



Council Business Meeting

August 1, 2023

Agenda Item	Contract for an Electric System Master Plan with Stoddard Power Systems, LLC	
From	Thomas McBartlett III	Electric Utility Director
Contact	Thomas.mcbartlett@ashland.or.us 541-488-5357	
Item Type	Requested by Council <input type="checkbox"/> Update <input type="checkbox"/> Request for Approval <input checked="" type="checkbox"/> Presentation <input type="checkbox"/>	

SUMMARY

Approval is being requested to enter into a contract for an **Electric System Master Plan** at a cost of \$78,159.00. A formal competitive sealed proposal (Request for Proposal) is the required sourcing method for an acquisition of this type (Personal Services) greater than \$75,000.00. The City's intent is to award a contract to the highest ranked proposer, Stoddard Power Systems, LLC.

POLICIES, PLANS & GOALS SUPPORTED

- Climate Energy Action Plan execution
- Quality infrastructure and facilities through timely maintenance and community investment

BACKGROUND AND ADDITIONAL INFORMATION

A formal RFP (Request for Proposal) was facilitated, and the City received three (3) proposals in response to the RFP. The proposals were evaluated in accordance with the evaluation process and criteria outlined in the RFP and the City's intent is to award a public contract to the highest ranked proposer.

In accordance with AMC 2.50.070(2), this contract exceeds delegated authority and thus requires Council approval. In accordance with AMC 2.50.090 and AMC 2.50.120(A), a formal Competitive Sealed Proposal (Request for Proposal) is required to acquire personal services exceeding \$75,000.00.

Please refer to the attached solicitation – Request for Proposals – for the scope of services.

FISCAL IMPACTS

The Electric Utility Department has funds budgeted for this project.

DISCUSSION QUESTIONS

SUGGESTED NEXT STEPS

Staff recommends award of a contract for the Electric System Master Plan services to the highest ranked proposer, Stoddard Power Systems, LLC.

REFERENCES & ATTACHMENTS

- Evaluation Summary
- Request for Proposal – Electric System Master Plan
- Stoddard Proposal



City of Ashland
Request for Proposal
ELECTRIC SYSTEM MASTER PLAN
Evaluation Summary
July 7, 2023

Evaluation Criteria	Points	ELCON ASSOCIATES INC.			ENERNEX, LLC			STODDARD POWER SYSTEMS, LLC		
		#1	#2	#3	#1	#2	#3	#1	#2	#3
Letter of Introduction, Table of Contents and Proposal Submission Form (Exhibit A)	5	5	5	5	5	5	5	5	5	5
Qualifications and Experience	30	25	20	25	20	20	20	28	30	30
Task List & Timeline	25	25	25	25	15	10	10	25	25	25
References	10	8	10	7	5	5	9	10	10	10
Contractual Terms and Conditions	5	5	5	5	5	5	5	5	5	5
SUBTOTAL	75	68	65	67	50	45	49	73	75	75
Cost Proposal	25	25	25	25	2.61	2.61	2.61	21.1	21.1	21.1
TOTAL	100	93	90	92	52.61	47.61	51.61	94.1	96.1	96.1

Cost Proposals				
Elcon Associates, Inc.	\$65,950.00	\$65,950.00	100%	25 Points
Enernex, LLC	\$632,314.00	\$65,950.00 / \$632,314.00	10.43%	2.61 Points
Stoddard Power Systems, LLC	\$78,159.00	\$65,950.00 / \$78,159.00	84.38%	21.1 Points



**CITY OF
ASHLAND**

Request for Proposals

ELECTRIC SYSTEM MASTER PLAN

Date of Release: May 24, 2023

Proposals are due by: 2:00:00 PM (PST), Tuesday, June 27, 2023

Contracting Agency:	City of Ashland
Sole Point of Contact:	Kari Olson
Title:	Purchasing Specialist
Address:	City of Ashland 90 N. Mountain Avenue Ashland, OR 97520
Telephone:	(541) 488-5354
Fax:	(541) 488-5320
Email:	kari.olson@ashland.or.us

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EXHIBIT A – PROPOSAL SUBMISSION FORM

EXHIBIT B – CERTIFICATE OF COMPLIANCE

EXHIBIT C – PERSONAL SERVICES AGREEMENT

PUBLIC NOTICE:



**Request for Proposals
Electric System Master Plan**

Proposals are due by 2:00:00 PM (PST), Tuesday, June 27, 2023

The City of Ashland is requesting written proposals from qualified engineering firms for professional services to complete an **Electric System Master Plan** for the City's electric utility.

The City intends to enter into a contract with the highest ranked proposer for the proposed timeline required to complete the Electric System Master Plan.

This Request for Proposal (RFP) is intended to provide prospective proposers with sufficient information to prepare and submit a proposal for consideration by the City.

The REQUEST FOR PROPOSALS is available online at www.ashland.or.us Log on to the City's website, scroll down the home page to **Online City Services** and click on "**Proposals, Bids and Notifications**". Locate the public notice and click on "**REQUEST BID PACKET**" (beneath the public notice). Log into the system and download the solicitation documents. You will need to log into the system each time you would like to download the solicitation documents and any subsequently issued addenda.

