auto owned, leased, hired, or borrowed by the Consultant or for which the Consultant is responsible; and (2) the insurance coverage shall be primary insurance as respects WRCOG, its Directors, officials, officers, employees, and designated agents, or if excess, shall stand in an unbroken chain of coverage excess of the Consultant's scheduled underlying coverage. Any insurance or self-insurance maintained by WRCOG, its Directors, officials, officers, employees, and designated agents shall be in excess of the Consultant's insurance and shall not be called upon to contribute with it in any way.

(C) Workers' Compensation and Employers Liability Coverage.

(i) Consultant certifies that he/she is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and he/she will comply with such provisions before commencing work under this Agreement.

(ii) The insurer shall agree to waive all rights of subrogation against WRCOG, its Directors, officials, officers, employees, agents, and volunteers for losses paid under the terms of the insurance policy which arise from work performed by the Consultant.

(D) All Coverages. Requirements of specific coverage or limits contained in this section are not intended as a limitation on coverage, limits, or other requirement, or a waiver of any coverage normally provided by any insurance.

(i) The limits of insurance required in this Agreement may be satisfied by a combination of primary and umbrella or excess insurance. Any umbrella or excess insurance shall contain or be endorsed to contain a provision that such coverage shall also apply on a primary and non-contributory basis for the benefit of WRCOG (if agreed to in a written contract or agreement) before WRCOG's own insurance or self-insurance shall be called upon to protect it as a named insured. The umbrella / excess policy shall be provided on a "following form" basis with coverage at least as broad as provided on the underlying policy(ies).

(ii) Consultant shall provide WRCOG at least thirty (30) days prior written notice of cancellation of any policy required by this Agreement, except that the Consultant shall provide at least ten (10) days prior written notice of cancellation of any such policy due to non-payment of premium. If any of the required coverage is cancelled or expires during the term of this Agreement, the Consultant shall deliver renewal certificate(s) including the General Liability Additional Insured Endorsement to WRCOG at least ten (10) days prior to the effective date of cancellation or expiration.

(iii) The retroactive date (if any) of each policy is to be no later than the effective date of this Agreement. Consultant shall maintain such coverage continuously for a period of at least three years after the completion of the work under this



Agreement. Consultant shall purchase a one (1) year extended reporting period A) if the retroactive date is advanced past the effective date of this Agreement; B) if the policy is cancelled or not renewed; or C) if the policy is replaced by another claims-made policy with a retroactive date subsequent to the effective date of this Agreement.

(iv) The foregoing requirements as to the types and limits of insurance coverage to be maintained by Consultant, and any approval of said insurance by WRCOG, is not intended to and shall not in any manner limit or qualify the liabilities and obligations otherwise assumed by the Consultant pursuant to this Agreement, including but not limited to, the provisions concerning indemnification.

(v) If at any time during the life of the Agreement, any policy of insurance required under this Agreement does not comply with these specifications or is canceled and not replaced, WRCOG has the right but not the duty to obtain the insurance it deems necessary, and any premium paid by WRCOG will be promptly reimbursed by Consultant or WRCOG will withhold amounts sufficient to pay premium from Consultant payments. In the alternative, WRCOG may cancel this Agreement. WRCOG may require the Consultant to provide redacted copies of all insurance policies in effect for the duration of the Project.

(vi) Neither WRCOG nor any of its Directors, officials, officers, employees, volunteers or designated agents shall be personally responsible for any liability arising under or by virtue of this Agreement.

3.2.10.5 Separation of Insureds; No Special Limitations. All insurance required by this Section shall contain standard separation of insureds provisions. In addition, such insurance shall not contain any special limitations on the scope of protection afforded to WRCOG, its Directors, officials, officers, employees, agents, and volunteers.

3.2.10.6 Deductibles and Self-Insurance Retentions. Any deductibles or self-insured retentions shall be the sole responsibility of the Consultant.

3.2.10.7 Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A:VII, licensed or authorized to do business in California, and satisfactory to WRCOG.

3.2.10.8 Verification of Coverage. Consultant shall furnish WRCOG with original certificates of insurance and endorsements effecting coverage required by this Agreement on forms satisfactory to WRCOG. The certificates and endorsements for each insurance policy shall be signed by a person authorized by that insurer to bind coverage on its behalf and shall be on forms provided by WRCOG if requested. All certificates and endorsements must be received and approved by WRCOG before work commences. WRCOG reserves the right to require redacted copies of all required insurance policies, at any time.

3.2.10.9 Sub-consultant Insurance Requirements. Consultant shall not allow any sub-contractors or sub-consultants to commence work on any sub-contract until they have provided evidence satisfactory to WRCOG that they have secured all insurance required under this section. Policies of commercial general liability insurance provided by such sub-contractors or sub-consultants shall be endorsed to name WRCOG as an additional insured using ISO Form CG 20 38 04 13 or an endorsement providing the exact same coverage. If requested by Consultant, WRCOG may approve different scopes or limits of insurance for particular sub-contractors or sub-consultants.

3.2.11 Safety. Consultant shall execute and maintain its work so as to avoid injury or damage to any person or property. In carrying out its Services, the Consultant shall at all times be in compliance with all applicable local, state, and federal laws, rules, and regulations, and shall exercise all reasonable precautions for the safety of employees appropriate to the nature of the work and the conditions under which the work is to be performed. Safety precautions as applicable shall include, but shall not be limited to: (A) adequate life protection and life-saving equipment and procedures; (B) instructions in accident prevention for all employees and sub-contractors, such as safe walkways, scaffolds, fall protection ladders, bridges, gang planks, confined space procedures, trenching and shoring, equipment, and other safety devices, equipment and wearing apparel as are necessary or lawfully required to prevent accidents or injuries; and (C) adequate facilities for the proper inspection and maintenance of all safety measures.

### **3.3 Fees and Payments.**

3.3.1 Compensation. Consultant shall receive compensation, including authorized reimbursements, for all Services rendered under this Agreement at the rates set forth in Exhibit "C" attached hereto and incorporated herein by reference. The total compensation shall not exceed one hundred seventy-four thousand seven hundred seventy-eight (\$174,778) without written approval of WRCOG's Executive Committee. Extra Work may be authorized, as described below, and, if authorized, said Extra Work will be compensated at the rates and manner set forth in this Agreement.

3.3.2 Payment of Compensation. Consultant shall submit to WRCOG a monthly itemized statement which indicates work completed and hours of Services rendered by Consultant. The statement shall contain the invoice number and date; remittance address; Agreement number \_\_\_\_\_, and invoice total. The statement shall describe the amount of Services and supplies provided since the initial commencement date, or since the start of the subsequent billing periods, as appropriate, through the date of the statement. WRCOG shall, within 30 days of receiving such statement, review the statement and pay all approved charges thereon.

3.3.3 Reimbursement for Expenses. Consultant shall not be reimbursed for any expenses unless authorized in writing by WRCOG.

3.3.4 Extra Work. At any time during the term of this Agreement, WRCOG may request that Consultant perform Extra Work. As used herein, "Extra Work" means any work which is determined by WRCOG to be necessary for the proper completion of the Project, but which the Parties did not reasonably anticipate would be necessary at the execution of this Agreement. Consultant shall not perform, nor be compensated for, Extra Work without written authorization from WRCOG's Representative.

3.3.5 Prevailing Wages. Consultant is aware of the requirements of California Labor Code Sections 1720, et seq., and 1770, et seq., as well as California Code of Regulations, Title 8, Section 16000, et seq., ("Prevailing Wage Laws"), which require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects. If the Services are being performed as part of an applicable "public works" or "maintenance" project, as defined by the Prevailing Wage Laws, and if the total compensation is \$1,000 or more, Consultant agrees to fully comply with such Prevailing Wage Laws. WRCOG shall provide Consultant with a copy of the prevailing rates of per diem wages in effect at the commencement of this Agreement. Consultant shall make copies of the prevailing

rates of per diem wages for each craft, classification, or type of worker needed to execute the Services available to interested parties upon request, and post copies at the Consultant's principal place of business and at the project site. Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers, and agents free and harmless from any claims, liabilities, costs, penalties or interest arising out of any failure or alleged failure to comply with the Prevailing Wage Laws.

### **3.4 Accounting Records.**

3.4.1 Maintenance and Inspection. Consultant shall maintain complete and accurate records with respect to all costs and expenses incurred under this Agreement. All such records shall be clearly identifiable. Consultant shall allow a representative of WRCOG during normal business hours to examine, audit, and make transcripts or copies of such records and any other documents created pursuant to this Agreement. Consultant shall allow inspection of all work, data, documents, proceedings, and activities related to the Agreement for a period of three (3) years from the date of final payment under this Agreement.

### **3.5 General Provisions.**

#### **3.5.1 Termination of Agreement.**

3.5.1.1 Grounds for Termination. WRCOG may, by written notice to Consultant, terminate the whole or any part of this Agreement at any time and without cause by giving written notice to Consultant of such termination, and specifying the effective date thereof, at least seven (7) days before the effective date of such termination. If WRCOG terminates this Agreement due to a default of Consultant, WRCOG shall provide written notice to Consultant of such default and allow Consultant to have an opportunity to cure such default, within seven (7) days, in order to avoid termination. Upon termination, Consultant shall be compensated only for those services which have been adequately rendered to WRCOG, and Consultant shall be entitled to no further compensation. Consultant may not terminate this Agreement except for cause.

3.5.1.2 Effect of Termination. If this Agreement is terminated as provided herein, WRCOG may require Consultant to provide all finished or unfinished Documents and Data and other information of any kind prepared by Consultant in connection with the performance of Services under this Agreement. Consultant shall be required to provide such documents and other information within fifteen (15) days of the request.

3.5.1.3 Additional Services. In the event this Agreement is terminated in whole or in part as provided herein, WRCOG may procure, upon such terms and in such manner as it may determine appropriate, services similar to those terminated.

3.5.2 Delivery of Notices. All notices permitted or required under this Agreement shall be given to the respective Parties at the following address, or at such other address as the respective parties may provide in writing for this purpose:

**Consultant: AECOM Technical Services, Inc.  
999 Town and Country Rd.  
Orange, CA 92868  
Attn: Calum Thompson**

**WRCOG: Western Riverside Council of Governments  
3390 University Avenue, Suite 200  
Riverside, CA 92501  
Attn: Daniel Soltero**

Such notice shall be deemed made when personally delivered or when mailed, forty-eight (48) hours after deposit in the U.S. Mail, first class postage prepaid and addressed to the Party at its applicable address. Actual notice shall be deemed adequate notice on the date actual notice occurred, regardless of the method of service.

### 3.5.3 Ownership of Materials and Confidentiality.

3.5.3.1 Documents & Data; Licensing of Intellectual Property. This Agreement creates a non-exclusive and perpetual license for WRCOG to copy, use, modify, reuse, or sub-license any and all copyrights, designs, and other intellectual property embodied in plans, specifications, studies, drawings, estimates, and other documents or works of authorship fixed in any tangible medium of expression, including but not limited to, physical drawings or data magnetically or otherwise recorded on computer diskettes, which are prepared or caused to be prepared by Consultant under this Agreement ("Documents & Data") upon proper payment for services. Consultant shall require all sub-contractors to agree in writing that WRCOG is granted a non-exclusive and perpetual license for any Documents & Data the sub-contractor prepares under this Agreement. Consultant represents and warrants that Consultant has the legal right to license any and all Documents & Data. Consultant makes no such representation and warranty in regard to Documents & Data which were prepared by design professionals other than Consultant or provided to Consultant by WRCOG. WRCOG shall not be limited in any way in its use of the Documents & Data at any time, provided that any such use not within the purposes intended by this Agreement shall be at WRCOG's sole risk.

3.5.3.2 Intellectual Property. In addition, WRCOG shall have and retain all right, title, and interest (including copyright, patent, trade secret, and other proprietary rights) in all plans, specifications, studies, drawings, estimates, materials, data, computer programs or software and source code, enhancements, documents, and any and all works of authorship fixed in any tangible medium or expression, including but not limited to, physical drawings or other data magnetically or otherwise recorded on computer media ("Intellectual Property") prepared or developed by or on behalf of Consultant under this Agreement as well as any other such Intellectual Property prepared or developed by or on behalf of Consultant under this Agreement upon proper payment for services.

WRCOG shall have and retain all right, title and interest in Intellectual Property developed or modified under this Agreement whether or not paid for wholly or in part by WRCOG, whether or not developed in conjunction with Consultant, and whether or not developed by Consultant. Consultant will execute separate written assignments of any and all rights to the above referenced Intellectual Property upon request of WRCOG.

Consultant shall also be responsible to obtain in writing separate written assignments from any sub-contractors or agents of Consultant of any and all right to the above referenced Intellectual Property. Should Consultant, either during or following termination of this Agreement, desire to use any of the above-referenced Intellectual Property, it shall first obtain the written approval of the WRCOG.

All materials and documents which were developed or prepared by the

Consultant for general use prior to the execution of this Agreement and which are not the copyright of any other party or publicly available and any other computer applications, shall continue to be the property of the Consultant. However, unless otherwise identified and stated prior to execution of this Agreement, Consultant represents and warrants that it has the right to grant the exclusive and perpetual license for all such Intellectual Property as provided herein.

WRCOG further is granted by Consultant a non-exclusive and perpetual license to copy, use, modify or sub-license any and all Intellectual Property otherwise owned by Consultant which is the basis or foundation for any derivative, collective, insurrectional, or supplemental work created under this Agreement.

**3.5.3.3 Confidentiality.** All ideas, memoranda, specifications, plans, procedures, drawings, descriptions, computer program data, input record data, written information, and other Documents & Data either created by or provided to Consultant in connection with the performance of this Agreement shall be held confidential by Consultant. Such materials shall not, without the prior written consent of WRCOG, be used by Consultant for any purposes other than the performance of the Services. Nor shall such materials be disclosed to any person or entity not connected with the performance of the Services or the Project. Nothing furnished to Consultant which is otherwise known to Consultant or is generally known, or has become known, to the related industry shall be deemed confidential. Consultant shall not use WRCOG's name or insignia, photographs of the Project, or any publicity pertaining to the Services or the Project in any magazine, trade paper, newspaper, television, or radio production or other similar medium without the prior written consent of WRCOG.

**3.5.3.4 Infringement Indemnification.** Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, employees, volunteers, and agents free and harmless, pursuant to the indemnification provisions of this Agreement, for any alleged infringement of any patent, copyright, trade secret, trade name, trademark, or any other proprietary right of any person or entity in consequence of the use on the Project by WRCOG of the Documents & Data, including any method, process, product, or concept specified or depicted.

**3.5.4 Cooperation; Further Acts.** The Parties shall fully cooperate with one another and shall take any additional acts or sign any additional documents as may be necessary, appropriate, or convenient to attain the purposes of this Agreement.

**3.5.5 Attorney's Fees.** If either Party commences an action against the other Party, either legal, administrative, or otherwise, arising out of or in connection with this Agreement, the prevailing party in such litigation shall be entitled to have and recover from the losing party reasonable attorney's fees and all other costs of such action.

**3.5.6 Indemnification.** Consultant shall defend, indemnify, and hold WRCOG, its Directors, officials, officers, consultants, employees, volunteers, and authorized agents free and harmless from any and all claims, demands, causes of action, costs, expenses, liability, loss, damage or injury, in law or equity, to property or persons, including wrongful death, to the extent caused by any negligent acts, omissions, or willful misconduct of Consultant, its officials, officers, employees, agents, consultants and contractors, arising out of or in connection with the performance of the Services, the Project or this Agreement, including without limitation the payment of all reasonable damages and attorneys' fees and other related costs and expenses. Consultant shall defend, at Consultant's own cost, expense, and risk, any and all such aforesaid suits, actions, or other legal proceedings of every kind that may be brought or instituted against WRCOG, its Directors, officials, officers, consultants, employees, agents or volunteers.

Consultant shall pay and satisfy any judgment, award, or decree that may be rendered against WRCOG or its Directors, officials, officers, consultants, employees, agents, or volunteers, in any such suit, action or other legal proceeding. Consultant shall reimburse WRCOG and its Directors, officials, officers, consultants, employees, agents, or volunteers, for reasonable expenses and costs, including reasonable attorneys' fees, incurred by each of them in connection therewith or in enforcing the indemnity herein provided. Consultant's obligation to indemnify shall not be restricted to insurance proceeds, if any, received by WRCOG, its Directors, officials, officers, consultants, employees, agents, or volunteers. This section shall survive any expiration or termination of this Agreement. Notwithstanding the foregoing, to the extent Consultant's Services are subject to Civil Code Section 2782.8, the above indemnity shall be limited, to the extent required by Civil Code Section 2782.8, to claims that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of the Consultant.

3.5.7 Entire Agreement. This Agreement contains the entire Agreement of the Parties with respect to the subject matter hereof, and supersedes all prior negotiations, understandings or agreements. This Agreement may only be modified by a writing signed by both Parties.

3.5.8 Governing Law. This Agreement shall be governed by the laws of the State of California. Venue shall be in Riverside County.

3.5.9 Time of Essence. Time is of the essence for each and every provision of this Agreement. Neither party shall be responsible for a delay or disruption in, or inability to provide its respective performance under this Agreement, other than a delay in payment for Services already performed, if such delay is caused by events or contingencies, existing or future, beyond the reasonable control of the claiming Party, including "acts of God," abnormal weather conditions or other natural catastrophes, war (whether declared or not), terrorism, sabotage, computer viruses, civil unrest, strikes, lockouts or other industrial disturbances, pandemics, epidemics, health emergencies, virus (e.g., SARS Cov-2), disease (e.g. COVID-19), plague, changes in law or regulations, quarantine, travel restrictions, discovery of hazardous materials, differing or unforeseeable site conditions, acts of governmental agencies or authorities (whether or not such acts are made in response to other Force Majeure Events), or any other events or circumstances not within the reasonable control of the party affected, whether or not of a similar kind or nature to any of the foregoing (a "Force Majeure Event"). The Party seeking application of this provision shall notify the other Party in writing promptly upon learning of the impact of the Force Majeure Event upon the notifying Party's performance of its obligations under this Agreement. Upon the occurrence of a Force Majeure Event, Consultant shall be entitled to an equitable adjustment to the project schedule and compensation sufficient to compensate Consultant for any increase in the time or costs necessary to perform the Services under this Agreement. Should a Force Majeure Event substantially prevent or be reasonably likely to substantially prevent Consultant's performance of the Services for more than thirty (30) days, then Consultant shall be entitled to terminate this Agreement without breach. In case of such termination, Consultant shall be entitled to compensation for those Services performed as of the date of termination.

3.5.10 WRCOG's Right to Employ Other Consultants. WRCOG reserves the right to employ other consultants in connection with this Project.

3.5.11 Successors and Assigns. This Agreement shall be binding on the successors and assigns of the Parties.

3.5.12 Assignment or Transfer. Consultant shall not assign, hypothecate, or transfer, either directly or by operation of law, this Agreement or any interest herein without the prior written consent of WRCOG. Any attempt to do so shall be null and void, and any assignees, hypothecates or transferees shall acquire no right or interest by reason of such attempted assignment, hypothecation or transfer.

3.5.13 Construction; References; Captions. Since the Parties or their agents have participated fully in the preparation of this Agreement, the language of this Agreement shall be construed simply, according to its fair meaning, and not strictly for or against any Party. Any term referencing time, days, or period for performance shall be deemed calendar days and not work days. All references to Consultant include all personnel, employees, agents, and sub-contractors of Consultant, except as otherwise specified in this Agreement. All references to WRCOG include its Directors, officials, officers, employees, agents, and volunteers except as otherwise specified in this Agreement. The captions of the various articles and paragraphs are for convenience and ease of reference only, and do not define, limit, augment, or describe the scope, content, or intent of this Agreement.

3.5.14 Amendment; Modification. No supplement, modification, or amendment of this Agreement shall be binding unless executed in writing and signed by both Parties.

3.5.15 Waiver. No waiver of any default shall constitute a waiver of any other default or breach, whether of the same or other covenant or condition. No waiver, benefit, privilege, or service voluntarily given or performed by a Party shall give the other Party any contractual rights by custom, estoppel, or otherwise.

3.5.16 No Third-Party Beneficiaries. There are no intended third-party beneficiaries of any right or obligation assumed by the Parties.

3.5.17 Invalidity; Severability. If any portion of this Agreement is declared invalid, illegal, or otherwise unenforceable by a court of competent jurisdiction, the remaining provisions shall continue in full force and effect.

3.5.18 Prohibited Interests. Consultant maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement. Further, Consultant warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, brokerage fee, gift, or other consideration contingent upon or resulting from the award or making of this Agreement. For breach or violation of this warranty, WRCOG shall have the right to rescind this Agreement without liability. For the term of this Agreement, no member, Director, officer, official, agent volunteer, or employee of WRCOG, during the term of his or her service with WRCOG, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

3.5.19 Equal Opportunity Employment. Consultant represents that it is an equal opportunity employer, and it shall not discriminate against any sub-contractor, employee, or applicant for employment because of race, religion, color, national origin, handicap, ancestry, sex, or age. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff, or termination. Consultant shall also comply with all relevant provisions of any of WRCOG's Minority Business Enterprise Program, Affirmative Action Plan, or other related programs or guidelines currently in effect or hereinafter enacted.

3.5.20 Labor Certification. By its signature hereunder, Consultant certifies that it is aware of the provisions of Section 3700 of the California Labor Code which requires every employer to be insured against liability for Workers' Compensation, or to undertake self-insurance in accordance with the provisions of that Code, and agrees to comply with such provisions before commencing the performance of the Services.

3.5.21 Authority to Enter Agreement. Consultant has all requisite power and authority to conduct its business and to execute, deliver, and perform the Agreement. Each Party warrants that the individuals who have signed this Agreement have the legal power, right, and authority to make this Agreement and bind each respective Party.

3.5.22 Counterparts. This Agreement may be signed in counterparts, each of which shall constitute an original.

### **3.6 Subcontracting.**

3.6.1 Prior Approval Required. Consultant shall not subcontract any portion of the work required by this Agreement, except as expressly stated herein, without prior written approval of WRCOG. Subcontracts, if any, shall contain a provision making them subject to all provisions stipulated in this Agreement.

**[SIGNATURES ON FOLLOWING PAGE]**



**SIGNATURE PAGE TO**  
**WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS**  
**PROFESSIONAL SERVICES AGREEMENT**

IN WITNESS WHEREOF, the Parties hereby have made and executed this Agreement as of the date first written above.

WESTERN RIVERSIDE COUNCIL  
OF GOVERNMENTS

AECOM Technical Services, Inc.

By: \_\_\_\_\_  
Dr. Kurt Wilson  
Executive Director

By: \_\_\_\_\_  
Title: \_\_\_\_\_

APPROVED AS TO FORM:

ATTEST:

By: \_\_\_\_\_  
General Counsel  
Best Best & Krieger LLP

By: \_\_\_\_\_  
Its: \_\_\_\_\_

\*A corporation requires the signatures of two corporate officers.

One signature shall be that of the Chairman of Board, the President or any Vice President, and the second signature (on the attest line) shall be that of the Secretary, any Assistant Secretary, the Chief Financial Officer or any Assistant Treasurer of such corporation.

If the above persons are not the intended signators, evidence of signature authority shall be provided to WRCOG.

**EXHIBIT “A”**  
**SCOPE OF SERVICES**

DRAFT



# Approach & Understanding of the Scope of Work Plan

## UNDERSTANDING OF THE PROJECT AND WRCOG NEEDS AND REQUIREMENTS

The Western Riverside Council of Governments operates as a collaborative regional body addressing critical issues affecting its member agencies, including cities, county entities, and utilities. Faced with mounting challenges such as climate change, population growth, and the increasing frequency of power outages caused by extreme weather events, WRCOG is committed to advancing energy resilience and community preparedness. This proposal by AECOM responds to the four critical areas of focus that align with WRCOG's strategic priorities: Microgrid Feasibility Studies, Community Resilience Center Feasibility Studies, Financing Strategies, and an Implementation Plan.

### Microgrid Feasibility Studies

Microgrids are integral to WRCOG's vision of enhancing energy resilience for its member agencies. These localized energy systems can operate independently or in conjunction with the main power grid, providing a reliable power source during outages. The feasibility studies will identify the technical, operational, and economic viability of implementing microgrids at critical facilities owned by WRCOG's member agencies. Our approach highlighted below will address WRCOG members concerns of the impacts that power outages have on critical facilities, ensuring member agencies are provided with a feasibility study that will:

- Assess the existing infrastructure and its suitability for integrating renewable energy sources and battery storage systems.
- Evaluate the potential energy demand, system design requirements, and environmental considerations.
- Prioritize facilities based on their operational importance, social vulnerability, and exposure to physical hazards.

### Community Resilience Center Feasibility Studies

Recognizing the need to support residents during both normal operations and disasters, WRCOG seeks to establish Community Resilience Centers (CRCs). These centers would provide essential services, shelter, and access to energy resources during emergencies. To address these requirements AECOM will develop feasibility studies for

individual CRCs, ensuring the following key criteria areas are included:

- Analyze the capacity of existing member agency-owned facilities to serve as CRCs.
- Evaluate site-specific requirements, including retrofitting needs, energy generation potential, and accessibility considerations.
- Identify the resources and services required to support vulnerable populations during extreme events.

### Funding and Financing Strategies

We understand that WRCOG's resilience plans are only as good as its ability to implement them. Implementing microgrids and CRCs will require member agencies to consider new and, potentially, innovative approaches to funding, financing, and project implementation. As a key requirement of WRCOG's mission to provide solutions to meet member agencies critical needs, including support with resources, AECOM will provide a financing strategy that will:

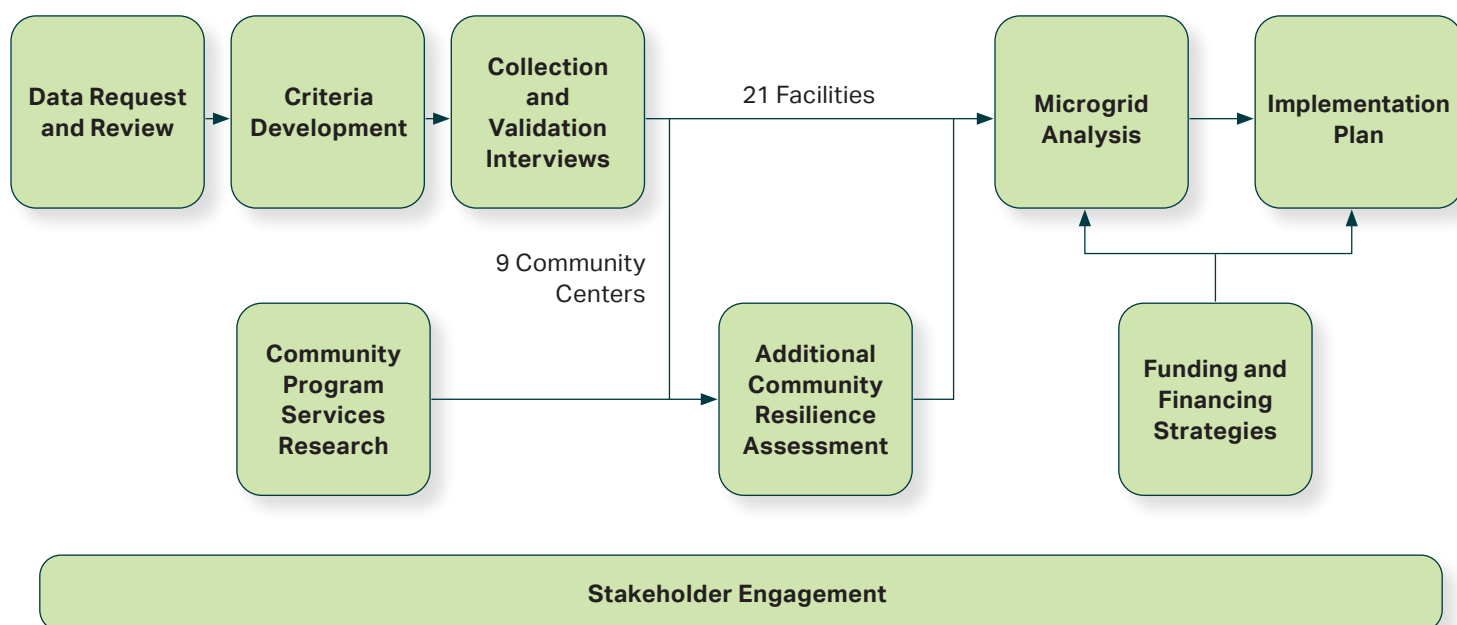
- Identify relevant funding opportunities, including federal and state grants, public-private partnerships, and low-interest financing options.
- Explore cost-sharing models that equitably distribute expenses across stakeholders.
- Develop a roadmap for leveraging utility incentives and renewable energy credits to offset costs.

### Implementation Plan

To translate feasibility studies and financing strategies into actionable outcomes, WRCOG requires a comprehensive implementation plan. This plan must:

- Outline a phased approach to project execution, detailing timelines, responsibilities, and milestones.
- Incorporate stakeholder engagement strategies that align with community needs and priorities.
- Establish monitoring and evaluation frameworks to track progress and measure the impact of implemented solutions.
- Provide guidance on scaling successful projects across the WRCOG subregion.

Our approach to completing these tasks is summarized in the following diagram:



To meet the challenges posed by this project, our work plan is built on a detailed approach that will deliver each member agency actionable studies through combination of our engineering expertise, economics advisors, stakeholder engagement approach and regulatory experts. Although the focus is on the development of engineered feasibility studies, development of a solution to fund and implement these is critical and AECOMs approach will provide actionable studies with lay the groundwork for the effective implementation of microgrids & CRCs across member facilities.

## WORK PLAN APPROACH

### Task 1 – Microgrid Feasibility Studies

AECOM will provide a detailed and proven approach to develop microgrid feasibility studies that will cost effectively meet WRCOG needs. Our phased approach is proven to deliver successful studies, and has been utilized on multiple completed and ongoing projects, including our work with

A feasibility study evaluates both the technical and financial viability of a project. It begins with a request for key information, such as facility load data (8760 hours), utility tariffs, schematics, and system capacity (e.g., ampacity). Using this information, the study follows these general steps:

#### 1. Technical Analysis:

- Calculate potential energy generation based on existing technologies and available resources (e.g., solar PV and BESS, using tool software such as Homer Grid, Helioscope etc).

- Assess energy offset and identify potential energy excess for sale or storage.
- Evaluate system resilience, operability, and integration with current infrastructure and regulations (Rule 21, UL 1741, etc.).

#### 2. Market and Financial Assessment:

- Identify an appropriate energy market and utility tariff structure for the project.
- Evaluate applicable financial incentives (e.g., ITC, state programs like SGIP) and funding strategies (direct or indirect).
- Analyze the overall rough order of magnitude (ROM) project cost and calculate the return on investment (ROI).

#### 3. Final Conclusion:

- The study concludes by determining whether the project is technically and financially viable. If the analysis shows promising results, stakeholders can move forward with detailed design and implementation planning. Otherwise, the study advises against pursuing the project to avoid technical or financial challenges.

This structured approach ensures informed decision-making, balancing technical feasibility with financial sustainability.

## Stakeholder Interviews

To implement microgrids cost-effectively, AECOM will engage WRCOG member agencies to understand facility needs, key concerns, and goals. By collaborating with stakeholders, AECOM will gather insights into current and future operations, proposed solutions from those most familiar with existing operations, and identify Key Performance Indicators (KPIs) to use when assessing microgrid options. This approach allows the microgrid design to meet performance requirements and aligns with WRCOG's needs.

AECOM will begin with stakeholder questionnaires at project kickoff to identify priorities, followed by detailed interviews to refine operational requirements and understand existing resiliency threats that each microgrid must mitigate. This process captures diverse input while allowing focused assessments from those most familiar with facility needs.

## Performance Requirements

Through this collaboration with WRCOG member agencies the AECOM team will develop a comprehensive list of requirements that the microgrids must meet. These will include specifics such as what critical loads the microgrids must support, how long the microgrid must support these and whether there are any state and/or federal requirements that the microgrid must meet. These requirements become the criteria that the microgrids must operate to.

Microgrid integration rules vary by state, but California stands out with a well-established framework for microgrid deployment. This framework has served as a model for other states to follow.

## General California Technical Requirements for Microgrid Integration

- Rule 21: Governs interconnection, operation, and metering for distributed energy resources (DERs).
- UL 1741 SB: Certification for inverters ensuring advanced grid support capabilities.
- Smart Inverter Functions: Inverters must support autonomous grid functions like voltage regulation, frequency support, and ride-through, per the Smart Inverter Working Group (SIWG) recommendations.
- Communication Protocols: Must use IEEE 2030.5 for secure communication with utility systems.
- Utility Coordination: Follow interconnection procedures outlined by local utilities.

## Energy Load Analysis

The first step in our analysis is to evaluate existing energy loads and projected future demands for each facility. AECOM will analyze 15-minute electrical interval data to create detailed annual load profiles, providing a baseline for current usage. Recognizing that a successful microgrid must support future needs, we will also account for potential increases

in demand, such as all-electric buildings, EV charging, and renewable energy integration.

## Future Load Development

As our facilities evolve it is anticipated that electrical loads will shift greatly. Building electrification and EV charging will increase electrical loads, whilst incorporated Distributed Energy Resources (DERs) will reduce and shift building loads.

**Building Electrification:** our high-performance building will determine the impact that a future all-electric building will have on WRCOG facilities

**EV Charging Systems:** As WRCOG member agencies transition their fleets to all-electric and EVs are adopted by the wider community, providing necessary charging infrastructure will be critical to help meet the needs of the community. This adoption will greatly impact building electric loads, and AECOMs engineers will include the impact of these in future load profiles in the analysis

**Distributed Energy Resources:** As all-electric and EV charging systems increase electrical loads, introduction of DERs will shift and reduce loads. AECOM will identify potential solar photovoltaic (PV) system capacities at each site and estimate the annual generation from these through modeling software's such as Helioscope. Our energy engineers will take these generation profiles into our custom tools that will cost effectively size (kW and kWh) battery energy storage systems (BESS). Utility rate structure will be analyzed to assess how DER deployment will impact energy costs, along with their resilience and environmental impacts. An updated DER load profile will then be incorporated into the modeling to finalize the anticipated future asset energy demand profile.

## Critical Load Development

There is no universal rule for determining how much load and for how long a microgrid should support critical loads. However, guidelines exist to help define the critical loads that need to be supported, depending on the specific needs of the customer. Critical loads vary based on the site's priorities; for instance, an office building and a wastewater treatment plant will have distinct requirements that must be identified by local stakeholders.

Below are general guidelines and examples of typical critical loads:

- **NFPA 110:** Addresses emergency and standby power systems, including critical load considerations for essential infrastructure.
- **Federal Energy Management Program (FEMP):** Advises evaluating critical loads during microgrid design to ensure reliable power for essential functions.

Having identified the critical loads in earlier phases the AECOM team will quantify these and determine the overall

uninterruptable loads that the microgrid must serve. The outcome from this process will be an understanding of the load (kW) and energy (kWh) requirements that the microgrid system must be designed around

### Infrastructure Assessment

The feasibility and cost of integrating a microgrid largely depend on a facility's existing electrical infrastructure. Necessary upgrades may add complexity and existing infrastructure capabilities may guide optimal microgrid. AECOM will analyze electrical single-line diagrams and conduct site assessments to determine an effective configuration for powering critical loads and identify system limitations. This analysis will optimize DER integration, reduce costs, and provide recommendations for required infrastructure upgrades.

### Microgrid Modeling

Once future critical loads are determined the AECOM team will utilize a combination of microgrid modeling software and internal AECOM tools to simulate the operations of the microgrid during both regular and power outage periods. Through modeling different DER systems and critical facility loads, systems will be sized to meet the performance requirements of the microgrids. This analysis will include analysis of the facility during regular operations assist in sizing DERs to optimize financial performance through peak load shifting, whilst also meeting KPIs. Modeling will provide preferred design configurations that can proceed into conceptual design studies

An in-depth analysis of funding and financing opportunities will be undertaken during Task 3 and incorporated into the microgrid feasibility studies, which will include financial modeling in addition to microgrid energy modeling. The financial model of a microgrid begins with identifying the optimal market for energy trading, which depends on the state, utility regulations, applicable tariffs, and the volume of energy being traded. For small-scale microgrids, California's NEM 3.0 (Net Energy Metering) is often the more viable option, while larger producers may benefit from Corporate PPAs (Power Purchase Agreements).

By combining government incentives, state programs, and strategic market positioning, microgrid projects can be effectively financed to deliver both feasibility and long-term cost stability.

### Conceptual Design Options

With a detailed understanding of the requirements of the microgrid, the loads it must serve and the existing infrastructure, AECOM will determine conceptual microgrid options for each of the 21 facilities. Approximate DER system capacities and locations will be identified, and existing single line diagrams updated to reflect the necessary upgrades required to accommodate the microgrid. The conceptual

design narratives will provide system components, sizes, locations and detail the interconnectivity of the microgrid controller with existing building and utility infrastructure. Guidelines will also be provided on operational considerations during both normal operation and power outage conditions.

#### Task 1 Deliverables

- Draft and Final: Twenty-one microgrid feasibility studies providing conceptual solutions to meet WRCOG member agency resilience needs .

### Task 2 – Community Resilience Center Feasibility Studies

The AECOM team recognize that one of the key areas of focus for this effort is in furthering the resilience of facilities to maximize the benefit to the wider community. The focus of Task 2 is on community centers and expanding the resilience assessments beyond microgrid feasibility to include facility accessibility, physical resilience and to identify and evaluate the community support services and programs that the facility may provide.

The proposed AECOM core team includes specialists in asset advisory, climate adaptation and resilience and social equity, all of whom bring expansive applicable experience in each area of the community resilience feasibility studies. We have conducted over 1,000 buildings in California for ADA compliance and have provided facility resilience assessments across Santa Clara County's healthcare portfolio. Our experience includes developing community resilience frameworks and programs for government agencies including for Southern California Association of Governments (SCAG) and the Texas General Land Office (GLO). Together, our team has identified an integrated approach of review and engagement that will provide the breath of assessment with sufficient tangible project and program recommendations to inform the implementation plan.

Our approach to Task 2 for the nine targeted community centers will be conducted in parallel to the microgrid feasibility studies in Task 1, with several steps overlapping, such as the stakeholder engagement processes. To facilitate the resilience center feasibility assessment, the AECOM team will first develop a set of criteria, which will be validated with the WRCOG core team, which will be used aid the review of each facility and identify key gaps or existing issues. These reviews will be undertaken in two parts:

**Part 1: Data request and review** – In addition to the data requests for microgrid feasibility assessment, the community resilience center feasibilities studies will require a complete set of architectural building drawings to aid in the Building and Landscapes assessment. The physical facility criteria including ADA compliance (e.g. entryways and bathroom accessibility), HVAC system requirements, and physical hazard vulnerabilities will be initially evaluated by reviewing the

received drawing sets. As with Task 1, this desktop review will also determine the existing electrical and water infrastructure, and spatial availability and configuration for potential improvement projects.

**Part 2: Stakeholder interviews** – Following the data review, the stakeholder interviews will look to both validate the primary criteria evaluation and fill in the remaining data gaps. It is anticipated that the interview will provide the majority of the required operational requirements (including and existing power, water, and communication needs) and map them to the service levels that the facility could perform. The AECOM team will have specific questions to facilitate the required data collection in a consistent manner. This may be augmented by a pre-survey prior to the meeting.

The AECOM team will build on outcomes of the community engagement workshops conducted by WRCOG staff and Grid Alternatives and conduct research of applicable services and programs prior to these meetings. This will allow the interviews to also be leveraged as an opportunity to gather feedback on potential programs and services that could be provided at the facility.

The result of these efforts will be a comprehensive summary of existing performance and resilience gaps across criteria for the nine community centers. There will be a comparison matrix, summarizing their relative performance, and facility-specific memos which will lay out in more detail the findings of the assessment, the gaps and focus areas, and recommended projects.

