



**C46 License # 1005845**

**Solicitation Number 10088487-18-A RFSQ 100% Renewable Energy RESPONSE**

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**CITY OF SAN DIEGO**

**PURCHASING & CONTRACTING DEPARTMENT**  
1200 Third Avenue, Suite 200  
San Diego, CA 92101-4195  
Fax: (619) 236-5904

**ADDENDUM B**

RFSQ No. 10088487-18-A

**Revised RFSQ Closing Date: July 21, 2017**  
**@ 2:00 p.m. PST**

RFSQ for furnishing the City of San Diego with **100% Renewable Energy**

The following changes are hereby made effective as though they were originally shown and/or written:

1. **The RFSQ closing date has been changed from July 19, 2017 @ 2:00 p.m. to July 21, 2017 at 2:00 p.m. PST.**
2. **Delete the Addendum A Request for Statement of Qualifications Cover Sheet and replace with the attached **Addendum B Request for Statement of Qualifications Cover Sheet.****
3. **Delete the Addendum A Request for Statement of Qualifications Contract Signature Page 10 and replace with the attached **Addendum B Request for Statement of Qualifications Contract Signature Page 10.****
4. **Add a two (2) page "Questions and Answers". (NOTE: This is for informational purposes only and is not part of any resulting contract.)**

CITY OF SAN DIEGO PURCHASING & CONTRACTING DEPARTMENT



Veronica Ford  
Associate Procurement Contracting Officer  
(619) 236-6032

July 14, 2017

VF/ss



Request For Statements of Qualifications (RFSQ)  
for  
100% Renewable Energy  
ADDENDUM B  
Cover Sheet

RFSQ Number: 10088487-18-A

Closing Date and Time ("Closing Date"): July 21, 2017, 2:00 p.m. PST

City Contact: Veronica Ford,  
Associate Procurement  
Contracting Officer,  
1200 Third Avenue, Suite 200  
San Diego, California 92101  
VMFord@sandiego.gov  
(619) 236-6032

Submissions: **Proposer is required to provide two (2) originals, four (4) copy, and one (1) electronic copy (e.g. thumb drive or CD) of their proposal, as described herein. Note: The most recent Addendum Signature Page must be signed and submitted.**

**Emailed submissions will not be accepted.**

**K. CITY'S UNILATERAL RIGHT**

The City reserves the unilateral right to do any of the following if the City determines in its sole discretion that such action is in the City's best interests: Cancel this RFSQ, in whole or in part, or reject all submittals submitted in response to this RFSQ; select a Respondent's submittal in whole or in part; select one or more Respondents; waive or permit cure of minor irregularities; and conduct discussions with Respondents in any manner necessary to serve the City's best interests.

**RESPONDENT SIGNATURE IS REQUIRED**

Respondent Name: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone No. and E-Mail Address: \_\_\_\_\_

Website: \_\_\_\_\_

Authorized Representative Name and Title: \_\_\_\_\_

Representative's Original Signature: \_\_\_\_\_

Date Signed: \_\_\_\_\_

**RFSQ No. 10088487-18-A****Questions and Answers****Question 1**

Does the City of San Diego intend to use this RFSQ to select a short list of companies that can respond to a future Request for Proposals to provide the city of San Diego with 100% renewable energy, and companies that are not selected will not be able to participate in future RFPs?

**Answer 1**

This may be the last step in this procurement process. The City seeks qualifications from interested parties to support the City's goal to provide electricity entirely from renewable generating sources by 2035 to the residents, businesses, and government operations within the City of San Diego. The purpose of this Request for Statements of Qualifications ("RFSQ") is to enable the City to determine the qualifications of organizations that can provide a pathway to procure and deliver electric power and/or efficiencies that will ensure timely and cost effective mechanisms and programs to help reach the City's 100% renewable electricity goal as detailed in the City's Climate Action Plan ("CAP"; found at [www.sandiego.gov/sustainability/climate-action-plan](http://www.sandiego.gov/sustainability/climate-action-plan)). The City may determine to structure one or more RFPs based on categorical qualifications of respondents.

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**Question 2**

If a company does not respond to this RFSQ, does that preclude the company from bidding on future RFPs to provide the City of San Diego with 100% renewable energy by 2035?

**Answer 2**

Yes, if a company does not prove to be a qualified organization by way of a response to the RFSQ, the company will be precluded from submitting a proposal on a later RFP.

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**Question 3**

Is the City looking for specific technology solutions to be implemented as indicated by areas one and two in the RFP, or can a team respond that can help evaluate appropriate technology solutions as part of working with the City?

**Answer 3**

**The City is seeking proven technology solutions. Selected vendors will work with the City to evaluate solutions at scale that best prove to meet the needs of the City's goals.**

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**Question 4**

Must respondents be able to address every item in the SOW, or can teams submit that have expertise in certain areas?

**Answer 4**

**Submittals must address every item in the SOW. Team Submittals are acceptable.**

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**Question 5**

Is there a requirement for all or part of the respondents proposed team members to be located in California?

**Answer 5**

**No.**

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**\* End of Questions and Answers \***



Ms. Veronica Ford  
Associate Procurement  
Contract Officer  
City of San Diego  
1200 Third Avenue, Suite 200  
San Diego, CA 92101  
[VMFord@sandiego.gov](mailto:VMFord@sandiego.gov)  
619-236-6032

July 17, 2017

### 1. Cover Letter

**To: Evaluation Team Solicitation Number 10088487-18-A RFSQ 100 % Renewable Energy RESPONSE**

**ONE STOP RENEWABLE ENERGY RESOURCE  
TO MEET  
CITY OF SAN DIEGO'S  
CLIMATE ACTION PLAN 100% RENEWABLE ENERGY GOALS**

**MISSION/ROLE/POSITION**

Dedicate SWG Energy Inc's cross renewable energy technology expertise to function as an accelerator to assist City in the aggressive advancement of the Climate Action Plan 100% Renewable Energy Goals.