In accordance with AMC Section 2.50.080, Competitive sealed proposals may be available online, but applicants will NOT be able to submit their proposals and/or responses online. Proposals must be delivered in hard copy form to the City in accordance with the requirements outlined in the RFP. Individuals that obtain the solicitation materials electronically are responsible for regularly checking for instructions, addenda, and related materials.

Contract terms, conditions and specifications may be reviewed in the City of Ashland, Purchasing Office, located at 90 N. Mountain, Ashland, Oregon.

Deadline for submitting questions is 5:00:00 PM (PST), Friday, June 16, 2023.

Sealed proposals must be received by **2:00:00 PM (PST), Tuesday, June 27, 2023**, by Kari Olson, Purchasing Specialist in the City of Ashland, Purchasing Office located at 90 N. Mountain Avenue, Ashland OR 97520. The proposals will be opened **at 2:00:00 PM (PST), Tuesday, June 27, 2023**, and the City will record and make available the identities of the proposers. Proposals will not be available for inspection until after the evaluation process has been completed and the Notice of Intent to Award has been issued.

Kari Olson
Purchasing Specialist
City of Ashland, Oregon
Kari.olson@ashland.or.us
Tel: 541-488-5354

Published: **May 24, 2023**



CITY OF
ASHLAND
Request for Proposals
Electric System Master Plan
May 24, 2023

ORS 279B.060(2)(c) PURPOSE OF REQUEST FOR PROPOSALS

The City of Ashland is requesting written proposals from qualified engineering firms for professional services to complete an **Electric System Master Plan** for the City's electric utility.

The City intends to enter into a contract with the highest ranked proposer for the proposed timeline required to complete the Electric System Master Plan.

This Request for Proposal (RFP) is intended to provide prospective proposers with sufficient information to prepare and submit a proposal for consideration by the City.

ORS 279B.060(2)(b) SOLE POINT OF CONTACT

Information, correspondence and questions pertaining to this Request for Proposals (RFP) shall **ONLY** be directed to:

Name:	Kari Olson
Title:	Purchasing Specialist
Address:	City of Ashland 90 N. Mountain Avenue, Ashland, OR 97520
Telephone:	541-488-5354
Fax:	541-488-5320
Email:	Kari.olson@ashland.or.us

This person is the sole point of contact during the entire RFP process including clarification and/or protest of specifications, method of bidding, the evaluation and award process, and/or other questions that may arise. The RFP documents may be reviewed upon request by contacting the designated sole point of contact listed above.

OAR 137-047-0260(2)(a)(C) OPENING DUE DATE AND TIME

Proposals must be received prior to the scheduled opening. The **opening** is scheduled for the following due date and time:

Proposals are due by: **2:00:00 PM (PST), Tuesday, June 27, 2023**

The proposal must be addressed to the designated sole point of contact and received prior to the due date and time. Proposals received after CLOSING are considered LATE and will NOT be accepted for evaluation. Late proposals will **not** be considered.

OAR 137-047-0260(2)(c)(A) SCHEDULE OF EVENTS

<u>ACTIVITY</u>	<u>DATE</u>
Request for Proposals Released	May 24, 2023
1 st Public Notice	May 24, 2023
Deadline for Submitting Questions and Requests for Additional Information	5:00:00 PM (PST), Friday, June 16, 2023
RFP Protest Period Ends	5:00:00 PM (PST), Monday, April 10, 2023
DUE DATE AND TIME (Note: Proposals must be received prior to the due date and time.)	2:00:00 PM (PST), Tuesday, June 27, 2023 Location: City of Ashland, Purchasing Office 90 N. Mountain, Ashland, OR 97520
Evaluation Process	June 28 – July 6, 2023
Contract Recommendation	Upon completion of evaluation process
Notice of Intent to Award Announcement	(7) Days prior to executing contract
Award Protest Period Ends	(7) Days after Notice of Intent to Award is released
Contract Recommendation Presented to City Council for Final Approval	July 18, 2023
Contract Award	Upon Council Approval and (7) Days after the Notice of Intent to Award Announcement
Services intended to begin	Upon receiving a fully executed contract

NOTE: This is a tentative schedule and is provided as a courtesy to potential proposers. The actual schedule may vary from that provided without notice to potential proposers. Any changes made to the closing date of the RFP will be made in the form of an addendum and mailed to all potential proposers who have received RFP documents.

QUESTIONS AND REQUESTS FOR ADDITIONAL INFORMATION:

All potential proposers are encouraged to ask questions and request additional information that will aid in the clarification of the RFP requirements. Questions and requests for information will be promptly considered, and written responses will be provided in the form of a written addendum and posted on the City’s website.