#### **Task 2 Deliverables**

- A summarized community resilience memo for each assessed facility outlining performance against each resilience center feasibility criteria, summary of anticipated requirements and the gaps (and associated recommended initiatives) to close them.
- Draft and Final: Nine community resilience center feasibility studies

### **Task 3 – Financing Strategies**

Building off the Funding and Financing Strategies developed for the Energy Resilience Plan, AECOM will develop a Financing and Business Plan that outlines funding and financing strategies to specifically support implementation of the microgrids and CRCs. Microgrids are capital-intensive systems, but various funding opportunities can significantly offset costs:

1. **Tax Incentives:** The Investment Tax Credit (ITC) provides a 30% tax credit, with additional bonuses of up to 10% for using local labor or U.S.-made materials.

2. **State Programs:** Programs like California's Self-Generation Incentive Program (SGIP) can provide funding for battery energy storage systems (BESS).
3. **Private Financing through PPAs:** For projects capable of generating energy at competitive rates, private companies may finance the project through PPA contracts, offering variants that can fully fund the project while securing long-term, stable energy tariffs.

By combining government incentives, state programs, and strategic market positioning, energy and community resilience projects can be effectively financed to deliver both feasibility and long-term cost stability. With WRCOG members spanning multiple jurisdictions and with varying levels of resources, our team understands that one solution may not fit for all and will identify a diverse array of funding opportunities that will meet WRCOG member agency needs. This Plan will provide a menu of funding and financing strategies along with key considerations about prioritizing strategies, combining strategies, and phasing.

AECOM will consider the following:

- Local, state, and federal grants and incentives (and will highlight those that may be affected by recent state and federal ballot and election results)
- Utility-backed programs
- Private funding and financing, including energy savings performance contracting (ESPC)
- Local revenue sources, including potential of existing revenue sources
- Financing options, such as bonds and loans

#### **Task 3 Deliverable**

- Memo (up to 10 pages) outlining funding and financing strategies, including key considerations and steps for developing a tailored strategy for each project.

The Consultant will develop an Implementation Plan that can be used by WRCOG member agencies to implement the microgrids and community resilience centers identified in the Energy Resilience Plan 2.0. The intent of the Implementation Plan is to provide information and steps to WRCOG member agencies so they can implement the projects identified in the Energy Resilience Plan 2.0. The Implementation Plan should include enough information to help inform the WRCOG member agency in the development of solicitations for further studies, construction, and analysis necessary to develop construction documents. The Implementation Plan shall identify milestones and provide an outline of the multi-step development process of a microgrid, including approvals, agreements, contracting, construction stages, plans and procedures, reports and studies, and commissioning needed to implement the microgrids and community resilience centers. The Implementation Plan shall include a list of



potential contractors and/or consultants that are experienced with developing microgrids and/or community resilience centers.

#### Task 4 – Implementation Plan

AECOM will develop a detailed and actionable Implementation Plan to support WRCOG member agencies in advancing the microgrids and community resilience centers identified in the Energy Resilience Plan 2.0. This Implementation Plan will serve as a practical roadmap, enabling member agencies to navigate the complex processes required to bring these projects from concept to realization.

From experience, microgrids and similar projects are typically implemented via two pathways:

1. **Design Build:** Engineer provides schematic design documentation until a 30% level, at which the project is bid by a design-build contractor
2. **Design Bid Build:** Engineer provides fully permitted documentation to the 100% level, at which point the project is bid to contractors. Engineer supports construction through construction administration

AECOM has experience with both delivery methods, with the first being undertaken at Santa Rosa and the second for the Veolia Rialto Wastewater Treatment Plant, where AECOM is providing full design documentation. Both delivery methods however require close coordination between engineers, contractors and WRCOG, thus AECOM will provide WRCOG with an implementation plan that will outline the critical activities, resources, anticipated timeframes and case studies that its member agencies can reference for support during implementation. This will include a detailed overview of the key aspects at each stage of the implementation process, once the feasibility studies are complete. The plan will outline in clear detail the findings from Task 3, and provide additional context and resources to provide WRCOG member agencies staff training and programs required for the procurement and operations of complex systems.

#### General Assumptions

- This proposal is contingent upon successful negotiation of mutually acceptable terms between AECOM and WRCOG
- All cost estimates are high-level ROM.
- Preliminary cost estimates are for equipment and project deployment costs.
- Current Tariffs and Market Prices are based on the energy tariff and market prices available at the time of the feasibility study.

- Economic Trends will utilize available data on inflation and interest rate trends at the time of analysis.
- AECOM will not participate in community engagement workshops conducted by WRCOG staff.
- AECOM is entitled and will rely upon the accuracy, completeness, currency and non-infringement of information and data provided by WRCOG or obtained from generally accepted sources within the industry, except to the extent such verification by AECOM may be expressly required as a defined part of the services herein. AECOM will not be responsible for defects in its services attributable to its reliance upon or use of such information and data.
- The data provided for the Community Resilience Center assessments must be of sufficient quality for assessment, no additional time is assumed for site assessment or repeated follow-up over the time required for microgrid feasibility assessment site work
- No costing will be provided for the resilience interventions required outside of the microgrid feasibility.
- Funding and Financing analysis will be informed by desktop research
- Funding and financing strategies will be confirmed with the client before continuing research and evaluation.



EXHIBIT “B”

SCHEDULE OF SERVICES

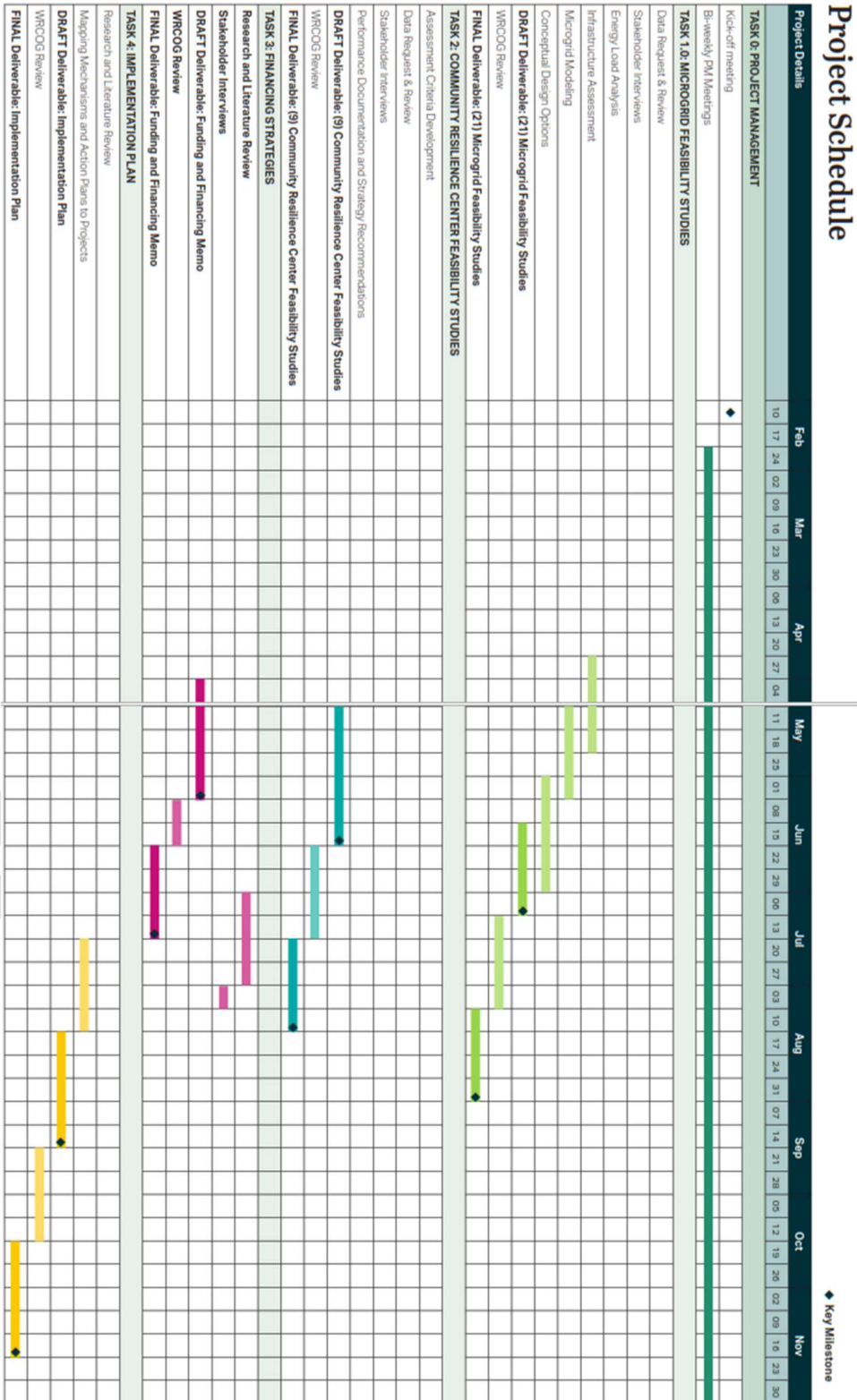


Exhibit “B”

## EXHIBIT "C"

### COMPENSATION BILLING RATES

The below fee reflects the requested scope of work, inclusive of the 12 microgrid feasibility studies and the 9 community resilience center feasibility studies. We have not included the provided "Attachment E - Activities and Cost Matrix" because our scope of work is covered in our proposed fee. However, AECOM can provide a fee for microgrid design services for any of the facilities, if requested at a later date.

| Task                                                    | Hours | Fee              |
|---------------------------------------------------------|-------|------------------|
| Task 0: Project Management                              | 88    | \$15,521         |
| Task 1: Microgrid Feasibility Studies                   | 520   | \$102,524        |
| Task 2: Community Resilience Center Feasibility Studies | 172   | \$31,639         |
| Task 3: Financing/Business Plan                         | 60    | \$10,077         |
| Task 4: Implementation Plan                             | 108   | \$15,017         |
| <b>Total</b>                                            |       | <b>\$174,778</b> |

AECOM can provide 30% / 100% design for any of the facilities for a fee to be scoped.



# Western Riverside Council of Governments

## WRCOG Executive Committee

### Staff Report

**Subject:** Appointment of WRCOG Representatives to Various Outside Committees  
**Contact:** Chris Gray, Deputy Executive Director, [cgray@wrcog.us](mailto:cgray@wrcog.us), (951) 405-6710  
**Date:** February 3, 2025

#### **Recommended Action(s):**

1. Appoint Brian Tisdale as the primary and Chris Barajas as the alternate representative to the California Association of Councils of Governments for a term commencing January 1, 2025, and ending December 31, 2026.
2. Appoint Linda Krupa as the primary number one representative and Greg Newton as the primary number two representative, and Chris Barajas as the alternate representative for primary one and Joseph Morabito as the alternate representative for primary two, to the Riverside County Solid Waste Advisory Council / Local Task Force for a term commencing January 1, 2025, and ending December 31, 2026.
3. Appoint Wes Speake as the representative to the Santa Ana Watershed Project Authority's One Water One Watershed Steering Committee for a term commencing January 1, 2025, and ending December 31, 2026.
4. Appoint Colleen Wallace as the primary representative to the San Diego Association of Governments' Borders Committee for a term commencing January 1, 2025, and ending December 31, 2026.
5. Appoint the following representatives to the listed SCAG Policy Committees for a term commencing January 1, 2025, and ending December 31, 2026:
  - i. Joseph Morabito (Wildomar) - Community, Economic & Human Development Policy Committee
  - ii. Dale Welty (Canyon Lake) - Energy & Environment Policy Committee
  - iii. Colleen Wallace (Banning) - Transportation Policy Committee
  - iv. Linda Krupa (Hemet) - Transportation Policy Committee
  - v. Wes Speake (Corona) - Transportation Policy Committee
  - vi. Crystal Ruiz (San Jacinto) - Transportation Policy Committee

#### **Summary:**

WRCOG makes appointments to various committees in outside agencies every other even numbered year. The Administration & Finance Committee serves as the nominating committee and provides recommendations to the Executive Committee for ultimate approval.

#### **Purpose / WRCOG 2022-2027 Strategic Plan Goal:**

The purpose of this item to provide a list of individuals who have expressed interest in representing WRCOG on a committee in an outside agency. This item supports WRCOG's 2022-2027 Strategic Plan Goal #1 (Serve as an advocate at the regional, state, and federal level for the Western Riverside subregion).

**Discussion:**

**Background**

WRCOG's Executive Committee appoints a number of elected officials to represent the Agency and/or the subregion's interests on a number of committees in outside agencies. These include the following:

- California Association of Councils of Governments (CALCOG) (one appointment plus an alternate)
- Riverside County Solid Waste Advisory Council / Local Task Force (two appointments plus two alternates)
- San Diego Association of Governments (SANDAG) Borders Committee (one appointment plus an alternate)
- Santa Ana Watershed Project Authority (SAWPA) One Water One Watershed (OWOW) Steering Committee (one appointment)
- Southern California Association of Governments (SCAG) Policy Committees (six appointments)

Per policy, all WRCOG appointees serve for a two-year term. The term for these appointments will be from January 2025 through December 2026. Also per policy, priority in selection is to be given to elected officials who serve on WRCOG as Executive Committee members or alternates.

WRCOG emailed a notice of availability to all elected officials for WRCOG's member agencies. A list of those persons who responded was presented to the Administration & Finance Committee for review and discussion on December 11, 2024.

**Prior Action(s):**

**December 11, 2024:** The Administration & Finance Committee recommended appointments to CALCOG, Riverside County Solid Waste Advisory Council / Local Task Force, SANDAG Borders Committee, SAWPA OWOW, and SCAG Policy Committees.

**Financial Summary:**

WRCOG stipends are included in the Agency's adopted Fiscal Year 2024/2025 Budget under the General Fund (Fund 110).

Appointments to SCAG Policy Committees have no fiscal impact to WRCOG since SCAG provides stipends to elected officials for attendance at its meetings.

**Attachment(s):**

None.



# Western Riverside Council of Governments

## WRCOG Executive Committee

### Staff Report

**Subject:** Authorization to Purchase Real Property Located at 1955 Chicago Avenue, Riverside, CA

**Contact:** Dr. Kurt Wilson, Executive Director, [kwilson@wrcog.us](mailto:kwilson@wrcog.us), (951) 405-6701  
Andrew Ruiz, Chief Financial Officer, [aruiz@wrcog.us](mailto:aruiz@wrcog.us), (951) 405-6741

**Date:** February 3, 2025

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#### **Recommended Action(s):**

1. Authorize the Executive Director to conduct all necessary actions related to the purchase of the property located at 1955 Chicago Avenue, Riverside, CA 92507 (APN 210-081-002) in the amount of \$6,734,545 plus various costs related to due diligence, closing costs, space planning, experts, and legal services for a total Not To Exceed amount of \$7,000,000.
  2. Authorize the Executive Director to sublease the existing office space and any available vacant space in the proposed building to be purchased, subject to consent from the Real Estate Ad Hoc Committee.
- 

#### **Summary:**

The Executive Committee directed the Executive Director to explore options for long-term office space. The property located at 1955 Chicago Avenue, Riverside, CA 92507, meets the long-term space needs of WRCOG and also provides an investment with significant long-term financial benefits for WRCOG. WRCOG is currently under contract to purchase the property and opened escrow on January 25, 2025. The property, priced at \$6,734,545, provides a cost-effective alternative to leasing while also generating rental income from existing tenants. The total Not To Exceed amount is \$7,000,000, which includes various costs related to due diligence, closing costs, space planning, experts, and legal services.

#### **Purpose / WRCOG 2022-2027 Strategic Plan Goal:**

The purpose of this item is to provide information regarding the purchase of property by WRCOG as well as a budget amendment. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #3 (Ensure fiscal solvency and stability of the Western Riverside Council of Governments).

#### **Discussion:**

#### **Background**

WRCOG currently leases office space in Citrus Towers through a lease that expires in 2028. Based on

current market conditions, the Executive Committee authorized the Executive Director to explore alternatives that would align with operational needs and strengthen WRCOG's long-term financial position.

Real Estate advisory services were acquired through a Request For Proposal process. Staff worked with the broker to evaluate several options including renegotiating the existing lease, subleasing surplus space, entering into a new lease, and purchasing a property. Ten properties were evaluated based on a pre-established set of criteria that included location, size, parking, proximity to amenities and members, safety, rental income, physical layout, adjacent uses, etc. Initially, potential properties remained available for extended periods of time. Recently, however, suitable properties were under contract very quickly.

This evaluation concluded that purchasing the available building at 1955 Chicago Avenue, Riverside, CA 92507, best meets WRCOG's current and future operational requirements. This property offers adequate space in a strategic location and aligns with WRCOG's goals for long-term financial sustainability. Additionally, the property generates rental income from existing tenants, providing an opportunity to offset operational costs while enhancing the organization's financial position.

### **Present Situation**

WRCOG is currently under contract to purchase the property and entered escrow on January 25, 2025, with an anticipated closing date in early March, pending additional evaluation by staff and our experts.

The WRCOG General Fund is the recommended funding source for the purchase. The price of the property is \$6,734,545. The total Not To Exceed amount is \$7,000,000, which includes various costs related to due diligence, closing costs, space planning, experts, and legal services to ensure a thorough evaluation before finalizing the purchase.

### **Prior Action(s):**

None.

### **Financial Summary:**

The purchase of this building will decrease WRCOG's General Fund's cash position by \$6,734,545 plus related costs Not To Exceed \$7,000,000 in total. The money will come out of WRCOG's California Asset Management Program (CAMP) investment account 6054-001. Due to the building being an asset, the net effect to WRCOG's Fund Balance will be minimal. Additionally, this building is currently generating rental income, which will not only cover the building's ongoing maintenance costs, but can potentially further add to WRCOG's General Fund balance.

### **Attachment(s):**

[Attachment 1 - For Sale Brochure - 1955 Chicago Ave](#)

# Attachment

For Sale Brochure - 1955  
Chicago Ave



# CHICAGO GATEWAY

1955 CHICAGO AVENUE | RIVERSIDE, CA 92507



OFFICE BUILDING FOR SALE OWNER/USER



# PROPERTY HIGHLIGHTS

- 1955 Chicago Avenue at Chicago Gateway is a rare opportunity to acquire a highly desirable owner/user office condominium building in Riverside, CA at an exceptionally low basis.
- This two-story office consisting of  $\pm 34,531$  square feet is located in the heart of Riverside in the Hunter Park market, near Restaurants, Retail, the University of California at Riverside, and Downtown Riverside.
- As an owner, you would immediately be able to occupy up to  $\pm 34,531$  square feet within the building.
- Excellent visibility on Chicago Avenue within the beautifully landscaped, master planned,  $\pm 160,000$  square foot Chicago Gateway campus.
- Ownership opportunity in Southern California's Inland Empire with a population of 4.6 million people and whose \$200-billion economy is equal to that of the State of Utah.
- Great Access to 60, 91 and 215 Freeways and only 17 miles from Ontario International Airport.
- High quality interior improvements built with a very functional and flexible floorplan to accommodate your specific needs.
- Priced significantly below the cost to replace this type of property and offering new ownership the opportunity for significant after tax savings of owning vs. leasing.
- Elevator served offering easy access as needed to the second floor.
- Excellent signage opportunity for ownership to increase visibility and promote their organization.
- Easily accessed 4:1 parking providing ample parking for employees and visitors.





# BUILDING INFORMATION

1955 CHICAGO AVENUE  
RIVERSIDE, CA 92507

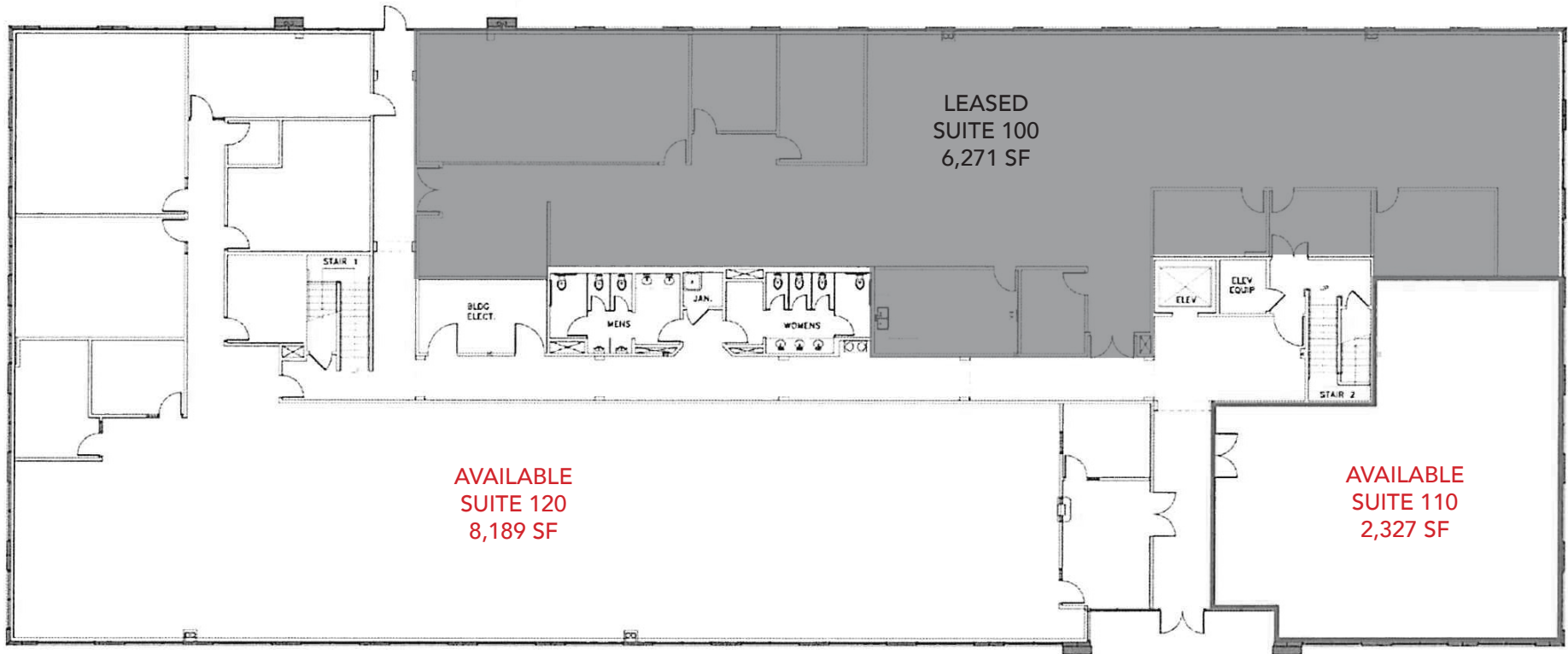
|                  |                              |                               |
|------------------|------------------------------|-------------------------------|
| SALE PRICE       | \$6,734,000/\$195 PSF        |                               |
| SQUARE FOOTAGE   | 34,531 SF                    |                               |
| VACANT           | 54% Available                |                               |
| APN              | 210-081-002                  |                               |
| AVAILABLE SPACE  | 18,710 SF                    |                               |
| AVAILABLE SUITES | Suite 110                    | 2,327 SF                      |
|                  | Suite 120                    | 8,189 SF (Available 1/1/2025) |
|                  | Suite 240                    | 8,194 SF                      |
| YEAR BUILT       | 2006                         |                               |
| STORIES          | Two-Story                    |                               |
| PARKING RATIO    | 4.00 per 1,000 square feet   |                               |
| ACCESS           | 24 hours a day/7 days a week |                               |



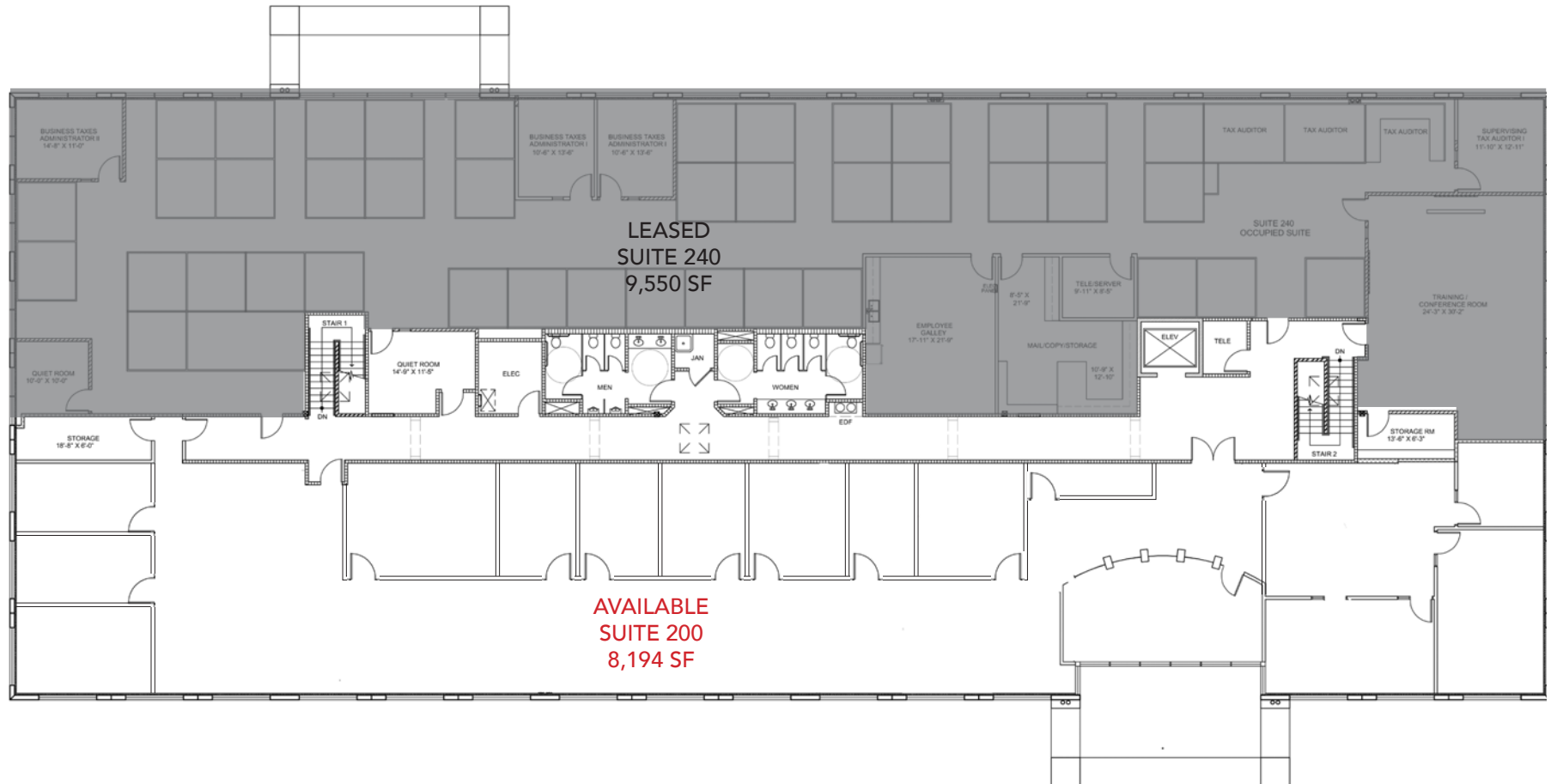




## FIRST FLOOR



## SECOND FLOOR



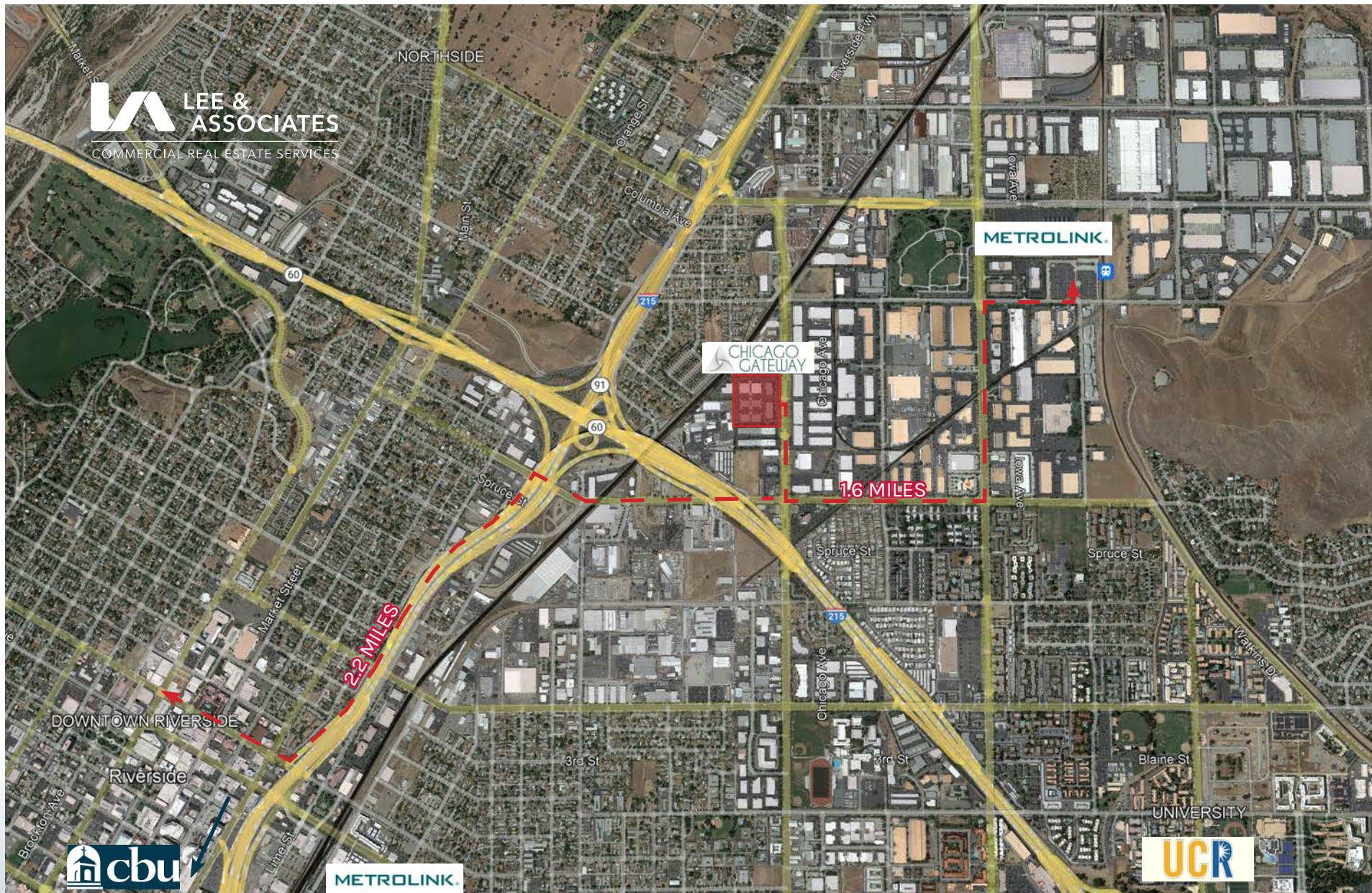


# CHICAGO GATEWAY

1955 CHICAGO AVENUE | RIVERSIDE, CA 92507







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# Western Riverside Council of Governments

## WRCOG Executive Committee

### Staff Report

**Subject:** Recap and Summary of the January 10, 2025, Strategic Planning Session  
**Contact:** Dr. Kurt Wilson, Executive Director, [kwilson@wrcog.us](mailto:kwilson@wrcog.us), (951) 405-6701  
**Date:** February 3, 2025

#### **Recommended Action(s):**

1. Receive and file.

#### **Summary:**

The Executive Committee met on January 10, 2025, to review WRCOG's 2022-2027 Strategic Plan and hear of staff progress and accomplishments in meeting the goals of the Plan.

#### **Purpose / WRCOG 2022-2027 Strategic Plan Goal:**

This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #4 (Communicate proactively about the role and activities of the Council of Governments).

#### **Discussion:**

#### **Background**

The Executive Committee met on January 10, 2025, at Western Water to discuss WRCOG's 2022-2027 Strategic Plan. The purpose of the convening was to receive updates on the progress of the current Strategic Plan goals and consider any modifications to the current plan.

Attendees included:

- City of Banning - Sheri Flynn
- City of Beaumont - Mike Lara
- City of Canyon Lake - Dale Welty
- City of Corona - Jacque Casillas
- City of Eastvale - Christian Dinco
- City of Hemet - Carole Kendrick
- City of Jurupa Valley - Chris Barajas
- City of Lake Elsinore - Brian Tisdale
- City of Menifee - Bob Karwin
- City of Norco - Kevin Bash



- City of Riverside - Chuck Conder
- City of Wildomar - Joseph Morabito
- County, District 1 - Jose Medina
- County, District 2 - Karen Spiegel
- Western Water - Brenda Dennstedt

Others present:

- Clara Miramontes, City of Perris,
- Jason Simpson, City of Lake Elsinore
- Ron Moreno, City of Temecula

### **Major Themes of Discussion**

1. Stay The Course: Continue current efforts to ensure resources are focused on core priorities and not diluted with lower priority options.
2. Economic Development: Explore expansion of job-creating projects like the Tech Bridge, non-traditional revenue capture models like the one offered by the Kosmont companies, and acknowledgement of the role of city-county revenue neutrality agreements on development within incorporated cities.
3. Transportation: Affirm the strong existing relationships and role clarity with the Riverside County Transportation Commission and the County of Riverside and consider performing additional traffic studies to identify local trends and patterns.
4. Communication: Take intentional steps to communicate the value, opportunities, and accomplishments of WRCOG including annual presentations at governing board meetings of members to share return on investment data and current issues.
5. Advocacy: Take a more aggressive legislative stance to defend the region and leverage the existing WRCOG Advocacy Ad Hoc committee by providing more updates to the Executive Committee.
6. Energy Resilience: Local public safety power shutoff events occurred in the days leading up to the planning session. This highlighted the importance of energy resilience and heightened the interest in current and previous resilience projects with an emphasis on grants and microgrids.

Members were also surveyed during the session and provided the following results.

- 100% believe we strike the right balance between Stability / Consistency and Risk / Innovation.
- 81% believe we have a clear mission.
- 82% believe we are focused on the right things and stick to our mission.
- 100% are proud to be part of WRCOG.
- 95% believe we are moving in the right direction.

### **Prior Action(s):**

None.

### **Financial Summary:**

This item is for informational purposes only; therefore, there is no fiscal impact.

**Attachment(s):**

None.



# Western Riverside Council of Governments

## WRCOG Executive Committee

### Staff Report

**Subject:** I-REN Energy Workforce Gaps Assessment and Memorandums of Understanding with Riverside and San Bernardino Counties' Workforce Development Departments

**Contact:** Casey Dailey, Director of Energy & Environmental Programs, [cdailey@wrcog.us](mailto:cdailey@wrcog.us), (951) 405-6720

**Date:** February 3, 2025

#### **Recommended Action(s):**

1. Authorize the WRCOG Executive Director to execute Memorandums of Understanding with Riverside County and San Bernardino County separately, and authorize him, or his designee, to enter into discussions with both Counties to develop contracts to implement programs related to these Memorandums of Understanding, for consideration by the I-REN Executive Committee and both Counties.

#### **Summary:**

Between February and November 2024, I-REN developed an energy workforce assessment to analyze energy workforce gaps, employer needs, and existing training opportunities in Riverside and San Bernardino Counties. Released in December 2024, the draft assessment recommends to 1) connect job seekers to training, 2) enhance support services, 3) strengthen the education-to-career pipeline, and 4) foster collaboration between employers and training providers to meet the region's growing energy workforce demands.

Furthermore, I-REN is seeking to enter into two separate Memorandums of Understanding (MOUs) with Riverside County and San Bernardino County to provide services to expand I-REN's Workforce Education & Training Program based upon recommendation identified in its Energy Workforce Gaps Assessment. These partnerships will focus on creating pathways for underserved communities, aligning training programs with industry needs, fostering hands-on opportunities, and leveraging resources to support I-REN's clean energy goals.

#### **Purpose / WRCOG 2022-2027 Strategic Plan Goal:**

The purpose of this item is to provide regular updates on I-REN activities. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #6 (Develop and implement programs that support resilience for our region).

#### **Discussion:**

## **Background**

One of the goals of I-REN since its launch has been to establish and formalize partnerships with key institutions and organizations throughout the region to better allow for widespread development and implementation of energy-related programs and services. As part of the Workforce Education & Training (WE&T) Sector, I-REN initially focused on establishing partnerships with K-12 organizations, community colleges, and universities in the region to support the implementation of the I-REN Energy Fellowship Program.

In February 2024, I-REN began developing a regional energy workforce and training market assessment to examine the workforce gaps within the energy sector in Riverside and San Bernardino Counties, identify training needs, and address job accessibility issues to strengthen the local workforce and meet growing energy sector demands. Between March and November 2024, I-REN conducted a training market analysis and gathered primary and secondary data on energy employers and training opportunities in the region. I-REN engaged with local stakeholders in person and conducted an employer needs survey to understand employers' needs and challenges. This data informed an analysis of employment opportunities, training accessibility, and workforce gaps in the Inland Empire.

I-REN is now looking to expand its partnerships to include both San Bernardino County and Riverside County Workforce Development Departments (WDD). Over the past two years, I-REN staff have met with both Counties' WDD frequently to discuss areas of opportunities for collaboration and ways to leverage each other's resources to implement programs that support the goals of both Departments and I-REN in the establishment of a workforce that is prepared to take advantage of high-quality, clean energy careers.

Representatives from both Counties have participated in I-REN WE&T roundtable discussions and events and contributed to the recently completed I-REN Energy Workforce Assessment. Additionally, I-REN staff have participated in both Counties' Planning Stakeholder Listening Sessions on the development of each Department's required four-year plans. There is significant alignment between the goals of each WDD and I-REN with a specific focus on filling gaps in upskilling existing workers, providing resources to employees, and creating pathways for clean energy career development.

## **Present Situation**

### **I-REN Energy Workforce Assessment Finding and Key Recommendations:**

In December 2024, The Energy Coalition (TEC) finalized the Energy Workforce Gaps Assessment, which provides an overview of the current energy labor market, the results from the employer needs assessment survey, and an analysis of available training in the region. A summary of assessment key findings include:

Key findings from the region's energy industry: The Inland Empire population is projected to grow rapidly. The growing youth population (ages 16 - 24) presents an opportunity to engage them in energy careers through training and apprenticeships. In contrast, the increase in retirees (ages 55+) highlights the need for enhanced training, certification, and knowledge transfer to retain a skilled workforce in high demand energy sectors.

- The assessment found that energy-related occupations are projected to grow by an average of 20% through 2030, amplifying the need for a skilled workforce to meet demands. Significant job growth is expected in energy-related fields, such as solar photovoltaic (PV) installers (81.3%), electricians (22.3%), engineers (19.8% - 25%), and maintenance workers (16.4% - 35.4%).
- Between 2020 and 2030, energy-related occupations are projected to see an average 25% retirement rate and 57% transfer rate of skilled workers (e.g., electricians, HVAC mechanics, plumbers, PV installers), which poses a significant challenge for maintaining a skilled energy workforce. Over 75% of workers in critical energy-related roles are projected to retire or transfer between 2020 and 2030, highlighting the need for immediate recruitment and retention strategies.
- 83.3% of the population has a high school diploma, which opens opportunities for entry-level energy jobs, apprenticeships, and certifications. These are crucial for closing skills gaps and creating a diverse talent pipeline. Culturally relevant outreach and training programs are essential, as 54% of residents identify as Hispanic / Latino.

Key findings from the regional energy employer survey: An energy employer survey, conducted from May to November 2024, received 385 responses; 28.9% of respondents were from community-based organizations (non-profits, education, local governments, consultants), and 71.1% were from local energy employers in the electrical, mechanical, construction, and HVAC sectors.

Respondents identified key challenges are as follows:

- Energy employers perceive a shortage of relevant industry experience and insufficient training or certifications among potential hires.
- 79.5% of employers identified retention challenges as a key barrier to maintaining a stable and skilled workforce, driven by limited financial and career growth opportunities, skill gaps, a competitive labor market, and retirements.
- Employers emphasized the importance of a combination of foundational education, specialized certifications, and hands-on experience when looking to hire new employees. Survey respondents indicated that job applicants and employees lack technical, workplace, and interpersonal skills equally. This indicates the importance of addressing workforce skill gaps in the region's energy sector with a multi-faceted approach.
- Employers indicated high training costs, limited access to relevant programs, and insufficient opportunities to address skill gaps are significant barriers keeping employees and job seekers from accessing necessary certifications and training.
- 40% of employers provide training or financial support for training, focusing on safety requirements and key technical skills essential for their work, like electrical systems, mechanical proficiency, energy auditing, and expertise in smart grids and energy-efficient technologies.
- Employers often prioritize experience over formal education, which limits their ability to fill job openings locally.