**Technologies Provided**

Solar Energy  
On-site Distributed Wind Energy  
Energy Storage Systems  
Energy Resiliency/Security  
Energy Islandability For Independent/Emergency Operation  
Street & Parking Lot Off Grid Lighting - Smarter Lights  
Energy Management & Monitoring Systems  
CAISO Compliant & Compatible

**Serving San Diego Market Sectors**

City of San Diego Facilities  
Public Entities Within City of San Diego  
Corporate/Commercial Facilities  
Municipal Facilities  
State Facilities  
Federal Facilities  
Residential Homeowners

**License Type -** CA License C46 #1005845 Solar PV  
SWG Energy Inc dba SWG Solar Energy

**Authorized Person** Joseph J. Willix, President  
 SWG Energy Inc  
 7040 Avenida Encinas #104-648  
 Carlsbad, CA 92011  
 760-978-8666  
 jwillix@swgenergy.com

**Business Structure** Delaware Corporation April 13, 2007

**Experience** 10 Years - 2007 to 2017  
 Solar energy (PV)  
 Wind energy  
 Off grid Solar LED Street & Parking Lot Lighting  
 Energy Storage Systems  
 Geothermal Cooling/Heating

**Federal Contracting** Proven Past Performance Track Record  
 Federal Government Contractor  
 DUNS - 801419149  
 As Prime General Contractor (not subcontractor)  
 Responsible for financing, design, installation & maintenance

Department of Energy	\$2 million
Department of Labor	\$650,000
Oklahoma Medical Research Foundation	\$1,500,000
F.E. Warren Air Force Base	\$100,000

**Qualifications** SWG Energy Inc is a renewable energy company that specializes in the design, installation, and maintenance of solar energy, wind energy, energy storage, off grid solar LED street & parking lot lighting, and geothermal cooling & heating systems.

**Uniquely Qualified** Specialized Renewable Energy Company - Renewable Energy Expertise (Not a Roofing Company, Window/Door Company, Electrical Contractor that expanding into solar energy.)  
 Unique Cross Functional Solar & Wind System Training  
 Over the past 10 years SWG Solar Energy's technical team has been trained and certified as system designers, installers and maintenance by Sunpower University (residential & commercial PV), by Northern Power Wind(100KW), GreenStorm Wind 60/100/225KW Wind, Britwind/Evance 5KW wind, Osiris Wind 10KW, Helix Wind 5KW, Cleanfield Energy Wind 3.5KW, and High Altitude Commercial Industry Training & Rescue.



Trained and Certified in Energy Storage by Sharp Smart Storage, LG Chem ESS Energy Storage System, SolarEdge/StorEdge, Enphase Storage.

**Small Business** SWG Energy has already filed applications for the following classifications DBE, Minority-Owned Small Business, Woman-owned Small Business. The company is also in the process of filing for it's 8a classification.

**New To San Diego** SWG Energy Inc relocated from its original headquarters market, Dallas Texas to Carlsbad CA in February 2016 to relocate to California the State with the most progressive renewable energy policies in the U.S.

**No. San Diego SBDC** SWG Energy works closely with Cheryl Brown, Senior Business Advisor to advance the company's Small Business Advancement Goals and integration and growth within the San Diego and Federal Contracting markets.

Best regards,

Joseph J. Willix, President

## 2. Minimum Requirements

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**License Type -** CA License C46 #1005845 Solar PV  
SWG Energy Inc dba SWG Solar Energy

**Federal Government Contractor** DUNS 801419149

**Master Electrician** Kyle Shean

**Structural Engineers** Steve Borossay  
Loyd Martin

### 3. Respondents Qualifications's and Experience

#### Firm Overview

**Origination:** SWG Energy Inc was launched in 2007 as a Delaware Corporation headquartered in Dallas Texas as a renewable energy company that specialized in the design, installation and maintenance of solar energy, wind energy and geothermal cooling.

**Mission:** Accelerate the growth of renewable energy in the U.S. by implementing already proven solar, wind and geothermal technologies to grow the market.

**Core Technologies:** Market Research indicated solar, wind & geothermal were the core renewable technologies because 95% of all potential SWG Energy clients could reduce their carbon emissions by using them.

**One Stop Resource:** SWG Energy wanted to position its company to clients as a one-stop-resource that could fulfill all of their renewable energy needs for solar energy, wind energy and geothermal cooling & heating.

**Company's Marketing Positioning:** SWG Energy's Point-of-Differentiation from competitors is that it specialized in renewable energy and that it offered large corporate, municipal and government clients all three technologies. Clients could choose SWG Energy as renewable energy experts vs other competitors like Sullivan Solar and Pedersen Dean who were roofers expanding into solar and companies like Baker Electric an electrical contractor who expanded into solar. Or a window/door company who did the same. None of which were true renewable energy experts.

**Top Tier Renewable Technology Strategy:** SWG Energy only offers products from Top Tier global solar industry manufacturers because they are financially stable, stand behind their 25 year warranty and have a history of investing in research & development resulting in superior products.

**Expanded Solutions'** - As the renewable energy industry developed in 2010 SWG Energy Inc added off-grid solar LED street & parking lot lighting by creating its Sunlight At Night custom engineered proprietary street light system for a major Department of Energy contract. In the past five years SWG Energy has also added energy storage due to its increasing importance in controlling & managing time of use energy needs to reduce utility demand charges.

**Small Business Certifications:** SWG Energy Inc dba SWG Solar Energy is currently formalizing all of its Small Business Certifications at the federal and state level with applications pending for the following:

8a

DBE

Minority-Owned Small Business

Woman-owned Small Business

### 3. Continued Respondents Qualifications's and Experience

#### SWG Energy Inc - An Emerging Business With A Team of Industry Leading Manufacturers

While SWG Energy Inc is classified as a Small Business: DBE, SMBE, SWBE, 8a applications pending, it as aligned itself with a team of Industry Leading Manufacturers & Technologies who provide the ability to scale-up to complete major projects with financing, the latest technology, engineering, procurement and implementation support.