All inquiries, whether relating to the RFP process, administration, deadline or method of award, or to the intent or technical aspects of the RFP must:

- Be delivered **via email** to the **Sole Point of Contact** identified on **page 4** of the RFP
- Reference the name of the RFP
- Identify the proposer’s name and contact information
- Be sent by an authorized representative
- Refer to the specific area of the RFP being questioned (i.e., page, section and paragraph number); and
- Be received by the due date and time for Questions/Requests for Clarification identified in the schedule

OAR 137-047-0260(2)(a)(F) Addenda The provisions of this RFP cannot be modified by oral interpretations or statements. Proposers are cautioned not to make any assumptions as to the implied meaning or intent of any part of the RFP. Proposers should request clarification. If inquiries or comments by proposers raise issues that require clarification by the City, or the City revises any part of this RFP, addenda will be provided in the form of a written addendum and posted on the City’s website. Receipt of an addendum must be acknowledged by signing and returning it with the proposal. Addenda will be issued within a reasonable time to allow prospective proposers to consider the addenda in preparing their proposals. Unless a different deadline is set forth in the addendum, a proposer may submit a request for change or protest by the close of the next business day after the issuance of the addendum, or up to the

last day the RFP Protest Period ends, whichever date is later. If the date established in the previous sentence falls after the RFP Protest Period ends, the City will consider a request for change or protest to the addendum only. Addenda shall not be issued less than 72 hours before the closing unless the addendum also extends the closing.

ORS 279B.405 Protest Solicitation Process A prospective proposer for a public contract solicited under ORS 279B.055, 279B.060 or 279B.085 may file a protest with the City if the prospective proposer believes that the procurement process is contrary to law or that a solicitation document is unnecessarily restrictive, is legally flawed or improperly specifies a brand name. If a prospective proposer fails to timely file such a protest, the prospective proposer may not challenge the contract on grounds under this subsection in any future legal or administrative proceeding. If the protest is received at least 10 days prior to bid closing and meets the requirements of ORS 279B.405, the City shall consider the protest and issue a decision in writing. Otherwise, the City shall promptly notify the prospective proposer that the protest is untimely or that the protest failed to meet the requirements and give the reasons for the failure. The City shall issue a decision on the protest no fewer than three business days before proposals are due, unless a written determination is made by the City that circumstances exist that justify a shorter time limit.

Protests must:

- Be delivered to the **Sole Point of Contact** identified on [page 4](#) via email, facsimile, hard copy
- Reference the name of the RFP
- Identify prospective proposer's name and contact information
- Be sent by an authorized representative
- State the Reason for the protest, including:
 - the grounds that demonstrate how the procurement process is contrary to law, unnecessarily restrictive, legally flawed, or improperly specifies a brand name; and
 - evidence or documentation that supports the grounds on which the protest is based
- State the proposed changes to the RFP provisions or other relief sought
- Protests to the RFP must be received by the due date and time identified in the schedule
- Protests to addenda must be received by the close of the next business day after the issuance of the addendum, or up to the last day the RFP Protest Period ends, whichever date is later.

OAR 137-047-0440 Pre-Closing Modification or Withdrawal of Offers A proposer may modify its proposal in writing prior to the closing in accordance with OAR 137-047-0400, OAR 137-047-0410 and OAR 137-047-0440. Any modification must include the proposer's statement that the modification amends and supersedes the prior proposal. A proposer in accordance with OAR 137-047-0440 may withdraw its proposal by written notice submitted on proposer's letterhead, signed by authorized representative of the proposer, and delivered to the individual and location specified in the solicitation document prior to closing.

OAR 137-047-0460 Late Offers, Late Withdrawals and Late Modifications

Any proposal received after closing is late. A proposer's request for withdrawal or modification of a proposal received after closing is late. An Agency shall not consider late proposals, withdrawals or modifications except as permitted in OAR 137-047-0470 or 137-047-0262.

Proposal Acceptance Proposals that do not address all areas requested by this RFP may be deemed non-responsive and may not be considered for any possible contract awarded resulting from this RFP.

ORS 279B.060(2)(e) Cancel, Reject or Delay Procurement The City of Ashland may cancel the procurement, reject in whole or in part any or all proposals, or suspend or delay the procurement in accordance with ORS 279B.100 when it's in the best interest of the City of Ashland as determined by the City of Ashland. In no event shall the City of Ashland have any liability for the cancellation, rejection, or

suspension of a solicitation or award. The proposer assumes the sole risk and responsibility of all expenses connected with the preparation of its proposal.

Collusion By submitting a proposal, proposer certifies that no officer, agent, or employee of the City of Ashland has a monetary interest in this proposal; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other proposer and that the proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or company.

Disputes In case of any doubt or differences of opinions as to the items or services to be furnished hereunder, or the interpretation of the provisions of the RFP, the decision of the City of Ashland shall be final and binding upon all parties.

Clarification of Responses The City of Ashland reserves the right to request clarification of any item in any proposal, or to request additional information necessary to properly evaluate a proposal.

References The City of Ashland reserves the right to investigate any and all references and the past performance information provided in the proposal with respect to proposer's successful performance of similar projects, compliance with specifications and contractual obligations, completion or delivery of a project on schedule, and lawful payment of employees and workers.

Recyclable and Recycled Products Contractors shall use recyclable products to the maximum extent economically feasible in the performance of the contract work set forth in this RFP.

ORS 279A.125 The City shall give preference to goods that are certified to be made from recycled materials if the recycled product is available, meets applicable standards, can be substituted for a comparable non- recycled product; and the recycled products costs do not exceed the costs of non-recycled products by more than five percent, or a higher percentage if a written determination is made by the City.