Key findings from the regional training assessment: The assessment identified over 100 training providers offering 360 energy-related training opportunities in Riverside and San Bernardino Counties. Community colleges, universities, and K-12 institutions play a key role in developing the energy workforce, providing nearly half of these training opportunities.

- Most available training programs concentrate on technical and foundational skills in traditional energy sectors such as welding, electrical work, construction, and HVAC, with limited offerings in

advanced clean energy technologies.

- Collaboration between educational institutions, workforce development agencies, community organizations, labor unions, and employers is crucial for developing a skilled energy workforce. Most regional energy training (57%) is delivered in person, which presents challenges related to travel, time commitment, and costs, particularly for workers in rural areas. Only 10% - 13% of regional training is offered online or through self-paced courses, which can be flexible, but lack of hands-on experience can have access barriers depending on technology requirements (e.g., home computer, reliable internet connection).
- I-REN's updated regional equity map highlights underserved communities and areas with limited energy employment opportunities, particularly in rural regions such as the high and low deserts. The distribution of training providers and employers reveals that colleges and universities have the broadest reach, including rural areas, while most other training programs are concentrated in urban hubs.
- More training is needed in the clean energy sector, including energy storage systems, electric vehicle infrastructure, emerging technologies, energy auditing, green building standards, and other clean energy skills. To meet the growing demand for energy-related jobs, curricula must be updated to incorporate emerging technologies like smart grids and electric vehicles, and training access in underserved communities must be expanded.

Based on the assessment findings, four recommendations were developed for the I-REN Executive Committee's consideration to inform future WE&T programming within the I-REN territory.

**Recommendation #1: Connect job seekers to training providers.** Feedback from energy employers and assessments of local training institutions indicate that job seekers - particularly in underserved and rural areas - face significant barriers in acquiring the necessary skills, training, and certifications to secure stable employment in the energy industry.

To address these challenges, I-REN should:

- Build partnerships with leading training providers and local labor unions, connecting employers with apprenticeship programs and ensuring access to certifications and training opportunities for job seekers, especially in underserved areas.
- Integrate third-party training providers, offering flexible learning formats (e.g., online courses, evening classes) to cater to different schedules and connect job seekers to regionally relevant WE&T programs.
- Organize job fairs and informational sessions to raise awareness about training opportunities and encourage employees to engage with trade associations and workforce development networks for professional growth and industry insights.
- Develop a clear, data-driven framework to measure the effectiveness of training programs and partnerships, including metrics like job placement and retention rates.

**Recommendation #2: Provide support services to make training and certification more attainable.** The assessment revealed that job applicants often need more skills / certifications to meet the region's energy workforce needs but that they face significant barriers to obtaining the required certifications. Training institutions in the region currently have only a small number of accessible resources for the energy workforce. Workers in more populous areas have greater access to training centers than those in high and low desert communities, who often need help to obtain training due to the

distance between their employment areas and larger workforce hubs.

To address this, I-REN should:

- Collaborate with employers to offer financial support for employees, including subsidizing certification costs, providing training stipends, covering transportation, and paying for materials and exam fees.
- Work with employers to provide paid time for employees to engage in training and complete certifications, helping employees balance work and training obligations.
- Collaborate with employers to provide affordable or free training, particularly for certifications essential to employees' roles, and partner with community organizations to offer training for underserved populations.
- Support employers in offering or connecting employees to financial support for education programs, certifications, and skill development programming.
- Develop specific initiatives to enhance access to training and employment in underserved communities.

**Recommendation #3: Strengthen the regional education and training pipeline from K-12 to energy employment.** To address energy employers' needs and workers' skills gaps, I-REN should collaborate with K-12 educational institutions to create a seamless education-to-career pipeline, offering localized training programs that focus on the skills needed for in-demand energy roles.

To address this, I-REN should:

- Collaborate with educational institutions to enhance or develop new energy-related Career Technical Education pathways in local high schools, certification programs, and hands-on experiences, building a stronger pipeline from education into energy sector jobs. Introduce certification programs in high school education.
- Create mentorship opportunities where experienced employees guide new hires, helping them gain practical skills and boost job retention.
- Incorporate entrepreneurial skills and business development into K-12 training to provide necessary skills for students interested in self-employment, particularly in underserved or rural regions where traditional energy jobs may be limited.
- Develop internship opportunities and career fairs to connect high school students with jobs in the energy industry and expand their access to relevant experience, training, and career pathways within the energy sector.

**Recommendation #4: Strengthen collaboration between employers and workforce development organizations to assess training effectiveness.** Currently, there are few opportunities for employers, workforce development organizations, and educational institutions to collaborate directly on strategies for building an energy-focused workforce. To build a strong energy workforce infrastructure, I-REN should foster stronger partnerships between local educational institutions, employers, and workforce development organizations to ensure that training programs align with regional industry needs.

To address this, I-REN should:

- Organize regular hybrid meetings with employers, workforce development organizations, and educational institutions to discuss energy industry standards, evolving workforce needs, and

strategies for effective training programs.

- Actively engage energy employers, workforce organizations, and educational institutions to align on the development and continuous improvement of training programs, ensuring they remain relevant and meet both employer and job seeker needs.
- Develop and monitor clear, measurable metrics (e.g., program completion rates, post-training employment outcomes, and participant satisfaction) to evaluate and improve the effectiveness of energy-related training programs.
- Encourage employers to conduct regular skills assessments to identify areas for additional training or certification, ensuring that employees acquire up-to-date skills for better productivity and retention.

In December, I-REN hosted three working group roundtables at each of the three subregions to present and gain feedback on the draft recommendations presented in the Assessment. The roundtable participants assessed and rated the draft recommendations based on how important each was in addressing a perceived gap, in comparison to the extent existing efforts have already covered these recommendations. The results of the prioritization - from most important to least - are:

1. Strengthen collaboration between employers and workforce development organizations to assess training effectiveness.
2. Strengthen the regional education and training pipeline from K-12 to energy employment.
3. Connect job seekers to training providers.
4. Provide support services to make training and certification more attainable.

On January 21, 2025, the I-REN Executive Committee approved the roundtables prioritization of recommendations. The prioritization of recommendations developed in the Energy Workforce Gaps Assessment will inform the development or expansion of WE&T programming within the I-REN territory. The I-REN Executive Committee also received a presentation on development of two MOUs between I-REN and the Riverside and San Bernardino County WDDs, respectively; the feedback and recommendations received from the I-REN Executive Committee from this discussion will feed into the areas of prioritization for programs that result from the MOUs.

### **Riverside and San Bernardino County Memorandums of Understanding:**

Over the summer and into the fall of 2024, I-REN and the Counties, respectively, began developing MOUs to formalize the partnership and to begin identifying areas of opportunity for collaboration and program development. Both I-REN and the Counties' WDD are dedicated to advancing a just and equitable transition to clean energy. To achieve this shared vision, the partnership will prioritize the following objectives:

1. **Expanding Opportunities for All:** Increase access to clean energy job opportunities for historically marginalized groups, including people of color, women, low-income individuals, and individuals with disabilities.
2. **Fostering Strong Partnerships:** Maintain regular communication and coordination to ensure alignment on workforce development strategies and policies.
3. **Identifying Key Opportunities:** Identify targeted energy programs and policies, including but not limited to energy efficiency, renewable energy, and zero-emission transportation, to strengthen and align workforce development efforts in these critical areas.
4. **Leveraging Resources:** Collaborate to leverage California Workforce Development Board



(CWDB) programs, policies, and funding opportunities to cultivate a skilled workforce that supports the achievement of California's clean energy goals.

Specifically, through the new partnership, all parties are committed to promoting workforce equity and sustainability by fostering pathways that empower underserved communities to access opportunities within the expanding clean energy sector.

Through this collaboration, I-REN and the WDDs will:

- **Identify Workforce Needs:** Through a comprehensive assessment, determine skill gaps and training requirements within the clean energy industry, ensuring programs align with employer demands and contemporary industry standards.
- **Develop Targeted Training Programs:** Assist in designing and implementing customized training programs tailored to equip individuals from disadvantaged and low-income communities with the technical expertise and soft skills necessary to secure and thrive in high-quality jobs within the energy sector.
- **Foster Industry Partnerships:** Strengthen and cultivate relationships with local employers to develop apprenticeships and internships, ensuring program participants gain hands-on experience and access to sustainable career pathways.
- **Provide Comprehensive Support Services:** Provide holistic support, including career coaching resume assistance, interview preparation, and access to resources to empower individuals to overcome employment barriers.
- **Advocate for Equitable Policies:** Collaborate on policy initiatives that promote workforce diversity, equity, and inclusion within the clean energy sector.

Examples of specific contributions from each WDD include:

- Review the labor market information to identify specific skills and training requirements for jobs within the clean job energy sector.
- Work with training providers to design customized programs or use existing curriculum to equip individuals with the tools and knowledge required to become employable in the clean energy sector.
- Continue engaging historically marginalized communities through focused outreach and recruitment efforts.
- Strengthen and foster relationships with local employers for a seamless pipeline from training to employment.
- Provide support services, such as but not limited to job coaching and resume writing, to help individuals secure employment as deemed necessary.

I-REN's role and responsibilities are intended to seamlessly align with the recommendations presented as part of the Energy Workforce Assessment. These broad areas include:

- Connect local job seekers to established training providers and introduce third-party training providers.
- Provide and connect employees with support services to enhance training and certification attainability.
- Strengthen the regional education and training pipeline from K-12 to employment.

- Strengthen collaboration between employers and workforce development organizations to continuously assess training effectiveness.

If both MOUs are approved, a contract will be developed for each County that will include financial contributions of I-REN and each County, along with specific tasks, deliverables, and outcomes desired by the parties. The I-REN Executive Committee set aside approximately \$300,000 in the current fiscal year budget in anticipation of a new WE&T program and staff has identified approximately \$2,700,000 in additional unprogrammed funds through 2027 that could be incorporated into the financial contributions resulting from these MOUs. While the exact amount has yet to be determined, there are approximately \$3,000,000 available for the region to implement this effort through 2027.

Both of the MOUs are currently in development and under review by both Counties' legal counsel and will be scheduled to be taken to their respective governing boards in the coming months. Staff is recommending authorizing the WRCOG Executive Director to execute both MOUs and authorize him or his designee to enter into discussions with both Counties on developing a contract for consideration by the I-REN Executive Committee and both Counties to develop and implement programs related to this MOU.

**Prior Action(s):**

None.

**Financial Summary:**

Approximately \$300,000 is set aside in the current Fiscal Year 2024/2025 I-REN budget, and while the exact amount has yet to be determined for the remainder of the Fiscal Year, an additional \$2.7M is available in programmed funding for the I-REN. If the amount exceeds what is currently budgeted for the Fiscal Year, a budget amendment will be brought forward for approval.

**Attachment(s):**

[Attachment 1 - Draft I-REN Energy Workforce Gaps Assessment](#)

[Attachment 2 - Energy Workforce Assessment Summary Report](#)

[Attachment 3 - Draft MOU between IREN and Riverside County Workforce Development Department](#)

# Attachment

## Draft Energy Workforce Gaps Assessment

# **DRAFT** Energy Workforce Gaps Assessment

Prepared by:  the Energy  
Coalition



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# Executive Summary

Together Riverside and San Bernardino counties form the Inland Empire (IE), a dynamic region with significant opportunities for local businesses and residents to excel within the transformative energy sector. This workforce assessment examines the availability and accessibility of jobs and training programs within the Inland Empire, identifying gaps that hinder the ability of the current and future energy workforce to secure high-quality, sustainable employment. The report is informed by labor market and training data as well as survey responses from 385 regional stakeholders and local energy employers. This data allowed us to evaluate and recommend improvements in programming to bridge the gap between prospective workers and energy industry employers.

The assessment reviews occupational growth within the energy sector and related fields, incorporating feedback from local employers and stakeholders on the challenges they face in hiring and retaining skilled employees. It highlights the resulting training gaps that affect workforce readiness. As the energy industry transitions toward clean energy and energy demand continues to rise, career opportunities expand and intersect across emerging and competing fields. Energy-related occupations are projected to grow by an average of 20% through 2030, amplifying the need for a workforce that is equipped to meet these demands.

Given the projected availability of thousands of energy jobs, it is crucial to strengthen the regional workforce ecosystem that connects job seekers, employers, workforce organizations, and local training institutions. Employers report difficulty in finding qualified workers with the necessary certifications, experience, and technical expertise. On the other hand, job seekers face barriers to training opportunities, including high costs, limited access in certain regions, and misalignment between training offerings and industry needs. Notably, communities in the high and low deserts have limited access to relevant training and job opportunities.

The regional analysis, based on employer feedback and available training data, underscores the urgent need to enhance workforce preparedness.

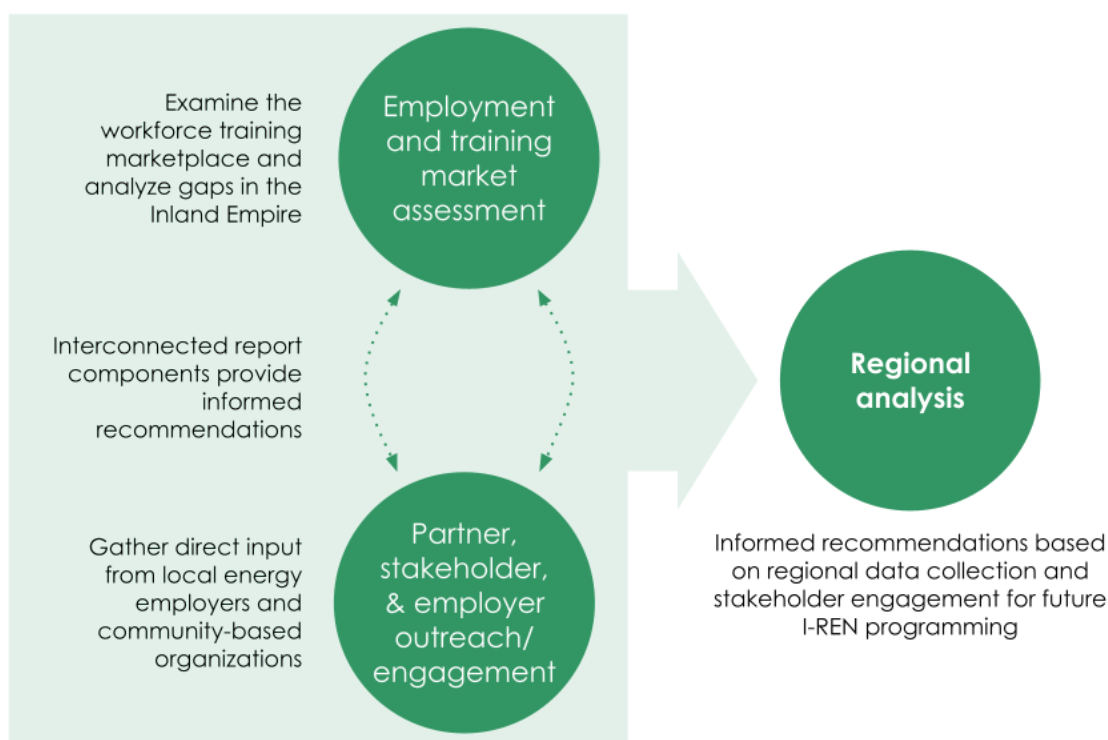
## **This assessment recommends the following actions to address workforce challenges:**

- ✓ Connect local job seekers to established training providers and introduce third-party providers to increase training access.
- ✓ Offer support services to help employees navigate training and certification processes, improving accessibility.
- ✓ Strengthen the regional education-to-employment pipeline from K-12 through post-secondary education and into the workforce.
- ✓ Enhance collaboration between employers and workforce development organizations to continuously assess and adapt training programs to meet evolving industry needs.

# Introduction

The Inland Regional Energy Network (I-REN), in partnership with The Energy Coalition (TEC), has developed a regional energy workforce assessment to understand the current energy workforce, identify gaps in training and education for energy careers in the Inland Empire, and offer recommendations to strengthen the local workforce and meet the growing demand for skilled energy workers. The methodology of this assessment focused on two main components: an employment and training market assessment and engagement and outreach with partners, stakeholders, and employers. The results of this assessment will inform the third component: a regional analysis to provide informed recommendations.

*Figure 1: Components of I-REN's energy workforce gaps assessment*



## Methodology

### SECTION SUMMARY

- The assessment combines primary and secondary data on regional energy employers and training opportunities to provide an informed analysis.
- A survey was conducted to gather input from regional employers and stakeholders, guiding



recommendations on training programs and workforce strategies.

- The data and stakeholder outreach informed the assessment to identify gaps in energy workforce training and offered solutions for future development programs.

The employment and training market analysis includes primary and secondary data on regional energy employers and available training opportunities. We compiled publicly available information on active energy-related employers and training institutions that offer pathways to energy-related career pathways.

I-REN and TEC staff engaged in partner and stakeholder outreach, focused on building strong relationships with key regional stakeholders to better understand the resources they provide. We engaged in direct conversations through local workforce roundtables, events, and informational calls to gain insights into available offerings and challenges (Appendix D).

We also conducted a survey to collect input from regional employers and stakeholders to inform the assessment's recommendations on training programs and workforce strategies.

The data collected informs the regional analysis, which examines employment opportunities and the accessibility and availability of training pathways<sup>1</sup> and resources in the Inland Empire, highlighting the challenges faced by energy employers, job seekers, and regional stakeholders in building and sustaining a skilled energy workforce. By combining data from the two components—market assessment and stakeholder/employer engagement—we developed an energy workforce gaps assessment that provides well-informed recommendations for future workforce development programs.

## Inland Empire Regional Context

### SECTION SUMMARY

- The Inland Empire is a rapidly growing region with over 4.6 million residents and expanding sectors like logistics, healthcare, technology, and clean energy.
- Energy-related occupations are expected to grow in the region by 20% by 2030, highlighting the need to invest in a skilled workforce.

---

<sup>1</sup> Training pathways are sequences of training that will lead to skill development and competency

The I-REN service territory covers Riverside and San Bernardino counties, also known as the Inland Empire, which is an expansive region spanning nearly 27,500 square miles. The Inland Empire is one of the fastest-growing areas in California, with over 4.6 million residents.<sup>2</sup> The region has exponentially grown in various sectors, including healthcare, transportation and warehousing, retail, and education services<sup>3</sup>. Considering the growth in these areas and increased funding and investments in infrastructure, thousands of jobs have become available in existing and newer industries, leading to a job boom.

The growth of the green energy sector has led to a surge in job opportunities, many of which are linked to the Inland Empire's expanding energy workforce. With rapid growth in energy-related occupations, it is crucial for local businesses and regional stakeholders to understand the workforce and training landscape to prepare for changes and support the development of a skilled workforce. To ensure the region can effectively accommodate growth, it is vital to identify gaps in training accessibility and resources for energy-related careers. With energy-related occupations projected to grow an average of 20% in the region, it is necessary to assess current workforce pathways and upskill opportunities to fill these roles successfully.<sup>4</sup>

The energy workforce market is universally experiencing significant changes in technological advances, job growth, the addition of new occupations, and increasing intersectionality with sustainability goals. Identifying workforce trends will allow Inland region local governments and businesses to make decisions that can sustain and increase growth and, as a result, support job creation. By understanding workforce needs, local institutions can support existing and new training programs, new occupation pathways, and a steady pipeline of workers within the energy sector.

This regional workforce assessment will assess the Inland Empire's energy workforce and training landscape and identify gaps/barriers in training and education for energy-related career pathways. The market assessment provides actionable recommendations and strategies for workforce development to strengthen the local energy workforce and meet the demand for skilled energy workers.

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<sup>2</sup> Data from U.S. Census Bureau, San Bernardino and Riverside County Population, Census, April 1, 2020

<sup>3</sup> Data from the Bureau of Labor Statistics' Employment Projections by Occupation 2020-2030  
Riverside-San Bernardino-Ontario, CA Metro Area

<sup>4</sup> Data from the Bureau of Labor Statistics' Employment Projections by Occupation 2020-2030  
Riverside-San Bernardino-Ontario, CA Metro Area

# Regional Energy Industry Overview

## About the Inland Empire

### SECTION SUMMARY

- The Inland Empire is experiencing significant shifts towards clean energy and building electrification, creating job opportunities in clean energy and energy-efficient infrastructure.
- The region's logistics sector is a key economic driver but contributes to air pollution; reducing pollution will require efforts in transportation electrification and expanding EV infrastructure.
- As the energy sector evolves, investing in workforce development is essential to ensure local workers are equipped with the skills needed for emerging energy roles, while traditional energy efficiency jobs remain critical in managing regional energy demand.

The Inland Empire, comprising Riverside and San Bernardino counties, is a rapidly growing and diverse region undergoing significant changes in its energy and industrial sectors. As the energy industry shifts toward clean energy sources and building electrification, this region is seeing increased clean energy and energy-efficient infrastructure job opportunities. These industry shifts will support the Inland Empire's growing population, help address regional energy goals, and create new opportunities in energy-related occupations. Riverside and San Bernardino counties are well-positioned to expand clean energy generation and green building while phasing out traditional fossil fuels. However, the region faces ongoing challenges related to poor air quality, largely driven by its geography and logistics industry.

The logistics sector, which includes transportation, warehousing, distribution, and manufacturing, is a vital part of the Inland Empire's economy. The region's location near major ports and freeway networks makes it a central hub for national and international trade. However, the heavy reliance on petroleum-based fuels for transportation and logistics contributes significantly to air pollution. Reducing air pollution will require a concerted effort in transportation electrification and expanding charging infrastructure. California has set ambitious goals to electrify the transportation sector, including electric vehicles (EVs) and heavy-duty trucks, to reduce greenhouse gas emissions. As the region industrializes further, it can align local industry needs with California's goal of 100% clean energy by 2045, ensuring both environmental sustainability and economic growth.

Riverside and San Bernardino counties also have abundant natural resources for clean energy development. The region benefits from abundant sunshine, making it a prime location for large-scale solar farms and residential solar installations. Riverside County is home to the San Geronimo Pass, one of the largest wind farms in the country, and both counties have access to local rivers and reservoirs, enabling small-scale hydropower systems. These clean energy sources will continue to drive job creation in the coming years, particularly as the demand for clean energy grows.

As demand for electric vehicles (EVs) and energy-efficient appliances increases, the region will need skilled workers to install, maintain, and support the expansion of charging stations and EV infrastructure. Furthermore, large-scale electrification projects, including grid modernization and electrification of heavy-duty freight transport, are expected to significantly increase job opportunities in the region's energy sector.

While clean energy production is rising, Southern California still relies on natural gas-powered plants, especially during peak periods when clean sources cannot meet the full demand. Regional labor projections indicate a 2% decline in utility occupations such as natural gas generation, and electric transmission and distribution, reflecting the start of the region's energy transition. Though utility jobs are projected to decline slightly, traditional energy roles will remain an essential part of the energy transition.

Traditional energy efficiency jobs are essential in keeping up with regional energy demands and maintaining, enhancing, and upgrading the existing infrastructure. These roles typically focus on reducing energy consumption, improving performance, and promoting sustainable industry practices. They are critical in residential, commercial, and industrial sectors. Energy efficiency roles support the region's unique economic, environmental, and energy-related challenges and opportunities. Considering the region's hot and dry climate, energy demand is high during the summer seasons, and cooling within residential, commercial, and industrial buildings is critical. Energy efficiency roles are needed to reduce electricity consumption by installing efficient heating, ventilation, and air conditioning (HVAC) systems, insulation, and smart energy management systems to reduce power grid strain during peak energy demand. As the regional population expands, so do housing and commercial developments. As new buildings and infrastructure appear, roles in building design and retrofits minimize energy waste and lower the overall costs of energy use. The Inland Empire's diverse workforce, especially within the skilled trades, can benefit from opportunities within the energy efficiency sector that provide accessible career pathways that are stable and in high demand.

As the region adapts to changes in its economy and energy sector, it will need to invest in the workforce to ensure that local workers are equipped with the skills they need.

## Recent Innovations and Opportunities

### SECTION SUMMARY

- The shift toward clean energy and electrification drives significant job growth opportunities, especially for energy efficiency, energy storage, grid modernization, and transportation electrification roles.
- New technologies and changes in infrastructure address challenges in developing sufficient energy storage, improving grid reliability, and promoting sustainable energy consumption during peak energy demand.

As the region moves toward cleaner energy sources and electrification, industries must address the challenge of storing excess energy and balancing supply and demand. Large-scale battery storage systems can meet this need. Local universities and research institutions may also develop new clean energy technologies, focusing on innovations in energy storage and grid efficiency. Utilities are also expanding their programs to encourage energy efficiency in homes, businesses, and public entities. With population growth putting pressure on the power grid, demand response programs are helping manage energy consumption during peak demand periods, enhancing grid reliability.

Careers in clean energy, energy efficiency, electrification, energy storage, grid modernization, and environmental stewardship are expected to grow significantly due to the region's shift toward efficiency and cleaner energy. For instance, roles such as solar photovoltaic (PV) installers, wind turbine technicians, and hydroelectric plant operators will be essential in the installation, maintenance, and operation of clean energy systems. Positions such as battery engineers, energy grid specialists, and energy systems experts will be critical in managing energy production and distribution.

Meanwhile, the region's existing infrastructure demands professionals such as green building designers, energy auditors, and LEED (Leadership in Energy and Environmental Design) specialists who will support sustainable construction and building retrofits.

The electrification of transportation is another driver of job creation in the region. As electric vehicles (EVs) and EV infrastructure expand, there will be a growing need for EV technicians, charging infrastructure specialists, and engineers to maintain and repair the related systems.

With all these energy, building, and transportation sectors, it will be essential to invest in workforce training and upskilling, both for new roles and for evolving existing positions, to ensure local workforce needs are met.

## Opportunities for Job Growth in Traditional Energy Efficiency Industries

### SECTION SUMMARY

- Jobs in energy-related trades remain in high demand. Traditional roles such as electricians, HVAC technicians, and construction laborers are essential in maintaining energy infrastructure and supporting regional needs.
- Workforce development programs must sustain the energy industry by supporting essential energy efficiency roles and balancing the inclusion of emerging energy sectors.

While the energy industry is transitioning toward cleaner energy sources, there is still robust demand for jobs within traditional energy sectors in the Inland Empire. Roles in energy-related construction trades, such as electricians, heating, ventilation, and air conditioning (HVAC) technicians, and construction laborers, are still vital to meeting households' and commercial facilities' energy demands. These traditional energy efficiency jobs and trades not only maintain the region's energy infrastructure but also serve as a foundation for integrating upgrading buildings with new technologies and energy systems.

As the region's economy evolves, traditional energy roles will support the broader industrial ecosystem, ensuring energy needs are met as new technologies and infrastructure projects take shape. Because the region will continue to need skilled workers in these foundational industries, workforce development efforts should maintain the backbone of the region's energy system while transitioning into emerging sectors.

## Stakeholders Contributing to the Energy Workforce Development Ecosystem

### SECTION SUMMARY

- Workforce development organizations (unions, trade associations, community colleges, and training centers) are crucial in providing training, certifications, and educational opportunities for the evolving energy sector.
- Collaboration among industry stakeholders is essential for building a skilled workforce adaptable to advancements in clean energy, energy storage, grid modernization, and

electrification.

- Energy professionals must upskill to meet the demands of a transitioning economy, addressing challenges in training access, vacant positions, and retention. As older generations retire and new workers explore other career paths, stronger workforce support, and development pathways are essential to building a sustainable, skilled energy workforce.

The energy workforce ecosystem comprises a diverse range of organizations and professionals. These entities work alongside government and regulatory agencies, which shape the industry through policy, research funding, and energy initiatives. Local and state governments also regulate energy rates, oversee clean energy programs, and enforce energy efficiency measures impacting both the public and private sectors.

Workforce development organizations such as labor unions, trade associations, community colleges, and specialized training centers provide essential training programs, certifications, and educational opportunities to meet the sector's evolving needs and ensure a sustainable energy workforce. They advocate for labor standards, raise awareness of career pathways, and help workers adapt to rapid technological changes in the industry. This collaboration among workforce and energy industry key stakeholders is crucial to building a workforce that is skilled, resilient, and adaptable to technological advancements in clean energy, energy storage, grid modernization, and electrification.

Universities, research institutions, and energy start-ups drive innovation in smart grids, energy storage, and clean energy technologies, creating demand for a new generation of highly skilled workers. For instance, as these organizations create new energy storage systems and technologies to balance clean energy supply and demand, the region will need specialized technicians and engineers.

The energy sector is primarily made up of energy workers who provide energy services to businesses and local communities. Energy professionals need to stay up to date and participate in upskilling programs to fulfill increasing demands within a transitioning energy economy. Without proper workforce infrastructure, professionals in the energy workforce experience challenges accessing relevant training, open positions are left vacant, and employee retention is challenging. As previous generations of energy professionals retire, current generations seek job security, and newer generations often pursue professional pathways outside the energy sector, thus indicating the importance of providing stronger support systems for existing professionals and developing more robust pathways for building a skilled workforce.

Figure 2: Flowchart illustrating the connection between job seekers and energy employers via workforce development organizations and training institutions, all contributing to the greater energy workforce ecosystem



## What is a Green Energy Job?

### SECTION SUMMARY

- Identifying energy sector occupations is challenging as clean energy technologies evolve, making some roles obsolete while new, undefined roles emerge.
- The U.S. Bureau of Labor Statistics defines green jobs as, 'Jobs in which workers' duties involve making their establishment's production processes more environmentally friendly or use fewer natural resources.' Common terms used to reference green jobs include energy efficiency jobs, clean energy jobs, and renewable energy jobs.<sup>5</sup>
- Environmental Defense Fund defines green energy jobs as 1) efficiency jobs from product design and manufacturing to equipment installation and building retrofit, 2) clean energy refers collectively to renewable energy and energy efficiency technologies and markets., and 3) Renewable energy jobs refer to jobs that support energy technology, production, and maintenance coming from renewable energy resources..<sup>6</sup>

The green energy workforce is complex, with overlapping industries, sectors, and jobs. Green energy jobs typically include occupations related to building electrification, electric vehicles, clean energy, and other energy efficiency-related occupations. These

<sup>5</sup> U.S. Bureau of Labor Statistics. (n.d.). Green careers. U.S. Department of Labor.

<sup>6</sup> Environmental Defense Fund and Meister Consultants Group. " Now Hiring: The Growth of America's Clean Energy & Sustainability Jobs." 2017.



roles fall into a broad range of industries, from construction and manufacturing to energy production and engineering. For example, electricians may work on green energy installation projects and conventional power systems; there is no clear way to capture this distinction between “green” and conventional work on a large scale. This overlap makes it challenging to create policies and analyze labor metrics that accurately reflect the green energy workforce.

Identifying whether an occupation fits within the energy sector is further complicated as other sectors evolve and intersect with energy. As the energy industry adapts to clean energy technologies, existing occupations may become obsolete or experience reduced demand while new roles emerge that are not yet fully defined. The definition of an “energy job” (let alone a green energy job!) shifts as technologies and standards do.

Energy-related jobs range from fossil fuel extraction to clean energy generation, but “energy-related” can be ambiguous. For instance, non-traditional energy sectors, such as software engineering for solar panel mapping, often fall under the broader technology industry and are not always included as energy jobs. Different organizations will make different decisions regarding whether to “count” roles indirectly related to the energy sector as “energy-related jobs” or to focus solely on direct energy occupations.

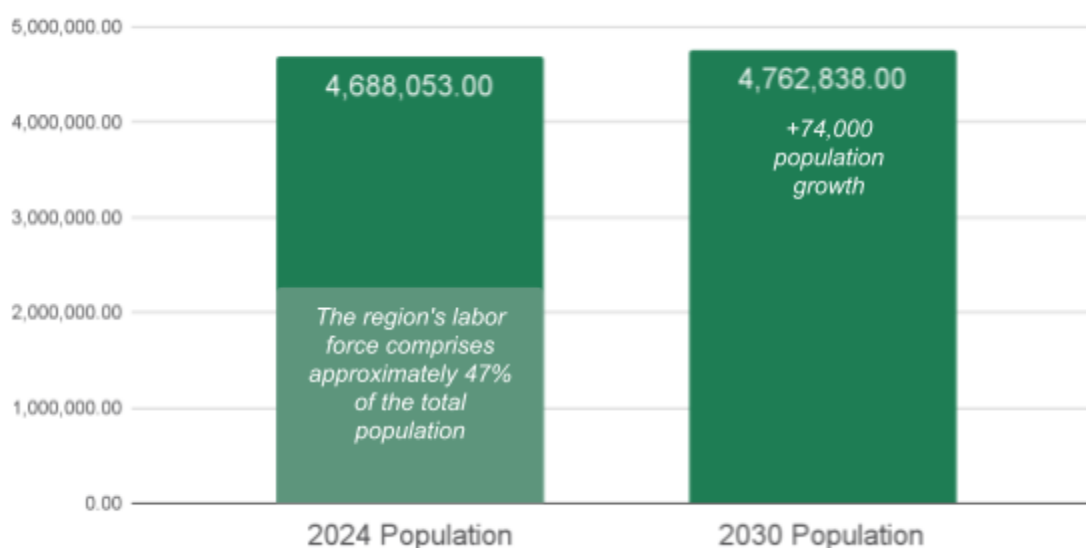
## Labor Market Demographics and Metrics

### SECTION SUMMARY

- The Inland Empire is projected to grow at twice the rate of Southern California, reaching a population of 4.76 million by 2030. The labor force is approximately 2.2 million (47% of the population), and the unemployment rate is 5.3% as of September 2024.
- The growing youth population (ages 16-24) presents an opportunity to engage them in energy careers through training and apprenticeships. In contrast, the increase in retirees (ages 55+) highlights the need for enhanced training, certification, and knowledge transfer to retain a skilled workforce in high-demand energy sectors
- With 54% Hispanic/Latino residents, targeted outreach and culturally relevant training programs are crucial for ensuring diverse community participation in the energy sector.
- While 83.3% of the population has at least a high school diploma, many lack higher education or professional training. This creates opportunities for entry-level energy jobs, apprenticeships, and certificate programs to bridge skills gaps. High school education can expose students to energy career pathways, fostering a talent pipeline.

The Inland Empire's workforce is critical to the region's economic resilience, particularly as it adapts to the growing demands of the energy sector. This section examines demographic factors such as age distribution, gender composition, educational attainment, and income levels. By analyzing employment trends, participation rates, and occupational profiles, we can assess the region's capacity, adaptability, inclusivity, and preparedness to support its expanding energy-related occupations to determine where workforce development initiatives can have the most impact.

*Figure 3: Population and labor growth in the Inland Empire*



As of 2024, the Riverside-San Bernardino Metro Area has a population of 4,688,053 residents, with the Inland Empire expected to grow at twice the rate of the rest of Southern California. By 2030, the population will increase to 4,762,838, adding more than 74,000 by 2030.<sup>7</sup> As of September 2024, the region's labor force comprises approximately 47% of the total population, or about 2.2 million individuals, with an average unemployment rate of 5.3%<sup>8</sup> (Figure 3). This population growth will increase demand for housing, healthcare, education, transportation, energy, and employment.

To meet the demands of the growing energy sector, it's essential to align the region's workforce with the skills required by emerging industries such as clean energy, energy efficiency, and electrification. By identifying trends in educational attainment, skills, and labor force participation, we can identify the workforce development efforts necessary to equip residents for sustainable, high-demand energy jobs.

<sup>7</sup> Data from the State of California Department of Finance report P-2C County Population by Sex and Age Group

<sup>8</sup> Data from U.S. Bureau of Labor Statistics on unemployment for Riverside-San Bernardino-Ontario, CA Metro Area

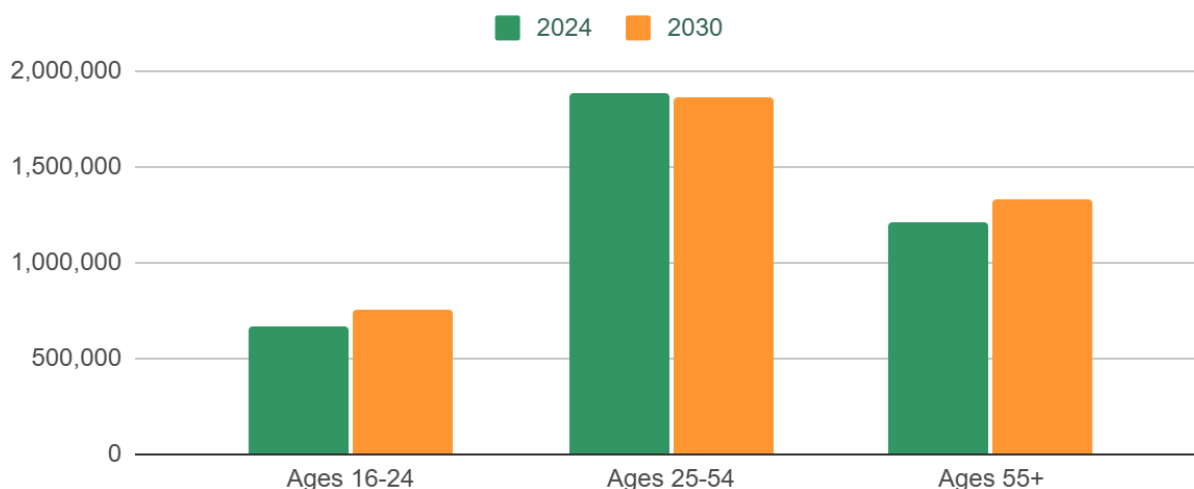
## *Regional Population Age Distribution*

With a median age of 36, two years younger than the state's median age, the Inland Empire has a relatively youthful population, which is beneficial for sustaining the long-term energy workforce. Younger workers are entering the job market, and experienced workers are nearing retirement. The demographic data was analyzed based on the following age group breakdowns.

- **Emerging Population (ages 16-24):** This group represents entry-level workers entering the job market—a key demographic for the future energy workforce. Engaging this population through early career opportunities, apprenticeships, and training programs is crucial for developing the next generation of energy professionals.
- **Established Working Population (ages 25-54):** This group comprises the core of the region's labor force. It is largely made up of mid-career professionals and skilled workers. Many in this age range may seek upskilling or retraining opportunities, particularly as the energy sector shifts toward clean technologies and electrification.
- **Retiring Workforce (ages 55+):** A significant portion of the Inland Empire's workforce is approaching retirement, leading to potential gaps in institutional knowledge and technical expertise in specialized energy occupations. The aging workforce creates an urgent need for succession planning and training initiatives to ensure that the next generation of energy professionals fills these roles.

According to projections (see Figure 4), the emerging population (ages 16-24) is expected to grow through 2030. This provides a regional opportunity to engage youth in energy-related career pathways early through training programs, apprenticeships, and entry-level job opportunities. The increase in the retiring workforce (ages 55+) indicates the importance of increasing training and certification pathways and knowledge transfer initiatives for the established workforce to retain an experienced and skilled workforce, particularly in high-demand energy sectors.