SWG Solar Energy has a proven track record of successfully completing all major projects on-time, on-budget, with zero change orders to insure the success of the City of San Diego's solar + storage projects using best-in-class solar technologies. All to deliver longterm utility savings



SWG Energy working with CED Greentech the largest U.S. solar distributor insures advance product reservations for all the required solar energy & storage equipment at competitive market pricing. Plus it enables SWG Solar Energy access to the latest high efficiency solar + storage equipment for the City of San Diego's projects



LG Solar is the most recognized brand name in the solar industry. LG is committed to delivering its latest solar panel technology to the City of San Diego's projects in order to deliver the highest energy production. A global financially stable industry leader insures longterm warranty coverage.



SolarEdge is the leader in commercial three phase inverters with power optimizers designed to maximize energy harvest and provide individual panel level monitoring to facilitate long-term O&M. SolarEdge is committed to insuring the City of San Diego's solar project success.



Worldwide UNIRAC has installed more Gigawatts of UNIRAC RM non-penetrating commercial solar mounting than any other racking manufacturer. It's project team plans to provide start-to-finish support to the the City of San Diego's project.



With over 270MW of solar carports installed, M Bar C Construction is committed to delivering high quality steel work, engineering & construction to insure the City of San Diego's receives quality solar carports; if part of the plan.



SWG Energy works with Sharp Smart Storage to provide the latest energy storage technology to commercial solar energy projects. Sharp Smart Storage ranks second in number of SGIP approved projects and ranks first in project completions. It is committed to insuring the success of the City of San Diego's AES Advanced Energy Storage projects.



SWG Energy also works with Green Charge to develop commercial building energy storage systems. They team up to provide the correctly sized solar energy system along with the correctly sized energy storage system. The design is focused on reducing your energy usage peaks to reduce SDGE's high cost demand charges.



SWG Energy Inc is working closely with Greenstorm Wind, the Italian Wind Turbine manufacturer to bring its wind energy technology to the U.S. Market. Unique Ability to scale-up to deliver 60KW, 100KW and 225 KW wind turbines 30 days from order to overcome traditional long lead time manufacturing.

### 3.a Ability To Perform Desired Services

**ONE STOP RENEWABLE ENERGY RESOURCE  
TO MEET  
CITY OF SAN DIEGO'S  
CLIMATE ACTION PLAN 100% RENEWABLE ENERGY GOALS**

**MISSION/ROLE/STRATEGY**

Dedicate SWG Energy Inc's multifunctional renewable energy technology expertise to function as an accelerator to assist City in the aggressive advancement of the Climate Action Plan 100% Renewable Energy Goals.

**Technologies Provided**

Solar Energy  
On-site Distributed Wind Energy  
Energy Storage Systems  
Energy Resiliency/Security  
Energy Islandability For Independent/Emergency Operation  
Street & Parking Lot Off Grid Lighting - Smarter Lights  
Energy Management & Monitoring Systems

### CAISO Compliant & Compatible

**DERP Distributed Energy Resource Provider**

The CAISO recognizes a distributed energy resource provider (DERP) as a new type of market participant that owns or operates distributed energy resources (DER)<sup>1</sup> with the ability to meet participation requirements, in aggregate, as a new type of market resource capable of operating in response to an ISO schedule, award or dispatch. Distributed energy resource aggregations (DERAs), meeting a 0.5 MW minimum capacity requirement, can participate in the CAISO day-ahead, real-time and ancillary services markets as a participating generator using participation models that fit the needs of the DERA. The ISO envisions these resources contributing to the low-carbon, flexible capacity needed to maintain real-time system balance and reliability supporting the integration of renewable energy.

The DERP must first execute a Distributed Energy Resource Provider Agreement (DERPA) to accept and abide by the terms of the ISO tariff.<sup>2</sup> A DERP, the aggregated resources it operates and the distributed energy resources that comprise such aggregated resources must comply with applicable utility distribution company (UDC) tariffs and any applicable requirements of the local regulatory authority.

### Serving San Diego Market Sectors

City of San Diego Facilities  
Public Entities Within City of San Diego

Corporate/Commercial Facilities  
Municipal Facilities  
State Facilities  
Federal Facilities  
Residential Homeowners

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### **3.b Special Characteristics - Expanded Importance of Energy Storage**

SWG Energy Inc working with leading energy storage companies like, Smart Storage By Sharp, Green Charge, LG Chem, Enphase SolarEdge/StorEdge and others, it provides the City of San Diego with the ability to eliminate the following:

1. 30% of its SDGE utility bill with on site energy production
2. 60% of its SDGE utility bill with energy storage systems
3. Solar + Storage Solution maximizes the City's utility savings!

### **3.c Distinguish Respondent From Others**

#### **Multiple Renewable Energy Sources**

SWG Energy's One Stop Resource for Renewable Energy Technologies provides the City of San Diego with one supplier who can deliver multiple renewable energy technologies and the expertise needed to correctly size and install systems to meet the clients needs.

#### **Energy Security/ Energy Islandability/ Energy Independence**

Working to meet the goals of the Office of Energy Initiatives for the U.S. Army, U.S. Air Force and U.S. Navy, SWG Energy is on the ground floor of developing systems that meet their requirements for:

- Producing energy on-site
- Storing energy on-site
- Developing systems that provide resiliency
- Provide emergency & independent operation

In 2017/2018 these are important benefits for the City of San Diego to implement.

#### **10 Year Asset Management Service Plan & Performance Guarantee**

Smart Storage By Sharp - working with Sharp Smart Storage SWG Energy is able to provide the City with a 10 Year Asset Management Service Plan & Performance Guarantee of the City's Energy Storage Systems.

### **3.d Delivering What The City Needs to Implement The Climate Action Plans 100% Renewable Energy Goal - FASTER, BETTER, WITH MORE TECHNOLOGIES**

SWG Energy's One Stop Renewable Energy Offering enables the City to work with one supplier with the expertise to deliver Turnkey

Solar/Wind/Energy Storage/ Solar LED Street & Parking Lot  
Lighting systems to the city's facilities:

- design
- engineer
- procurement
- installation
- O & M services

**ALL DESIGNED TO ACCELERATE RENEWABLE ENERGY  
IMPLEMENTATION!**



**4. Provisos or Conditions****SWG Energy Inc - An Emerging Small Business With A Team of Industry Leading Strategic Partners**

When you hire SWG Energy Inc we bring a team of renewable energy companies who are interested in one end goal, the successful completion and long-term on-going operation of your renewable energy project. All of these strategic partners are industry leaders who expand SWG Energy's capacity to take on major projects.