ORS 282.210 All printing, binding and stationery work done for the City shall be performed within the State of Oregon.

ORS 279B.060(2)(g) If required under ORS 468A.710, the contractor or subcontractor is required to possess an asbestos abatement license.

ORS 279B.060(6)(a) Opening Procedures Notwithstanding ORS 192.410 to 192.505, proposals may be opened in a manner to avoid disclosure of contents to competing proposers during, when applicable, the process of negotiation, but the City of Ashland shall record and make available the identity of all proposers as part of the City's public records after the proposals are opened.

Notwithstanding ORS 192.410 to 192.505, proposals are not required to be open for public inspection until after the notice of intent to award a contract is issued. The fact that proposals are opened at a meeting, as defined in ORS 192.610, does not make the contents of the proposals subject to disclosure, regardless of whether the public body opening the proposals fails to give notice of or provide for an executive session for the purpose of opening proposals.

OAR 137-047-0260(2)(a)(E) Certification of Nondiscrimination Proposer to certify that the proposer has not discriminated and will not discriminate, in violation of ORS 279A.110(1), against a minority, women or emerging small business enterprise certified under ORS 200.055 or against a business enterprise that is owned or controlled by or that employs a disabled veteran as defined in ORS 408.225 in obtaining a required subcontract. The Certificate of Compliance attached as **Exhibit B**, is required to be

signed and included with your proposal.

ORS 279B.060(6)(b) Proprietary Information (Trade Secrets) Notwithstanding any requirement to make proposals open to public inspection after the City of Ashland's issuance of a notice of intent to award a contract, the City of Ashland may withhold from disclosure to the public materials included in a proposal that are exempt or conditionally exempt from disclosure under ORS 192.501 or 192.502.

All proposals are public record and are subject to public inspection after Agency issues the Notice of the Intent to Award. If a proposer believes that any portion of its proposal contains any information that is a trade secret under ORS Chapter 192.501(2) or otherwise is exempt from disclosure under the Oregon Public Records Law (ORS 192.410 through 192.505).

The scope of services and cost information generally is not considered a trade secret under Oregon Public Records Law (ORS 192.410 through 192.505) and identifying the proposal, in whole, as exempt from disclosure is not acceptable. Agency advises each proposer to consult with its own legal counsel regarding disclosure issues.

If proposer fails to identify the portions of the proposal that proposer claims are exempt from disclosure, Proposer has waived any future claim of non-disclosure of that information.

If applicable, the proposer shall submit a **redacted version of its proposal** if the proposal being submitted in response to this RFP contains trade secrets.

ORS 279B.060(13) Notice of Intent to Award a Public Contract The City of Ashland shall provide written notice of its intent to award to all proposers pursuant to ORS 279B.135 and OAR 137-047-0610 at least seven (7) days before the award of the contract, unless the City determines that circumstances justify prompt execution of the contract, in which case the City may provide a shorter notice period.

ORS 279B.060(14) Contract Award The City of Ashland shall award the contract to the responsible proposer whose proposal the City of Ashland determines in writing to be the most advantageous to the City of Ashland based on the evaluation process and evaluation factors described in this Request for Proposals, and any applicable preferences described in ORS 279A.120, ORS 279A.125 and ORS 279A.128 and, when applicable, the outcome of any negotiations authorized by this Request for Proposals. Other factors may not be used in the evaluation. In addition, any other public agency wishing to use the resulting contract may be authorized by mutual consent of the City of Ashland and the contractor.

ORS 279B.410 Protest of Contract Award A proposer may protest the award of a public contract or notice of intent to award a public contract if the proposer is adversely affected because the proposer would be eligible to be awarded the public contract in the event that the protest were successful. The written protest shall specify the reasons for the protest pursuant to ORS 279B.410(1)(b) and be delivered to the sole point of contact named in the RFP within seven days after issuance of the Notice of Intent to Award a contract. The City shall consider and respond in writing to a protest in a timely manner.

ORS 279B.060(2)(h) Contractual Terms and Conditions The proposer selected by the City of Ashland will be expected to enter into a written contract in the form attached to this RFP. This RFP and the contents of the proposal of the successful proposer will become contractual obligations if a contract is executed. The proposal should indicate acceptance of the City of Ashland's contract provisions or suggest reasonable alternatives that do not substantially impair the City of Ashland's rights under the contract. The proposer may also propose contractual terms and conditions that relate to subject matter reasonably identified in this Request for Proposals. The City of Ashland reserves the right to negotiate the contractual

terms and conditions proposed as alternatives by the proposer. If inclusion of any of the City of Ashland's contract provisions will result in higher costs for the services, such costs must be specifically identified in the proposal. Unconditional refusal to accept the contract provisions proposed by the City of Ashland without offering acceptable alternatives may result in the disqualification of the proposal.

Insurance Certificates The Contractor will be required to provide and maintain ALL required insurance certificates, and provide current Certificates of Insurance, including the City of Ashland endorsed as the additional insured, to the City prior to any lapse of insurance coverage.

Additional Terms

The City of Ashland reserves the right to waive irregularities or deficiencies in a proposal if the City of Ashland determines that waiver is in the best interest of the City of Ashland.