Figure 4: Projected population growth by age group from 2024 -2030<sup>9</sup>

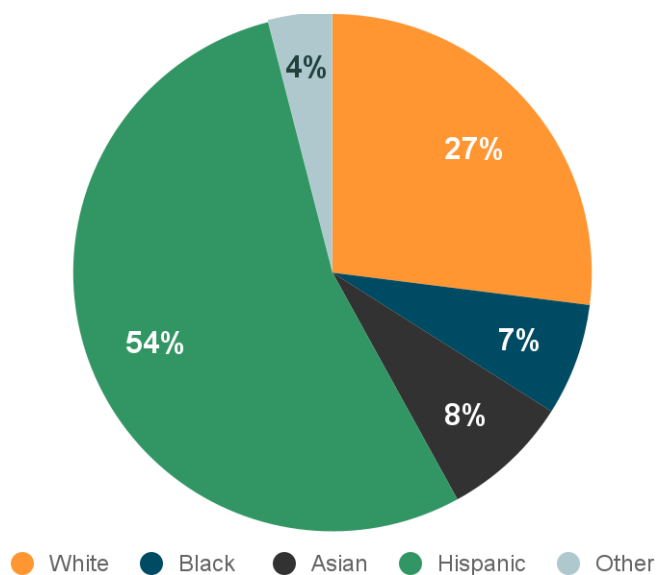


### Regional Ethnicity

The Inland Empire's diverse population is one of its greatest assets, contributing a wealth of perspectives, skills, and cultural competencies that enhance its workforce. Understanding the ethnic makeup of the local labor pool is critical for developing inclusive workforce strategies that meet the unique needs of various communities. The Hispanic/Latino residents represent a substantial portion of the Inland Empire's population (54%) and workforce. Engaging the Hispanic/Latino community through targeted outreach and culturally relevant training programs can help ensure their participation in emerging energy-related fields. Workforce initiatives that emphasize cultural awareness, accessibility, and inclusivity can help overcome barriers to entry, reduce skill gaps, and foster an energy workforce that reflects the region's diversity. Additionally, linguistically-inclusive materials and training resources can strengthen pathways to employment and promote a more equitable workforce. By investing in programs that address the unique needs of the Hispanic/Latino community, the region can support its energy sector's growth and develop a skilled, inclusive workforce.

<sup>9</sup> Data from the State of California Department of Finance report P-2C County Population by Sex and Age Group

Figure 5: Ethnic composition of the Inland Empire population<sup>10</sup>



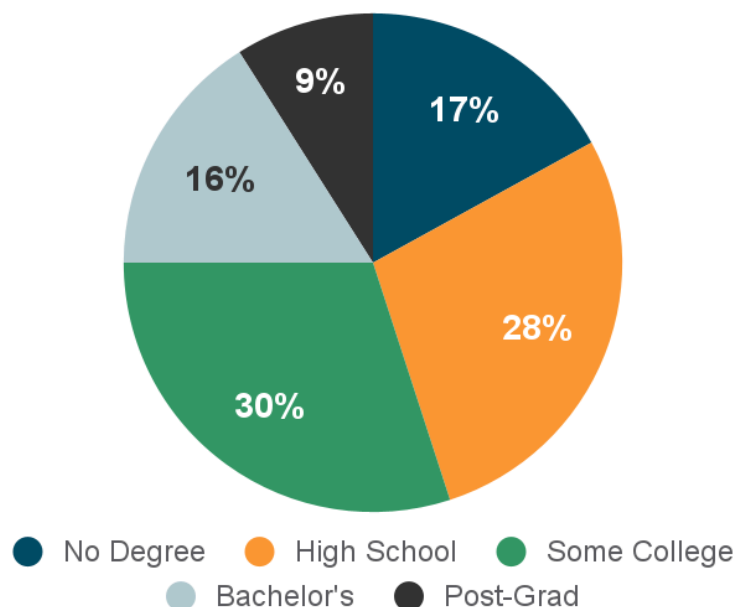
### Regional Education Levels

Educational attainment is a critical factor influencing workforce readiness and adaptability, particularly in the fast-evolving energy sector. Understanding educational trends can highlight areas where workforce development initiatives are needed. This information can support regional recommendations for programs that provide training and credentials aligned with the educational requirements of workforce development strategies. It also informs recommendations related to skill requirements for high-growth energy-related industries.

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<sup>10</sup> U.S. Census Bureau (2023). American Community Survey 1-year estimates. Retrieved from Census Reporter Profile page for Riverside-San Bernardino-Ontario, CA Metro Area

Figure 6: Population by highest level of education<sup>11</sup>



In the Inland Empire, 83.3% of the population has attained at least a high school diploma. A significant portion of the population does not pursue higher education or professional training, especially in lower-income and rural areas where access to educational opportunities is more limited. Many entry-level roles and apprenticeships in the energy sector only require a high school diploma or relevant experience, presenting an opportunity to bridge skill gaps with basic technical training or certificate programs. High school education institutions can support this by exposing students to pathways in energy-related occupations and trades as an alternative pathway to higher education. Additionally, workforce development programs can provide energy-related certifications, technical skills training, and hands-on learning experiences to build and provide skills necessary to be successful in the industry. Exposure to energy career pathways early on can strengthen the region's talent pipeline and equip the workforce to meet the demands of the energy sector.

<sup>11</sup> U.S. Census Bureau (2023). American Community Survey 1-year estimates. Retrieved from Census Reporter Profile page for Riverside-San Bernardino-Ontario, CA Metro Area

## Regional Energy-Related Occupation Overview

### SECTION SUMMARY

- Essential industries for workforce training and investment: High-demand energy occupations with median hourly earnings above the state's living wage threshold, particularly those with at least 15% projected growth from 2020-2030 in construction trades, engineering, installation/repair, and management.
- Notable job growth includes solar photovoltaic installers (81.3%), electricians, construction laborers, plumbers, engineers, and maintenance workers (17%-35%), along with a 25.1% increase in construction managers.
- Between 2020 and 2030, energy-related occupations are projected to see an average 25% retirement rate and 57% transfer rate of skilled workers (e.g., electricians, HVAC mechanics, plumbers, PV installers), which poses a significant challenge for maintaining a skilled energy workforce. Projections show over 75% of workers in critical energy-related roles may retire or transfer by 2030, highlighting the need for immediate recruitment and retention strategies.
- Many only require a high school diploma or equivalent, but workers often need specialized and technical knowledge, hands-on training, and certifications to be successful in these occupations. This provides an opportunity to expand training and certification programs for entry-level energy occupations, offering strong career prospects without advanced degrees.

The Inland Empire is poised to benefit from substantial growth in energy-related industries driven by California's ambitious climate goals, technological innovations, and the rising demand for sustainable energy solutions. Our assessment focuses on energy-related occupations with high workforce demand and median hourly earnings above the state's living wage threshold. These high-demand, well-paid occupations will be the focus for our recommended investments in workforce training. Understanding the workforce needs of growing sectors such as clean energy, grid modernization, construction and building upgrades, energy efficiency, electrification, and EV infrastructure is crucial to align workforce development efforts with skill shortages to support economic growth.

This analysis utilizes the Bureau of Labor Statistics' Standard Occupational Classifications (SOC) to identify growing energy-related occupations. Specifically, we examined occupations with at least 15% projected growth from 2020 to 2030. These include roles in management, construction, installation and repair, engineering, trades, and manufacturing. The identified occupational groups are as follows:

- (SOC 11-2000) Construction Trades Workers

- (SOC 17-2000) Engineering
- (SOC 17-3000) Drafters, Engineering Technicians, and Mapping Technicians
- (SOC 49-0000) Installation, Maintenance, and Repair Occupations
- (SOC 11-2000) Management Occupations

Table 1 illustrates notable job growth across these energy-related occupations. For example, solar photovoltaic installers are projected to experience the most significant growth, with employment increasing by 81.3% by 2030. Notable energy-related occupations, such as electricians, construction laborers, plumbers, engineers, and maintenance workers, are also expected to grow strongly, ranging from 17% to 35%, demonstrating the broad need for skilled labor as the region focuses on clean energy and infrastructure development. Management positions are also expected to grow, with construction managers projected to increase by 25.1%. This growth underscores the increasing complexity of energy-related construction projects, which require strong leadership and organizational skills.

Overall, the data highlights significant opportunities for job growth in clean energy, energy efficiency, and infrastructure maintenance. These projections suggest that the Inland Empire's job market is shifting to demand skilled labor in the energy and construction industry, providing more opportunities for sustainable career growth.

*Table 1: Riverside-San Bernardino estimated 2020 - 2030 employment and projected employment growth by energy-related occupations.<sup>12</sup>*

| Energy-Related Occupations                                | Employment Estimate 2020 | Employment Estimate 2030 | Projected Growth 2020-2030 | Percentage Growth 2020-2030 | Median Annual Wages |
|-----------------------------------------------------------|--------------------------|--------------------------|----------------------------|-----------------------------|---------------------|
| Total Energy Related-Occupations <sup>13</sup>            | 137,270                  | 162,120                  | 24,850                     | 18.10%                      | N/A                 |
| Total Regional Occupations in Construction Trades Workers | 78,600                   | 93,980                   | 15,380                     | 19.60%                      |                     |
| Solar Photovoltaic Installers                             | 910                      | 1,650                    | 740                        | 81.30%                      | \$49,590            |
| Electricians                                              | 7,210                    | 8,820                    | 1,610                      | 22.30%                      | \$63,365            |
| Construction Laborers                                     | 16,180                   | 19,590                   | 3,410                      | 21.10%                      | \$47,310            |
| Structural Iron and Steel Workers                         | 1,300                    | 1,530                    | 230                        | 17.70%                      | \$64,572            |
| Roofers                                                   | 2,110                    | 2,480                    | 370                        | 17.50%                      | \$60,713            |
| Plumbers, Pipefitters, and Steamfitters                   | 4,080                    | 4,790                    | 710                        | 17.40%                      | \$62,024            |

<sup>12</sup> Data from the Bureau of Labor Statistics' Employment Projections by Occupation 2020-2030  
Riverside-San Bernardino-Ontario, CA Metro Area

<sup>13</sup> This number includes all identified energy related occupations, not only the ones in high demand.



|                                                                                          |        |        |        |        |           |
|------------------------------------------------------------------------------------------|--------|--------|--------|--------|-----------|
| Carpenters                                                                               | 19,250 | 22,560 | 3,310  | 17.20% | \$60,548  |
| Sheet Metal Workers                                                                      | 1,130  | 1,310  | 180    | 15.90% | \$59,609  |
| Total Regional Occupations in Engineering                                                | 9,740  | 11,510 | 1,770  | 18.20% |           |
| Materials Engineers                                                                      | 120    | 150    | 30     | 25.00% | \$92,069  |
| Industrial Engineers                                                                     | 1,040  | 1,280  | 240    | 23.10% | \$84,775  |
| Civil Engineers                                                                          | 2,920  | 3,590  | 670    | 22.90% | \$103,402 |
| Electrical Engineers                                                                     | 1,160  | 1,390  | 230    | 19.80% | \$101,165 |
| Total Regional Occupations in Drafters, Engineering Technicians, and Mapping Technicians | 4,940  | 5,710  | 770    | 15.60% |           |
| Surveying and Mapping Technicians                                                        | 370    | 450    | 80     | 21.60% | \$59,155  |
| Architectural and Civil Drafters                                                         | 940    | 1,130  | 190    | 20.20% | \$62,626  |
| Calibration and Engineering Technologists and Technicians, Except Drafters, All Other    | 730    | 850    | 120    | 16.40% | \$53,920  |
| Civil Engineering Technicians                                                            | 640    | 740    | 100    | 15.60% | \$70,810  |
| Mechanical Engineering Technicians                                                       | 130    | 150    | 20     | 15.40% | \$60,357  |
| Total Regional Occupations in Installation, Maintenance, and Repair                      | 60,340 | 72,810 | 12,470 | 20.70% |           |
| Maintenance Workers, Machinery                                                           | 480    | 650    | 170    | 35.40% | \$61,355  |
| Industrial Machinery Mechanics                                                           | 2,300  | 3,010  | 710    | 30.90% | \$62,110  |
| Mechanical Door Repairers                                                                | 190    | 240    | 50     | 26.30% | \$47,220  |
| Millwrights                                                                              | 180    | 220    | 40     | 22.20% | \$65,282  |
| First-Line Supervisors of Mechanics, Installers, and Repairers                           | 4,720  | 5,690  | 970    | 20.60% | \$79,592  |
| Electrical and Electronics Repairers, Commercial and Industrial Equipment                | 510    | 610    | 100    | 19.60% | \$72,215  |
| Riggers                                                                                  | 110    | 130    | 20     | 18.20% | \$47,323  |
| Heating, Air Conditioning, and Refrigeration Mechanics and Installers                    | 5,600  | 6,610  | 1,010  | 18.00% | \$48,284  |
| Automotive Service Technicians and Mechanics                                             | 8,950  | 10,420 | 1,470  | 16.40% | \$50,124  |

|                                          |        |         |        |        |           |
|------------------------------------------|--------|---------|--------|--------|-----------|
| Total Regional Occupations in Management | 84,750 | 103,770 | 19,020 | 22.40% |           |
| Construction Managers                    | 4,590  | 5,740   | 1,150  | 25.10% | \$104,247 |
| Architectural and Engineering Managers   | 1,360  | 1,620   | 260    | 19.10% | \$156,251 |
| Industrial Production Managers           | 1,640  | 1,900   | 260    | 15.90% | \$100,920 |

### *Projected Retirements and Transfers*

The Inland Empire’s energy-related industries are on the brink of rapid expansion, driven by California’s ambitious climate goals and technological advancements. However, the region faces a significant challenge: the projected average retirement of 30% of its experienced energy workforce, coupled with an average transfer rate of 70% within energy-related occupations between 2020 and 2030. Electricians, HVAC mechanics, plumbers, photovoltaic (PV) installers, riggers, millwrights, and construction laborers are critical to the region’s continued growth in clean energy, energy efficiency, and infrastructure upgrades. The workforce’s aging demographics, combined with a high turnover rate, intensify the need for targeted workforce development efforts to address the potential for skill shortages. Immediate and long-term training programs can help prevent disruptions in the region’s energy infrastructure.

The projected employment data, particularly for energy-related occupations, reveals a concerning trend: significant numbers of experienced professionals are expected to retire or transfer out of critical roles. Table 2 highlights energy-related occupations, with a projected exit and transfer rate of more than 75% by 2030. These roles are critical to the region’s energy infrastructure and require immediate action to ensure a steady pipeline of skilled professionals. Labor force exits are due to retirement or disability; occupational transfers are when workers shift careers for reasons like advancement opportunities or job satisfaction. Both labor force exits and occupational transfers contribute to workforce instability. These trends underline the importance of developing robust recruitment and retention strategies for energy-related fields. A new generation of workers must step into these vacancies to maintain momentum in energy projects, from clean energy installations to grid modernization and electrification efforts.

Table 2: Riverside-San Bernardino projected percentage of retirement, transfers, and job openings 2020 - 2030.<sup>14</sup>

| Energy-Related Occupations                                                               | Exit Rate | Transfers Rate | Total Exit and Transfer Rate | Total Job Openings |
|------------------------------------------------------------------------------------------|-----------|----------------|------------------------------|--------------------|
| Total Energy Related-Occupations <sup>15</sup>                                           | 30.94%    | 70.32%         | 101.26%                      | 163,850            |
| Total Regional Occupations in Construction Trades Workers                                | 26.32%    | 59.95%         | 86.27%                       | 96,460             |
| Solar Photovoltaic Installers                                                            | 24.85%    | 64.24%         | 89.11%                       | 2,210              |
| Electricians                                                                             | 26.42%    | 66.78%         | 93.20%                       | 9,830              |
| Construction Laborers                                                                    | 27.00%    | 61.66%         | 88.67%                       | 20,780             |
| Structural Iron and Steel Workers                                                        | 23.53%    | 70.59%         | 94.13%                       | 1,670              |
| Roofers                                                                                  | 22.98%    | 64.52%         | 87.51%                       | 2,540              |
| Plumbers, Pipefitters, and Steamfitters                                                  | 26.93%    | 66.60%         | 93.53%                       | 5,190              |
| Carpenters                                                                               | 27.04%    | 57.80%         | 84.84%                       | 22,450             |
| Sheet Metal Workers                                                                      | 25.19%    | 60.31%         | 85.52%                       | 1,300              |
| Total Regional Occupations in Drafters, Engineering Technicians, and Mapping Technicians | 28.55%    | 59.89%         | 88.45%                       | 5,820              |
| Surveying and Mapping Technicians                                                        | 33.33%    | 80.00%         | 113.41%                      | 590                |
| Architectural and Civil Drafters                                                         | 28.32%    | 58.41%         | 86.75%                       | 1,170              |
| Calibration and Engineering Technologists and Technicians, Except Drafters, All Other    | 28.24%    | 56.47%         | 84.74%                       | 840                |
| Civil Engineering Technicians                                                            | 28.38%    | 56.76%         | 85.17%                       | 730                |
| Mechanical Engineering Technicians                                                       | 26.67%    | 60.00%         | 86.84%                       | 150                |
| Total Regional Occupations in Installation, Maintenance, and Repair                      | 28.55%    | 58.84%         | 87.39%                       | 76,100             |
| Maintenance Workers, Machinery                                                           | 29.23%    | 47.69%         | 76.97%                       | 670                |
| Industrial Machinery Mechanics                                                           | 27.24%    | 47.51%         | 74.76%                       | 2,960              |
| Millwrights                                                                              | 27.27%    | 54.55%         | 81.94%                       | 220                |

<sup>14</sup> Data from the Bureau of Labor Statistics' Employment Projections by Occupation 2020-2030  
Riverside-San Bernardino-Ontario, CA Metro Area

<sup>15</sup> This number includes all identified energy related occupations, not only the ones in high demand.

|                                                                       |        |        |        |        |
|-----------------------------------------------------------------------|--------|--------|--------|--------|
| First-Line Supervisors of Mechanics, Installers, and Repairers        | 26.54% | 54.48% | 81.02% | 5,580  |
| Riggers                                                               | 23.08% | 69.23% | 92.49% | 140    |
| Heating, Air Conditioning, and Refrigeration Mechanics and Installers | 23.60% | 62.93% | 86.54% | 6,730  |
| Welders, Cutters, Solderers, and Brazers                              | 24.22% | 72.88% | 97.11% | 5,430  |
| Automotive Service Technicians and Mechanics                          | 27.64% | 63.05% | 90.69% | 10,920 |

Expanding apprenticeship programs, creating partnerships with community colleges, and investing in specialized certification programs can address these gaps. Outreach focusing on attracting and retaining younger workers and encouraging diversity within these critical fields are essential to building a robust, adaptable workforce. Collaboration among educational institutions, labor unions, and industry stakeholders will ensure the Inland Empire has the talent needed to fill the labor market needs.

### *Occupations' Education Requirements*

Table 3 outlines energy-related occupations within the Inland Empire and the educational and on-the-job training requirements for each role. Understanding these requirements is crucial for designing targeted workforce development programs that help workers enter and advance in the energy sector. Notably, many high-demand energy-related jobs require a high school diploma or equivalent to entry-level education, with apprenticeship programs or significant on-the-job training essential for success. These positions include roles in the skilled trades, such as electricians, plumbers, and solar photovoltaic installers. While formal education requirements for a majority of occupations are relatively low, these occupations often require specialized and technical knowledge, hands-on training, and certifications for workers to be successful in these occupations.

There is a significant opportunity to expand training and certification programs for energy occupations that require only a high school diploma. Many entry-level energy occupations offer strong career prospects without needing advanced degrees. By building a stronger career pipeline and providing accessible, industry-recognized certifications and hands-on training, local workforce organizations and educational institutions can help job seekers gain the skills needed for these high-demand roles.

This approach can increase access to sustainable employment opportunities and support the growth of a skilled energy workforce in the region.

*Table 3: Occupations' education requirements and on the job training availability*

| Occupational Title                                                                                                                                                                                                                                                                                                                                     | On the Job Training                        | Entry Level Education             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|-----------------------------------|
| <ul style="list-style-type: none"> <li>• Electricians</li> <li>• Structural Iron and Steel Workers</li> <li>• Plumbers, Pipefitters, and Steamfitters</li> <li>• Carpenters</li> <li>• Sheet Metal Workers</li> <li>• Millwrights</li> </ul>                                                                                                           | Apprenticeship                             | High school diploma or equivalent |
| <ul style="list-style-type: none"> <li>• Maintenance Workers, Machinery</li> <li>• Industrial Machinery Mechanics</li> <li>• Electrical Power-Line Installers and Repairers</li> <li>• Machinists</li> </ul>                                                                                                                                           | Long-term on-the-job training              | High school diploma or equivalent |
| <ul style="list-style-type: none"> <li>• Solar Photovoltaic Installers</li> <li>• Roofers</li> <li>• Surveying and Mapping Technicians</li> <li>• Mechanical Door Repairers</li> <li>• Riggers</li> <li>• Welders, Cutters, Solderers, and Brazers</li> <li>• Construction Laborers</li> <li>• Automotive Service Technicians and Mechanics</li> </ul> | Moderate or short-term on-the-job training | High school diploma or equivalent |
| <ul style="list-style-type: none"> <li>• Electrical and Electronics Repairers, Commercial and Industrial Equipment</li> <li>• Heating, Air Conditioning, and Refrigeration Mechanics and Installers</li> <li>• Automotive Service Technicians and Mechanics</li> </ul>                                                                                 | Long or short-term on-the-job training     | Postsecondary non-degree award    |
| <ul style="list-style-type: none"> <li>• Architectural and Civil Drafters</li> <li>• Calibration and Engineering Technologists and Technicians, Except Drafters, All Other</li> <li>• Civil Engineering Technicians</li> <li>• Mechanical Engineering Technicians</li> </ul>                                                                           | None                                       | Associate's degree                |
| <ul style="list-style-type: none"> <li>• Administrative Services and Facilities Managers</li> <li>• Industrial Production Managers</li> <li>• Construction Managers</li> <li>• Architectural and Engineering Managers</li> <li>• Materials Engineers</li> <li>• Industrial Engineers</li> <li>• Civil Engineers</li> </ul>                             | None                                       | Bachelor's degree                 |

|                                                                                                          |  |  |
|----------------------------------------------------------------------------------------------------------|--|--|
| <ul style="list-style-type: none"> <li>• Electrical Engineers</li> <li>• Mechanical Engineers</li> </ul> |  |  |
|----------------------------------------------------------------------------------------------------------|--|--|

## Geographic Variations Across the Inland Region

Riverside and San Bernardino Counties have distinct regional characteristics influencing economic development, industry concentrations, and workforce readiness. While the Inland Empire is often associated with its rapidly growing warehousing and logistics sectors, there are notable variations in industry distribution between Riverside and San Bernardino counties.

Riverside County's economic drivers are primarily in healthcare, retail and logistics, and education, while San Bernardino County is more focused on logistics and transportation, manufacturing, mining, and energy. Both counties offer opportunities for energy-related employment across various industries.

In urban areas, such as Riverside, Ontario, and San Bernardino, job opportunities in sectors like professional services, education, healthcare, and logistics are more prevalent. Urban residents generally have better access to higher-paying jobs but face a higher cost of living, which can discourage lower-income workers from moving to these areas.

Rural areas often have fewer employment opportunities, with most jobs concentrated in agriculture, local government, and energy-related industries. Rural communities experience higher unemployment rates due to lower demand for workers, limited access to training, and a lack of job diversity. Additionally, rural areas often struggle to attract younger workers who may be drawn to professional opportunities in urban centers.

Ultimately, because of the geographic diversity within the Inland Empire, the region will need tailored workforce development strategies to reduce regional disparities and create a more balanced economic landscape.

## Regional Energy Employer Survey

To understand the needs of the energy workforce and ensure regional training programs align with local employers' requirements, we conducted primary research through an energy employer needs assessment survey. The survey gathered direct input from energy employers in the Inland Empire to identify regionally relevant workforce challenges and needs, including hiring difficulties, employee retention, skill gaps, and training requirements. By engaging with employers in energy-related industries across Riverside and San Bernardino counties, local workforce organizations,

and regional stakeholders who provide training programs or collaborate with employers to address workforce challenges, we captured real-world insights to guide our recommendations for workforce development.

The survey was launched in May 2024 and closed in November 2024, receiving 385 responses. Respondents included energy employers, workforce development organizations, and educational institutions. The survey consisted of 13 questions (see Appendix B) focused on gathering quantitative and qualitative data on the following topics:

- **Employer Hiring and Retention:** Challenges in hiring qualified candidates, retention issues, and required skills.
- **Training and Skill Development:** Gaps in regional training resources, needed certifications, and education levels for energy roles.
- **Employer Support:** Barriers to accessing training, in-house training capabilities, and collaboration with local stakeholders.

## Survey Outreach and Engagement Methodology

### SECTION SUMMARY

- Outreach targeted over 180 regional stakeholders, including employers, schools, trade schools, workforce organizations, and public sector agencies. It further targeted 9,500 energy-related employers via email, phone calls, and in-person interactions.
- Partnered with Probolsky Research to ensure geographically diverse responses and insights from employers across sectors and geographic communities.

To ensure representative survey results, the outreach and engagement methodology targeted a broad network of over 180 regional stakeholders, including employers, K-12 schools, colleges, universities, trade schools, chambers of commerce, workforce development organizations, and public sector agencies. Furthermore, by attending local workforce events, job fairs, and networking sessions, we actively engaged with stakeholders in person and raised awareness about the employer needs survey. We also distributed the survey through local partner organizations to encourage participation. We made concerted efforts to ensure broad participation by reaching out to employers directly. Our outreach included contacting over 9,500 energy-related employers through email, phone calls, and in-person event interactions. To incentivize

responses, we offered Amazon gift cards as a token of appreciation for survey participation.

To ensure balanced regional representation, we partnered with Probolsky Research. Probolsky Research supported outreach to ensure responses were geographically diverse and provided insights from employers across sectors and communities.

By engaging various stakeholders, including workforce organizations and educational institutions, we captured various perspectives on the challenges faced by different sectors and communities across the Inland Empire.

## Survey Results

### SECTION SUMMARY

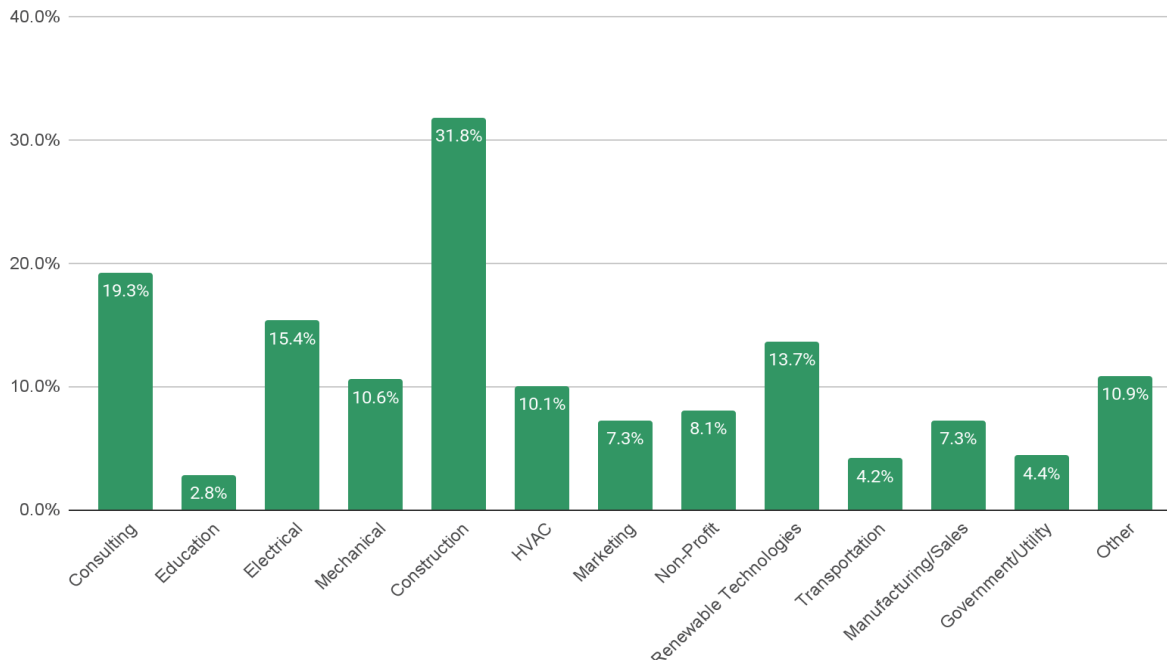
- 28.9% of survey respondents were from community-based organizations (non-profits, education, local governments, consultants), while 71.1% were energy employers in the electrical, mechanical, construction, and HVAC sectors.
- Survey respondent ratios indicate that the survey represents the labor market, highlighting the construction and electrical industries in the energy sector.
- 29.6% of employers indicated they have between 1 to 5 job openings annually for energy-related positions. Overall, survey respondents' annual job availability is mostly evenly distributed among employers.

### *Respondent Breakdown by Organization Type and Industry*

Of the 385 respondents, 28.9% were from community-based organizations (e.g., non-profits, education institutions, local governments, and consultants), while the remaining 71.1% were energy employers involved in sectors like electrical, mechanical, construction, and HVAC. The largest share of respondents (31.8%) were employers in the construction industry, followed by consulting (19.3%), electrical (15.4%), and renewable technologies (13.7%). These results align with labor market trends, where construction and electrical industries are major drivers of workforce growth in the energy sector.



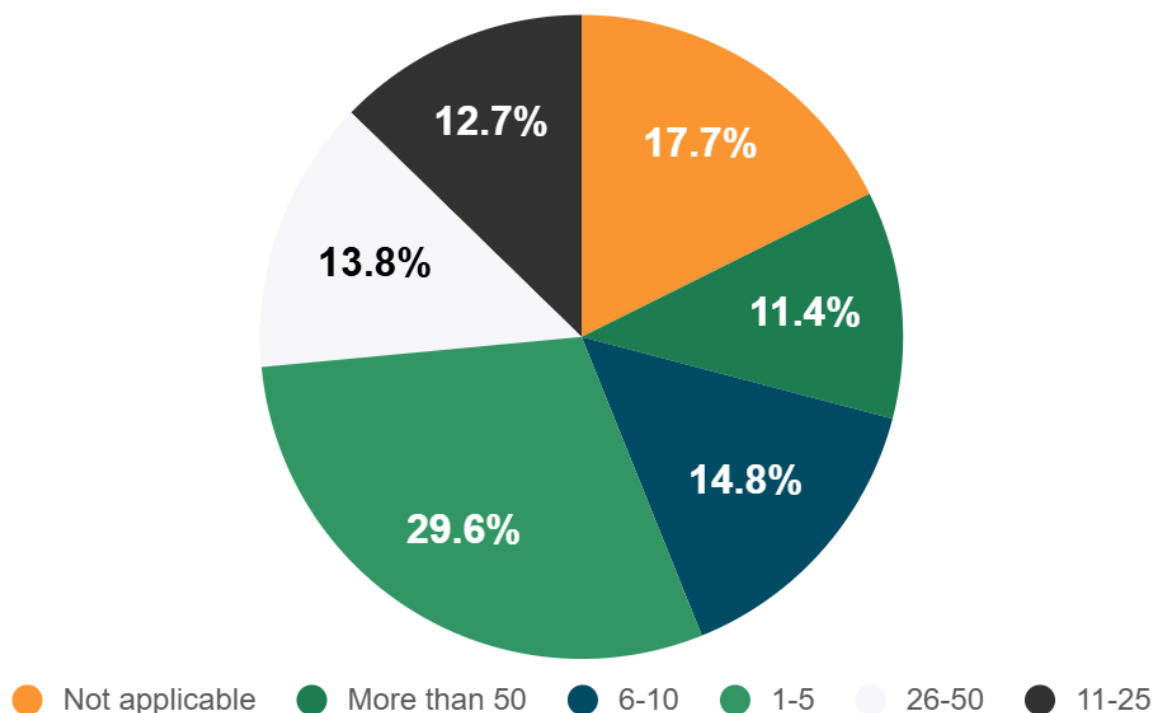
Figure 7: Percentage of survey respondents by industry



### Job Availability

With regional employment projections showing significant growth in energy-related occupations, this survey aimed to assess annual job availability from employers surveyed. To ensure we have the right people with the right skills to meet employer demand, we need to understand what skills are needed, if there are enough jobs to fill, and how needs vary between different-sized businesses. 29.6% of employers surveyed indicated they have between 1 and 5 openings annually for energy-related positions. The remaining survey responses ratio indicates a nearly equal distribution of annual job availability (Figure 7). This data fits the regional employer data and generally suggests that many employers are hiring for energy-related positions but in smaller numbers.

Figure 8: Annually available energy-related positions per employer



## Employer Hiring and Retention

### SECTION SUMMARY

- Survey respondents highlighted several obstacles they face when recruiting for energy roles, with the most significant barriers centered around the availability of qualified applicants, a lack of relevant industry experience, and inadequate training or certifications among potential hires.
- 79.5% of respondents identified retention challenges as a key barrier to maintaining a stable workforce. Contributing factors to high turnover rates include financial and career growth opportunities, employee qualifications, a competitive labor market, and regional retirements.
- Survey respondents value a combination of foundational education, specialized certifications, and practical work experience for energy sector roles. 49.6% of employers require a high school diploma for entry-level positions, highlighting the importance of foundational education.
- Survey respondents indicated that job applicants and employees lack technical, workplace, and interpersonal skills equally, and it is important to address workforce gaps in the region's energy sector.

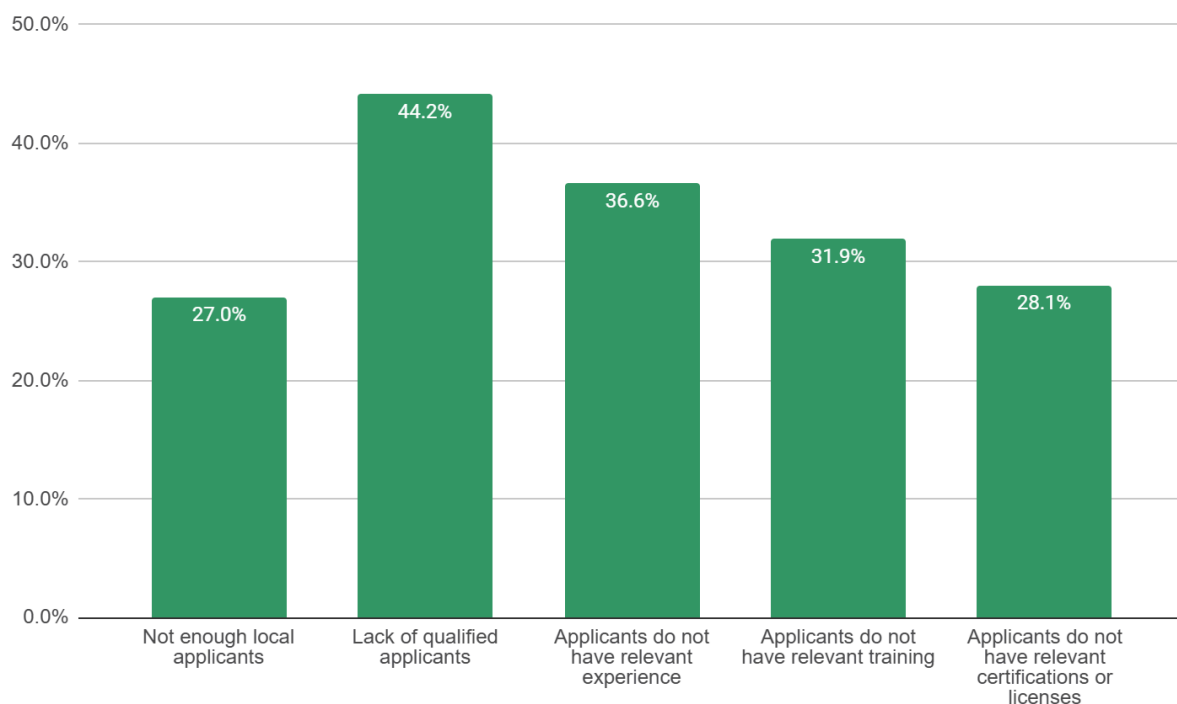
## Hiring Challenges

Hiring challenges in the energy sector are shaped by industry demands, geographic differences, skill requirements, and local labor market conditions.

“Survey respondents highlighted several obstacles they face when recruiting for energy roles, with the most significant barriers centered around the availability of qualified applicants, a lack of relevant industry experience, and inadequate training or certifications among potential hires” (Figure 8)

This finding indicates a need for training programs and greater alignment between industry needs and educational offerings to bridge these gaps.

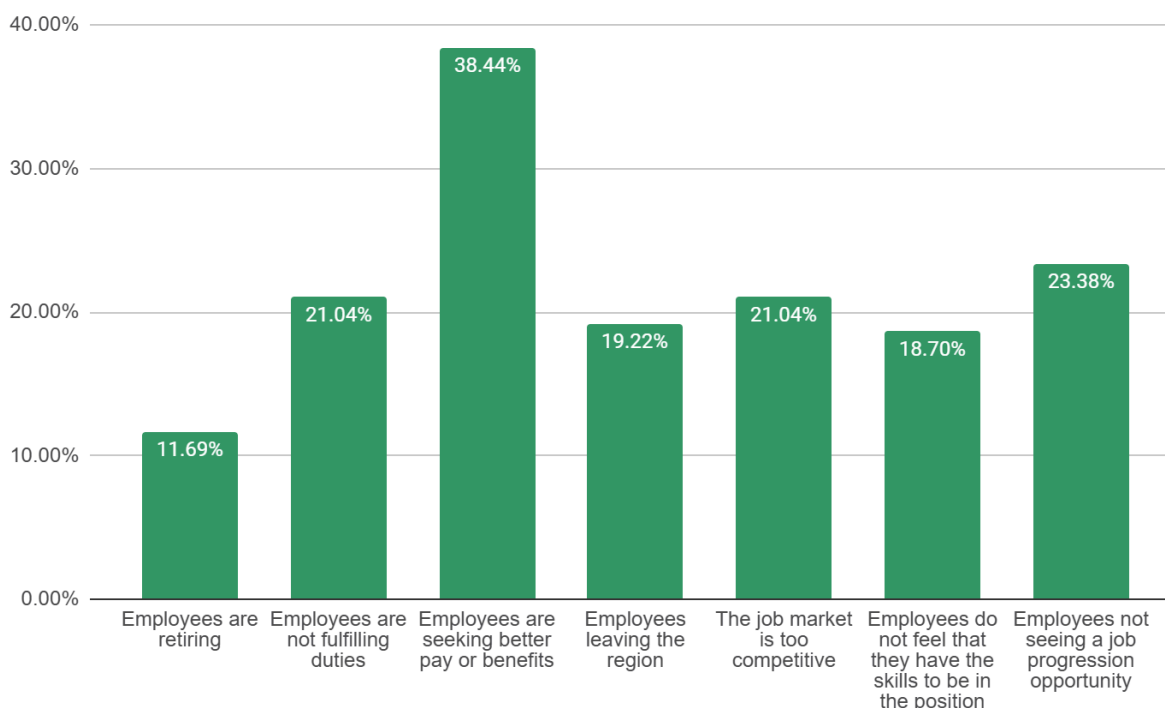
Figure 9: Challenges faced by energy employers when hiring employees



## Factors Affecting Employee Retention

Employee retention is a significant concern for survey respondents in the Inland Empire, with 79.5% of respondents identified retention challenges as a key barrier to maintaining a stable and skilled workforce. The survey findings revealed several underlying factors contributing to high turnover rates within the energy sector in four distinct categories: 1) financial and career growth, 2) employee qualifications, 3) a competitive labor market, and 4) retirements in the region (Figure 10).

Figure 10: Employers analyze challenges with employee retention



### Financial and Career Growth Opportunities

The most significant driver of employee turnover, according to 38.4% of survey respondents, is employees seeking better pay or benefits, and the second highest, at 23.4%, is the lack of job progression opportunities. Employees in the energy sector may feel that their growth potential within a company is limited if there are few opportunities for advancement or skill development. This aligns with broader economic trends in the Inland Empire, where rising living costs, particularly housing, put pressure on workers' financial stability. Survey respondents indicated that the lack of competitive wages and benefits packages compared to neighboring regions or industries contributes to employees seeking opportunities with more attractive compensation.

### Employee Qualifications

21% percent of respondents highlighted that employees are not fulfilling their duties as expected, leading to retention issues. They cited insufficient training, lack of experience, and job dissatisfaction contributing to this issue. Additionally, 18.7% of employers reported retention issues due to workers not feeling adequately equipped to meet the responsibilities of their roles, causing them to struggle with performance expectations, leading to dissatisfaction and turnover. This reflects a skills gap in the

local workforce, where incoming workers may need the technical competencies or certifications for energy-related positions. Together, these responses highlight the critical need for training programs and ongoing skill development to prepare employees better to meet the demands of energy sector careers.