## 5. Staff Qualifications - **Uniquely Qualified Renewable Energy Company**

CEO Carmen Willix's vision in 2010 was to develop "A UNIQUELY QUALIFIED COMPANY OF RENEWABLE ENERGY EXPERTS" who were trained and certified to accelerate the growth of the renewable energy industry by accelerating the implementation of proven renewable energy sources. The three core technologies were solar, wind, and geothermal.

### **Company Name**

The name of the company is actually derived from those three core renewable energy sources "S" stands for solar, "W" stands for wind and "G" represents geothermal

### **One Stop Renewable Energy Resource**

The company's uniquely qualified renewable energy strategy and renewable expertise offering multiple renewable energy sources separate it from other competitors in the marketplace. These competitors traditionally specialize in a single technology: only solar energy, or only wind energy or only geothermal, and some newer companies now specialize in only energy storage.

The unique concept of developing a company that offers true renewable energy expertise in solar, wind, and geothermal in 2007 was unique. In 2017, 10 years after the company was founded this company positioning is still unique.

### **Market Expands New Renewable Products Are Offered.**

#### **1. Off-grid solar powered LED Lighting**

SWG Energy added off grid-solar LED street and parking lot lighting to its offering because the need to reduce the use of traditional fossil fuel utility powered street and parking lot lighting exists.

#### **2. Solar + Storage - AES Advanced Energy Storage Systems**

In 2017, energy storage is becoming very important because battery storage systems supplied by solar energy systems can now enable clients to reduce the high cost of energy demand charges that utility companies have used to maintain revenue. The addition of AES Advanced Battery Systems flattens out usage peaks, and reduces the client's demand charges. This demand reduction can often result in a client's ability to change to an A Rate Plan that can eliminate ALL demand charges; insuring long term utility cost reduction.

We have already experienced situations in which the solar + storage systems can pay for themselves in as little as 3.2 Years.

## 5a. Staff Resumes

### CARMEN M. WILLIX

2517 Holly Valley Drive, Vista CA 92084 - cwillix@swgenergy.com - 214-870-4334

### EXPERIENCE

#### SWG ENERGY INC

##### Chief Executive Officer

Since launching the company in 2007, as CEO Carmen's role has been to communicate the company mission of "accelerating the use of renewable energy". To do so she has consistently provided a balanced approach to company resources: funding and people, shifting both to meet annual market conditions. Carmen is very focused on building the right culture with "shared attitudes, goals, behavior and values" to drive both the employee and customer experience. Carmen has the ultimate responsibility for good decision making on what's best for the company affecting multiple departments. As CEO she has final responsibility for driving company performance by staying on top of industry trends, market conditions and core business functions to increase sales, deliver the best customer experience while delivering profit levels to support continued business growth.

#### Major Project Past Performance

In the past ten years, SWG Energy has developed an impressive Past Performance Track Record:

- **Federal Government Contracts** - \$2 million Department of Energy Contract to install the largest off-grid solar LED streetlight system in the U.S. A \$700,000 Department of Labor Design/Build Wind Turbine Contract. And successfully funded multiple solar and wind energy projects with \$10 million of Grant Funds.
- **Major Corporate Project** - \$1.3 million Integrated Building Integrated Wind Turbine Installation on the roof of the Oklahoma Medical Research Foundation
- **Commercial Solar Projects**- Installed hundreds of KW of solar energy systems on multiple medical professional buildings, commercial agriculture and manufacturing facilities.
- **Relocation From TX to CA**- Relocated the company to California in 2016 to position the company for accelerated growth by being in the #1 Solar Energy Market, and in CA a more "progressive political policy renewable energy friendly state".

#### Education, Certification & Training

**Sunpower University**- Carmen believes in Top Down Management, so she graduated from SunPower University, the premier solar training program in the U.S. as a Trained Certified Commercial Solar and Residential Solar Designer & Installer.

**Presidents Association Training Program**- Program is designed to train senior level executives in their new role as President of a company and create direct networking opportunities with other company presidents and on-going education.

**Harvard University Business Economics Summit Seminar**- designed to instruct high level corporate management on the financial management strategies that drive corporate growth.

#### Previous Work Experience

**20 Years experience as President of Metropolitan Sunday Newspapers Inc.** The 65 year national newspaper cooperative owned by major newspapers across the country. **Director of Marketing for ABC Radio Networks**- directing its new business development effort and **Grey Advertising**- as a Media Planning Associate Manager for Grey Advertising Fortune 500 clients.

**JOSEPH J. WLLIX, SR.**

2517 Holly Valley Drive Vista, CA 92084- jwillix@swgenergy.com - 760-978-8666

**EXPERIENCE****SWG ENERGY INC - President**

Since launching the company in 2007, as President Joseph's role has been to communicate the company mission of "accelerating the use of renewable energy". He has developed and implemented the strategic plan to build the business across the three major business segments: residential, commercial, and state & federal government. He directs the marketing, sales, and revenue building efforts of the company's solar energy, wind energy, off-grid solar LED streetlighting and energy storage products. As President he leads the new business development team that focuses on large corporate projects. He is responsible for developing strategic relationships, networking relationships, and developing Federal & State Government Agency Contracting opportunities with major growth potential.

**Major Project Past Performance**

In the past ten years, SWG Energy has developed an impressive Past Performance Track Record:

- **Federal Government Contracts** - \$2 million Department of Energy Contract to install the largest solar LED streetlight system in the U.S. A \$700,000 Department of Labor Design/Build Wind Turbine Contract. Was successfully awarded multiple solar and wind energy projects with \$10 million of Grant Funds to fund client projects.
- **Major Corporate Project** - \$1.3 million Integrated Building Integrated Wind Turbine Installation on the roof of the Oklahoma Medical Research Foundation
- **Commercial Solar Projects**- Installed hundreds of KW of solar energy systems on multiple medical, professional buildings, commercial agriculture and manufacturing facilities.
- **Custom Wind Turbine Manufacturing**- after developing two major wind turbine projects, SWG Energy implemented the custom manufacture of the vertical axis wind turbines required to complete the two projects

**Education, Certification & Training**

**Sunpower University**- graduated from the premier solar training program in the U.S. as a Trained Certified Commercial Solar and Residential Solar Designer & Installer.