The City of Ashland may request supplemental written information from a proposer concerning the proposer's ability to perform the services. If a proposer fails to provide supplemental information within the time stated in the request, the City of Ashland may refuse to consider the proposer's proposal.

The City of Ashland may request an interview with any proposer. If a proposal is unclear, or appears inadequate, the proposer may be given an opportunity in the interview to explain how the proposal complies with the RFP.

The City of Ashland reserves the right to make such investigation it deems appropriate to determine whether a proposer is qualified to provide the services. If a proposer fails to cooperate with an investigation, or if a proposer provides false, misleading or incomplete information, the City of Ashland may refuse to consider the proposer's proposal.

In cases of doubt or differences of opinion concerning the interpretation of this RFP, the City of Ashland reserves the exclusive right to determine the intent, purpose and meaning of any provision in this RFP.

SCOPE OF SERVICES

The City of Ashland is requesting written proposals from qualified engineering firms for professional services to complete an **Electric System Master Plan** for the City's electric utility.

The following is a general **description of the scope of services** for the City's Electric System Master Plan. A more detailed scope of services may be developed with the highest ranked proposer.

Information the City will provide is as follows:

- Known urban growth information.
- BPA load data
- Available transformer data
- Available pole data
- Available underground cable data
- Available meter and SCADA data
- Available DER data
- Relevant technical information from the City's electrical engineering firm

Electric System Master Plan responsibilities and deliverables to be provided are as follows:

1. Load forecasting for future growth needs
2. Seasonal load shift data to identify areas of concern
3. Major electrical infrastructure replacement schedule
4. Transformer inventory review and replacement schedule
5. Pole inventory review and replacement schedule
6. Underground cable inventory review and replacement schedule
7. Electric meter system replacement schedule and future system advisory
8. System situational awareness advisory and monitoring to maintain optimal operations.
9. Opportunities and barriers for adding renewables (e.g., solar, wind, hydro, etc.).
10. Evaluate system readiness for moderate to high adoption of EVs (i.e., residential and commercial electric vehicle charging stations) and fuel switching (e.g., gas appliances to electric appliances).
11. Projected rate impacts for all capital improvement recommendations
12. Recommendations for integration of the City's **Climate and Energy Action Plan** in the Electric System Master Plan <https://ashlandor.org/climate-energy/climate-plan/>
13. Recommendations for integration of the City's **Wildfire Mitigation Plan** in the Electric System Master Plan <https://edocs.puc.state.or.us/efdocs/HAQ/ro14haq91017.pdf>

Close-out tasks to be provided as follows:

1. Prepare draft of Electric System Master Plan for City staff review.
 - Email draft to the Electric Director, Thomas McBartlett III. Thomas.mcbartlett@ashland.or.us
 - The draft will be reviewed internally by City staff.
 - Additional information and/or revisions and/or services may be requested for the development of the Electric System Master Plan at this time, which may require an amendment (i.e., increase in SOW and compensation) to the contract.
 - Prepare final draft of the Electric System Master Plan.
2. Schedule and facilitate an in-person review of the final draft of the Electric System Master Plan with the City's Electric Director, Thomas McBartlett III.
3. Present the final draft of the Electric System Master Plan to the City Council. Assist City staff, as needed, to obtain the City Council's approval and adoption of the proposed Electric System Master Plan.

PROPOSAL CONTENTS

Proposals shall provide a straightforward, concise description of the proposer's capabilities to satisfy the requirements of the RFP. Emphasis should be on completeness and clarity of content. Submissions of technical literature, display charts, or other supplemental materials are the responsibility and within the discretion of the proposer. The proposal must contain and be organized in accordance with the following section titled Proposal Contents. The proposer assumes the sole risk and responsibility of all expenses connected with the preparation of its proposal.

Letter of Introduction / Cover Page

- ✓ Include a letter of introduction addressed to **Thomas McBartlett III, Electric Director** and signed by a person legally authorized to bind the proposer to its proposal. The letter will introduce the company and include the company name, principal contact name, physical address, mailing address, telephone number, fax number and email address. The letter of introduction may also introduce the proposal and summarize the key provisions of the proposal.

Table of Contents

- ✓ Include a clear identification of the material by section and by page number.

Proposal Submission Form

- ✓ Complete and include the **Proposal Submission Form** attached as **Exhibit A**.

Qualifications and Experience

- ✓ Describe your **firm's experience** specifically **creating Electric System Master Plans** for electric utilities . Include the name, location, client entity, and year the Electric System Master Plans were created for each of the utilities.
- ✓ Provide the **names and titles of each person**, their specific qualifications, credentials, level of experience (practical and educational), and number of years' experience that will be assigned to the City's project.
- ✓ Provide **proof of licenses** required to practice in the State of Oregon.

Task List & Timeline

- ✓ Provide the **task list & timeline** being proposed to complete the scope of services.

(Note: The City Council meetings occur on the first and third Tuesdays of each month, excluding holidays.)

References

- ✓ Provide a **minimum of three (3) references** the proposer has/is currently providing these types of professional services. The City reserves the right to verify these references.