### Competitive Labor Market

A competitive labor market and regional mobility also influence employee retention in the Inland Empire's energy sector. Approximately 21% of survey respondents indicated that the region's competitive job market is challenging. Local employers compete for skilled workers with larger coastal markets that can offer higher wages, better benefits, or more career growth opportunities. Additionally, 19.2% of respondents reported that employees leave the region for better job prospects or more affordable living options, further complicating retention efforts. Competition for talent and regional migration trends create a challenging landscape for employers, who must compete with other industries and regions with more attractive economic conditions.

### Retirement

While less of a contributing factor than the others outlined above, 11.7% of respondents indicated employee retirement as a factor that creates employee retention challenges. The projected employment and demographic data indicate an aging workforce and a steady increase in retirements in the energy sector. As experienced workers exit the workforce, employers must fill these positions with qualified replacements. Survey respondents indicated that incoming workers who fill these roles often lack sufficient experience and training and struggle to meet performance expectations, leading to higher turnover rates and disruption in operational efficiency.

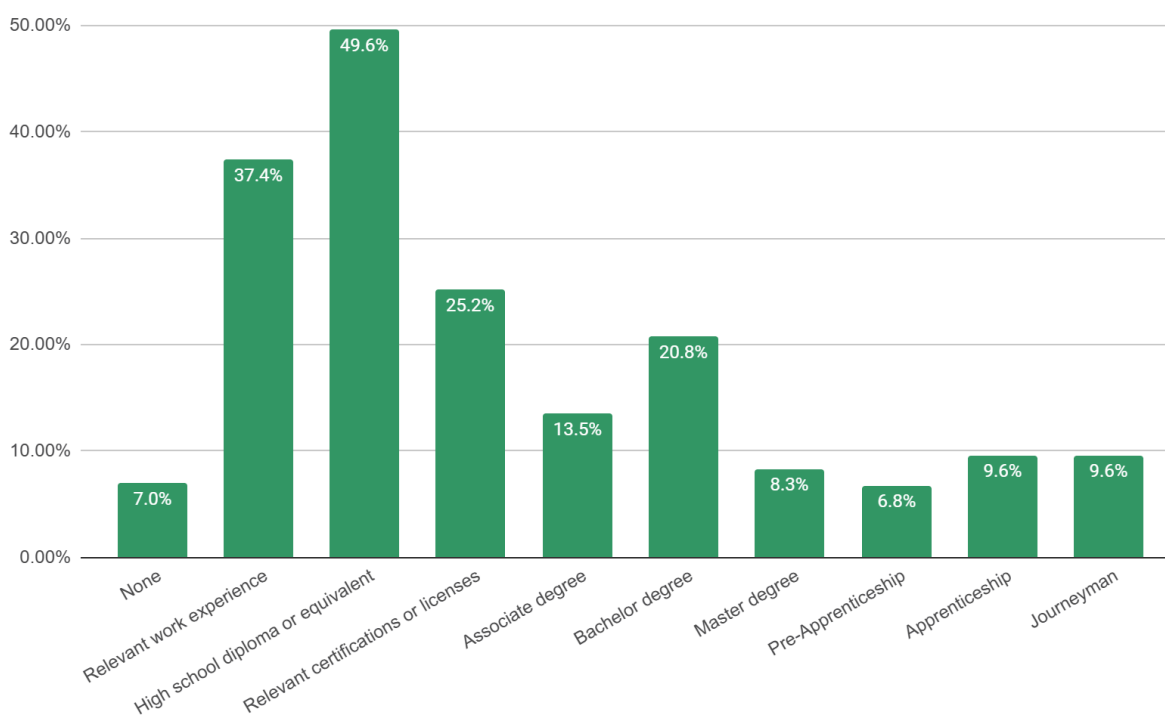
### *Minimum Education Requirements When Hiring*

Based on the survey responses, employers value a blend of foundational education, specialized certifications, and practical work experience when evaluating candidates for energy sector roles (Figure 11). Nearly half of employers (49.6%) consider a high school diploma or equivalent a minimum requirement for entry-level roles. This highlights the need for foundational education while underscoring the importance of additional training beyond high school. The second most common minimum education requirement (37.4%) was relevant work experience, underscoring the value of practical, on-the-job training. This finding suggests that employers prioritize candidates who not only possess educational credentials but can also demonstrate hands-on experience.

Certifications and licenses were identified as important by 25.2% of employers. These certifications, which can range from technical training in areas like solar panel

installation or energy auditing to safety and regulatory compliance, are essential for workers to meet the energy sector's needs. The emphasis on certifications reflects the industry's demand for specialized skills that may not be addressed through traditional academic programs. This suggests that expanding certification programs, particularly in clean energy, electrification, and energy management, could help workers gain the necessary credentials to compete in the market.

*Figure 11: Percentage of employers indicating the minimum level of education required by employers*



## Employee Skillsets Needed

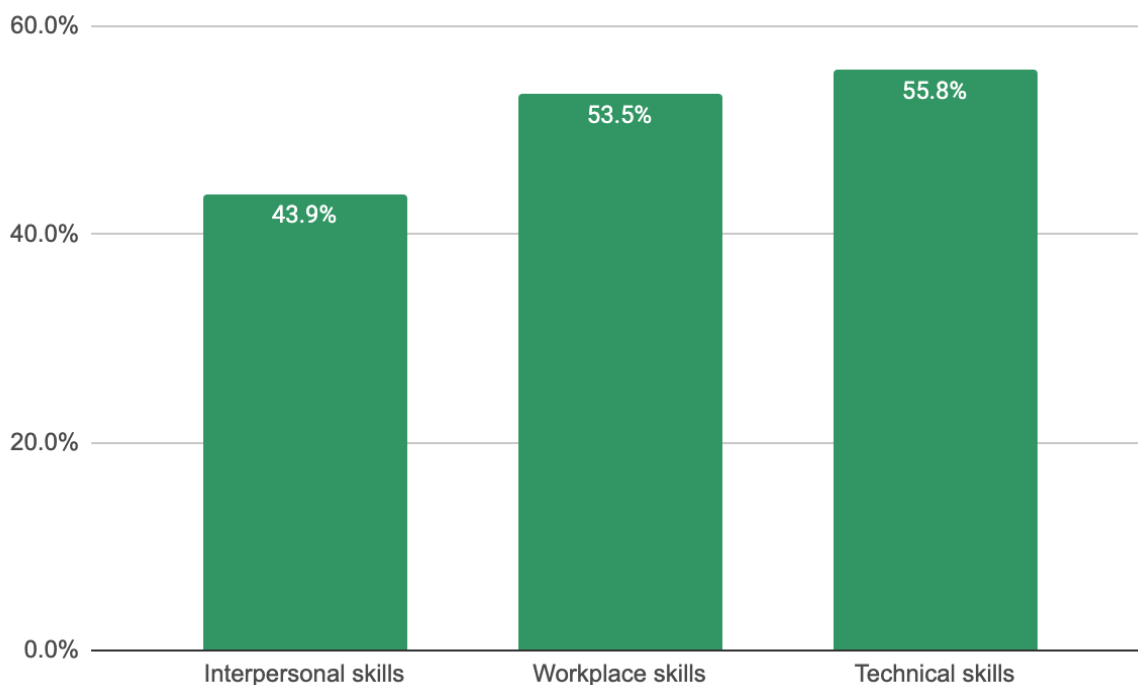
To better understand the skills applicants or employees may lack, we asked survey respondents to share which skills are typically lacking in your job applicants or employees. We categorized skills into three categories: interpersonal skills, workplace skills, and technical skills.

- Interpersonal skills refer to the behaviors and strategies individuals use to interact effectively with others. These skills encompass communication, active listening, attitude, and manners, all of which contribute to building positive relationships in the workplace with clients, coworkers, and supervisors.

- Workplace skills are essential for success in any job. These core competencies include the ability to understand instructions, solve problems, and collaborate effectively with coworkers and customers. They also include essential attitudes, such as professionalism and adaptability.
- Technical skills are specific, teachable abilities or knowledge required to perform particular tasks, often related to using tools, equipment, software, or specialized systems within a particular field or industry. These skills are foundational in the energy sector, enabling professionals to ensure that energy systems operate effectively, safely, and in line with industry standards.

Technical skills (55.8%) and workplace skills (53.5%) were the most frequently cited deficiencies by employers, with a clear need for improvement in both areas (Figure 12). This is followed closely by interpersonal skills, with (43.9%) of respondents indicating it is an area of improvement needed for the regional workforce. The survey findings suggest that a balanced focus on workplace, technical, and interpersonal skills is crucial for addressing the gaps in the region's energy workforce. The region could benefit from comprehensive training programs addressing hard and soft skill deficiencies.

*Figure 12: Percentage of employers indicating particular skillsets are lacking in their job applicants or employees*



# Training and Skill Development

## SECTION SUMMARY

- Survey respondents identified barriers for employees accessing training locations, limited opportunities, inadequate programs to address skill gaps, and high training costs. The most prevalent challenge, cited by 39% of energy employers, was the high cost of training, making it difficult for employees to access necessary certifications and training.
- 40% of survey respondents provide direct professional development opportunities or financial support for training to improve both soft and hard skills. These opportunities primarily come from established workforce development programs, such as apprenticeships, or employers offering specific training, certifications, and safety requirements.
- Key technical skills in demand include knowledge of electrical systems, mechanical proficiency, energy auditing and analysis, and expertise in programming and automation for smart grids and energy-efficient technologies.

## Accessing Trainings

Survey respondents indicated barriers to workforce training, including inaccessibility of training locations, a lack of opportunities, inadequate programs to address skill gaps, and the high cost of certifications. While survey data indicates that energy sector workers are gradually gaining awareness of training centers and career pathways existing training infrastructure, the survey indicates that workers experience challenges accessing relevant training and certifications. These access challenges are demonstrated in regional equity data and training distribution later in this report. Job seekers, particularly from underserved communities, experience additional challenges in accessing workforce training to enter and thrive in the energy sector.

Energy employer survey respondents) identified the high cost of training as the most prevalent challenge for employees in accessing necessary certifications and training (39% of respondents listed “training is too expensive” as the primary barrier, see Figure 13). Although regional programs and scholarships exist, training costs remain a barrier, particularly impacting individuals from low-income or underserved communities. Training programs that do provide the required certifications and skills are often prohibitively expensive, making it difficult for both employers to cover the costs and employees to afford the training themselves.

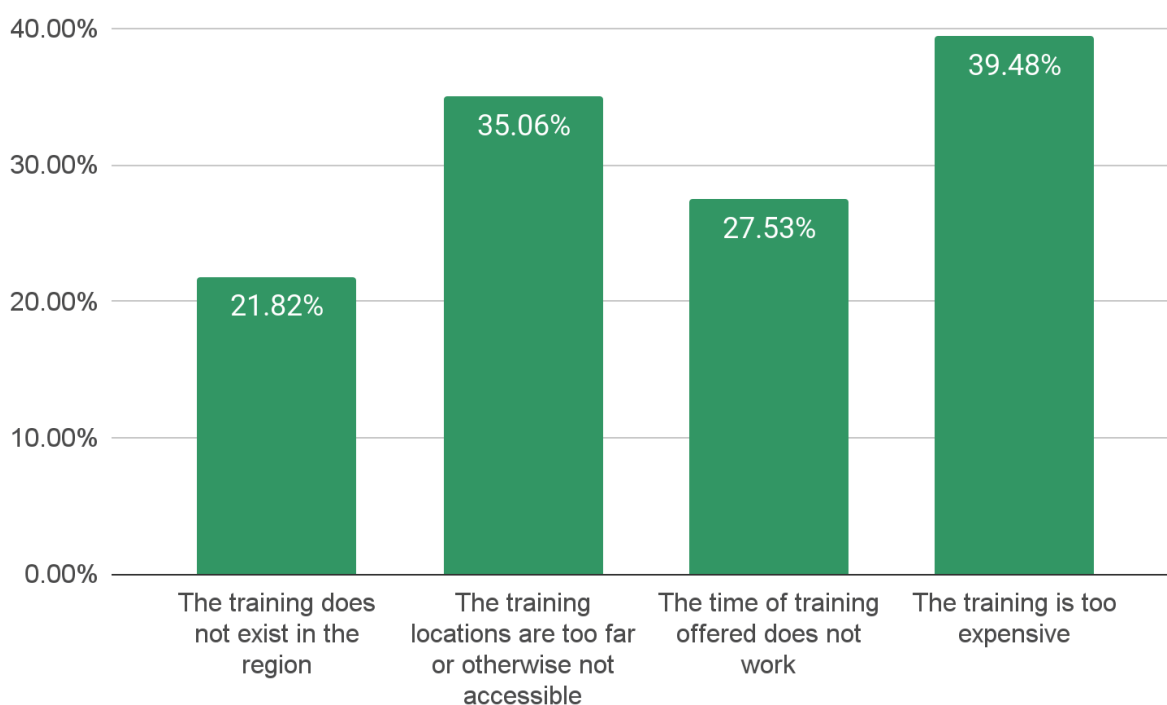
Training affordability is compounded by logistical challenges, including the distance to training locations, which 35% of respondents indicated as a significant barrier. Additionally, 27.5% of respondents reported that the timing of training sessions



conflicts with workers' schedules, further limiting access to skill development opportunities. Another 21.8% of respondents highlighted that the specific training they need is unavailable in the region, revealing a gap in the Inland Empire's training infrastructure.

Employers also identified additional challenges related to training accessibility, such as the higher costs associated with qualified workers. Licensed and certified workers often come with increased expenses for employers, such as higher insurance premiums and taxes. Collectively, these barriers highlight the need for investment in more accessible, affordable, and flexible training opportunities.

*Figure 13: Employers identify training and skill development challenges experienced by job seekers*



### *Direct Employer Training*

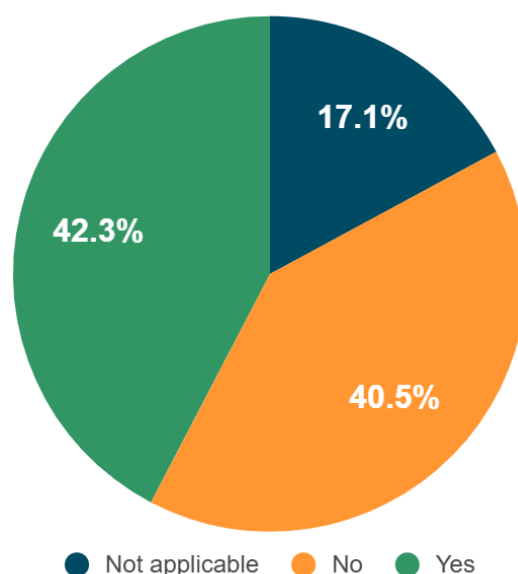
Approximately 40% of survey respondents indicated they offer direct professional development opportunities or provide financial support to access training to improve necessary (both soft and hard) skills. Respondents who offered training opportunities mostly came from established workforce development programs, such as apprenticeships, or employers offering specific training, certifications, and safety requirements or funds. Below is a categorized list of training from respondents:

- **Foundational and Safety Training:** Occupational Safety and Health Administration (OSHA) approved certifications, cardiopulmonary resuscitation (CPR)/first aid/automated external defibrillator (AED) training, personal protective equipment (PPE) usage and safety protocols, energy safety practices and procedures, safe working conditions, and conflict management.
- **Energy-Specific Technical Training:** Electrical and clean energy technologies certifications, solar panel installation, low-voltage, HVAC certifications, EV infrastructure training programs, energy efficiency, and use optimization.
- **On-the-Job and Hands-On Training:** Equipment operation, one-on-one driver training, machine handling, electrical work.
- **Apprenticeships and vocational training:** Electrical apprenticeships, union-sponsored trade apprenticeships, vocational programs in HVAC, plumbing, and electrical.
- **Online and remote training opportunities:** Information technology, renewable energy, marketing, energy transition software and tools, and industry-specific training through online courses (e.g., HVAC, National Comfort Institute (NCI), North American Technician Excellence (NATE), National Electrical Code (NEC), International Municipal Signal Association (IMSA).
- **Certifications and Sponsored Programs:** Employer-sponsored certifications or reimbursement for completing industry-specific licenses or certifications.
- **Employer-Sponsored Advanced Education:** sponsored classes, training, certifications, after-hours or evening programs, childcare support programs, incentives for additional training, and time allowance for training and exams.

### *Employer-Required Energy Certifications*

Because entry-level energy industry jobs are a new and growing field in the Inland Empire, job seekers are sometimes unaware of job requirements and do not know the minimum qualifications required for roles. While energy employers do not always require incoming energy professionals to have certifications, licenses, or training, 42.3% of energy employers require certifications from job candidates (Figure 14). With over 600 energy-related certifications available statewide, different occupations and roles require varying qualifications.

Figure 14: Employer demand for energy-related certifications



Employers also value interpersonal and communication skills, such as team collaboration, effective communication, and project management abilities. With the energy sector's growing complexity, regulatory and safety knowledge is also critical, especially regarding compliance with local, state, and federal energy regulations (e.g., OSHA standards and environmental policies). Based on the employer survey, we found that employers in the energy sector seek workers with a diverse skill set that spans technical and interpersonal abilities. Key technical skills in demand include:

- **Electrical systems knowledge:** Proficiency in installing and maintaining electrical systems for utilities and clean energy systems.
- **Mechanical proficiency:** Operating, maintaining, and repairing energy production equipment.
- **Energy auditing and analysis:** Assessing energy usage and recommending energy efficiency improvements.
- **Programming and automation:** Coding and operating automated systems in smart grids and energy-efficiency technologies.

Required certifications from energy employers are outlined in Table 4 below.

*Table 4: Required certifications disclosed by energy employers via energy workforce survey*

|                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| General Safety and Compliance Certifications | <ul style="list-style-type: none"> <li>• Occupational Safety and Health Administration (OSHA) Certification: compliance with occupational safety standards</li> <li>• Manufacturing Safety and Compliance (MSCH) Certification: state and federal manufacturing safety standards</li> <li>• Hazmat Certification: handling hazardous materials safely</li> </ul>                                                                                                                                                                                            |
| Energy and Renewable Energy Certifications   | <ul style="list-style-type: none"> <li>• Certified Energy Manager (CEM): energy management and efficiency</li> <li>• Renewable Energy Professional (REP): professional certification specializing in renewable systems</li> <li>• North American Board of Certified Energy Practitioners (NABCEP): certification for solar energy professionals</li> <li>• Certified Energy Auditor (CEA): specialized in energy efficiency audits</li> <li>• LEED Accredited Professional (LEED AP): expertise in sustainable building and environmental design</li> </ul> |
| Electrical and Technical Licenses            | <ul style="list-style-type: none"> <li>• Certified Journeyman and Apprentice Electrician: specializes in professional electrical work</li> <li>• Electric Vehicle Infrastructure Training Program (EVITP): specializes in EV charging systems</li> <li>• California Electrical License: required for electrical work in the state</li> <li>• Photovoltaic (PV) Installer Certification: for solar panel design, installation, and maintenance</li> </ul>                                                                                                    |
| HVAC and Mechanical Licenses                 | <ul style="list-style-type: none"> <li>• HVAC Certification: required for heating, ventilation, and air conditioning technicians</li> <li>• Specialized Equipment Handling License: operating machinery like forklifts and heavy equipment</li> <li>• California Refrigerant Certification: technicians handling refrigerants in cooling systems</li> </ul>                                                                                                                                                                                                 |
| Professional Engineering Certifications      | <ul style="list-style-type: none"> <li>• Professional Engineer (PE): highly regarded certification for advanced engineering roles, especially in energy and systems design</li> <li>• Energy Systems Engineer Certification: focuses on designing and managing complex energy systems</li> </ul>                                                                                                                                                                                                                                                            |
| Vocational and Hands-On Training             | <ul style="list-style-type: none"> <li>• Forklift Operation Certification: essential in warehousing and industrial roles</li> <li>• Building Performance Institute (BPI) Certifications: energy-efficient buildings</li> <li>• Welding Certification: for energy infrastructure and manufacturing</li> </ul>                                                                                                                                                                                                                                                |

## Employer and Worker Needs

### SECTION SUMMARY

- High-demand energy roles, such as carpenters, electricians, and construction laborers, need more skilled workers with specialized training, certifications, or experience.
- Employers prioritize experience over formal training and have limited outreach to diverse communities, hindering their ability to fill job openings with qualified local candidates.
- Employers recognize the growing demand for battery storage, EV infrastructure, and clean energy roles. Still, more training programs and the skills required for these emerging sectors must be available.
- Workers, especially in rural and non-metropolitan areas, face challenges finding accessible and affordable energy sector training programs, which can limit their job competitiveness.
- Workers lack specific skills and knowledge to meet employer requirements and prepare for emerging roles in the energy sector. To bridge the gap between existing skills and employer demands, workers require targeted training and re-skilling initiatives.

### Employer Needs

Key findings from the survey reveal that while there are numerous energy sector job openings, especially in high-demand roles, employers face critical challenges in sourcing skilled workers with specialized training, certifications, or experience. These findings emphasize the need to address workforce gaps to ensure a well-prepared talent pool for the energy sector's future needs. From the survey data, four main areas of employer need were identified:

1. **Filling Job Openings:** High-demand roles in the Inland Empire include carpenters, construction laborers, automotive service technicians and mechanics, and electricians. As these positions become available, employers are seeking skilled workers to fill them.
2. **Effective Hiring Practices:** Employers often prioritize experience over formal training and have limited outreach to diverse communities, excluding potential workers. This creates a significant barrier to filling job openings with qualified local candidates.
3. **Addressing Skill Shortages:** Many employers have difficulty recruiting and retaining employees with the necessary certifications or relevant work

experience. There is a notable gap between available job opportunities and the skills of the current workforce.

4. **Keeping Up with Future Industry Trends:** Employers recognize the need to prepare for emerging roles in battery storage, EV infrastructure, and clean energy project management. These sectors are expected to experience significant growth, requiring new skill sets and specialized knowledge.

Overall, there is a mismatch between available training programs and the skills required for energy-related roles, including emerging clean energy occupations.

### *Worker Needs*

Despite growing job opportunities and projected high demand in the energy sector, job seekers face several barriers to securing employment, particularly in rural and non-metropolitan areas. Inland Empire residents struggle to access local, affordable training for careers in the energy sector. Key obstacles include:

- **Access to Job Opportunities and Training:** Many workers face difficulty locating accessible and affordable training programs, especially within the energy sector, which limits their ability to compete for job opportunities.
- **Skill and Knowledge Gaps:** The current workforce lacks specific skills or knowledge, which hinders workers' ability to meet employer needs, adhere to industry standards, or prepare for future job roles in emerging energy fields.
- **Training and Development Needs:** Workers need training programs and re-skilling initiatives to bridge the gap between the skills that employers require and the capabilities of the current workforce.
- **Resource Gaps:** Limited resources (financial, infrastructural, or logistical) pose challenges to training providers and job seekers.

## **Regional Training Assessment**

The Inland Empire is home to a rapidly growing demand for skilled energy workers driven by the increased opportunities for energy occupations across key industries such as clean energy, construction, HVAC, and electrical. As the region shifts toward energy efficiency projects and clean energy technologies, the need for an adequately trained workforce has become even more critical. Local educational institutions, workforce development organizations, and employers collaborate to create pathways for workers into these high-demand fields. However, despite the expansion of training programs,

programs have not fully met the evolving needs of the energy industry and are not accessible enough to diverse populations.

This section assesses the availability of workforce training programs in Riverside and San Bernardino counties, focusing on aligning training content with the specific needs of local employers in the energy sector. It explores key factors such as the types of training offered, delivery methods, geographic accessibility, and equity considerations for underserved populations. Additionally, it identifies gaps in existing training offerings and examines barriers that workers face in accessing these programs, including challenges related to geographic location, cost, and lack of awareness.

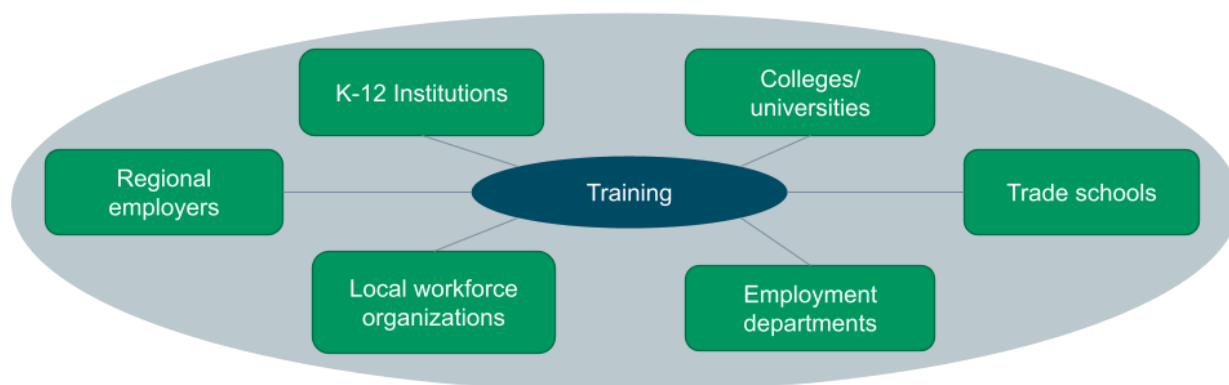
## Regional Training Providers and Stakeholders

### SECTION SUMMARY

- Collaboration between local stakeholders, including educational institutions, colleges, universities, K-12 schools, trade schools, workforce development agencies, community organizations, labor unions, and employers is essential.
- We identified over 100 training providers in Riverside and San Bernardino counties offering 360 energy-related training opportunities. Colleges, universities, and K-12 institutions provide nearly half of these training opportunities, emphasizing their key role in developing the energy workforce.

Riverside and San Bernardino counties contain a diverse and growing network of reputable educational institutions and community-based organizations committed to training the region's existing and incoming workforce. As the energy sector in the Inland Empire expands, it is critical that the region continues to build and strengthen its workforce development and training infrastructure. Continued expansion of the energy sector calls for enhanced collaboration between local stakeholders, including educational institutions, colleges, universities, K-12 schools, trade schools, workforce development agencies, community organizations, labor unions, and employers. These stakeholders can close workforce readiness gaps and improve existing training pathways, ensuring the region's workforce development ecosystem is prepared for traditional energy efficiency and emerging energy-related roles.

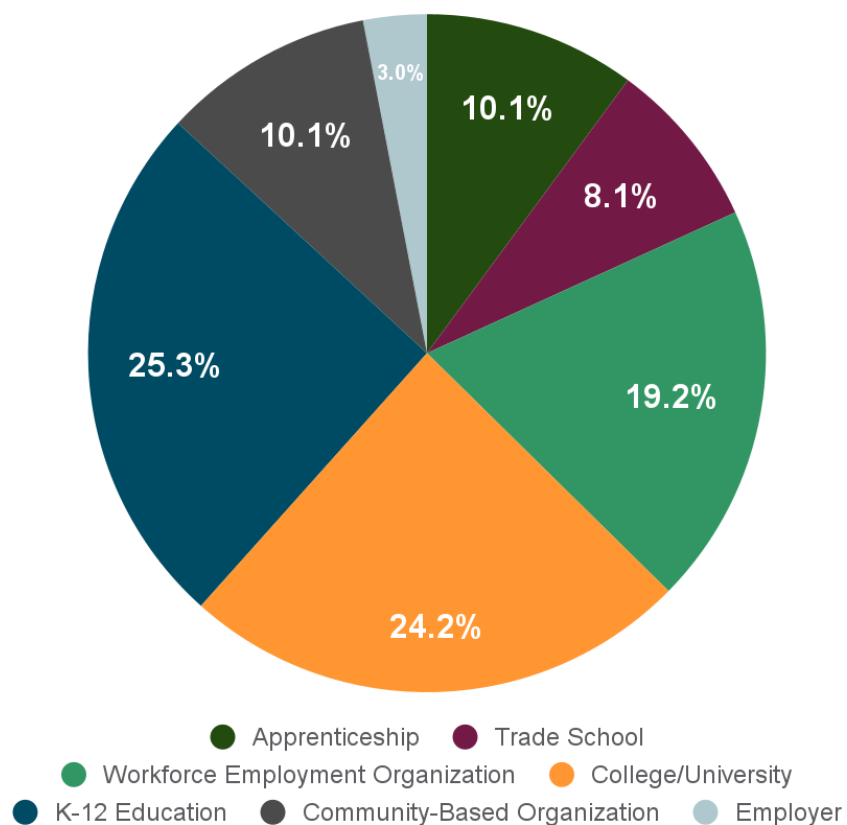
*Figure 15: Regional stakeholders offering training resources and programming to support the workforce*



To understand the available training offerings, data from various local and state databases were gathered to create a comprehensive list of over 100 training providers in Riverside and San Bernardino counties. These providers offer 360 training opportunities across multiple energy industries. Notably, nearly half of these opportunities are provided by educational institutions such as colleges and universities and K-12 institutions, highlighting the critical role formal education institutions play in shaping the energy workforce (Figure 16).



Figure 16: Training providers identified in the region by institution type



## Key Training Stakeholders

### SECTION SUMMARY

- Colleges and universities can collaborate with local energy companies to offer apprenticeships, hands-on experience, and industry-recognized credentials. However, to meet the evolving workforce needs in the energy sector, curricula must be updated to align with emerging technologies like electric vehicles and smart grids, and access and offerings in underserved communities must be expanded.
- K-12 institutions provide STEM education and offer Career Technical Education (CTE) programs to prepare students for careers in the energy sector. While many schools offer exposure to energy-related fields through specialized programs and internships, only 39 energy-related training pathways exist within local K-12 schools, with few integrated into CTE programs.
- Apprenticeship programs and trade schools prepare the Inland Empire workforce for skilled trades in electrical work, construction, HVAC, solar installation, and clean energy technologies. Challenges include geographic accessibility, high training costs, and a need

for more substantial alignment with regional workforce needs.

- Workforce development organizations and local employers play a key role in building a skilled energy sector workforce by providing on-the-job training, career services, and specialized programs in high-demand occupations, and existing programs provide value opportunities to energy-related workforce development.

## *Colleges and Universities*

Riverside and San Bernardino counties host several well-regarded colleges and universities. These institutions offer academic programs aligned with local energy sector needs, providing clear pathways to careers in both traditional energy efficiency and emerging energy fields. Local universities offer degrees in environmental sciences, engineering, and energy systems. Local community colleges provide certifications and associate degrees in clean energy and technical trades, such as HVAC, electrician technician training, and solar energy installation. See **Appendix A** for a full list of regional educational institutions and their relevant training offerings.

Many colleges collaborate with local energy companies, unions, and workforce organizations to offer apprenticeships in clean energy, electrical work, and grid maintenance. These partnerships provide students with hands-on experience and industry-recognized credentials, increasing their employability. Additionally, regional institutions lead research in clean energy technologies, driving innovation and ensuring academic programs remain aligned with industry advancements.

Despite these strengths, challenges persist. Educational programs must adapt to technological advancements like electric vehicles and smart grids, which require investment in curriculum development, faculty training, and infrastructure. Many colleges serve underserved, low-income, and minority communities, where students need scholarships, mentorship, and training support to enhance equitable access to energy careers.

Of the 24 higher education institutions in the region, 21 offer at least one energy-related training pathway, indicating a strong commitment to workforce development. See **Appendix A** for a full list of regional institutions and their relevant training offerings. However, expansion in emerging energy fields and more equitable access to these programs are needed to meet the evolving needs of the energy sector and ensure a skilled, diverse workforce in the Inland Empire.

## *K-12 Educational Institutions*

K-12 educational institutions are a critical part of the region's educational ecosystem, laying the foundation for future careers by providing students with essential knowledge and skills. K-12 schools are increasingly emphasizing STEM—science, technology, engineering, and math—education that is integral to careers in the energy sector. Through specialized programs, internships, and industry partnerships, K-12 schools expose students to energy careers and provide a glimpse into pathways in the energy industry. This early exposure builds a pipeline of future workers and raises awareness about the opportunities within the energy workforce.

K-12 schools, particularly middle and high schools, often offer Career Technical Education (CTE) programs that allow students to explore potential career paths. CTE pathways blend theoretical and applied knowledge, preparing students for direct entry into the workforce or further education. California has 15 CTE industry sectors. CTE pathways typically reflect the state's workforce needs, but a similar approach should be applied regionally. CTE offerings in California are typically focused on health science, information technology, and engineering. With the Inland region's growing energy industry and emphasis on sustainability, it should develop energy-related CTE pathways to encourage students to pursue energy-related careers.

While Riverside and San Bernardino school districts offer a variety of CTE pathways, only a small number focus on energy-specific fields. Across both counties, only 39 energy-related training pathways are available within K-12 institutions, with only a few incorporated into CTE programs. For a full list of K-12 educational institutions offering energy-related training, see [Appendix A](#). Expanding these programs and introducing new energy-focused pathways will better prepare students for careers in clean energy, infrastructure, and sustainable development and better equip them with the foundational and technical knowledge needed for energy-related professions.

CTE aligns education with regional workforce needs and creates opportunities for students to enter high-demand industries like the energy sector.

## *Apprenticeship Training and Trade Schools*

Apprenticeship programs and trade schools are integral to workforce development in the Inland Empire. They provide hands-on training and classroom instruction that equips individuals with the skills and experience for skilled trades such as electrical work, construction, HVAC, solar installation, manufacturing, and clean energy technologies. Apprentices work under the guidance of experienced professionals while attending local technical schools, community colleges, or training centers to

complement their learning. Upon completion, they earn industry-recognized credentials or certifications, ensuring they are workforce-ready.

Trade schools offer specialized training aligned with industry standards, preparing students to meet the demands of the energy sector and helping to prepare the region's workforce to support its evolving energy needs.

Despite the benefits of apprenticeships and trade schools, several challenges remain. These programs must better align with regional workforce needs and remove barriers for prospective trainees, such as geographic accessibility and the high cost of training. Building stronger collaboration between industry partners, including local energy companies, is critical to ensure that apprenticeship programs are responsive to employers' skill requirements. Additionally, apprenticeship programs should incorporate more soft skills training—such as communication, teamwork, and job readiness—to meet the soft skills gap identified by regional employers.

While apprenticeships provide a valuable pathway to skilled employment, the average 2-4 years of training they require can be a financial challenge for some job seekers. Furthermore, apprenticeship centers are concentrated in the most populous areas of Riverside and San Bernardino counties, limiting access for individuals in more rural or underserved communities (see Figure 21 in the regional energy map section). Expanding access to apprenticeship opportunities in these regions and improving affordability will be essential to building a stronger career pipeline in the energy sector.

### *Workforce Development Organizations and Local Employers*

Workforce development organizations and local employers are pivotal in addressing job seekers' needs and supporting their career growth. Workforce development organizations provide on-the-job training, educational opportunities, and hands-on experience in high-demand fields such as HVAC, electric vehicles, and solar energy. Many also offer career services, job placement assistance, and professional development resources, helping workers build the skills for long-term success in the energy sector. Local employers offer on-the-job training that enables new and existing employees to gain the skills and knowledge required for their positions. This model benefits both employers—by ensuring a skilled, ready workforce—and employees who gain valuable experience to meet industry demands. Approximately 40% of employers surveyed offer some form of training to employees. Employers understand which skills are necessary for their employees, so they are well-equipped to address skill gaps. Some employers offer support services to assist employees with obtaining certifications.

Workforce, Education, and Training (WE&T) programs, funded through ratepayer funds and offered by Portfolio Administrators, advance energy efficiency initiatives and shape career pathways in the state and regional energy sectors. These programs provide specialized skills for energy-efficient construction, retrofitting, and energy-saving technologies. Many programs include no-cost resources for underserved communities. WE&T programs help increase training accessibility in hard-to-reach areas, filling gaps where larger training providers may lack the capacity or reach (see Appendix C for a full list of offerings).

Some of the programs available in the region include the statewide Energy is Everything program, administered by investor-owned utilities (IOUs) and the ACES program, administered by the Southern California Regional Energy Network (SoCalREN). Both Energy is Everything and the ACES program engage K-12 students to learn essential energy skills and provide hands-on energy careers guidance and pathways. These education initiatives are built to provide resources to underserved communities and offer no-cost programming with Spanish offerings to reach a larger audience. Additionally, the statewide IOU-administered Energized Careers (partnered with Inland Empire Electrical Training Center) and the SoCalREN-administered Green Path Careers program provide training and job placement for disadvantaged workers. These programs provide youth and emerging professionals with hands-on experience in green energy jobs, support contractors entering the energy efficiency sector, and offer mentorship and resources to enhance industry engagement. These programs prepare individuals for the growing clean energy sector, focusing on accessibility, skills development, and sustainable job opportunities.

There is a concerted effort from workforce organizations in the region to shift away from reliance on lower-wage industries and create sustainable, high-quality jobs within the green sector. Workforce organizations and local employers are working together to offer training tailored to industry needs, with a growing emphasis on clean energy and infrastructure careers. These programs respond to increasing demand for green energy jobs and support the transition to sustainable energy solutions. However, the programs could improve by connecting workforce organizations with local employers to create training pathways that align with industry requirements.

### *Key Training Implementers*

Energy-related training comes from a wide range of institutions and workforce organizations. A few key institutions stand out for their leadership, impact, and vision:

- Riverside Community College District (RCCD) is a prominent training entity offering workforce development programs in clean energy, energy efficiency,

and construction trades. RCCD is part of the broader California Community Colleges system, which serves as an essential resource for equipping workers with the skills needed for high-demand energy jobs.

- San Bernardino County and the San Bernardino Community College District (SBCCD) provide specialized training programs that support careers in energy systems, HVAC, and electrical trades. These programs are available across several campuses and contribute to meeting the growing demand for skilled workers in energy efficiency and emerging clean energy industries.
- GRID Alternatives Inland Empire, a leading community-based organization, runs the Clean Tech Training Center (CTTC) in Riverside. The CTTC offers hands-on training in solar energy installation, electric vehicle service, and battery energy storage. Notably, GRID Alternatives prioritizes equitable access to training, focusing on disadvantaged communities and providing no-cost training.
- Inland Empire/Desert Regional Consortium connects K-12 and community colleges with programs tailored to meet the growing demand for careers in energy and infrastructure.
- Inland Empire Labor Institute (IELI) leads the PlugIn IE initiative, focusing on union-led training programs in energy and water infrastructure and zero-emission transportation. The primary goal of the training programs is to provide equitable access to green jobs and support the state's climate adaptation needs.

## Training Gaps and Opportunities

### SECTION SUMMARY

- Most available training programs focus on technical and foundational skills within the existing energy sector; the most common programs are in technical trades such as welding, electrical work, construction, and HVAC.
- The most common training pathways in the region are general training courses covering foundational and specialized energy-related skills, followed by certifications and apprenticeship programs.
- There are gaps in advanced clean energy training, particularly in clean energy technology, energy storage systems, innovative grid technologies, and electric vehicle infrastructure; additional training in energy auditing, green building standards, and emerging technologies like hydrogen and geothermal systems is needed to meet growing skill

demands in the clean energy sector.

While local institutions are expanding their training offerings to meet industry and employer needs, significant gaps remain in energy-related training across the Inland Empire. Local entities must identify missing offerings and assess which programs must be developed to meet evolving industry demands. Currently, most available training programs focus on technical and foundational skills within the existing energy sector. Figure 17 provides a breakdown of available training by industry, showing that the most common programs are in technical trades such as welding, electrical work, construction, and HVAC. Limited opportunities exist to explore career pathways and required skills in emerging fields. As the region navigates the transition to a more sustainable energy future, training programs should reflect the job opportunities available in these emerging sectors.

Although there is a high demand for workers in the skilled and technical trades, training for emerging fields is essential to building an energy workforce with skills and training needed for all energy-related fields. There is a shortage of training options in emerging and expanding fields like clean energy, architecture/design, and mechanical engineering, which are critical to meeting the growing needs of the energy sector.