**Certified Wind Manufacturer Training**- Greenstorm 60KW/100KW/225KW, Renewegy Wind 20KW, Osiris Wind 10KW, Evance 5KW, Venger Wind 5KW, Helix Wind 5KW, Cleanfield Energy

**North San Diego Small Business Development Center**- Working with North San Diego Small Business Development Center, SWG Energy is obtaining multiple Small Business, Minority Business and 8a Certifications to enhance its government contracting efforts

**Previous Work Experience**

**20 Years Corporate Management Experience: GTE New Media**- Vice President, **Newsweek New Media and Newsweek Magazine**- Director New Business Development, **ABC Radio Networks**- Director of New Business, **Doyle Dane Bernbach**- Vice President Account Management.

**JEFFREY J. WILLIX**

936 Alyssum Rd, Carlsbad, CA 92011 - jeffwillix@swgenergy.com - 760-809-7414

**EXPERIENCE****SWG ENERGY INC - Sr. Vice President**

Corporate Sr. Vice President with 10-Years of renewable energy company management experience. Jeff's management role is to support the corporate mission to increase revenue across all business sectors: residential, commercial and Federal/State Government solar, wind, solar LED off grid street lighting and energy storage projects. Jeff plays a key role in all aspects of company operations: sales, marketing, customer service, technology selection and installation. Jeff plays a leadership role in the design, planning, permitting, procurement, and mobilization for all projects. He heads the installation teams and supervises all sub-contractors: electrical, roofing, and construction. As the corporate CSLB License holder, Jeff passed both the CSLB Law and Business Exam along with the specialized Solar Thermal and Photovoltaic Exam required to operate a solar company in CA.

**Major Project Past Performance**

In the past ten years, SWG Energy has developed an impressive Past Performance Track Record:

- **Federal Government Contracts** - \$2 million Department of Energy Contract to install the largest solar LED off grid streetlight system in the U.S. A \$700,000 Department of Labor Design/Build Wind Turbine Contract. Successfully was awarded Federal Grants for its clients that funded multiple solar, wind energy & solar LED off grid Streetlight projects with \$10 million of Grant Funds.
- **Major Corporate Project** - \$1.3 million Integrated Building Integrated Wind Turbine Installation on the roof of the Oklahoma Medical Research Foundation; largest building integrated wind project in U.S.
- **Commercial Solar Projects**- Installed hundreds of KW of solar energy systems on multiple medical professional buildings, commercial agriculture and manufacturing facilities.
- **Residential Solar Projects**- Co-leads the residential sales, marketing and installation program targeting high growth solar markets.

**Education, Certification & Training**

**Sunpower University**- the premier solar training program in the U.S. as a Trained Certified Residential Solar Designer, Advanced Designer & Installer.

**Wind Turbine Manufacturer Certified Training Programs Installation & Maintenance-**

Northern Power 100KW, Greenstorm 60/100/225KW, Renewegy 20KW, Evance 5KW, Helix Wind 5KW, Venger Wind 5KW, Cleanfield Energy 3.5KW.

**High Altitude Industry Certification**- Tech Safety Lines Competent Climber Training -Wind Industry, and Self Rescue & Emergency Egress Training

**Whittier College** - Liberal Arts Bachelors Degree, 1994

**Previous Work Experience**

**15 Years Corporate Experience: MicroMacro Production**- Digital Project Management,

**ABC Radio Networks**- Broadcast Sales, **CBS Television**- Programming Operations & Sales,

**CoolCitiesUSA**- Internet Publishing Company - Owner

**Personal**

Jeff is married to Terri Willix a successful IT Project Management Engineer. They have twins: a boy & girl. Jeff enjoys spending time with his family and is a passionate surfer.

**JOSEPH J. WILLIX, JR.**

4554 Glenwick Lane #2206, Dallas 75206 TX - joewillix@swgenergy.com - 214-870-4336

**EXPERIENCE****SWG ENERGY INC - Sr. Vice President**

Corporate Sr. Vice President with 10-Years of renewable energy company management experience. Joe's management role is to support the corporate mission to increase revenue across all business sectors: residential, commercial and Federal/State Government solar, wind, solar LED off grid street lighting and energy storage projects. Joe plays a key role in all aspects of company operations: sales, marketing, customer service, technology selection and installation. Joe plays a leadership role in the design, planning, permitting, procurement, and mobilization for all projects. He heads the installation teams and supervises all sub-contractors: electrical, roofing, and construction. Joe manages the company's networking marketing efforts, lead generation campaign and produces the company's print, online and video marketing campaigns.

**Major Project Past Performance**

In the past ten years, SWG Energy has developed an impressive Past Performance Track Record:

- **Federal Government Contracts** - \$2 million Department of Energy Contract to install the largest solar LED off grid streetlight system in the U.S. A \$700,000 Department of Labor Design/Build Wind Turbine Contract. Successfully was awarded Federal Grants for its clients that funded multiple solar, wind energy & solar LED Streetlight projects with \$10 million of Grant Funds.
- **Major Corporate Project** - \$1.3 million Integrated Building Integrated Wind Turbine Installation on the roof of the Oklahoma Medical Research Foundation; largest building integrated wind project in U.S.
- **Commercial Solar Projects**- Installed hundreds of KW of solar energy systems on multiple medical professional buildings, commercial agriculture and manufacturing facilities.
- **Residential Solar Projects**- Co-leads the residential sales, marketing and installation program targeting high growth solar markets.

**Education, Certification & Training**

**Sunpower University**- the premier solar training program in the U.S. as a Trained Certified Residential Solar Designer, Advanced Designer & Installer.