Include the following information for each reference:

- Name of agency
- Contact name of individual who can verify your performance.
- Telephone number
- Email address
- Identify the services that were provided for each reference.

Contractual Terms and Conditions

The highest ranked proposer will enter into an agreement with the City of Ashland, Oregon, *in a form substantially similar to* that attached hereto as **Exhibit C**.

- ✓ Indicate acceptance of the City’s contract provisions found in the **Personal Services Agreement** attached as **Exhibit C** or suggest reasonable alternatives that do not substantially impair the City’s rights under the agreement. Some contract terms and conditions may be negotiable.
- ✓ The **Certificate of Compliance** attached as **Exhibit B**, is required to be signed and included with your proposal.

Cost Proposal

IMPORTANT: The Cost Proposal (fee schedules, including any alternative pricing options) are to be **submitted separately from the technical proposal in a sealed envelope** marked “COST PROPOSAL” per the submission instructions on [page 16](#).

- ✓ Provide **detailed costs by task** and the **total proposed cost** to complete the project. Any and all costs for travel, lodging and meals, will preferably be at federal per diem rates. The City understands if the scope of services is further developed with the successful proposer, there may be additions or deletions to the cost at that time.

Note: For ease in preparing the detailed cost proposal, you are welcome to add the costs and total amount to your Task List & Timeline and submit the version with the associated costs separately with your cost proposal.

- ✓ Provide **hourly rate fee schedule**.

Trade Secrets (if applicable)

- ✓ If applicable, the proposer shall submit a **redacted version of its proposal** if the proposal being submitted in response to this RFP contains trade secrets.

IMPORTANT: Proposals become **public information** after the City releases a Notice of Intent to Award a Public Contract. It is important to submit a **fully redacted copy of the proposal** if it contains confidential trade secrets. A description of services being acquired by the City and the costs associated with those services are NOT considered confidential information.

PROPOSAL SUBMISSION REQUIREMENTS

The complete written proposal is to be submitted with **multiple copies** as follows:

TECHNICAL PROPOSAL

- **One (1) original copy** of the complete proposal **SIGNED IN INK**
- **Two (2) additional copies** of the complete proposal

COST PROPOSAL

Cost proposal must be submitted separately from the technical proposal in a **sealed envelope** as follows:

- **One (1) original copy** of the complete proposal **SIGNED IN INK**
- **Two (2) additional copies** of the complete proposal

The complete proposal, including the additional copies, are to be submitted in a single **SEALED ENVELOPE** (or box) labeled as follows and received at the following address:

**Kari Olson
Purchasing Specialist
City of Ashland
90 N. Mountain Avenue
Ashland, OR 97520**

Contents: Request for Proposal
ELECTRIC SYSTEM MASTER PLAN
Due by: **2:00:00 PM (PST), Tuesday, June 27, 2023**

Please note: Late proposals will not be considered. No exceptions. It is recommended that you request available delivery options for the City of Ashland, Oregon area and verify that your method of shipment will arrive prior to the due date and time.

DUE DATE AND TIME:

The proposals must be received at the designated address listed above by **2:00:00 PM (PST), Tuesday, June 27, 2023.** Late proposals will **not** be considered. Faxed or emailed proposals will **not** be considered.

Period of Irrevocability

Proposals will be offers that are irrevocable for a period of **sixty (60) days** after the time and date proposals are due. Proposals will contain the name, address and telephone number of an individual or individuals with authority to bind the company during the period in which the proposal will be evaluated.

EVALUATION PROCESS

In accordance with ORS 279B.060 (14), The City shall award the contract to the responsible proposer whose proposal the City determines in writing is the most advantageous to the City based on the evaluation process and evaluation criteria described in this RFP, applicable preferences described in ORS 279A.120, 279A.125 and 279A.128, and, when applicable the outcome of any negotiations authorized by the RFP. Other factors may not be used in the evaluation.

An evaluation committee appointed by the City of Ashland will evaluate the proposals based on the evaluation criteria established in this Request for Proposals. Each category will be scored with a number of points, up to the maximum number of points assigned to each category. The greater the number of points assigned to a category, the greater the category's level of importance. Each proposal will be evaluated, scored and then ranked according to the evaluation criteria set forth in this RFP.

After the initial evaluation of the proposals has been completed, the Evaluation Committee may **request clarifications**. Requests for clarifications will be processed via email by the sole point of contact identified on **page 4** of this RFP. No additions, deletions or substitutions may be made to proposals that cannot be termed as clarifications. Proposer's responses to questions shall restate the question and provide the requested clarification.

The City of Ashland may reject any proposal not in compliance with all prescribed solicitation procedures and requirements and other applicable laws, and the City may reject for good cause any or all proposals upon the City's findings that it is in the best interest of the City of Ashland.

If only one responsive proposal is received, the City of Ashland reserves the right to negotiate a contract with the sole responsive proposer.

The total points awarded to each proposal will be tabulated and the proposers shall be ranked accordingly. A contract with the proposer deemed to be the highest ranked proposer will then be negotiated. If negotiations with the highest ranked proposer are unsuccessful, the City of Ashland may proceed to the next highest ranked proposer, and so on until a contract is successfully negotiated.