*Figure 17: Count of training pathways available in the region by subject matter*

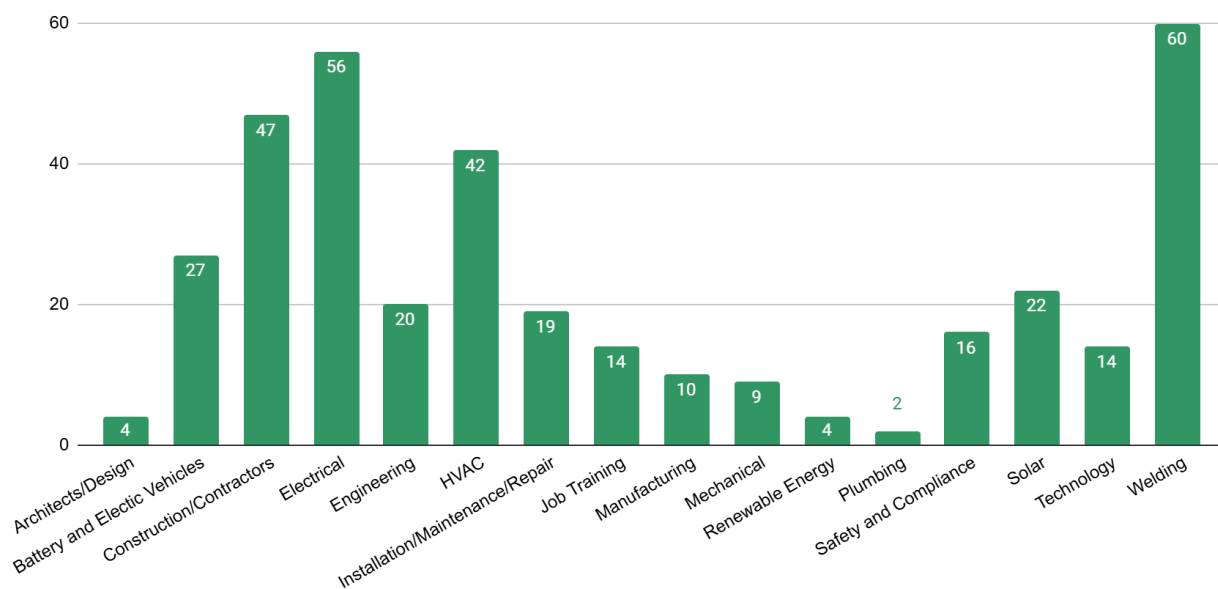
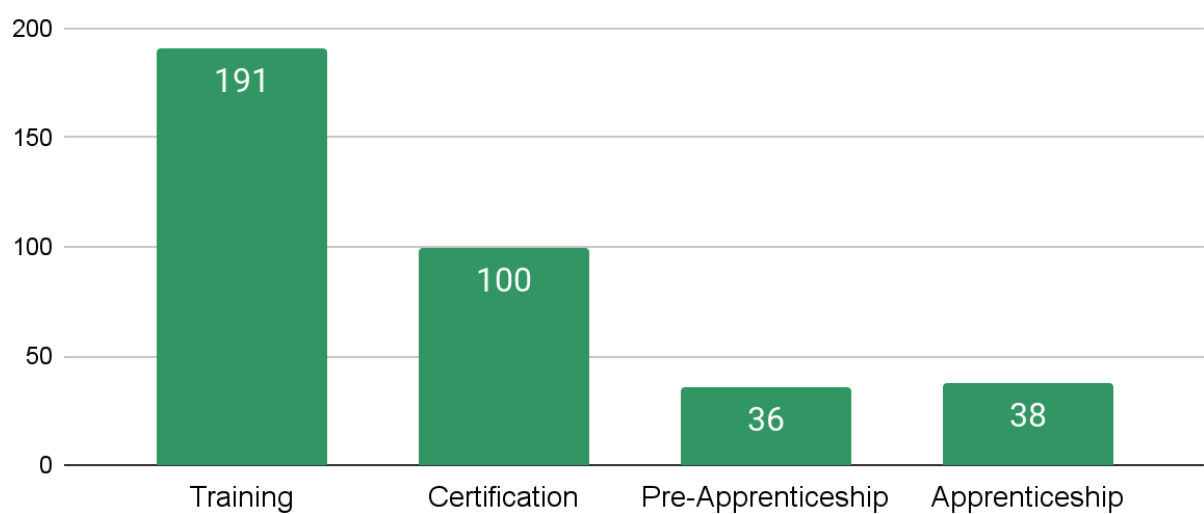


Figure 18 provides an overview of training pathways within the region. It shows that general training, such as courses on energy-related topics or hands-on skills, is the most common pathway offered in the area, followed by certifications and apprenticeship programs. General training covers foundational skills and specialized knowledge that prepare individuals for a wide range of roles within the energy sector. Through general training, individuals can learn technical and practical skills to apply to their roles and meet transferrable skill demands preferred by employers. This data aligns with feedback from the energy employer survey, which disclosed that the minimum education level required is typically a high school diploma or relevant experience, which is usually preferred when reviewing and selecting job applicants. Although some employers request certifications or higher education, most require training or experience in basic technical skills. General training that introduces core concepts and prepares energy workers to fulfill their specific job duties is most available within the region as it is sufficient for most energy-related roles, as seen in *Table 3: Occupations’ education requirements and on the job training availability* (reference page 25), where a high school diploma or equivalent is the entry-level education requirement. Typically, employers provide on-the-job training to support employee upskilling.

Figure 18: Count of training available in the region by training type



Gaps in Training Related to Clean Energy Systems

Currently, available training offerings focus primarily on skilled trades in clean energy and traditional trade careers. However, there are limited options in advanced clean energy training, such as solar and wind technology. Current offerings cover basic installation, but advanced training on system design, troubleshooting, and large-scale



clean energy is scarce. Training on emerging electrification efforts, such as battery storage and smart grid technologies is also scarce but will be necessary to meet skill demands within the clean energy space. New training could focus on energy storage systems and integration into modern grid infrastructure, which will be important as clean energy systems expand.

### *Opportunities for Energy Efficiency Extension Through Transportation Electrification*

As transportation electrification becomes more prominent in the region, electric vehicle infrastructure will require specialized knowledge and skills related to EV chargers and power systems. As EV chargers become more common, training employees on installing and maintaining EV charging stations and high-voltage safety and diagnostics will be essential.

### *Opportunities to Increase Energy Efficiency and Auditing*

Buildings and residences have high energy demand and will need to increase energy efficiency to reduce grid strain and energy costs as regional energy demand increases. Training programs must provide employees with the necessary skills to assess energy usage and recommend cost-effective improvements for commercial and residential buildings. Moreover, green building standards and Leadership in Energy and Environmental Design (LEED) training can provide employees with a comprehensive education on green construction practices. Building usage and energy auditing should be incorporated into local training pathways, especially within clean energy technologies or construction industries. There are currently no professional firms that provide auditing services located in the Coachella Valley; green building employer services must expand to fulfill the energy sector's anticipated needs.

### *Emerging Technologies*

Though training pathways within prominent clean energy industries such as solar and wind are available throughout the region, training in emerging technologies is limited. Energy generation using hydrogen or geothermal systems is becoming more available. Still, employees in the trades will need specialized instruction to handle and apply the new technologies, which must be included in performing these roles correctly. As employees transition to new roles from traditional fossil fuel jobs, cross-training from one role to a new role is an underdeveloped area and will need to be added as energy infrastructure changes.

Table 5: Growing careers within the clean energy sector and anticipated duties<sup>16</sup>

| Industry                                        | Job Title                           | Anticipated Duties                                                                                      |
|-------------------------------------------------|-------------------------------------|---------------------------------------------------------------------------------------------------------|
| Clean Energy Development                        | Solar photovoltaic (PV) installers  | Installing and maintaining solar panels for residential, commercial, and industrial purposes            |
|                                                 | Wind turbine technicians            | Servicing and repairing wind turbines                                                                   |
|                                                 | Hydroelectric plant operators       | Managing small-scale hydroelectric systems                                                              |
| Energy Storage and Grid Modernization           | Battery engineers and technicians   | Developing and maintaining energy storage systems                                                       |
|                                                 | Smart grid specialists              | Designing and managing advanced electrical grids                                                        |
|                                                 | Energy systems analysts             | Analyzing and optimizing energy systems to ensure efficiency and reliability                            |
| Sustainable Construction and Building Retrofits | Green building designers            | Specializing in design practices, prioritizing the use of sustainable materials and techniques          |
|                                                 | Energy auditors                     | Evaluating energy efficiency in buildings and providing recommendations for improvements                |
|                                                 | LEED specialists                    | Overseeing and certifying that construction projects meet energy efficiency and environmental standards |
| Electrification and Transportation              | EV technicians                      | Maintaining and repairing electric cars, buses, and trucks                                              |
|                                                 | Charging infrastructure specialists | Planning, installing, and maintaining EV charging networks                                              |
|                                                 | Engineers                           | Advancing technological developments for changing energy infrastructure                                 |

<sup>16</sup> Department of Energy, United States Energy & Employment Report 2024 and University of Pennsylvania, Powering the future: explore the rise of clean energy jobs.

## Training Modalities

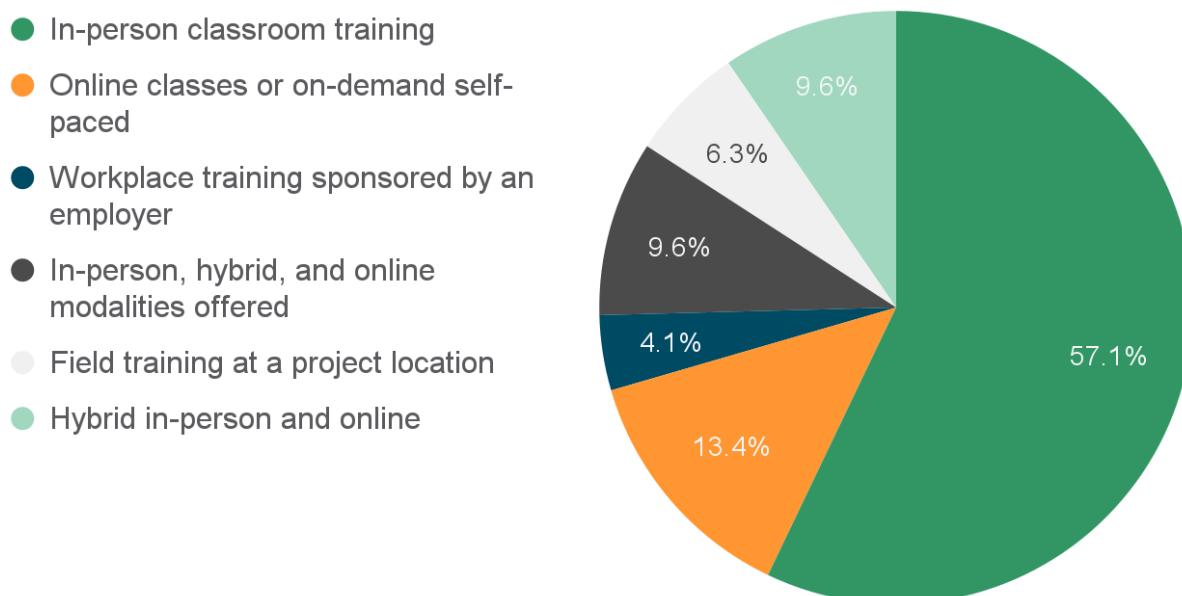
### SECTION SUMMARY

- 57% of regional energy sector training is delivered through in-person classroom instruction, which presents barriers related to travel, time commitment, and costs, particularly for workers in rural or underserved areas.
- 10-13% of regional training is offered through online or on-demand self-paced courses, which provide flexibility but may need more hands-on experience and face access issues due to limited technology.

In Riverside and San Bernardino counties, 57% of available energy sector training is delivered through in-person classroom instruction (Figure 19). While this traditional format allows for direct interaction between instructors and students, it also presents several barriers to accessibility. In-person training requires participants to travel to designated training centers, which can be challenging for workers in rural or underserved areas where training facilities may be limited or far from their homes. Additionally, the time commitment involved in attending in-person classes can be difficult for workers who need to balance training with other responsibilities, such as family or work obligations. The costs associated with attending in-person training, including travel expenses, can further limit access, especially for low-income workers.

Alternative modalities like online or on-demand, self-paced courses represent only 13% of the available offerings. These options provide greater flexibility for workers who cannot commit to fixed schedules or travel long distances, but they may lack the hands-on experience needed for technical roles. Furthermore, many workers have limited access to technology or reliable internet, making online training less accessible. Hybrid models, which combine in-person and online elements, offer a promising solution, but they currently represent only 10% of the region's available training programs.

Figure 19: Percentage of training modalities identified



## I-REN Regional Equity, Employer, and Training Map

### SECTION SUMMARY

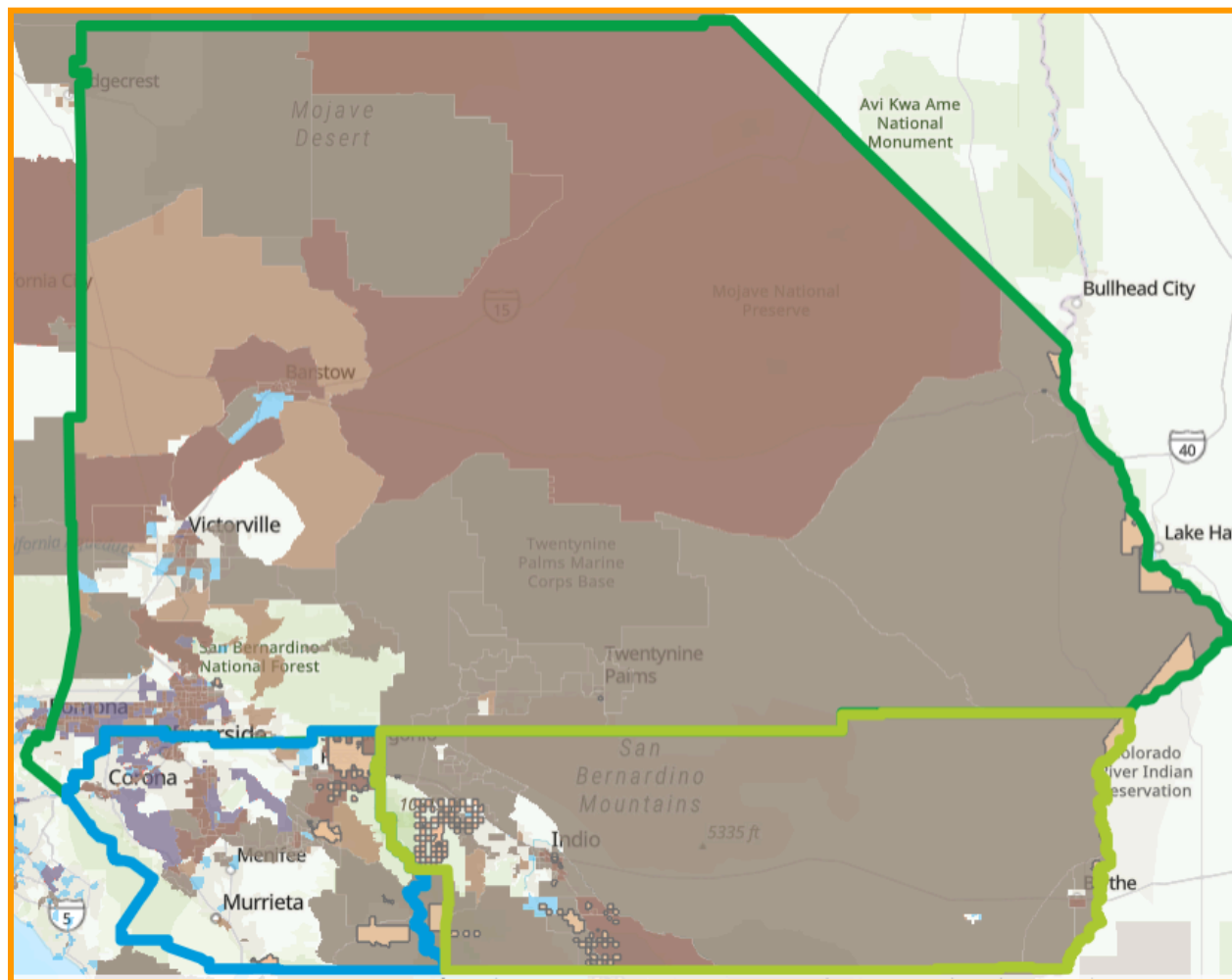
- A regional equity map helps to identify underserved communities and integrate equity demographics into program planning, ensuring expanded programming reach to these areas.
- The equity map is enhanced with an employer heat map showing the distribution of energy employers across the Inland Empire. This map reveals that areas like the high and low deserts have limited energy employment opportunities.
- The locations of training providers show that colleges and universities have the broadest reach, including rural areas, while the rest of the training is concentrated in urban hubs.

I-REN serves the workforce of Riverside and San Bernardino counties by providing community members access to relevant training and employment resources. I-REN developed a regional equity map<sup>17</sup> highlighting regional equity data, such as disadvantaged communities in the I-REN service territory with the integration of equity demographics into program planning, organizations like I-REN can gain a deeper understanding of the region's population and socioeconomic conditions and identify

<sup>17</sup>Regional Equity Map, <https://www.iren.gov/177/Regional-Equity-Maps>

gaps in access to critical resources. The information in the map is essential data to expand programming reach to disadvantaged communities within Riverside and San Bernardino counties.

*Figure 20: I-REN equity map before adding employer and training data*



CVAG Territory Boundary



WRCOG Territory Boundary



SBCOG Territory Boundary



Underserved: Federally Recognized Tribal Lands



Underserved: DAC per Section 75005 of Public Resources Code



Underserved: Low-income per Section 39713 of Health & Safety Code



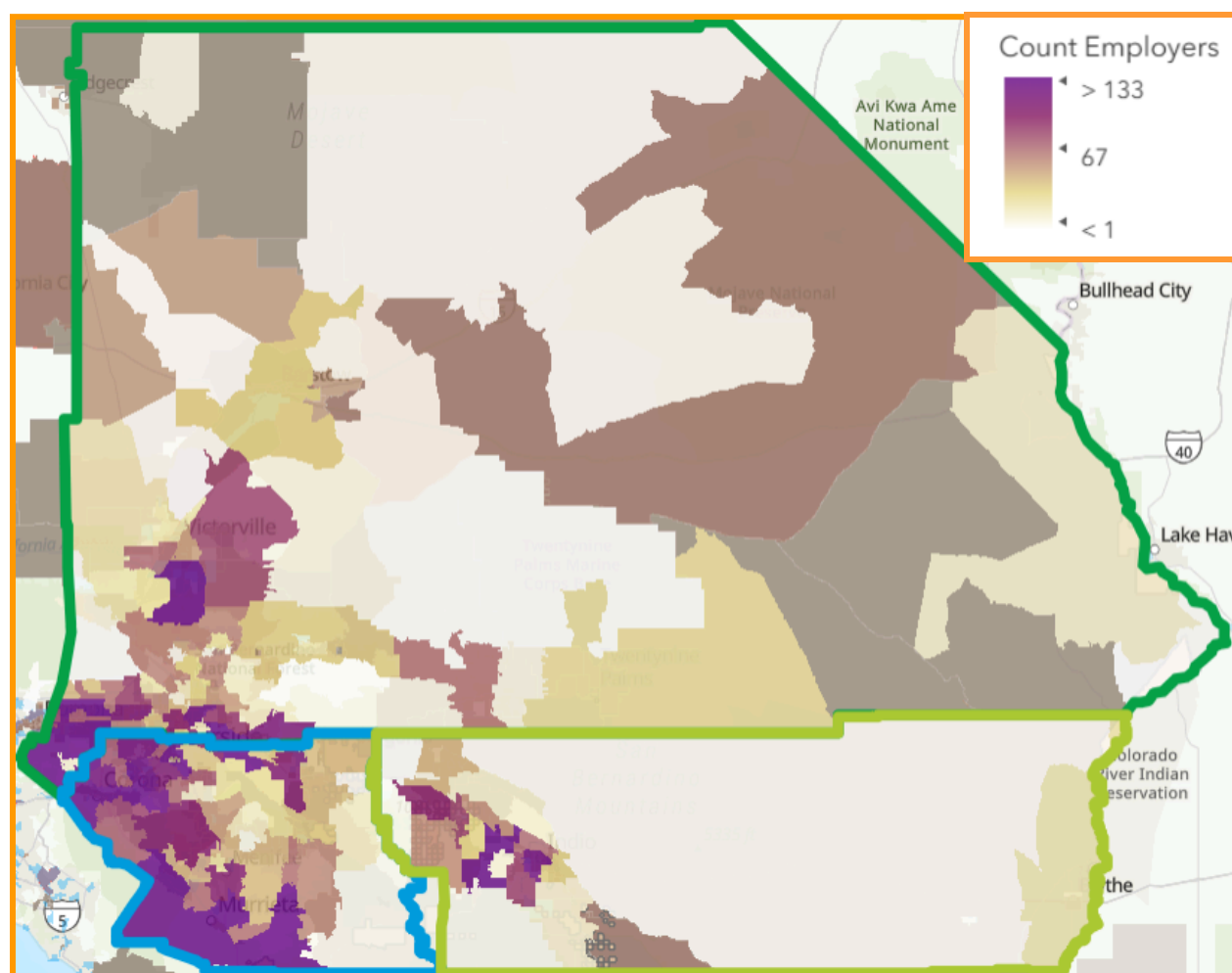
Underserved: CalEPA/CalEnviroScreen DAC



I-REN's regional equity map has revealed significant gaps within the Inland Empire region caused by the underrepresentation of minorities, women, and other marginalized groups in energy-related jobs. Additionally, rural and low-income communities across the Inland Empire face barriers to accessing training resources. To enhance the regional equity map, I-REN has integrated additional components using employer and training data on where job opportunities and training accessibility are limited in the region.

**Employer Heat Map:** The regional equity map now features a heat map that illustrates the distribution of energy employers by zip code and the total number of employers within each area. Users can interact with the map by clicking on individual employers to view detailed information, including company size and industry focus. In Figure 21 below, areas highlighted in a purple gradient indicate a higher concentration of employers. The lighter tan shade displays the low empower areas. Based on this map, it is clear that areas within the high and low deserts have low energy employment opportunities.

Figure 21: I-REN regional equity map and energy-related employer heat map

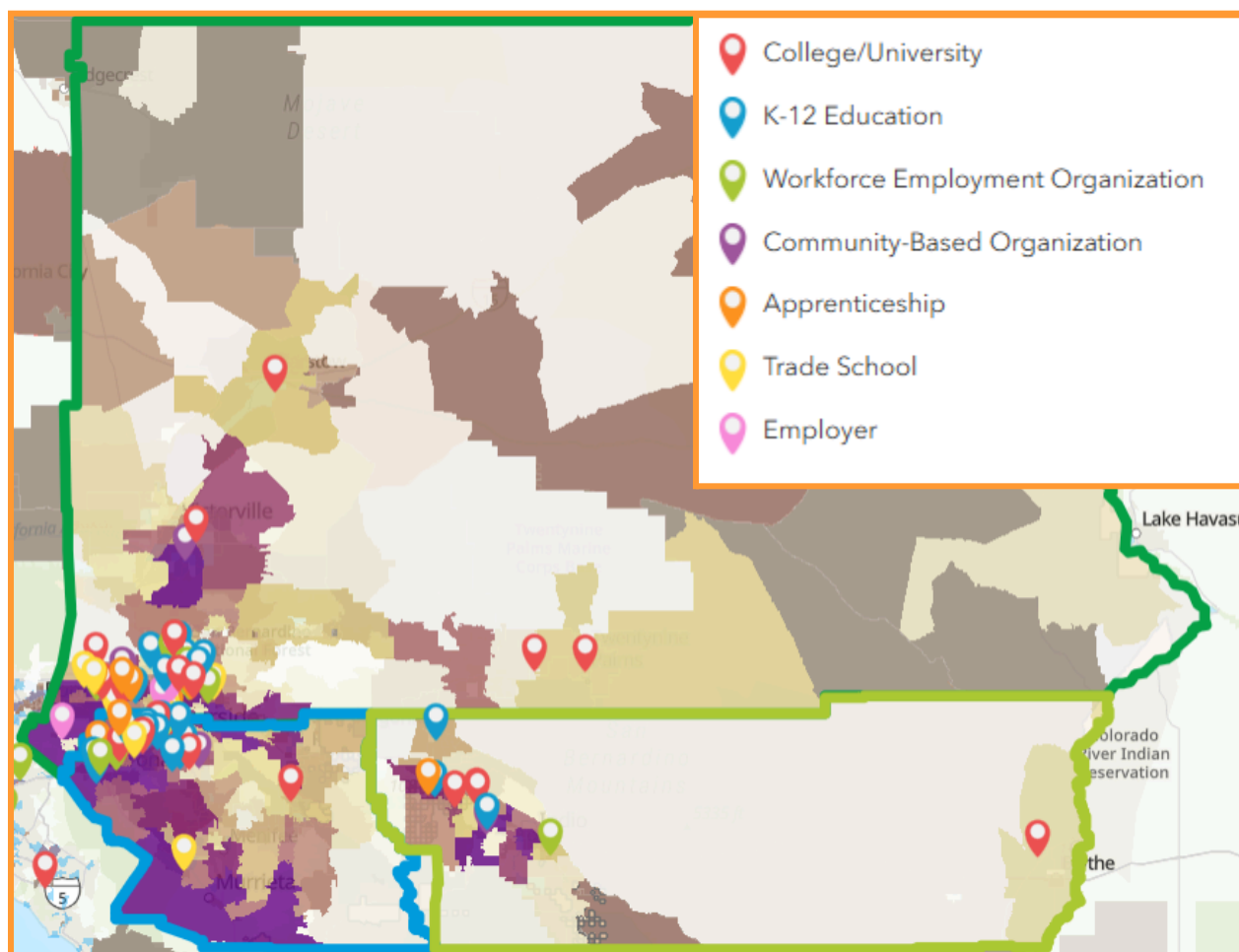


**Training Provider Pinpoints:** The map includes visual markers (pinpoints) indicating the locations of training providers, color-coded by the industry. By clicking on these pinpoints, users can access a list of available training programs and detailed information on each program, such as Training topics offered, locations of training providers, available incentives, program costs, and time commitment.

Training institutions are concentrated in major cities and populated regions. Colleges and universities have the most significant reach, with locations in both counties and harder-to-reach areas. This map aligns with our compiled data, showing that most training institutions are concentrated in the most populated areas. The geographic mapping indicates that colleges and universities (the red pinpoint) have the largest geographical spread in the region, thus providing opportunities for more rural communities to access energy-related training opportunities. K-12 institutions also offer many programs, but these training offerings are limited to school districts and sites' reach and are primarily concentrated in the urban hubs. The blue pinpoints in Figure 22

demonstrate that energy-related training programs are available in school districts with high job availability and major cities within the Inland Empire.

*Figure 22: Updated I-REN regional equity map with an employer heat map and training provider pinpoints*



## Conclusion and Recommendations

The Inland Empire is developing into a hub for the energy industry, and is projected to gain thousands of quality jobs over the next decade and beyond. To ensure local employers and job seekers can successfully build a skilled workforce, the region will need a comprehensive approach that addresses the challenges faced by employers and job seekers, leverages strategic partnerships, and incorporates education and resources tailored to the region's unique economic needs. This regional analysis and recommendations section offers recommendations to enhance and expand training programs to develop a skilled energy workforce that meets both industry standards and the evolving needs of the region.



## Employer Recruitment and Retention of Skilled Workers

### SECTION SUMMARY

- The Inland Empire's energy sector faces competition from retail, healthcare, manufacturing, and logistics industries. Still, energy-related occupations offer more stability due to consistent demand driven by population growth and the transition to clean energy.
- Energy-related jobs in the region are expected to grow by 20% between 2020 and 2030, with over 167,000 job openings anticipated due to retirements and transfers. These jobs require job seekers to have the necessary training, certifications, and skills.
- Employers should communicate job requirements, certifications, and training opportunities to help job seekers prepare for careers in the energy sector, ensuring long-term retention and sector stability.

The Inland Empire's energy sector must compete with other key regional industries, including retail, healthcare, manufacturing, and education. While logistics and transportation have historically been major drivers of local employment, recent downturns in these sectors—due to reduced freight volumes and slowed supply chains—have created instability. These industries are also under pressure from increasing environmental regulations.

In contrast, energy-related occupations offer stability. Energy jobs are essential and less susceptible to market fluctuations, with demand driven by population growth and the global transition to clean energy. Additionally, sectors like transportation, construction, and manufacturing will increasingly integrate electrification, further boosting energy job demand. The energy industry employs over 8 million professionals across the United States; California has approximately 956,400 residents in energy-related roles. Within the Inland Empire, high-demand energy occupations are projected to increase by 20% on average between 2020-2030. Energy-related occupations are expected to see a wave of retirement or transfers, which is anticipated to provide over 167,000 job openings in the region.<sup>18</sup>

To successfully fill these open positions, job seekers must have the necessary training, certifications, and skills to meet employer preferences and requirements. Ensure job seekers understand the certifications, licenses, and training required for their roles, which is crucial for setting clear expectations. By providing clear job descriptions and certification requirements during the hiring process, employers can equip potential

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<sup>18</sup> Data from the Bureau of Labor Statistics' Employment Projections by Occupation 2020-2030 Riverside-San Bernardino-Ontario, CA Metro Area

employees to plan their career paths and understand what is expected of them. Employers should maintain open lines of communication and regularly update employees on any changes to certification requirements or new training opportunities. This proactive approach can support retention efforts by ensuring that workers feel well-prepared for their roles and are motivated to stay in a sector that offers long-term stability and growth.

## Recruitment and Induction Energy-Related Career Pathways

### SECTION SUMMARY

- Employers in the energy sector must improve recruitment strategies by educating local communities about energy careers, emphasizing job security, competitive pay, and moderate training requirements to attract local talent.
- To attract younger workers, employers should clearly define job roles, required certifications, and accessible training programs, highlighting the diversity of opportunities in traditional and emerging energy roles.
- Early exposure to energy careers through hands-on experiences, mentoring, and integrating energy topics into STEM curricula can increase youth interest in these jobs, especially if they align with values such as combating climate change and sustainability.

As the energy workforce expands and new roles emerge, employers should reevaluate their recruitment strategies to attract local talent. Survey results highlight that many job seekers are increasingly looking to other industries or regions due to a lack of awareness about the energy sector's opportunities and skill requirements. This underscores the need to better educate local communities about energy careers and their benefits, such as job security, moderate training requirements, and competitive pay.

To attract younger workers to energy jobs, employers should clearly define available roles and outline the necessary qualifications, including certifications and training. Survey feedback indicates employers find it challenging to recruit and hire for their open positions because many potential applicants lack the skills or certifications needed for energy positions. This skill gap often deters employers from successfully recruiting applicants to fill their roles. A comprehensive recruitment strategy emphasizing job awareness, accessible training programs, and clear certification pathways will help build a strong talent pipeline. It is important to highlight the diversity of roles within the energy sector, ranging from traditional positions like electricians to modern roles like smart grid specialists.

Early education often directs students toward careers that require advanced degrees, leaving many unaware of the opportunities in skilled trades. In the Inland Empire, 38% of the workforce is in blue-collar jobs<sup>19</sup>, but energy careers provide a broad spectrum of opportunities at various skill and education levels. Exposing younger generations to energy-related careers through hands-on experiences and mentoring can increase interest in the industry. Incorporating energy topics into STEM curricula can boost engagement and interest in clean energy, energy efficiency, and technology careers.

Based on conversations with regional stakeholders (Appendix D), there is a perception that younger generations are motivated by careers contributing to larger initiatives like combating climate change. Although regional stakeholders are concerned that younger generations lack an interest in the skilled trades, studies show that Generation Z is enrolling in vocational-focused community college programs more than in previous years.<sup>20</sup> By emphasizing the importance of transitioning to cleaner energy sources and reducing emissions, training entities can inspire youth to pursue energy roles that align with their values, provide high-quality careers, and address local and industry-wide needs.

## Employee Retention Strategies

### SECTION SUMMARY

- Employers that focus on offering competitive wages, comprehensive benefits, and bonuses to retain top talent in the energy sector. Many employees seek long-term stability and advancement opportunities.
- Clear pathways for internal promotion and opportunities for upskilling and reskilling, particularly in emerging technologies, help improve employee retention by fostering career growth.
- Providing tuition reimbursement, financial support for certifications, and increasing online or remote training access can reduce financial barriers and enhance employees' professional development.
- Partnering with local workforce organizations, offering transportation support, and providing flexible or hybrid work options can improve recruitment and retention by addressing regional and personal challenges.

Employers should prioritize retention strategies to establish a stable and sustainable energy workforce. Most job seekers prefer long-term employment. The energy sector's

<sup>19</sup> <https://properties.zoomprospector.com/california/community/Inland-Empire-CA-/r1698/profile#>

<sup>20</sup> <https://www.nasrcc.org/the-wall-street-journal-how-gen-z-is-becoming-the-toolbelt-generation/>

consistent demand positions it as a stable career option, particularly with the growing need for skilled workers in the energy sector. Based on the employer survey, employers indicated they struggled with employee retention primarily due to economic factors, such as pursuing other opportunities with better benefits, pay, or career advancement. The survey also showed that employers found it challenging to offer competitive wages and benefits and often had to hire based on what they could afford to pay. Below are suggested strategies that could address these issues and support employee retention:

- **Competitive Wages:** While energy roles typically offer fair wages, aligning compensation with industry standards ensures that top talent remains with the organization. Competitive pay is key to long-term retention.
- **Comprehensive Benefits:** Attractive benefits are crucial for job seekers, as many rely on their employer to provide essential resources such as healthcare and child care. Strong retirement plans and paid time off further promote long-term personal and financial well-being.
- **Bonuses and Incentives:** Job seekers are more likely to be drawn to positions offering sign-on bonuses and performance-based incentives, which add immediate value to employment offers.

Energy careers often provide clear pathways for advancement, essential for employee retention. Most workers begin in entry-level positions but can quickly progress to higher-paying roles once they obtain the necessary certifications and training.

- **Internal Promotion:** Employees are more likely to stay with a company if they see opportunities for growth within the organization. Clear paths for internal promotion enhance motivation and loyalty.
- **Upskilling and Reskilling:** Offering training in emerging technologies allows employees to develop new skills and advance their careers, improving retention by supporting their professional growth.
- **Tuition Reimbursement:** Financial support for education and certifications makes a significant difference in career advancement, especially for lower-income employees who may find high training costs prohibitive.
- **Greater Access to Training:** Online learning platforms can significantly increase access to training, particularly when local training options are limited. Employers should consider providing or sponsoring remote courses paired with financial support, such as scholarships or discounts, to reduce financial barriers to participation.

Employers can adapt hiring practices to attract local talent and meet regional workforce needs.

- **Local Collaboration:** Partnering with local workforce and job boards can align recruitment with regional labor needs.
- **Transportation Support:** Offering travel stipends or transportation assistance helps address commuting challenges, particularly for job seekers in rural or underserved areas.
- **Hybrid/Remote Work:** For roles that allow it, offering remote or hybrid work opportunities reduces commuting time and costs, improving employee satisfaction and work-life balance. Flexible hours or staggered shifts can also accommodate personal needs.
- **Employee Resource Groups:** Creating or supporting employee resource groups, particularly for underrepresented groups, fosters community, inclusion, and advocacy within the workplace.

## Partnerships and Regional Networks

### SECTION SUMMARY

- Education institutions, workforce organizations, industry, and local government must collaborate to align curricula with industry standards and create clear career pathways in the energy sector.
- Regional stakeholders should analyze labor market trends and use performance metrics (job placement, retention, satisfaction) to refine training programs to meet industry needs.
- Training providers should engage employers through advisory committees and ensure programs align with energy sector demands. They should incorporate internships, apprenticeships, and on-the-job training to build a steady workforce pipeline.
- Connecting students and trainees directly with employers through guaranteed hiring pipelines will ensure smooth transitions from education and training to full-time employment.

A coordinated effort between education, training, industry, and the community would build economic growth and workforce readiness.

Local educational institutions, from K-12 schools to community colleges, universities, and trade schools, must establish strong lines of communication and collaboration to align curricula with industry standards. This partnership can create clear pathways for students into energy-related careers. Additionally, local government departments, workforce organizations, and economic development agencies should work together with workforce development boards to pool resources, share expertise, and increase outreach to both employers and job seekers.

Regional stakeholders should analyze labor market trends, including identifying prevalent jobs in traditional and emerging energy sectors, to create training and educational initiatives that respond to real-time workforce needs. Performance metrics such as job placement rates, retention rates, and employee satisfaction surveys can provide valuable insights into the effectiveness of training programs. This feedback loop ensures that programs are refined to meet industry standards.

Training providers should engage employers and industry stakeholders to work together on energy-related programming and ensure their programs are relevant and meet the energy sector's demands. One effective way to strengthen employer engagement is through advisory committees. These committees can gather direct input from employers on curriculum development and program priorities to ensure their offerings align with industry needs and produce workers with the skills employers require. Connecting students and training participants directly with local employers for on-the-job training, internships, co-op programs, and apprenticeships will help build a steady workforce pipeline. As participants progress through their programs, guaranteed hiring pipelines can ease their transition into full-time employment, ensuring a seamless connection between education, training, and job placement.

## Workforce Mobility

Workforce mobility is critical in supporting regional collaboration and providing equitable resource access. Riverside and San Bernardino counties, due to their large geographic size, present challenges in providing equal access to all communities. Consistent coordination across city and county lines ensures workforce programs address local needs. While in-person meetings may not always be feasible, virtual platforms can provide an effective way to connect stakeholders in rural or underserved areas, ensuring broad participation and input from all corners of the region.

## Addressing Training Barriers

### SECTION SUMMARY

- Private and public funding for energy-related training programs can drive economic growth and development, especially in underserved communities in the Inland Empire, where limited access to training sites and workforce hubs creates barriers.
- Investing in alternative training modalities, such as remote or virtual programs with real-life simulations, can expand access to energy sector training. Enhanced community outreach and digital visibility are crucial to raise awareness and encourage participation in these career pathways.

Private and public funding for energy-related training programs will support and strengthen the region's financial health, economic growth, and development. Policies that support green job training could also become an integral part of the region's economic development.

The limited training and employment opportunities within the Inland Empire's energy sector impact underserved communities within I-REN territories the most. Inland Empire residents within high and low desert communities have less access to training sites, and Inland Empire residents are far from workforce development hubs in larger metro areas, making it more challenging to engage in energy-sector training.

Alternative training modalities can make training more accessible to underserved communities. Based on employer feedback, we've learned that hands-on training is essential in becoming a skilled worker, especially for roles within the trades. Remote or virtual training opportunities do not typically allow trainees to practice the skills they are developing. Nonetheless, with technological advancements and training formats, remote training programs can simulate real-life scenarios and enhance trainees' learning experience. Investing in tools within the digital space can significantly broaden access to training options that are otherwise not feasible for trainees to access.

Worker awareness of available resources is important for connecting energy workers to training and employment opportunities. Through community outreach, school partnerships, and visibility on digital platforms, we can enhance promotion and encourage more participants to participate in training pathways. Outreach highlighting the economic and environmental benefits of careers within the energy sector can incentivize individuals to pursue these careers.

## **Actionable Recommendations**

As part of the Inland Regional Energy Network's efforts to provide the Inland Empire with equitable access to energy efficiency, I-REN's Workforce, Education, and Training (WE&T) sector programs will seek opportunities to create and enhance energy workforce development programming. Through this workforce assessment, engagement with regional partners, and the energy employer survey, I-REN is gathering the information needed to address the region's energy industry challenges and opportunities. This section provides actionable recommendations for the future of I-REN's WE&T programming.

## SECTION SUMMARY

- Recommendation #1: To address barriers faced by job seekers, especially in underserved areas, I-REN should strengthen partnerships with local and third-party training providers, ensuring access to clear, affordable, and comprehensive training and certification programs. Engaging with regional trade associations and specialized organizations will further expand opportunities for networking, professional development, and exposure to industry standards and technologies.
- Recommendation #2: I-REN should collaborate with training providers and employers to offer support services, such as subsidized certification costs, financial assistance, paid time off for training, and transportation stipends, to reduce barriers for job seekers in underserved areas, ensuring greater access to energy sector training and certification opportunities.
- Recommendation #3: I-REN should strengthen the regional education and training pipeline by collaborating with educational institutions to offer virtual and hands-on training options, enhance existing CTE Pathways or induce new opportunities, introduce certification programs in K-12, provide mentorship and on-the-job training, and incorporate entrepreneurial skills into pathways to support self-employment, enhancing career opportunities and local economic growth in the energy sector.
- Recommendation #4: Strengthen collaboration between employers, workforce development organizations, and educational institutions to align training programs with industry needs, regularly assess training effectiveness through metrics like completion rates and satisfaction, and use data-driven approaches to address skill gaps and improve workforce development.