**Wind Turbine Manufacturer Certified Training Programs Installation & Maintenance-**

Northern Power 100KW, Greenstorm 60/100/225KW, Renewegy 20KW, Evance 5KW, Helix Wind 5KW, Venger Wind 5KW, Cleanfield Energy 3.5KW

**High Altitude Industry Certification**- Tech Safety Lines Competent Climber Training -Wind Industry, and Self Rescue & Emergency Egress Training, NREL Wind for Federal Agencies

**Gettysburg College**- Liberal Arts Bachelors Degree - 1991

**Previous Work Experience**

**15 Years Corporate Experience: Metropolitan Sunday Newspapers**- Marketing Manager,

**Conde Nast Publishing Brides Magazine**- Research, Marketing & Sales Support Manager,

**United Way**- Annual Fund Assistant Program Manager, **CoolCitiesUSA**- Internet Publishing Company - Owner

**Personal:** Joe is married to Curry Willix who runs an emerging Medical Travel Company specializing in Costa Rica. They enjoy travel and cycling. Joe is involved in multiple service organizations. He enjoys playing the guitar, is a passionate hockey fan and surfer.

## 5b. PROJECT IMPLEMENTATION TEAM

**Team of Project Experts** SWG Energy brings a team of required trades and experts necessary to successfully complete the client's project. These include: trained & certified solar/wind/storage/LED geothermal designers and installers, master electricians, electrical contractors, permit package suppliers, structural engineers, and electrical engineers.

### Technology Manufacturer Experts Adds to SWG Energy Team

**“What better way to insure the success of a renewable energy project than by engaging the engineers who create and advance the technology to the client's project.” C. Willix CEO**

It is SWG Energy's standard operating procedure on all major projects to engage the expertise of the renewable energy manufacturer's experts. This includes system designers, applications engineers and sales personnel with a vested interest in insuring the success of the client's projects.

SWG Solar Energy has a proven track record of successfully completing all major projects on-time, on-budget, with zero change orders to insure the success of the City of San Diego's solar + storage projects using best-in-class solar technologies. All to deliver longterm utility savings

### CED Greentech San Diego

SWG Energy working with CED Greentech the largest U.S. solar distributor insures advance product reservations for all the required solar energy & storage equipment at competitive market pricing. Plus it enables SWG Solar Energy access to the latest high efficiency solar + storage equipment for the City of San Diego's projects

### LG Solar

LG Solar is the most recognized brand name in the solar industry. LG is committed to delivering its latest solar panel technology to the City of San Diego's projects in order to deliver the highest energy production. A global financially stable industry leader insures longterm warranty coverage.

### SolarEdge Inverters, Optimizers and StorEdge

SolarEdge is the leader in commercial three phase inverters with power optimizers designed to maximize energy harvest and provide individual panel level monitoring to facilitate long-term O&M. SolarEdge is committed to insuring the City of San Diego solar project success. SolarEdge's new StorEdge battery system technology/software applies their software expertise, which will develop into a commercial storage solution.

**UNIRAC Mounting Systems**

Worldwide UNIRAC has installed more Gigawatts of UNIRAC RM non-penetrating commercial solar mounting than any other solar racking manufacturer. It's project team plans to provide start-to- finish support to the the City of San Diego's project. New additions to their flat roof mounting system lines provide the ability to install more solar panels per square foot with the innovation of more space efficient system design”

**M Bar C Construction - The Leader In Solar Carports**

With over 270MW of solar carports installed, M Bar C Construction is committed to delivering high quality steel work, engineering & construction to insure the City of San Diego's receives quality solar carports when solar carports or walkways are part of the system design plan.

**Smart Storage By Sharp**

SWG Energy works with Sharp Smart Storage to provide the latest energy storage technology to commercial solar energy projects. Sharp Smart Storage rank's second in number of commercial CA SGIP approved projects and ranks first in commercial SGIP project completions. It is committed to insuring the success of the City of San Diego's AES Advanced Energy Storage projects.

**Green Charge**

SWG Energy also works with Green Charge to develop commercial building energy storage systems. They team up to provide the correctly sized solar energy system along with the correctly sized energy storage system. The design is focused on reducing your energy usage peaks to reduce SDGE's high cost demand charges.

**GreenStorm/SWG Energy - Mid Scale Distributed Wind Turbines**

SWG Energy Inc is working closely with Greenstorm Wind, the Italian Wind Turbine manufacturer to brings it's 60KW/100KW/225KW wind energy technology to the U.S. Market.

This is an important collaboration of the two companies as they has solved the industry's biggest problem “long-lead times. No one wants to wait 6 to 12 months from order to delivery date.

**30 Day Delivery**

Greenstorm/SWG Energy have the unique ability and financial backing to scale-up manufacturing to deliver 60KW,100KW and 225KW wind turbines 30 days from order to overcome the traditional long lead time manufacturing of the distributed wind category.



## 6. Financial Capacity - Long Term Credit Rating

SWG Energy Inc has a proven track record of self-financing all of its major contracts to date. Company has never had a loan and has a very good credit rating.

- No law suits or disbarments.

- Largest project self financed \$2 million for Department of Energy.

- SWG Energy works closely with CED Greentech San Diego who is the largest solar distributor in San Diego and in the U.S.

- Third Party Financing

  - The company has multiple source for third party financing for PPAs, Enhanced PPAs, PACE Financing (Ygrene/ Hero) in order to finance large commercial projects.

- Bonding \$15 million Single, \$30 million Aggregate

## **7. Other Considerations and Requirements**

### **International/ National Energy Policy**

Recent events like the decision not to support the Paris Climate Agreement are not in the best interest of our nation, the environment and are not compatible with the goals of our company.

### **State of California & City Of San Diego Energy Policy**

Our relocation from Texas to Carlsbad California in 2016 has proven to be a very smart & timely move as the State of California has a very strong public policy toward protecting our environment and innovating in the use of renewable energy as the #1 Ranked State for Solar Energy.

### **City of San Diego Climate Action Plan**

We appreciate that we moved our company to the metropolitan area of the largest City in the U.S. to adopt a 100% Renewable Energy Goal by the Year 2035. We welcome the opportunity to participate in this RFSQ and would enjoy the opportunity to bring our company's renewable energy expertise to the City of San Diego's projects.