In accordance with OAR 137-047-0260(2)((b)(A)(B)(C), the statement of work will identify the scope of work to be performed under the resulting contract, outline anticipated duties of the contractor and establish the expectations for the contractor's performance of the resulting contract. The agreed upon tasks will also identify respective responsibilities of the contractor and City staff.

In accordance with ORS 279B.060 (16), the City shall obtain the proposer's agreement to perform the scope of work and meet the performance standards set forth in the final negotiated **statement of work**.

The final contract recommendation will then be subject to the approval of the City Council acting as the Local Contract Review Board.

EVALUATION CRITERIA

The proposals will be evaluated according to the following criteria.

<u>EVALUATION CRITERIA</u>	<u>POINTS</u>
Letter of Introduction, Table of Contents and Proposal Submission Form (Exhibit A)	5
Qualifications and Experience	30
Task List & Timeline	25
References	10
Contractual Terms and Conditions	5
SUBTOTAL	75
Cost Proposal	25
TOTAL	100

EXHIBIT A

**Request for Proposals
ELECTRIC SYSTEM MASTER PLAN
May 24, 2023**

Proposal Submission Form

The undersigned proposer submits this proposal in response to the City’s Request for Proposals (RFP) for **Electric System Master Plan**, released on May 24, 2023. The proposer warrants that the proposer has carefully reviewed the RFP and that this proposal represents the proposer’s full response to the requirements described in the RFP. The proposer further warrants that if this proposal is accepted, the proposer will contract with the City, agrees to the terms and conditions found in the attached contract and RFP or has submitted terms and conditions acceptable to the City, and will provide all necessary labor, materials, equipment, and other means required to complete the work in accordance with the requirements of the RFP and contract documents.

The proposer hereby acknowledges the requirement to carry or indicates the ability to obtain the insurance required in the contract. Indicate in the affirmative by initialing here: _____

The proposer hereby acknowledges receipt of Addendum Nos. ____, ____, ____, ____, ____ to this RFP.

Full legal name of company:	
Principle owner’s name:	
Business Address:	
State and location of company headquarters:	
Year business established:	
Telephone Number:	
Fax Number:	
Email Address:	
Authorized Signature:	
Printed/Typed Name:	
Title:	
Date:	

EXHIBIT B

Certificate of Compliance

Compliance with Oregon Tax Laws:

In compliance with OAR 137-047-0260(2)(e), I hereby attest or affirm under penalty of perjury: That I am authorized to act on behalf of the proposer in this matter, that I have authority and knowledge regarding the payment of taxes, and that contractor is, to the best of my knowledge, not in violation of any Oregon Tax Laws, as defined in ORS 305.380.

Compliance with Nondiscrimination Laws:

In compliance with ORS 279A.110(4), OAR 137-046-0210(2) and OAR 137-047-0260(2)(a)(E), I hereby attest or affirm under penalty of perjury that I am authorized to act on behalf of proposer in this matter, and to the best of my knowledge the proposer has not discriminated and will not discriminate, in violation of ORS 279A.110(1), against a minority, women or emerging small business enterprise certified under ORS 200.055 or against a business enterprise that is owned or controlled by or that employs a disabled veteran as defined in ORS 408.225 in obtaining a required subcontract.

Corporate Officer:

By: _____
Signature

Print Name

Title: _____

Date: _____

EXHIBIT C
PERSONAL SERVICES AGREEMENT

<p>CITY OF ASHLAND 20 East Main Street Ashland, Oregon 97520 Telephone: 541/488-XXXX Fax: 541/552-XXXX</p>	<p>CONSULTANT:</p> <p>CONTACT:</p> <p>ADDRESS:</p> <p>TELEPHONE:</p>
---	--

This Personal Services Agreement (hereinafter "Agreement") is entered into by and between the City of Ashland, an Oregon municipal corporation (hereinafter "City") and XXXXXXXXXX, a domestic professional corporation or limited liability company ("hereinafter "Consultant"), for (description of services to be provided.).

NOW THEREFORE, in consideration of the mutual covenants contained herein, the City and Consultant hereby agree as follows:

- 1. Effective Date and Duration:** This Agreement shall become effective on the date of execution on behalf of the City, as set forth below (the "Effective Date"), and unless sooner terminated as specifically provided herein, shall terminate upon the City's affirmative acceptance of Consultant's Work as complete and Consultant's acceptance of the City's final payment therefore, but not later than XXXXXXXXXX.
- 2. Scope of Work:** Consultant will provide (description of services to be provided) as more fully set forth in the Consultant's Proposal dated XXXXXXXXXX, which is attached hereto as "Exhibit X" and incorporated herein by this reference. Consultant's services are collectively referred to in this Agreement as the "Work."
- 3. Compensation:** City shall pay Consultant the sum of \$XXXXXXX (this amount may be an hourly rate OR a lump sum - write out amount in long form here, e.g., two hundred thousand and eighty-five dollars) as full compensation for Consultant's performance of all Work under this Agreement. In no event shall Consultant's total of all compensation and reimbursement under this Agreement exceed the sum of \$XXXXXXXXXX (write out amount in long form here) without the express, written approval from the City official whose signature appears below, or such official's successor in office. Payments shall be made within thirty (30) days of the date of receipt by the City of Consultant's invoice. Should this Agreement be terminated prior to completion of all Work, payments will be made for any phase of the Work completed and accepted as of the date of termination.
- 4. Supporting Documents/Conflicting Provisions:** This Agreement and any exhibits or other supporting documents shall be construed to be mutually complementary and supplementary wherever possible. In the event of a conflict which cannot be so resolved, the provisions of this Agreement itself shall control over any conflicting provisions in any of the exhibits or supporting documents.