### *Recommendation #1: Connect local job seekers to established training providers and introduce third-party training providers*

Feedback from energy employers and assessments of local training institutions indicate that job seekers—particularly in underserved and rural areas—face significant barriers in acquiring the necessary skills, training, and certifications to secure stable employment in the energy industry. To address these challenges, I-REN should build strong partnerships with the region’s leading training providers to expand recruitment efforts for energy-related jobs.

If employers require employee certifications, they should ensure that employees can access clear, comprehensive information about local training centers and programs that offer the required certifications. By partnering with nearby training institutions or providing a list of trusted providers, employers can help employees find convenient, affordable options.

Employees should engage with regional trade associations to access widely-recognized industry certifications and training programs. These organizations frequently offer



certifications, workshops, and other resources aligned with current industry standards. They also offer opportunities for energy professionals to network, increase industry advocacy, gain access to industry information and resources, and raise awareness of available professional development.

Key Regional Trade Associations (see Appendix A for a full list of stakeholders):

- National Electric Contractors Association (NECA), Inland Empire Chapter: supports electrical contractors with training, labor agreements, and safety initiatives.
- GRID Alternatives Inland Empire: actively works on partnerships with local organizations and provides job training and hands-on experience for energy professionals.
- Solar Energy Council for the Inland Empire (SEC-IE): provides workforce training and public education for advancing solar energy within the Inland Empire.

Third-party organizations or industry experts can offer specialized training support, extending the reach of established training providers. This may include hosting workshops, webinars, or on-site training sessions tailored to specific job roles within companies. These collaborations can create valuable networking opportunities and expose employees to the latest tools, technologies, and best practices in their respective fields.



## Suggested Actions

1. I-REN facilitates partnership with local labor unions to recruit apprentices and provide on-the-job training to meet employers' needs (Appendix A list of stakeholders).
2. Connect energy employers with apprenticeship and pre-apprenticeship programs to build a pipeline of skilled workers and secure employment for program participants.
3. Integrate third-party training providers that offer high-quality, industry-aligned certifications and up-to-date knowledge with established training centers and institutions (Appendix A list of stakeholders).
4. I-REN supports connecting job seekers to regionally relevant WE&T programs (see list in Appendix C) to enhance workforce and training opportunities.
5. Offer flexible learning formats such as online courses, evening classes, and hands-on training to accommodate employees with varying schedules.
6. Organize local job fairs and informational sessions to raise awareness about training opportunities in the region.

7. Encourage employees to engage with trade associations and workforce development networks to stay informed on industry trends and certifications.
  8. Develop a clear, data-driven framework to measure the effectiveness of training programs and partnerships, including metrics like job placement and retention rates.
  9. Ensure that training programs are tailored to specific needs in diverse energy sectors, from traditional energy efficiency to clean energy fields.
- 

### *Recommendation #2: Provide employees with support services to enhance training and certification attainability*

Feedback from energy employers and assessments of local training institutions reveals that job seekers, particularly in underserved and rural areas, face significant barriers to obtaining the necessary skills, training, and certifications for stable employment in the energy industry. To address this, I-REN should establish strong partnerships with the region's leading training providers to enhance recruitment efforts for energy-related jobs. Subsidizing certification costs and offering financial support through grants, government funding, or affordable training centers would reduce financial barriers and make these programs more accessible for employees. I-REN can work with energy employers to support them in providing their workforce with training stipends for free transportation, covering costs for materials and exams, and offering paid time off to study and complete certifications could significantly increase accessibility, particularly for those who cannot afford these expenses.

Employers can demonstrate a commitment to employees' professional growth and foster a culture of learning within the organization by offering support services for education and skill development. These long-term investments in employees make them feel supported in their career journeys. Paid time off for training allows employees to focus on their studies without the stress of balancing work obligations. Employers can also partner with local community organizations or government-funded programs to provide training to underserved populations, such as those from disadvantaged backgrounds. Offering free or subsidized training for residents in specific areas can help close local skills gaps, benefiting both employees and the businesses that hire them.



## Suggested Actions

1. I-REN to support employers in providing funds for personal costs (e.g., housing, childcare, emergency expenses) and training-related costs (e.g., transportation, work clothing, tools, application fees).
2. I-REN to support employers in providing affordable or free training options, especially for certifications essential to employees' roles.
3. I-REN to support employers in providing employees to take paid time off to study for and complete their certifications or training programs.
4. I-REN to support employers in offering tuition reimbursement or financial assistance for higher education programs related to employee roles.
5. I-REN to support employers in developing specific incentives or initiatives for underserved communities to improve access to training and employment opportunities.

### *Recommendation #3: Strengthen the regional education and training pipeline from K-12 to employment*

To address gaps in training accessibility, I-REN should collaborate with educational institutions to offer virtual training options that combine theoretical learning with hands-on, practical experience. A comprehensive education-to-career pipeline will equip individuals of all ages with the skills needed for in-demand energy sector jobs. Local academic institutions, from K-12 to higher education institutions (Appendix A), must develop pathways that connect education directly to employment.

Introducing certification programs at the secondary education level will enable students to secure employment immediately after graduation or pursue further training at local institutions. These certifications can help young people build a clear career path, making the transition from education to employment more seamless. In addition to traditional academic training, internal and external training programs should offer hands-on, practical learning experiences. Experienced staff or external instructors can provide personalized training, enhancing skill development. Furthermore, mentorship programs where senior employees guide new hires can offer invaluable support. On-the-job training allows employees to apply what they have learned in real time, boosting confidence, improving retention, and enhancing job satisfaction.

As the demand for energy-related services grows, particularly in underserved and rural areas, many job seekers may find interest in exploring self-employment. While large corporations and local businesses provide stable, good-paying jobs, self-employment allows trade workers to control their careers, determine their income potential, and meet their communities' needs. With the addition of business development and entrepreneurial skills to training pathways, training providers can broaden the scope of existing training pathways to attract energy workers incentivized by increasing their earning potential and professional aspirations. This entrepreneurial path can be especially appealing in regions with limited or seasonal traditional energy employment opportunities. By pursuing entrepreneurship, trade workers in the energy sector can bridge the gap in service availability, create jobs, and inject economic vitality into local markets that may struggle to attract large-scale employers.

This growing demand for specialized services presents a significant opportunity for individuals with trade skills to launch their businesses and contribute to the ongoing transformation of the energy industry, all while expanding their potential earning capacity. By empowering energy workers to pursue self-employment, I-REN can cultivate a dynamic and resilient ecosystem that strengthens local economies, creates job opportunities, and helps meet the increasing demand for skilled trade services across the region.



## ***Suggested Actions***

1. I-REN enhances or develops new energy-related CTE pathways in local high schools, which teach students the skills for energy sector jobs.
2. I-REN organizes career fairs focused on energy careers to increase awareness and visibility among younger generations.
3. I-REN develops internship opportunities for high school students that connect and provide students with essential workplace skills and experience.
4. I-REN creates mentorship programs that connect incoming employees with experienced senior staff to offer guidance, training, and support.
5. I-REN can connect high school educators and students to regionally relevant WE&T programs (see list in Appendix C) to harness existing programs, enhance regional training opportunities, and build a stronger energy workforce pipeline.
6. I-REN offers funding or grants to trade workers interested in transitioning from traditional employment to self-employment. These funds can help cover startup costs, such as purchasing tools, vehicles, and equipment or securing necessary business licenses and insurance. Financial support could also help workers gain

specialized certifications to operate as independent contractors in energy-related fields.

7. Training programs include business development and entrepreneurial skills as part of energy-related training programs, targeting youth who may not be interested in traditional trade careers but are interested in self-employment and starting their own businesses.

Related skills:

- Strategic planning: developing long-term goals and actionable plans to achieve business objectives
  - Communication and networking: building and maintaining relationships with clients and investors
  - Financial management: budgeting, financial analysis, and efficient use of resources
  - Sales and marketing: developing branding and understanding data analytics to reach target customers to drive revenue
  - Leadership: managing teams effectively to work toward business goals collectively and fostering a positive work environment
- 

### *Recommendation #4: Strengthen collaboration between employers and workforce development organizations to continuously assess training effectiveness*

Given the region's vast geographic area, where educational institutions are often limited in reach, it is essential to build stronger partnerships between local educational institutions, employers, and workforce development organizations. These partnerships are key to aligning industry-aligned curricula with employer needs, ensuring that training programs are relevant and accessible. Currently, there are few opportunities for employers, workforce development organizations, and educational institutions to collaborate directly on strategies for building an energy-focused workforce.

To address this gap, local workforce development boards and chambers of commerce should work with employers to coordinate training initiatives, job fairs, and resource-sharing efforts. Workforce and training institutions should regularly evaluate the effectiveness of training programs in connection to the needs of the labor force, including metrics on program completion rates and participant satisfaction. These metrics are essential to adapting and improving training pathways, ensuring they remain responsive to industry needs. Regularly assessing the effectiveness of

energy-related training programs can help organizations align workforce development with current industry requirements.

Employers that do not already conduct periodic skills assessments, should be proactive in evaluating their workforce's skill levels and needs. This will allow them to identify knowledge gaps and certification requirements so they can develop training programs that address specific areas for improvement. By implementing this data-driven approach, companies can ensure employees receive the most relevant and impactful training, enhancing their performance and long-term career growth.



## *Suggested Actions*

1. I-REN organizes quarterly hybrid meetings (in-person and virtual) that bring together employers, workforce development organizations (Appendix A, Workforce Employment Organizations), and educational institutions. These meetings will provide a platform to discuss energy industry standards, evolving workforce needs, and strategies for effective training programs.
2. I-REN proactively reaches out to energy employers, workforce development organizations, and educational institutions to align on the development of training programs. Engaging all parties in ongoing discussions will ensure that training content is current, effective, and meets the needs of both employers and job seekers.
3. I-REN develops and tracks clear, measurable metrics—such as program completion rates, post-training employment outcomes, and participant satisfaction surveys—to evaluate the effectiveness of energy-related training programs. These metrics will provide valuable feedback for continuous improvement and program optimization.
4. I-REN encourages employers to conduct regular skills assessments to identify areas where employees may require additional training or certification. Tailoring training programs based on these assessments will ensure the workforce is equipped with the most relevant and up-to-date skills, improving overall productivity and employee retention.

# Appendix A: Training Institutions

## Colleges and Universities

| Provider                                      | Industry                                                                                               | Cost                     | Time        | Modality                     |
|-----------------------------------------------|--------------------------------------------------------------------------------------------------------|--------------------------|-------------|------------------------------|
| American College of Healthcare and Technology | HVAC                                                                                                   | \$17,850.00              | 36 weeks    | hybrid in-person and online  |
| Barstow College                               | Electrical, Installation/Maintenance/Repair, Welding                                                   | \$400-\$1,000 per course | Varies      | hybrid in-person and online  |
| Cal Baptist Career Center                     | Electrical                                                                                             | \$19,538 per semester    | 3 years     | hybrid in-person and online  |
| California State University, San Bernardino   | Electrical, HVAC, Installation/Maintenance/Repair, Manufacturing, Mechanical, Plumbing, Solar, Welding | \$500 - \$5,000          | Varies      | hybrid in-person and online  |
| Chaffey College                               | Electrical, Mechanical, Welding                                                                        | \$11,000 - \$20,000      | 10-18 weeks | in-person classroom training |
| College of the Desert                         | Electrical, Construction, HVAC, Solar                                                                  | \$400-\$2,500 per course | Varies      | in-person classroom training |
| Copper Mountain College                       | Electrical, Construction, Mechanical, Welding                                                          | \$400-\$2,500 per course | Varies      | hybrid in-person and online  |
| Heavy Equipment College                       | Safety and Compliance Certifications                                                                   | \$8,000 - \$12,000       | 2-4 weeks   | In-person and field training |
| InterCoast College Riverside                  | Electrical, HVAC, Solar                                                                                | \$9,000 - \$22,000       | 16-40 weeks | hybrid in-person and online  |
| La Sierra University                          | Engineering, Technology                                                                                | \$47,310.00              | 4 years     | in-person classroom training |
| Mayfield College                              | Electrical, HVAC                                                                                       | \$3,000 - \$16,000       | Varies      | hybrid in-person and online  |

|                                                                   |                                                                                      |                     |             |                              |
|-------------------------------------------------------------------|--------------------------------------------------------------------------------------|---------------------|-------------|------------------------------|
| Mt. Jacinto College                                               | Engineering, Technology                                                              | \$500 - \$14,000    | Varies      | in-person classroom training |
| Norco College                                                     | Electrical, Construction, Installation/Maintenance/Repair, Manufacturing, Renewables | \$500 - \$2,000     | Varies      | hybrid in-person and online  |
| Palo Verde College                                                | Construction, Technology, Solar, Welding                                             | \$500 - \$2,000     | Varies      | in-person classroom training |
| Riverside City College                                            | Construction, HVAC, Welding                                                          | \$500 - \$2,000     | Varies      | in-person classroom training |
| San Bernardino Community College District                         | Construction, HVAC                                                                   | \$1,000 - \$5,000   | 1-9 weeks   | in-person classroom training |
| San Bernardino Valley College                                     | Electrical, HVAC, Installation/Maintenance/Repair, Manufacturing, Welding            | \$1,000 - \$2,000   | 34-48 Weeks | in-person classroom training |
| San Joaquin Valley College                                        | Electrical, Construction, HVAC, Installation/Maintenance/Repair                      | \$16,000 - \$80,000 | Varies      | in-person classroom training |
| Summit College                                                    | Electrical, HVAC, Welding                                                            | \$16,000 - \$18,000 | 36-40 Weeks | hybrid in-person and online  |
| UMass Global (Riverside)                                          | Engineering, Technology                                                              | \$500 - \$2,000     | Varies      | online classes               |
| University of California Riverside Extension-Professional Studies | Engineering                                                                          | \$18,200            | 34 weeks    | in-person classroom training |
| Victor Valley College                                             | Electrical, Construction, HVAC, Installation/Maintenance/Repair, Solar, Welding      | \$500 - \$7,000     | Varies      | in-person classroom training |

### *K-12 Educational Institutions*

| Provider                 | Industry     | Type of training   | Modality            |
|--------------------------|--------------|--------------------|---------------------|
| Arroyo Valley Highschool | Construction | Pre-Apprenticeship | in-person classroom |



|                                                                                                                  |                                             |                    |                              |
|------------------------------------------------------------------------------------------------------------------|---------------------------------------------|--------------------|------------------------------|
|                                                                                                                  |                                             |                    | training                     |
| Cajon Highschool                                                                                                 | Construction, Battery and Electric Vehicles | Pre-Apprenticeship | in-person classroom training |
| Carter Highschool                                                                                                | Construction                                | Pre-Apprenticeship | in-person classroom training |
| Corona-Norco Adult School                                                                                        | Welding                                     | Training           | in-person classroom training |
| Curtis Middle School                                                                                             | Job Training                                | Pre-Apprenticeship | in-person classroom training |
| Earhart Middle School                                                                                            | Electrical, Engineering                     | Pre-Apprenticeship | in-person classroom training |
| Fontana Adult School                                                                                             | Electrical, Installation/Maintenance/Repair | Training           | online classes               |
| Gage Middle School                                                                                               | Construction                                | Pre-Apprenticeship | in-person classroom training |
| Indian Springs Highschool                                                                                        | Mechanical                                  | Pre-Apprenticeship | in-person classroom training |
| J.W. North Highschool                                                                                            | Job Training                                | Pre-Apprenticeship | in-person classroom training |
| Lee Pollard Highschool                                                                                           | HVAC                                        | Pre-Apprenticeship | in-person classroom training |
| Lincoln Highschool                                                                                               | Battery and Electric Vehicles               | Pre-Apprenticeship | in-person classroom training |
| Martin Luther King Highschool                                                                                    | Architects/Design, Engineering              | Pre-Apprenticeship | in-person classroom training |
| Norte Vista Highschool                                                                                           | Construction                                | Pre-Apprenticeship | in-person classroom training |
| Palm Desert Highschool                                                                                           | Engineering, Welding                        | Pre-Apprenticeship | in-person classroom training |
| Palm Springs Unified School District Renewable Energy Academy of Learning (REAL) - Desert Hot Springs Highschool | Clean Energy                                | Pre-Apprenticeship | in-person classroom training |
| Ramona Highschool                                                                                                | Construction                                | Pre-Apprenticeship | in-person classroom training |
| Rialto Highschool                                                                                                | Construction                                | Pre-Apprenticeship | in-person classroom training |
| Riverside County Office of                                                                                       | Welding                                     | Training           | in-person classroom          |

|                                                    |                                                          |                    |                                      |
|----------------------------------------------------|----------------------------------------------------------|--------------------|--------------------------------------|
| Education, School of Career Education              |                                                          |                    | training                             |
| Riverside STEM Academy                             | Engineering                                              | Pre-Apprenticeship | in-person classroom training         |
| San Bernardino Highschool                          | Engineering                                              | Pre-Apprenticeship | in-person classroom training         |
| San Gorgonio Highschool                            | Construction, Battery and Electric Vehicles, Engineering | Pre-Apprenticeship | in-person classroom training         |
| Science and Technology Education Partnership: STEP | Construction, HVAC, Manufacturing, Welding               | Training           | field training at a project location |
| Sierra Middle School                               | Engineering                                              | Pre-Apprenticeship | in-person classroom training         |

### Apprenticeship Training Centers

| Provider                                                     | Industry     | Cost             | Training Time            |
|--------------------------------------------------------------|--------------|------------------|--------------------------|
| AGC Apprenticeship and Training Trust                        | Construction | Paid Opportunity | 8,000 hours<br>2-4 years |
| California-Nevada JATC Power Lineman Program                 | Electrical   | Paid Opportunity | 7000 hours<br>3 years    |
| Construction Teamsters Apprenticeship Program                | Construction | Paid Opportunity | 3 years                  |
| Chaffey College InTech Center Apprenticeship                 | Mechanical   | Paid Opportunity | 2.5 years                |
| Ipply Employer Focused Career Development Apprentice Program | Multi-Sector | Paid Opportunity | 2-4 years                |
| Lancaster Burns Construction, Inc. Apprenticeship (CAMAC)    | Construction | Paid Opportunity | N/A                      |
| Osceola Consulting Geographic Information System Technician  | Technology   | Paid Opportunity | N/A                      |
| Southern California Surveyors Joint Apprenticeship Program   | Engineering  | Paid Opportunity | 6000 hours               |
| Western Electrical Contractors Association, Apprenticeship   | Electrical   | Paid Opportunity | 3-5 years                |

### Trade Schools

| Provider | Type of institution | Cost | Type of training |
|----------|---------------------|------|------------------|
|----------|---------------------|------|------------------|

|                               |                                 |                    |                              |
|-------------------------------|---------------------------------|--------------------|------------------------------|
| Colton Redlands Yucaipa ROP   | Battery and Electric Vehicles   | \$1,350.00         | in-person classroom training |
| RTC College                   | Electrical                      | \$2,000 - \$20,000 | in-person classroom training |
| UEI College                   | Electrical, HVAC                | \$21,500.00        | hybrid in-person and online  |
| Masters Vocational College    | HVAC, Mechanical                | Not available      | in-person classroom training |
| Universal Technical Institute | Installation/Maintenance/Repair | \$21,180.00        | in-person classroom training |
| AGI Technology Institute      | Installation/Maintenance/Repair | \$2,000 - \$3,000  | in-person classroom training |

### Workforce Employment Organizations

| Provider                                                     | Type of institution               | Industry                                                        | Type of training   |
|--------------------------------------------------------------|-----------------------------------|-----------------------------------------------------------------|--------------------|
| Construction Trades Workforce Initiative (CTWI)              | Community-Based Organization      | Electrical, Engineering                                         | Apprenticeship     |
| Southern California Pavement Striper, Road Slurry, Seal Coat | Community-Based Organization      | Installation/Maintenance/Repair                                 | Apprenticeship     |
| Inland Refrigeration JATC                                    | Employer                          | HVAC                                                            | Apprenticeship     |
| Asbestos Workers Joint Apprenticeship Fund                   | Workforce Employment Organization | Safety and Compliance Certifications                            | Apprenticeship     |
| Inland Empire Electrical Training Center                     | Workforce Employment Organization | Electrical, Battery, and Electric Vehicles, Construction, Solar | Apprenticeship     |
| Department of Energy                                         | Workforce Employment Organization | Battery and Electric Vehicles                                   | Certification      |
| Employment Development Department- Veterans Division         | Workforce Employment Organization | HVAC                                                            | Certification      |
| Energy Code Ace                                              | Workforce Employment Organization | Electrical, HVAC, Solar                                         | Certification      |
| Life Lifters International                                   | Community-Based Organization      | Construction/Contractors                                        | Pre-Apprenticeship |
| Inland Empire Job Corps                                      | Workforce Employment Organization | Electrical, Construction, Plumbing                              | Pre-Apprenticeship |

|                                                                |                                   |                                      |          |
|----------------------------------------------------------------|-----------------------------------|--------------------------------------|----------|
| Empowering Success Now                                         | Community-Based Organization      | Job Training                         | Training |
| First Institute Training and Management                        | Community-Based Organization      | Welding                              | Training |
| GRID Alternatives                                              | Community-Based Organization      | Solar                                | Training |
| Pilot Trucking School                                          | Community-Based Organization      | Safety and Compliance Certifications | Training |
| Sillers Institute                                              | Community-Based Organization      | Construction/Contractors             | Training |
| Skyway Trucking School                                         | Community-Based Organization      | Safety and Compliance Certifications | Training |
| Technical Employment Training, Inc.                            | Community-Based Organization      | Manufacturing                        | Training |
| A-Z Bus Sales                                                  | Employer                          | Battery and Electric Vehicles        | Training |
| EMC Squared Vehicles                                           | Employer                          | Battery and Electric Vehicles        | Training |
| Inland Empire Utilities Agency                                 | Employer                          | Installation/Maintenance/Repair      | Training |
| America Truck Driving School-Riverside                         | Workforce Employment Organization | Safety and Compliance Certifications | Training |
| Associated Builders and Contractors (ABC) Inland Empire Branch | Workforce Employment Organization | Electrical                           | Training |
| California Climate Action Corps                                | Workforce Employment Organization | Job Training                         | Training |
| Center for Employment Training- Coachella                      | Workforce Employment Organization | Construction. HVAC                   | Training |
| Center for Sustainable Energy                                  | Workforce Employment Organization | Solar                                | Training |
| Citadel Community Development Corporation (CCDC)               | Workforce Employment Organization | Job Training                         | Training |
| Civic Well, Civic Spark Fellowship                             | Workforce Employment Organization | Job Training                         | Training |
| Corona Chamber of Commerce                                     | Workforce Employment Organization | Job Training                         | Training |

|                                |                                   |                                                   |          |
|--------------------------------|-----------------------------------|---------------------------------------------------|----------|
| Frontier Energy                | Workforce Employment Organization | Electrical, Battery, and Electric Vehicles, Solar | Training |
| Goodwill Career Center         | Workforce Employment Organization | Job Training                                      | Training |
| North American Training Center | Workforce Employment Organization | HVAC                                              | Training |
| NV5                            | Workforce Employment Organization | Electrical                                        | Training |
| Tom's Truck Center dealership  | Workforce Employment Organization | Battery and Electric Vehicles                     | Training |

## Appendix B: Employer Needs Survey

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Company Name _____ Contact Name _____<br>Phone Number _____ Email Address _____                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                           |
| 2. Please mark the options that best describe your organization's work.<br><br><i>If not listed, please describe your organization's focus areas.</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | <input type="checkbox"/> Heating, Ventilation, and Air Conditioning (HVAC)<br><input type="checkbox"/> Marketing<br><input type="checkbox"/> Non-Profit/Community-Based Organization (CBO)<br><input type="checkbox"/> Renewable Technologies                                                                                                                                | <input type="checkbox"/> Energy/Business consulting<br><input type="checkbox"/> Electrical<br><input type="checkbox"/> Mechanical<br><input type="checkbox"/> Construction<br><input type="checkbox"/> Other: List below<br><input type="checkbox"/> N/A  |
| 3. On average, how many energy-related positions does your organization recruit and hire annually in Riverside and San Bernardino counties?<br><i>An "energy-related" job is any role contributing to producing, distributing, managing, or efficiently using energy across various industries. This includes jobs in traditional energy sectors like electricity, oil, and renewables and positions in manufacturing, construction, HVAC, logistics, city planning, and more.</i><br><br><div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> 1-5           <input type="checkbox"/> 6-10           <input type="checkbox"/> 11-25           <input type="checkbox"/> 26-50           <input type="checkbox"/> 50+           <input type="checkbox"/> N/A         </div> |                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                           |
| 4. What are the biggest challenges you are facing when hiring an energy-related employee?<br><br><i>Check all that apply.</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <input type="checkbox"/> Not enough local applicants<br><input type="checkbox"/> Lack of qualified applicants<br><input type="checkbox"/> Applicants do not have relevant experience<br><input type="checkbox"/> Applicants do not have relevant training                                                                                                                    | <input type="checkbox"/> Applicants do not have relevant certifications or licenses<br><input type="checkbox"/> Other: List below<br><input type="checkbox"/> N/A                                                                                         |
| 5. To your knowledge, what challenges do workers have in accessing pertinent certificates, training, and skill development?<br><br><i>Check all that apply.</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <input type="checkbox"/> The training locations are too far or otherwise not accessible<br><input type="checkbox"/> The training does not exist in the region<br><input type="checkbox"/> The time of training offered does not work<br><input type="checkbox"/> The training is too expensive<br><input type="checkbox"/> Other: List Below<br><input type="checkbox"/> N/A |                                                                                                                                                                                                                                                           |
| 6. What are the biggest challenges you are facing when retaining energy-related employees?<br><br><i>Check all that apply.</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <input type="checkbox"/> Employees are retiring<br><input type="checkbox"/> Employees are not fulfilling duties<br><input type="checkbox"/> Employees are seeking better pay or benefits<br><input type="checkbox"/> Employees leaving the region<br><input type="checkbox"/> The job market is too competitive                                                              | <input type="checkbox"/> Employees do not feel that they have the skills to be in the position<br><input type="checkbox"/> Employees do not see job progression opportunity<br><input type="checkbox"/> Other: List Below<br><input type="checkbox"/> N/A |

|                                                                                                                             |                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                            |  |
|-----------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| 7. Do you offer employee training programs to build new and/or improve current skills?                                      | <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A                                                                                                                                                                                                              |                                                                                                                                                                                                            |  |
| 8. What type of training programs do you offer your employees?                                                              |                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                            |  |
| 9. Please list what skill brackets you have observed are typically lacking in your job applicants or employees.             | Interpersonal skills are the behaviors and tactics a person uses to interact with others effectively.<br>Workplace skills are a person's basic skills to succeed in any workplace.<br>Technical skills are the abilities and knowledge needed to perform specific tasks.                           | <input type="checkbox"/> Interpersonal<br><input type="checkbox"/> Workplace<br><input type="checkbox"/> Technical<br><input type="checkbox"/> Other: List Below<br><input type="checkbox"/> N/A           |  |
| 10. Do your energy-related employees need any certifications, licenses, or training?                                        |                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                            |  |
| 11. What are those certifications, licenses or training?                                                                    |                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                            |  |
| 12. How can we best help your energy-related employees or potential employees access certifications, licenses, or training? |                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                            |  |
| 13. What minimum level of education do you typically require when hiring new employees?<br><br><i>Check all that apply.</i> | <input type="checkbox"/> Relevant work experience<br><input type="checkbox"/> High school diploma or GED<br><input type="checkbox"/> Associate degree<br><input type="checkbox"/> Bachelor degree<br><input type="checkbox"/> Master degree<br><input type="checkbox"/> Certifications or licenses | <input type="checkbox"/> Preapprenticeship<br><input type="checkbox"/> Apprenticeship<br><input type="checkbox"/> Journeymen<br><input type="checkbox"/> Other: List Below<br><input type="checkbox"/> N/A |  |

# Appendix C: WE&T Programs Offered by Portfolio Administrators

## Statewide Investor Owned Utilities (IOUs)

| Overview            |                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|---------------------|---------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Program Implementer | The Energy Coalition (TEC)                                          | Energy is Everything aims to build a pipeline of qualified energy workers by creating pathways for energy education for K–12 students, particularly in disadvantaged communities (DACs). Goals under the program include: increasing students’ pro-environmental literacy and behaviors, expanding the population of students exposed to environmental, STEM, and green career pathways by offering CTE, certification, and internship programs, and promoting environmental science concepts that correlate to the Next Generation Science Standards (NGSS) and Common Core State Standards (CCSS). |
| Program Name        | Energy is Everything                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Audience            | K-12 Schools                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Reach               | Statewide                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Overview            |                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Program Implementer | Strategic Energy Innovations (SEI)                                  | The Energized Careers Program's goal is to train and prepare disadvantaged workers to enter the energy-efficiency workforce and to place program participants into energy-efficiency jobs where they can use the knowledge and skills the training provided. This Program is implemented through training partnerships with 9 different community-based organizations (CBOs). For the region is Inland Empire Electrical Training Center                                                                                                                                                             |
| Program Name        | Energize Careers                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Audience            | Disadvantaged Workers                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Reach               | Statewide                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Overview            |                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Program Implementer | IOUs and partners                                                   | Technical Upskill and Core Energy Education Collaboration (CEEC), whose primary target populations include people in an energy efficient-related career seeking to improve upon their technical skills; college students and apprentices on post-secondary education tracks working to obtain or enhance an energy career; and/or disadvantaged workers seeking certifications to enter the energy workforce or technical upskilling for those who have already entered the energy industry                                                                                                          |
| Program Name        | Technical Upskill and Core Energy Education Collaborations programs |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Audience            | Incumbent Workforce                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Reach               | Statewide                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |



## Regional Energy Networks (RENs)

| Overview            |                                                       |                                                                                                                                                                                                                                                                                                                                                               |
|---------------------|-------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Program Implementer | Rising Sun Center For Opportunity                     | Opportunity Build is a pre-apprenticeship job training program for adults (18+) interested in starting a career in construction, solar, or entering a union apprenticeship. It provides 10-12 weeks of construction training and a full-year case management and job placement program.                                                                       |
| Program Name        | Opportunity Build                                     |                                                                                                                                                                                                                                                                                                                                                               |
| Audience            | Adults                                                |                                                                                                                                                                                                                                                                                                                                                               |
| Reach               | BayREN Territory                                      |                                                                                                                                                                                                                                                                                                                                                               |
| Overview            |                                                       |                                                                                                                                                                                                                                                                                                                                                               |
| Program Implementer | Rising Sun Center For Opportunity                     | Climate Careers provides youth employment through no-cost energy and water-saving delivery services to homes in the Bay Area and Stockton through Green House Calls and exposure to green jobs through an externship placement.                                                                                                                               |
| Program Name        | Climate Careers                                       |                                                                                                                                                                                                                                                                                                                                                               |
| Audience            | Low-income young people (ages 15-24)                  |                                                                                                                                                                                                                                                                                                                                                               |
| Reach               | BayREN Territory                                      |                                                                                                                                                                                                                                                                                                                                                               |
| Overview            |                                                       |                                                                                                                                                                                                                                                                                                                                                               |
| Program Implementer | Emerald Cities Collaborative                          | ACES Engages, exposes, and challenges students from Title 1 schools to explore architecture, engineering, and construction careers by capitalizing on public works investment, community college science, technology engineering, art, and math STEAM course offerings, and strong industry participation. Dual enrollment is a key component of the project. |
| Program Name        | Architecture Construction Engineering Students (ACES) |                                                                                                                                                                                                                                                                                                                                                               |
| Audience            | High School Students                                  |                                                                                                                                                                                                                                                                                                                                                               |
| Reach               | SoCalREN Territory                                    |                                                                                                                                                                                                                                                                                                                                                               |
| Overview            |                                                       |                                                                                                                                                                                                                                                                                                                                                               |
| Program Implementer | Emerald Cities Collaborative                          | The Green Path Careers program is designed to help transition-age youth, justice-impacted workers, and disadvantaged workers enter the green energy and sustainable economy by teaching them the skills required in the high-growth clean energy industry.                                                                                                    |
| Program Name        | Green Path Careers (GPC)                              |                                                                                                                                                                                                                                                                                                                                                               |
| Audience            | High School Students                                  |                                                                                                                                                                                                                                                                                                                                                               |
| Reach               | SoCalREN Territory                                    |                                                                                                                                                                                                                                                                                                                                                               |
| Overview            |                                                       |                                                                                                                                                                                                                                                                                                                                                               |

|                     |                                                     |                                                                                                                                                                                                                                                                               |
|---------------------|-----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Program Implementer | Emerald Cities Collaborative                        | The Green Path Careers program is designed to help transition-age youth, justice-impacted workers, and disadvantaged workers enter the green energy and sustainable economy by teaching them the skills required in the high-growth clean energy industry.                    |
| Program Name        | Green Path Careers (GPC)                            |                                                                                                                                                                                                                                                                               |
| Audience            | Foster Youth 18+                                    |                                                                                                                                                                                                                                                                               |
| Reach               | SoCalREN Territory                                  |                                                                                                                                                                                                                                                                               |
| Overview            |                                                     |                                                                                                                                                                                                                                                                               |
| Program Implementer | Emerald Cities Collaborative                        | Assist contractors entering the Energy Efficiency (EE) sector by providing access to resources, quality training, one-on-one assistance including access to capital, bonding and insurance and procurement assistance, and fundamentals of green building                     |
| Program Name        | E-Contractor Academy (ECA)                          |                                                                                                                                                                                                                                                                               |
| Audience            | Small Minority Disabled Veteran Business Enterprise |                                                                                                                                                                                                                                                                               |
| Reach               | SoCalREN Territory                                  |                                                                                                                                                                                                                                                                               |
| Overview            |                                                     |                                                                                                                                                                                                                                                                               |
| Program Implementer | Emerald Cities Collaborative                        | Organizes the infrastructure needed to connect SoCalREN’s small and minority contractors and disadvantaged workers to capacity-building resources and opportunities.                                                                                                          |
| Program Name        | Opportunity Hub                                     |                                                                                                                                                                                                                                                                               |
| Audience            | Contractors and Workers                             |                                                                                                                                                                                                                                                                               |
| Reach               | SoCalREN Territory                                  |                                                                                                                                                                                                                                                                               |
| Overview            |                                                     |                                                                                                                                                                                                                                                                               |
| Program Implementer | 3-CREN                                              | Connecting guest speakers to classrooms to help younger generations explore opportunities in sustainable design and construction. 3C-REN speakers are professionals with backgrounds in green building.                                                                       |
| Program Name        | Education for the Future Workforce                  |                                                                                                                                                                                                                                                                               |
| Audience            | High School Students                                |                                                                                                                                                                                                                                                                               |
| Reach               | 3-CREN Territory                                    |                                                                                                                                                                                                                                                                               |
| Overview            |                                                     |                                                                                                                                                                                                                                                                               |
| Program Implementer | 3-CREN                                              | This series is designed for new, aspiring, and current building professionals to understand the basics of building science.n each training, expert instructors will focus on industry best practices and new building technologies that are better for owners, better for the |
| Program Name        | High Performance Fundamentals                       |                                                                                                                                                                                                                                                                               |

|                     |                         |                                                                                                                                                                                                                    |
|---------------------|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                     | Certification           | environment, and better for your work as building professionals.                                                                                                                                                   |
| Audience            | Contractors and Workers |                                                                                                                                                                                                                    |
| Reach               | 3-CREN Territory        |                                                                                                                                                                                                                    |
| Overview            |                         |                                                                                                                                                                                                                    |
| Program Implementer | CivicWell, CivicSpark   | AmeriCorps Fellowship is dedicated to building capacity and energy comprehension within local public agencies. The program places up to 27 fellows at member agencies across Riverside and San Bernardino counties |
| Program Name        | Energy Fellowship       |                                                                                                                                                                                                                    |
| Audience            | Adults                  |                                                                                                                                                                                                                    |
| Reach               | I-REN Territory         |                                                                                                                                                                                                                    |

### *Planned Regional Energy Network WE&T Programs*

| Newly Authorized RENs                                      | Vision for Programming                                                                                                                                                                                                                                                                                                                                                         | Reach                                                         |
|------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|
| Central California RURAL Regional Energy Network (CCR-REN) | The vision for these services is to train youth as part of a comprehensive workforce education and training curriculum to become energy auditors, and then deploy them as part of the residential equity program. The program will substantially increase the skills of the local workforce and provide pathways for the employment of local workers within local communities. | Central Coast, Eastern Sierra, and San Joaquin Valley regions |
| Rural REN North (NCRREN)                                   | The vision is to empower rural communities by assessing local needs, engaging with tribes, and upskilling contractors. By expanding access to existing training and partnering with community colleges, we aim to provide targeted workforce development in hard-to-reach areas, ensuring equitable opportunities for a sustainable energy future.                             | North Coast and Northern Sierra regions                       |
| San Diego Regional Energy Network (SDREN)                  | The vision of this program increases access to education and training resources needed to develop high school students' awareness of energy/green career pathways and helps them learn the necessary skills to enter the workforce.                                                                                                                                            | San Diego                                                     |
|                                                            | This vision is to enhance the clean energy workforce, focusing on skill development for adult and incumbent workers. Targets employees and employers to boost employee skill development and the employer's capacity to work on electrification and decarbonization projects.                                                                                                  |                                                               |

# Appendix D: Regional Stakeholder and Training Provider Discussions

## *Meetings with Stakeholder and Training Providers*

| Regional Stakeholder                                    | Key Discussion Points                                                                                                                                                                                                                                                                                                                                                                                                |
|---------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inland Empire Labor Institute (IELI), PlugIn IE         | <ul style="list-style-type: none"> <li>Discussed available training programs that equip workers with necessary skills needed in emerging industries within the region such as green energy, advanced manufacturing, and logistics.</li> <li>Quality Green Jobs regional initiative focused on expanding pathways to energy and water infrastructure union careers.</li> </ul>                                        |
| San Bernardino Community College District (SBCCD)       | <ul style="list-style-type: none"> <li>SBCCD reviews available degree programs available within the region and employers hiring every two years.</li> <li>Discussed shared goals on setting up stable infrastructure to connect the incoming workforce with equitable resources.</li> </ul>                                                                                                                          |
| San Bernardino County Superintendent of Schools (SBCSS) | <ul style="list-style-type: none"> <li>Discussed the challenges of expanding energy-related curricula and CTE pathways.</li> <li>Encouraging students to consider careers within the skilled trades is difficult compared to other popular career paths, especially as social media and communications careers have become more popular.</li> </ul>                                                                  |
| Roots of Success                                        | <ul style="list-style-type: none"> <li>Discussed training program offered that connects environmental literacy and workforce readiness in green economy careers and targets supporting individuals from underserved communities.</li> <li>Roots of Success offers online courses, apprenticeship, and pre-apprenticeship programs that help connect trainees with employment opportunities post-training.</li> </ul> |
| U.S Green Building Council (USGBC-CA)                   | <ul style="list-style-type: none"> <li>Discussed training programs offered by USGBC that are available to energy professionals within the Inland Empire.</li> </ul>                                                                                                                                                                                                                                                  |
| Energz                                                  | <ul style="list-style-type: none"> <li>Discussed possible collaboration opportunities to inform and educate the public and students about emerging energy technologies, such as EVs and EV charging stations.</li> </ul>                                                                                                                                                                                             |

|                                                                           |                                                                                                                                                                                                                                                                                                                         |
|---------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ten Strands                                                               | <ul style="list-style-type: none"> <li>Discussed how community choice aggregations (CCA's) can support environmental and climate action education in TK-12 schools.</li> </ul>                                                                                                                                          |
| Center for Employment Training (CET)                                      | <ul style="list-style-type: none"> <li>Discussed possible collaboration between CET and I-REN to customize training pathways to fit the needs of the energy workforce and explore recruitment and placement services and community engagement strategies.</li> </ul>                                                    |
| Interplay Learning                                                        | <ul style="list-style-type: none"> <li>Discussed virtual training options for simulated 'hands-on' learning, foundational skills in common trades, and alignment with energy industry standards.</li> </ul>                                                                                                             |
| Community Home Energy Revolution Project (CHERP) Solar Works & CRW Energy | <ul style="list-style-type: none"> <li>Discussed training opportunities CHERP and CRW Energy offers within the clean energy industry, specifically related to solar panel manufacturing and installation.</li> </ul>                                                                                                    |
| Switch Energy Alliance                                                    | <ul style="list-style-type: none"> <li>Reviewed virtual no-cost energy and environment educational resources and lessons that are NGSS-aligned.</li> </ul>                                                                                                                                                              |
| UCR Center for Community Solutions                                        | <ul style="list-style-type: none"> <li>Discussed prevalent policy questions most relevant to regional needs and the center's strategy for influencing local policies via their data-driven approach.</li> <li>Discussed community outreach and survey strategies to support engagement with local employers.</li> </ul> |

### *In-Person and Virtual Outreach and Engagement*

| Event                                          | Outreach Purpose                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2024 Energy and Infrastructure Sector Showcase | <ul style="list-style-type: none"> <li>Connected with influential organizations within the energy sector, leading efforts in identifying industry needs and gaps.</li> <li>Event sessions focused on leading conversations about sourcing local employees as the workforce diminishes, establishing better pathways to support job seekers with securing entry-level positions sooner, and societal challenges in engaging younger generations in K-12.</li> </ul> |
| Energize SoCal 2024                            | <ul style="list-style-type: none"> <li>Engaged with local workforce organizations and energy professionals to discuss regional energy initiatives.</li> <li>Observed energy expert panelists discuss the energy transition within the Inland Empire, available incentive programs and energy efficiency, and the overall energy landscape.</li> </ul>                                                                                                              |

|                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                    |
|------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inland Empire Economic Partnership (IEEP) Webinar Series: Navigating Workforce Trends in the Inland Empire | <ul style="list-style-type: none"> <li>• Attended informational session exploring the collaboration between educational institutions and industries supporting the skilled workforce.</li> <li>• Covered vocational training and apprenticeship opportunities, highlighted best practices for retaining local talent, and emphasized the importance of accessible career pathways.</li> </ul>                      |
| Thrive SoCal Sub-Regional Backbone Convening                                                               | <ul style="list-style-type: none"> <li>• Discussed catalyst funding opportunities for local organizations to support the pre-development of sector-specific projects in the region.</li> <li>• Engaged with non-profit business owners on challenges while shaping initiatives and policies that address the needs of their communities.</li> </ul>                                                                |
| Quality Green Jobs Roundtable                                                                              | <ul style="list-style-type: none"> <li>• Attended a roundtable reviewing the principles of a 'just transition' to green jobs and the intersection with health and safety, climate, and environment for workers and local families.</li> </ul>                                                                                                                                                                      |
| Leaders In Energy Summit - Inland Empire Energy Outlook 2024                                               | <ul style="list-style-type: none"> <li>• Convened with prominent regional entities from large businesses, energy start-ups, and clean energy experts to discuss the energy outlook for the Inland Empire region.</li> </ul>                                                                                                                                                                                        |
| Inland Empire MegaMix Expo                                                                                 | <ul style="list-style-type: none"> <li>• Attended a multi-day conference to engage with energy-related employers attending the business-focused expo directly.</li> <li>• Engaged with energy-related exhibitors, from small businesses to local workforce organizations, to promote energy employer surveys.</li> </ul>                                                                                           |
| Innovation Council and Chino Valley Leadership Collaboration                                               | <ul style="list-style-type: none"> <li>• Engaged with local entrepreneurs and business-minded individuals to discuss workforce development resources within the Inland Empire.</li> </ul>                                                                                                                                                                                                                          |
| Chino Valley Women's Conference                                                                            | <ul style="list-style-type: none"> <li>• Engaged with local workforce development organizations and regional stakeholders within the Inland Empire to promote the energy employer survey.</li> <li>• Participated in sessions highlighting the under-representation of women and minority groups within the workforce industry during conversations with local employees and larger workforce entities.</li> </ul> |
| I-REN Kick-Off Workforce Roundtable                                                                        | <ul style="list-style-type: none"> <li>• Presented initial workforce assessment findings to regional partners and stakeholders to include their input and foster productive conversations centering on the future of the energy workforce.</li> </ul>                                                                                                                                                              |

# Attachment

## Energy Workforce Gaps Assessment Summary Report



# Energy Workforce Gaps Assessment Summary Report

Prepared by:  the Energy  
Coalition





# Introduction

I-REN has commissioned a regional energy workforce and training market assessment, which is summarized in this document. The report aimed to analyze workforce gaps within the energy sector in Riverside and San Bernardino counties, identify training needs, and address job accessibility issues to strengthen the local workforce and meet growing energy sector demands.