## Scope Of Services

### Scope of Services Goal

The overall goal of the scope of services is to help the City of San Diego achieve its Climate Action Plan goal to utilize 100% Renewable Energy by the year 2035. In order to accomplish this goal the City of San Diego has to assemble a team of contractors who can help them accelerate the use of renewable energy and start those actions in 2017. SWG Energy would like to be selected as one of those contractors.

We also recognize that the City of San Diego has already made excellent progress to achieving this goal with its use of renewable energy to date.

“The purpose of our Scope of Work Statement is for SWG Energy to demonstrate how it can help the City of San Diego achieve its 2035 Goal.” J. Willix President. *Our Scope of Work is a roadmap to delivering a Big Idea a 100% Renewable Energy Powered City of San Diego.*

### **Executive Summary “Why SWG Energy Should Be Selected” For The City of San Diego CAP Team**

**SWG Energy’s Mission Statement Is to Accelerate The Growth of Renewable Energy**

**Which Is Totally Compatible With The City of San Diego’s 2035 CAP Goals**

**SWG Energy’s Strategy Is To Do More/Do It Faster Across All Market Segments**

**Residential + City + Business + State + County + Federal Within City**

**Repeat Every Year To Exceed Annual Goals**

**SWG Energy’s Unique Multi-Renewable Energy Sources**

**Solar + Wind + Storage + Off-grid LED + ...**

**On Roofs + On-ground + On Carports + Structures + Streets + Parking Lots**

**Provides C. of S.D. The Ability To Produce Energy In More Ways From One Contractor**

**Not One Good Idea But Many Implemented Simultaneously Each Year Until 2035**

**Enables City of San Diego To Achieve Goals More Efficiently & Faster**

#### **1. The Ability to Integrate With Existing Electrical Transmission and Distribution Infrastructure**

SWG Energy dba SWG Solar Energy has 10 Years of experience designing and installing renewable energy systems that include solar energy, wind energy, geothermal cooling, off-grid solar powered LED street lighting systems, and AES Advanced Energy Storage systems. All of these system when installed complied with all utility and Public Utility Commission Regulations. Using this as its foundation of successfully integrated renewable energy systems that are connected to the Electrical Transmission System, SWG Energy can expand on this experience by designing and installing major renewable energy systems that will help the City of San Diego increase its portfolio of renewable energy systems.

#### **2. The Ability to Participate In The Electricity Market Through The California Independent System Operator CAISO.**

SWG Energy has already reviewed the detailed information required to participate in the CAISO Electricity Marketplace. We see no major obstacles that would prevent our company from doing this successfully by following the regulations and processes outlined in the CAISO Guidelines

and Practices. This can be accomplished by meeting all of the requirements including any collaborations with other entities that may be required to form.

### **CAISO Compliant & Compatible**

#### **DERP Distributed Energy Resource Provider**

The CAISO recognizes a distributed energy resource provider (DERP) as a new type of market participant that owns or operates distributed energy resources (DER)<sup>1</sup> with the ability to meet participation requirements, in aggregate, as a new type of market resource capable of operating in response to an ISO schedule, award or dispatch. Distributed energy resource aggregations (DERAs), meeting a 0.5 MW minimum capacity requirement, can participate in the CAISO day-ahead, real-time and ancillary services markets as a participating generator using participation models that fit the needs of the DERA. The ISO envisions these resources contributing to the low-carbon, flexible capacity needed to maintain real-time system balance and reliability supporting the integration of renewable energy.

The DERP must first execute a Distributed Energy Resource Provider Agreement (DERPA) to accept and abide by the terms of the ISO tariff.<sup>2</sup> A DERP, the aggregated resources it operates and the distributed energy resources that comprise such aggregated resources must comply with applicable utility distribution company (UDC) tariffs and any applicable requirements of the local regulatory authority.

### **3. A Detailed Description of the Strategy or Strategies to Significantly Expand the Renewable Electricity Content for All Residents, Businesses and Government Operations in San Diego**

SWG Energy has 10 Years of renewable energy experience doing business across all of the market sectors that the City of San Diego will have to target to increase the use of renewable energy. In order to reach the 100% Renewables Goal by 2035, an Individual Strategy will have to be developed for each market segment.

- **Residential Market** - SWG Energy is already working in this market segment to promote the use of solar energy and energy storage. This market segment has to also increase its use of small wind technology wherever and whenever possible. While solar growth has been very strong, we need to increase the use of small distributed wind systems when practical. Energy storage will be instrumental in reducing overall kWh of this market segment.
- **City of San Diego Facilities** - City facilities must continue to add renewable energy defined as solar energy, small wind energy, energy storage, off-grid solar LED street/parking /facility lighting, geothermal cooling, to increase the City's renewable energy portfolio on as many facilities as practical.

- **Business Facilities** - SWG Energy already targets the Business Sector as part of its Sales Strategy. This strategy would continue to expand the use of renewables by more businesses. A key driver in 2018 and beyond will be the Combination of Solar Energy + AES Advanced Energy Storage Systems which have already proven to be driven by the financial benefit of dramatically reducing Demand Charges by eliminating each businesses usage peaks whenever possible. Businesses should also strongly consider the adoption of Medium Sized Distributed Wind Turbine Systems in the range of 60KW, 100KW and 225KW on corporate campuses. SWG Energy and Greenstorm Wind Italy are already working closely together to bring Greenstorm Wind's Technology to the U.S. These businesses can also benefit from the adoption of off-grid lighting on industrial parks and corporate campuses. The benefit is that off-grid lighting eliminates the high cost of underground wiring. It also completely eliminates all electricity bills as these LED lighting systems are self-powered and self sufficient with very low maintenance.
- **State & Federal Government Facilities within San Diego** - SWG Energy as a Federal Government Contractor is already actively pursuing the expansion of renewable energy among State Agencies and Federal Agencies. For example: SWG Energy has submitted plans and has targeted the Renewable Energy Goals that the U.S. Army Office of Energy Initiatives, U.S. Air Force Office of Energy Initiatives and is actively working to bring more renewable energy to U.S. Navy Facilities in San Diego. SWG Energy is actively seeking projects with the \$1 Billion U.S. Navy Coastal Campus Project which already includes renewable energy, but can expand even more the use of solar energy, energy storage, off-grid solar LED street, parking lot and other exterior facility lighting projects.

While the Coastal Campus has already budgeted for some solar energy systems, other sources of Federal Funding like Grants and programs such as the Enable Program can be used gain funding and grants for projects that are not yet funded.

- **Other Public Entities** - Within the City renewable energy must be installed on more Public Entity Universities and Colleges, Hospitals, Municipal Facilities, Independent School Districts, Airports, to name a few. City Policy should actively support the use of renewables at all of these various types of Other Public Entities.

#### **4. The Ability and Experience To Procure Renewable Sources of Electricity Including the Identification of Local Sources and Potential of Local Sources**

SWG Energy has a proven track record of successfully completing major renewable energy projects for the Department of Energy (the largest off-grid solar LED street light system in the U. S.; the Department of Labor - Design Build Wind Turbines for DOL at Job Corps Centers, a \$2.2 million 300KW Wind Turbine System for the University of North Texas and the largest Building Integrated Wind Energy System working with architects Perkins + Will at the Oklahoma Medical Research Foundation's New Research Tower.

With CAISO's .5MW minimum system size, one strategy to develop larger renewable energy facilities is to adopt an aggregation strategy to capture the energy production from multiple sites that include a combination of solar energy + wind energy + energy storage.

#### **5. A Detailed Schedule/Timeline of Implementation of there Program Demonstrating An Increase In Renewable Energy Over time.**

The focus should be on implementation! How to do bigger systems, do more of them and do them faster. Another focus can be on matching the system type that best serves the facility in order to install more systems faster: rooftop solar, solar carports, solar walkways, wind

turbines, off-grid solar LED lighting. How to add AES Advanced Energy Storage to every City Facility that already has solar energy.

- Detailed Number of Installations By Year Goals Need to Be Established
- Aggressive Expansion Targets Must Exceed Anything That Has Been Accomplished In A Given Year to Date
- A Larger Aggregated Amount of Renewable Energy By Market Sector: Residential, City Facilities, State and Federal Facilities In The City, Commercial Business Facilities

The cumulative effect on energy production from solar + wind and the addition of Advanced Energy Storage saves money and reduces fossil fuel utility supplied electricity and reduces the carbon emissions footprint.

## **6. A Detailed Description of the Estimated Costs of the Proposed Program, Bundled and UnBundled Retail Electric Rates For All Customer Classes**

- What we know is that the Levelized Cost of Renewable Energy can be a fraction of the cost of utility supplied electricity. We think 4 cents/kWh vs. 40 cents per kWh.
- We know that the cost of adding AES Advanced Energy Storage may add cost to the renewable energy project and we also know that it can completely eliminate ALL demand charges in some cases, and dramatically reduce demand charges in many others.
  - City Facilities
  - Business Facilities
  - Municipal, County & State Facilities within the City
  - Federal Agency Facilities
  - Other Public Entities
- System Payouts could shrink to as short as 3 Years, after that the cost of electricity is FREE.
- Reducing long term utility cost redirects funds to add more renewable energy systems.
- In effect we redirect an on-going expense into an on-going stream of asset creation.

## **7. Greenhouse Gas Emissions Reductions That Relate to the Goals of the CAP**

While the National Energy Policy does not support efforts like the Paris Climate Agreement we know that the State of California and the City of San Diego are taking a leadership position by adopting the most aggressive carbon footprint reduction goals.

**EPA Greenhouse Gas Emissions Calculator** - continues to be an easily understood tool to inform citizens about the measurability of the impact of:

Watch What Happens When One Views Carbon Footprint Reduction Among ALL Market Segments As Outlined Below. We count as many as 15 Market Segments

- A. Renewable energy on the personal carbon emissions footprint of the residents
- B. The cumulative effect when many residents adopt renewable energy
- C. The impact of how the City's carbon emissions footprint reduction is being fast tracked by doing more renewable energy projects faster.
- D. The carbon footprint reduction from many business facilities who are large consumers of energy when they switch from fossil fuel based utility electricity to clean renewable energy
- E. Carbon footprint reduction from Municipal, County, State and Federal Facilities

- F. The Joint Military Offices of Energy Initiatives each are working to convert to clean energy on their respective & largest bases and stations.

## **8. Potential Risks and Roadblocks, Solutions, Mitigations, Anticipated Regulatory Issues**

### **Biggest Risks**

- In the last 10 Years that SWG Energy has been operating the on-going and biggest risk results from lobbying of the utility, gas and oil industries regarding “loss of business”.
- This has resulted in legislation that can impede the growth of renewable energy.
- We have seen this in states like Oklahoma where residents are penalized for adding solar energy, similar in Arizona. We have seen utility companies like Colorado’s Xcel Energy go from the “provider of incentives” to the “incentive killer”.
- However, not in California which has the most progressive renewable energy policy in the nation.
- That policy has been understood and adopted by the citizens, who we think won’t stand for obstruction.
- One has to look at energy as an ever changing industry that will find new sources “that serve the needs of the people and the planet”.

## **9. Additional Benefits of the Climate Action Plan**

- Economic Growth
- New Business Creation
- New Job Creation
- Rapidly Growing Renewable Energy Industry
- Growth from multiple renewable energies : solar, wind, energy storage,
- A variety of new and higher paying jobs: installers, technicians, software developers, customer service, sales, marketing,
- Environmental energy equals, cleaner air, cleaner water, and safer energy sources that don’t harm the planet or the people

### **9a. Ever Growing In Importance Extra Benefits That Must Be Part of The Climate Action Plan -**

The following will become increasingly more important over time when one evaluates energy vulnerabilities and the required protections that CAP helps to deliver:

#### **Renewable Energy Provides the City of San Diego With Greater Control**

- a. Energy Security within the City of San Diego
- b. Energy Independence for the City of San Diego
- c. Energy Resiliency to be able to respond “hackers/energy terrorists”
- d. Energy Islandability is the ability to operate on your own when others cannot.

**All of these things will become increasingly important to the City of San Diego!**

**END**