## *Components of I-REN's Energy Workforce Gaps Assessment*



### **Regional Energy Industry Analysis**

Current industry and forecasted changes, based on primary and secondary data on the region's energy industry



### **Energy Employer Survey**

Engagement (virtual and in-person) and a survey to collect employer and stakeholder feedback on energy employers' needs and challenges



### **Regional Training Assessment**

Analysis of training accessibility, workforce gaps, and current and future employment opportunities

The findings in these three components highlight challenges faced by energy employers, job seekers, and stakeholders in building a skilled workforce. Based on these findings, The Energy Coalition (TEC), who developed this report, has compiled four recommendations for I-REN to strengthen the local workforce and meet growing energy sector demands.



# Regional Energy Industry Analysis

The Inland Empire is projected to grow rapidly in the coming years. The youth population (ages 16-24) is projected to grow by 13.1%. This growing population presents an opportunity to meet the energy industry's growing needs by engage young people in energy careers through training and apprenticeships.

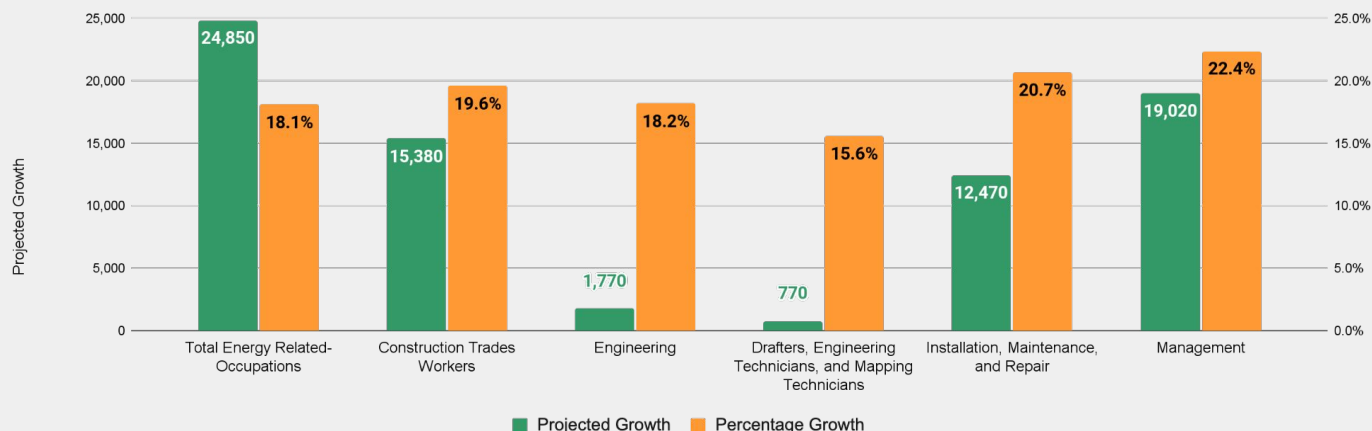
## ► 54%

Residents identifying as Hispanic/Latino, making culturally-relevant outreach and training programs essential.

## ► 83%

Population with high school diploma, opening opportunities for entry-level jobs, apprenticeships, and certifications.

**Projected Growth of Energy-Related Occupations in the Inland Empire (2020-2030)**



Meanwhile, retirees (ages 55+) are projected to grow by 10.3%. The region will need enhanced training, certification, and knowledge transfer to retain a skilled workforce in high-demand energy sectors as large numbers of workers retire. Energy-related occupations are projected to see an average 25% retirement rate and 57% transfer rate of skilled workers from 2020-2030. This poses a significant challenge for maintaining a skilled energy workforce.

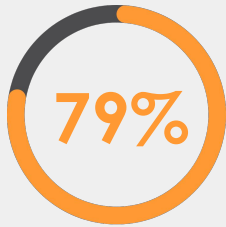
► *Over 75% of workers in critical energy-related roles are projected to retire or transfer between 2020 and 2030, highlighting the need for immediate recruitment and retention strategies.*

Energy-related occupations, which will require a skilled workforce, are projected to grow by an average of 20% through 2030. Significant job growth is expected in energy-related fields, such as solar photovoltaic installers (81.3%), electricians (22.3%), engineers (19.8%-25%), and maintenance workers (16.4%-35.4%).

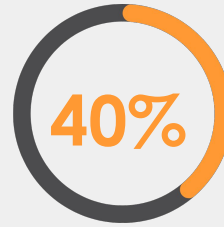


# Energy Employer Survey

The survey, conducted from May to November 2024, received **385 responses**, 28.9% of respondents were from community-based organizations (non-profits, education, local governments, consultants), and 71.1% were from energy employers in the electrical, mechanical, construction, and HVAC sectors.



Employers who identified retention challenges as a barrier to maintaining a stable and skilled workforce



Employers who provide or pay for training, focusing on safety requirements and essential technical skills

Energy employers perceive a **shortage of relevant industry experience and insufficient training or certifications** among potential hires. Survey respondents indicated that job applicants and employees lack technical, workplace, and interpersonal skills equally. This indicates the importance of addressing workforce skill gaps in the region's energy sector with a multifaceted approach.

Employers emphasized the importance of a combination of foundational education, specialized certifications, and hands-on experience when looking to hire new employees. They often prioritize experience over formal education, which limits their ability to fill job openings locally.

## QUESTION

What's driving employee retention challenges in the energy industry?

## ANSWER

- Limited financial and career growth opportunities
- Skill gaps
- Competitive labor market
- Retirements

## QUESTION

What's keeping employees and job seekers from accessing certifications/ training?

## ANSWER

- High training costs
- Limited access to relevant programs
- Insufficient opportunities to address skill gaps

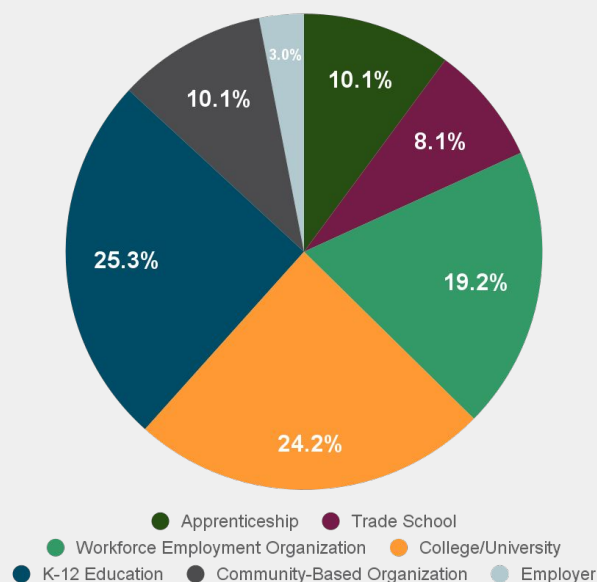


# Regional Training Assessment

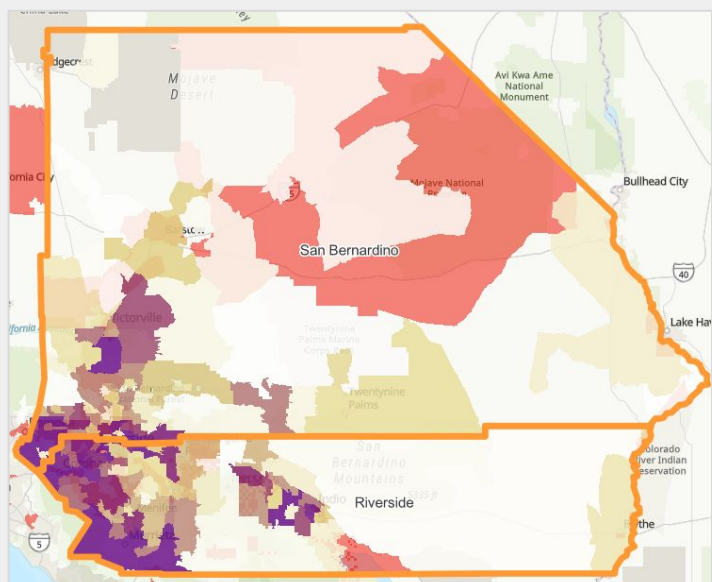
The assessment identified over 100 training providers offering 360 energy-related training opportunities in Riverside and San Bernardino counties. Collaboration between these training providers, workforce development agencies, community organizations, labor unions, and employers is crucial for developing a skilled energy workforce.

Most training programs concentrate on technical and foundational skills in traditional energy sectors such as welding, electrical work, construction, and HVAC, with limited offerings in advanced clean energy technologies.

**Identified Trainings in the Inland Region by Type**



**I-REN regional equity map and energy-related employer heat map**



- - higher concentration of employers
  - - lower concentration of employers
- Rural regions have limited energy employment opportunities and fewer training programs.

To meet the growing demand for energy-related jobs, more training and updated curricula is needed in the clean energy sector, including energy storage, EV infrastructure, energy auditing, green building standards, and other clean energy skills.

Most regional energy training (57%) is delivered in person, which presents challenges related to travel, time commitment, and costs, particularly for rural workers. Only 10-13% of regional training is offered online or through self-paced courses, which can be flexible, but lacks hands-on experience and can have access barriers depending on technology requirements. Training access in underserved communities must be expanded.



# Recommendations



## 1. Connect job seekers to training providers

Job seekers—particularly in underserved and rural areas—face significant barriers in acquiring the necessary skills, training, and certifications to secure stable employment in the energy industry.

### Recommended I-REN Actions

- **Build partnerships** with leading training providers and local labor unions
- Integrate third-party training providers, **offering flexible learning formats** to connect job seekers to workforce education and training (WE&T) programs.
- **Organize job fairs and informational sessions** to raise awareness about training opportunities.
- Develop a **clear, data-driven framework** to measure the **effectiveness of training programs and partnerships**.



## 2. Provide support services to make training and certification more attainable

Job applicants often need more skills/certifications to meet the region's energy workforce needs but they face barriers to obtaining the required certifications.

### Recommended I-REN Actions

- Collaborate with trainers and employers to offer financial support for energy sector training and certifications. For example:
  - subsidizing certification costs
  - offering training stipends
  - paying for materials and exams fees
  - covering transportation costs
- Support employers in developing specific incentives or initiatives for underserved communities.





### 3. Strengthen the regional education and training pipeline from K-12 to energy employment

I-REN should collaborate with K-12 educational institutions to create a seamless education-to-career pipeline, offering localized training programs that focus on the skills needed for in-demand energy roles.

#### Recommended I-REN Actions

- Collaborate with educational institutions to **enhance or develop new energy-related CTE pathways.**
- Introduce **certification programs** in high school education.
- Create **mentorship** opportunities where experienced employees guide new hires.
- Incorporate **entrepreneurial skills and business development into K-12 training.**
- Develop **internships and career fairs** to connect students with energy industry jobs.



### 4. Strengthen collaboration between employers and workforce development organizations to assess training effectiveness

There are currently few opportunities for key training stakeholders to collaborate directly on building an energy-focused workforce. I-REN should foster stronger partnerships to ensure training programs align with regional industry needs.

#### Recommended I-REN Actions

- Organize regular **meetings with employers, workforce development organizations, and educational institutions.**
- Engage energy employers, workforce organizations, and educational institutions to develop and improve training programs.
- **Develop and monitor clear, measurable metrics** to evaluate and improve the effectiveness of energy-related training programs.





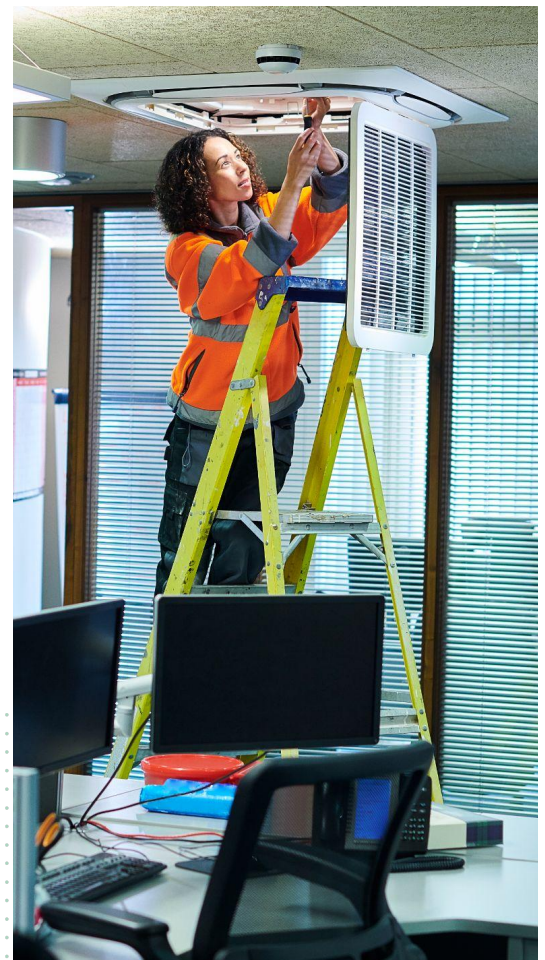
# Thank you!

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Thank you to the community-based organizations, educational institutions, local governments, consultants, and energy industry employers who contributed their experiences and input to develop this report. For questions or request for additional information based on this report summary, please contact Tyler Masters at [tmasters@wrcog.us](mailto:tmasters@wrcog.us).

## What Comes Next?

*This space will be updated with the I-REN Executive Committee's recommended next steps.*



# Attachment

Memorandum of Understanding  
between Inland Regional Energy  
Network (I-REN) and Riverside  
County Housing and Workforce  
Solutions Department: Workforce  
Development Division (HWS-WDD)  
to Collaborate on Increasing  
Economic Opportunities for All  
Disadvantaged Residents in  
Riverside County



## **Memorandum of Understanding**

### **Inland Regional Energy Network (I-REN) and Riverside County Housing and Workforce Solutions Department: Workforce Development Division (HWS-WDD) to Collaborate on Increasing Economic Opportunities for All Disadvantaged Residents in Riverside County**

This Memorandum of Understanding (MOU) establishes a strategic partnership between the Western Riverside Council of Governments, on behalf of the Inland Regional Energy Network (I-REN), and the Riverside County Housing and Workforce Solutions Department, Workforce Development Division (HWS-WDD) to develop a skilled workforce for Riverside County's growing clean energy sector. Through this collaboration, I-REN and HWS-WDD strive to address critical skill gaps, expand access to workforce education and training, and create high-quality career opportunities that empower disadvantaged and low-income communities to thrive in the energy sector.

Together, we will assess workforce needs, design targeted training programs, advance industry partnerships, deliver comprehensive support services, and advocate for equitable policies that promote workforce diversity and inclusion. This partnership reflects our commitment to equipping individuals with the tools and resources necessary to succeed in the clean energy economy while contributing to a sustainable and prosperous future for Riverside County and California.

#### **PURPOSE**

##### **Empowering Communities Through Clean Energy**

I-REN and HWS-WDD share a deep commitment to creating a more equitable and sustainable future for Riverside County. By partnering together, we aim to empower underserved communities through the expansion of workforce education and training programs that open local career opportunities within the clean energy sector. This collaboration goes beyond merely creating jobs; it is about fostering long-term, meaningful employment and building a pathway to economic stability for individuals and families in these communities. Our focus will not only be on reaching those in underserved areas but also targeting populations who face additional barriers to success—such as individuals with limited access to education, transportation, or stable employment—ensuring that they have the tools and resources to thrive in this growing sector.

##### **A Partnership for a Just and Equitable Energy Future**

Through this partnership, I-REN and WDD are committed to promoting workforce equity and sustainability by creating clear, accessible pathways for individuals from underserved communities to enter the expanding clean energy sector. Our goal is to bridge the gap between these communities and the opportunities in clean energy, providing the necessary training and support to help individuals succeed in this industry. By doing so, we aim to contribute to a just and equitable energy future where everyone can participate, grow, and succeed.

Through this collaboration, I-REN and WDD will:

- **Identify Workforce Needs:** Through a comprehensive assessment, determine skill gaps and training requirements within the clean energy industry, ensuring programs align with employer demands and contemporary industry standards.
- **Develop Targeted Training Programs:** Assist in designing and implementing customized training programs tailored to equip individuals from disadvantaged and low-income communities with the technical expertise and soft skills necessary to secure and thrive in high-quality jobs within the energy sector.
- **Foster Industry Partnerships:** Strengthen and cultivate relationships with local employers to develop apprenticeships, internships, ensuring program participants gain hands-on experience and access to sustainable career pathways.
- **Provide Comprehensive Support Services:** Provide holistic support, including career coaching, resume assistance, interview preparation and access to resources, to empower individuals to overcome employment barriers.
- **Advocate for Equitable Policies:** Collaborate on policy initiatives that promote workforce diversity, equity, and inclusion within the clean energy sector.

## PARTNERS

I-REN and HWS-WDD are collaborating to drive the growth of a green economy in Riverside County. This partnership focuses on building a skilled workforce, ensuring equitable access to clean energy career opportunities, and supporting the region's transition to a sustainable, low-carbon future.

Key areas of focus include aligning workforce development initiatives with climate change through mitigation strategies. Together, I-REN, WDD and regional partners are committed to building a workforce equipped to meet the challenges and seize the opportunities of a low-carbon economy.

### **The Role of Riverside County Housing and Workforce Solutions Department: Workforce Development Division and Inland Regional Energy Network in Advancing a Green Economy**

HWS-WDD plays a pivotal role within the County system and will:

- **Align Local and Regional Workforce Development:** HWS-WDD partners with local and regional workforce development boards to ensure programs and services are seamlessly coordinated and deliver maximum impact.
- **Support Climate Change Mitigation:** By integrating job quality and job access standards into major climate investment programs, HWS-WDD will help to create a green economy that benefits all residents in Riverside County.

Through these collaborative efforts, HWS-WDD and its regional partners are working to build a future where Riverside County's workforce is equipped to address the challenges and capitalize on the opportunities presented by changing climate.

HWS-WDD's contributions to this mission include:

- **Identifying Workforce Needs:** Review the Labor Market Information (LMI) to identify specific skills and training requirements for jobs within the clean job energy sector.
- **Developing Targeted Training Programs:** Work with training providers to design customized programs or use existing curriculum to equip individuals with the tools and knowledge required to become employable in the clean energy sector.

- **Expanding Access to Training:** Continue engaging historically marginalized communities through focused outreach and recruitment efforts.
- **Fostering Industry Partnerships:** Strengthen and foster relationships with local employers for a seamless pipeline from training to employment.
- **Providing Comprehensive Support Services:** Provide support services such as, but not limited to, job coaching and resume writing, to help individuals secure employment as deemed necessary.

Through these contributions, HWS-WDD will support in building a skilled workforce, capable of enhancing the transition from clean energy training to employment while elevating social and economic opportunities for Riverside County residents.

**I-REN** actively pursues participation in California's clean energy initiatives and build a stronger clean energy economy throughout communities in Riverside and San Bernardino counties. I-REN was formed as a partnership between the Coachella Valley Association of Governments, San Bernardino Council of Governments, and Western Riverside Council of Governments based on the shared belief in savings energy and increasing equity for residents, businesses, and local governments throughout San Bernardino and Riverside Counties. I-REN will:

- **Provide equitable access to energy efficiency resources** and the associated cost savings is crucial to the future of the communities.
- **Empower local and tribal governments** alike through energy efficiency resources, best practices education, and support staff.
- **Ensure a thriving future clean energy economy** in the Inland Empire by creating clean energy jobs and training the workforce on needed skills.
- **Equip the construction industry and local building departments** with in-depth training to comply with and enforce energy codes and standards.

### **Shared Priorities: A Collaborative Approach to a Sustainable Future**

I-REN and WDD are dedicated to advancing a just and equitable transition to clean energy. To achieve this shared vision, the partnership will prioritize the following objectives:

1. **Expanding Opportunities for All:** Increase access to clean energy job opportunities for historically marginalized groups, including people of color, women, low-income individuals, and individuals with disabilities.
2. **Fostering Strong Partnerships:** Maintain regular communication and coordination to ensure alignment on workforce development strategies and policies.
3. **Identifying Key Opportunities:** Identify targeted energy programs and policies, including but not limited to energy efficiency, renewable energy, and zero-emission transportation, to strengthen and align workforce development efforts in these critical areas.
4. **Leveraging Resources:** Collaborate to leverage California Workforce Development Board (CWDB) programs, policies, and funding opportunities to cultivate a skilled that supports the achievement of California's clean energy goals.

Through collaboration, we can build a sustainable future that fosters opportunity and prosperity for all.

## **TERM AND TERMINATION**

This MOU is effective upon signatures of the parties listed below and shall continue in effect through \_\_\_\_\_. Either party may terminate this MOU, with or without cause, upon written notice of intent to terminate the MOU served upon the other party stating the extent and effective date of termination.

## **SCOPE OF WORK**

The Riverside County Workforce Development Division (WDD) is committed to fostering pathways to prosperity for historically underrepresented and marginalized communities in Riverside County.

Recognizing that these communities have disproportionately experienced environmental, health, and socioeconomic inequities, our plan focuses on addressing workforce needs and advancing equitable access to clean energy opportunities across the region.

Key areas of focus include:

- **Workforce Development and Training:** Identify skill gaps, assist with the design of targeted training programs, and expand access to training opportunities for underserved populations.
- **Job Placement and Career Advancement:** Strengthen partnerships with employers, provide comprehensive support services, and foster professional growth through advanced training and mentorship programs.

These initiatives aim to address workforce needs while expanding equitable access to clean energy opportunities across Riverside County. By leveraging combined resources and expertise, I-REN and HWS-WDD are committed to preparing California's workforce to meet the demands of a sustainable and inclusive future.

### **I-REN Roles and Responsibilities**

I-REN seeks to support the shared vision and priorities understood in this agreement and will:

1. Connect local job seekers to established training providers and introduce third-party training providers.
2. Provide and connect employees with support services to enhance training and certification attainability.
3. Strengthen the regional education and training pipeline from K-12 to employment.
4. Strengthen collaboration between employers and workforce development organizations to continuously assess training effectiveness.

### **HWS-WDD Roles and Responsibilities**

To achieve the shared goals of this partnership, HWS-WDD will:

1. **Identify Workforce Needs:** Conduct comprehensive assessments to determine skill gaps and training requirements within the clean energy industry, ensuring alignment with workforce demands and industry standards.
2. **Assist in Developing Targeted Training Programs:** Collaborate with training providers on the design and implementation of customized training programs to equip individuals with the skills needed for high-demand clean energy jobs.

3. Expand Access to Training: Prioritize outreach and recruitment initiatives to engage historically underrepresented and marginalized communities, including people of color, women, low-income individuals, and individuals with disabilities, ensuring equitable access to training opportunities.
4. Foster Industry Partnerships: Strengthen relationships with local employers to develop apprenticeship, internship, and job placement opportunities.
5. Provide Comprehensive Support Services: Deliver an array support services, as deemed necessary, such as job coaching, resume writing, and interview preparation, to help individuals secure and retain meaningful employment.
6. Promote Career Advancement: Support the professional development of clean energy workers by providing access to advance training opportunities and mentorship programs.

## **COUNTY NOT OBLIGATED FOR ANY COSTS**

The Partner acknowledges and agrees that the County shall not be liable for any costs incurred by the Partner, including any of its affiliates in connection with the administration and/or implementation of the Collaboration on Increasing Economic Opportunities for All Disadvantaged Residents in Riverside County or any related partnership or program.

The Partner further acknowledges and agrees that the County shall not be liable in any way for payment of any costs, fees, wages or any other amounts to be paid to any party arising out of or related to (i) services provided pursuant to this MOU, (ii) the administration and/or implementation of the Collaboration on Increasing Economic Opportunities for All Disadvantaged Residents in Riverside County and/or (iii) this MOU.

## **POINTS OF CONTACT**

I-REN and HWW-WDD will designate primary points of contact to facilitate effective communication and ensure accountability throughout the duration of this MOU. While additional staff members may be involved in specific tasks or projects, these primary contacts will serve as the primary liaisons between the two organizations.

Upon signing this MOU, I-REN and WDD will exchange the names of their respective primary points of contact. These individuals will be responsible for coordinating efforts, addressing questions, and providing updates on project progress. As needed, both organizations may update the designated points of contact to maintain optimal communication and collaboration.

## **AMENDMENTS**

This MOU shall not be modified except by a written amendment signed by authorized representatives of the partners. The partners shall meet and coordinate on issues pertaining to the effectiveness and validity of this MOU annually, or as agreed upon by the partners.

## **MISCELLANEOUS**

This MOU is made for the sole and mutual benefit of the parties. No party and no other person or entity shall have any rights or remedies under or by reason hereunder. Nothing in this MOU may be the basis of any interparty or third-party challenges or appeals. The parties recognize that despite reasonable efforts,

because of varying programs, authority, and priorities, some of the recommendations shared or developed under this MOU may not result in actionable items.

Nothing in this MOU is intended to give rise to an employer-employee relationship; and the parties shall hold each other harmless from any and all claims that may be made against the other based upon any contention by a third party that an employer-employee relationship exists by reason of this MOU.

This MOU shall not be assigned, either in whole or in part, without prior written consent of each of the parties hereto. Any assignment or purported assignment of this MOU without the prior written consent will be deemed void and of no force or effect.

This MOU shall be governed by the laws of the State of California. Any legal action related to the performance or interpretation of this MOU shall be filed only in the Superior Court of the State of California located in Riverside, California, and the parties waive any provision of law providing for a change of venue to another location. In the event any provision in this MOU is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remaining provisions will nevertheless continue in full force without being impaired or invalidated in any way.

This MOU may be executed in counterparts, each of which will be an original, but all of which together will constitute one instrument. Each party to this MOU agrees to the use of electronic signatures, such as digital signatures that meet the requirements of the California Uniform Electronic Transactions Act ("CUETA") (Cal. Civ. Code §§ 1633.1 to 1633.17), for executing this MOU. The parties further agree that the electronic signatures of the parties included in this MOU are intended to authenticate this writing and to have the same force and effect as manual signatures. Electronic signature means an electronic sound, symbol, or process attached to or logically associated with an electronic record and executed or adopted by a person with the intent to sign the electronic record pursuant to the CUETA as amended from time to time. The CUETA authorizes use of an electronic signature for transactions and contracts among parties in California, including a government agency. Digital signature means an electronic identifier, created by computer, intended by the party using it to have the same force and effect as the use of a manual signature, and shall be reasonably relied upon by the parties. For purposes of this section, a digital signature is a type of "electronic signature" as defined in subdivision (i) of Section 1633.2 of the Civil Code.

Any determination that a provision in this MOU is invalid does not invalidate any other provision of this MOU or the MOU in its entirety.

[Signatures on Following Page]

[Remainder of Page Intentionally Blank]

## APPROVAL

Each party represents and warrants that it has the right, power, and authority to execute this agreement. Each party represents and warrants that it has given all notices and obtained all consents, powers, and authorities necessary to permit that party, and the persons executing this agreement for the party, to enter into this agreement.

“COUNTY”

COUNTY OF RIVERSIDE, a political subdivision of the State of California, by and through its Housing and Workforce Solutions/Workforce Development Division

By: \_\_\_\_\_  
Heidi Marshall  
Director of Housing and Workforce  
Development Division

Dated: \_\_\_\_\_

“PARTNER”

Western Riverside Council of Governments  
on behalf of the Inland Regional Energy  
Network (I-REN)

By: \_\_\_\_\_  
Dr. Kurt Wilson  
Executive Director

Dated: \_\_\_\_\_

APPROVED AS TO FORM

MINH C. TRAN  
COUNTY COUNSEL

By: \_\_\_\_\_  
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# Western Riverside Council of Governments

## WRCOG Executive Committee

### Staff Report

**Subject:** Member Dues Exploration  
**Contact:** Dr. Kurt Wilson, Executive Director, [kwilson@wrcog.us](mailto:kwilson@wrcog.us), (951) 405-6701  
**Date:** February 3, 2025

#### **Recommended Action(s):**

1. Approve the adjustment of member dues based on the local January-to-January Consumer Price Index starting from the 2008 total member dues of \$345,480 through present.
2. Approve the adjustment of member dues annually based on the local January-to-January Consumer Price Index.

#### **Summary:**

One of WRCOG's key revenue sources, member dues, has remained unchanged since a 15% reduction in Fiscal Year (FY) 2009/2010, raising questions about their sustainability. In response, after meeting twice since October 2023, a working group of WRCOG Technical Advisory Committee (TAC) members, guided by the WRCOG Administration & Finance Committee, has developed a proposed dues structure.

#### **Purpose / WRCOG 2022-2027 Strategic Plan Goal:**

The purpose of this item is to provide an update on exploring options for a potential increase to WRCOG member dues. This effort aligns with WRCOG's 2022-2027 Strategic Plan Goal #3 (Ensure fiscal solvency and stability of the Western Riverside Council of Governments).

#### **Discussion:**

#### **Background**

WRCOG annual member dues are currently set at \$294k in total. This is a fixed amount that has not changed since FY 2009/2010, when member dues were reduced by 15% due to the Great Recession. To provide perspective, the purchasing power of \$294k in 2008 is \$207k in 2023.

WRCOG distributes the total annual member dues on a weighted average allocation that is based on population and assessed value (which is described in the WRCOG Bylaws) for cities and the county, while the water districts and the Riverside County Office of Education are assessed fixed amounts. This weighted average allocation had not been updated from 2009 allocations until FY 2024/2025, so member dues had been calculated based on population and assessed value from 2009 through FY 2023/2024. WRCOG will continue to update the weighted average allocation annually, based on the latest available



data, as indicated by the WRCOG Bylaws. Updating the allocation provides an opportunity to adjust the allocation among agencies and improve the fairness of the cost.

Beyond updating the weighted average allocation with current data, WRCOG explored the adjustment of total member dues to more appropriately fit WRCOG's Strategic Plan and better serve WRCOG's members with elevated agency activities. Member dues are utilized to cover a portion of the Administration Department budget. The larger line item expenses within the Administration budget include staff time to cover committee meetings, legislative activities, agency sponsorship of events and organizations, agency events, and legal expenses. These line item expenses have increased over time as costs have risen, and, as member dues have not been adjusted since 2008, this has increased the burden on WRCOG programs to cover the Administration budget.

### **Present Situation**

The working group met two times since October 2023. Members of the working group consisted of the following TAC members: Betsy Lowrey (City of Temecula), Dr. Grace Martin (March JPA), Ernie Reyna (City of Perris), Rob Johnson (City of San Jacinto), Rod Butler (City of Jurupa Valley), and Will Kolbow (City of Calimesa). Staff provided information such as what other comparable agencies charge, how comparable agencies utilize their dues, the history of dues at WRCOG, how WRCOG currently utilizes its dues as part of its Administration budget, and how WRCOG envisions its Administration budget moving forward. WRCOG is focused on the long-term financial outlook of the Agency and is looking at ways to adjust budgets to reflect this. The goal of exploring member dues is to ensure the dues charged align with the long-term outlook of WRCOG.

The second working group meeting, held on January 25, 2024, focused on what other comparable agencies charge, analyzing how their budgets are structured, and how WRCOG may change its budget structure to better align. Working group members requested that staff return with more information on how member dues will be utilized moving forward as WRCOG's budget structure is revised to better align. WRCOG did reach out to the working group members prior to the September 19, 2024, group meeting to discuss the due diligence conducted after the second working group meeting. These conversations were conducted on a one-on-one basis to be more efficient with time.

### **Member Dues Adjustment Proposal**

Since member dues have remained stagnant since 2008, WRCOG programs (i.e., TUMF and I-REN) have been burdened to cover the costs needed to cover the Agency's Administration budget. This is not sustainable for WRCOG to maintain in the long-term and does not enable WRCOG to serve its member agencies at its fullest capacity. Based on the input provided by the working group from the meetings, WRCOG developed a proposal to adjust member dues in order to align with its Strategic Plan and ensure the long-term stability of WRCOG without having to place a large burden on the member agencies.

WRCOG is proposing to index member dues to the local (Riverside-San Bernardino-Ontario Metropolitan Area) Consumer Price Index (CPI) based on what each current member agency dues would have been in 2008 through January 2024. This includes the dues without the 15% reduction that took place in 2009. Dues would be indexed based on the January-to-January local CPI. WRCOG is proposing to adjust member dues via CPI since CPI is a commonly utilized metric among public agencies. The total member dues in 2008, based on the current WRCOG membership, would have been \$345,480. The

total member dues indexed annually from the January 2008 local CPI to the January 2024 local CPI is \$530,438. The local CPI was created in 2018, so the local CPI utilized from 2008 through 2017 is the Los Angeles-Long Beach-Anaheim Metropolitan Statistical Area. WRCOG does not have a general fund or tax revenues to assist funding its agency budget, so utilizing CPI adjustments can assist with rising costs.

As costs have risen and, as member dues have not been adjusted since 2008, this has increased the burden on WRCOG programs to cover the Administration budget. This burden has two major factors for the Agency and its members, as WRCOG programs have had to increase its contributions to cover the Administration budget.

1. Continues to take funding from program activities, such as those listed below.
  - Less staff / consultant support from TUMF
  - Less money for grant writing assistance
  - Less money for demographic research and travel behavior studies
2. Increases uncertainty for WRCOG and its programs.
  - Most funding sources for WRCOG programs are not certain annually because they depend on factors outside of WRCOG's control, such as the economy or grant funding. WRCOG has become increasingly dependent on funding from programs to fully fund its Administration budget which is a juxtaposition to its Strategic Plan and ensuring long-term stability of the Agency. Specific past experiences of uncertainty are listed below.
    - TUMF Program experienced a 90% decline in TUMF revenue over a two-year period.
    - WRCOG was awarded \$1.6M in State funding for housing planning (REAP 2.0). This funding was then withheld due to proposed budget cuts to the State budget, and then finally restored because of successful negotiations on the State budget.
    - Commercial PACE revenues vary year-to-year and are closely tied to the economy.
    - Six WRCOG programs are funded primarily by grants which require WRCOG to continually reapply and can vary depending on the State fiscal outlook.

Adjusting member dues from its current total to \$530,438 is an increase of 80% and increases for individual member agencies range from \$1,300 to \$26,000 based on 2023 population and assessed value. The dues increase that will be a result of this adjustment via CPI will be used to cover more of the Administration budget. This will enable WRCOG programs to dedicate more of its funding to increase program capabilities with the goal of benefitting member agencies. There are a lot of uncertainties in the coming years and WRCOG programs are susceptible so WRCOG is trying to be proactive as it looks at the long-term viability of the Agency.

### **TAC Recommendation**

The TAC received a report on this item at its September 19, 2024, meeting. Discussion took place among the members, and the Committee recommended that the Executive Committee adjust member dues based on local January-to-January CPI starting from the 2008 total member dues of \$345,480 through present, and adjust member dues annually based on local January-to-January CPI.

### **Administration & Finance Committee Recommendation**

The Administration & Finance Committee received a report on this item at its December 11, 2024, meeting. Discussion took place among the members, and the Committee recommended that the

Executive Committee adjust member dues based on local January-to-January CPI starting from the 2008 total member dues of \$345,480 through present, and adjust member dues annually based on Local January-to-January CPI.

**Prior Action(s):**

**December 11, 2024:** The Administration & Finance Committee recommended that the Executive Committee adjust member dues based on local January-to-January CPI starting from the 2008 total member dues of \$345,480 through present, and adjust member dues annually based on local January-to-January CPI.

**September 19, 2024:** The Technical Advisory Committee recommended that the Executive Committee adjust member dues based on local January-to-January CPI starting from the 2008 total member dues of \$345,480 through present, and adjust member dues annually based on local January-to-January CPI.

**Financial Summary:**

If the proposed change is approved, member dues will be adjusted based on local January-to-January CPI starting from the 2008 total member dues of \$345,480 through present, and will be adjusted annually based on local January-to-January CPI starting with the Fiscal Year 2025/2026 budget.

**Attachment(s):**

None.