5. **All Costs Borne by Consultant:** Consultant shall, at its own risk, perform the Work described above and, unless otherwise specified in this Agreement, furnish all labor, equipment, and materials required for the proper performance of such Work.
6. **Qualified Work:** Consultant has represented, and by entering into this Agreement now represents, that all personnel assigned to the Work to be performed under this Agreement are fully qualified to perform the services to which they will be assigned in a skilled manner and, if required to be registered, licensed, or bonded by the State of Oregon, are so registered, licensed, or bonded.
7. **Ownership of Work/Documents:** All Work, work product, or other documents produced in furtherance of this Agreement belong to the City, and any copyright, patent, trademark proprietary or any other protected intellectual property right shall vest in and is hereby assigned to the City.
8. **Statutory Requirements:** The following laws of the State of Oregon are hereby incorporated by reference into this Agreement: ORS 279B.220, 279B.230 and 279B.235.
9. **Data Safeguards:**
 - a. Consultant shall access, store, and use Confidential Information solely for the purpose of providing the Work required by this Contract.
 - b. Consultant shall maintain physical, technical, and administrative safeguards to protect Confidential Information against unauthorized access.
 - c. Contractor shall not disclose Confidential Information to any third parties other than Contractor's employees or approved subcontractors who have a legitimate need to access such Confidential Information and solely for the purpose of providing the Work, and only if such third parties are bound by confidentially and non-disclosure provisions no less restrictive than those set out in this Contract, including compliance with all applicable laws and regulations.
10. **Indemnification:** Consultant hereby agrees to defend, indemnify, save, and hold City, its officers, employees, and agents harmless from any and all losses, claims, actions, costs, expenses, judgments, or other damages resulting from injury to any person (including injury resulting in death), or damage (including loss or destruction) to property, of whatsoever nature arising out of or incident to the performance of this Agreement by Consultant (including but not limited to, Consultant's employees, agents, and others designated by Consultant to perform Work or services attendant to this Agreement). However, Consultant shall not be held responsible for any losses, expenses, claims, costs, judgments, or other damages, caused solely by the gross negligence of City.
11. **Termination:**
 - a. Mutual Consent. This Agreement may be terminated at any time by the mutual consent of both parties.
 - b. City's Convenience. This Agreement may be terminated by City at any time upon not less than thirty (30) days' prior written notice delivered by certified mail or in person.
 - c. For Cause. City may terminate or modify this Agreement, in whole or in part, effective upon delivery of written notice to Consultant, or at such later date as may be established by City under any of the following conditions:
 - i. If City funding from federal, state, county or other sources is not obtained and continued at levels sufficient to allow for the purchase of the indicated quantity of services;
 - ii. If federal or state regulations or guidelines are modified, changed, or interpreted in

such a way that the services are no longer allowable or appropriate for purchase under this Agreement or are no longer eligible for the funding proposed for payments authorized by this Agreement; or

iii. If any license or certificate required by law or regulation to be held by Consultant to provide the services required by this Agreement is for any reason denied, revoked, suspended, or not renewed.

d. For Default or Breach.

i. Either City or Consultant may terminate this Agreement in the event of a breach of the Agreement by the other. Prior to such termination the party seeking termination shall give to the other party written notice of the breach and its intent to terminate. If the party committing the breach has not entirely cured the breach within fifteen (15) days of the date of the notice, or within such other period as the party giving the notice may authorize in writing, then the Agreement may be terminated at any time thereafter by a written notice of termination by the party giving notice.

ii. Time is of the essence for Consultant's performance of each and every obligation and duty under this Agreement. City, by written notice to Consultant of default or breach, may at any time terminate the whole or any part of this Agreement if Consultant fails to provide the Work called for by this Agreement within the time specified herein or within any extension thereof.

iii. The rights and remedies of City provided in this subsection (d) are not exclusive and are in addition to any other rights and remedies provided by law or under this Agreement.

e. Obligation/Liability of Parties. Termination or modification of this Agreement pursuant to subsections a, b, or c above shall be without prejudice to any obligations or liabilities of either party already accrued prior to such termination or modification. However, upon receiving a notice of termination (regardless of whether such notice is given pursuant to Subsection a, b, c, or d of this section, Consultant shall immediately cease all activities under this Agreement, unless expressly directed otherwise by City in the notice of termination. Further, upon termination, Consultant shall deliver to City all documents, information, works-in-progress and other property that are or would be deliverables had the Agreement been completed. City shall pay Consultant for Work performed prior to the termination date if such Work was performed in accordance with this Agreement.

12. Independent Contractor Status: Consultant is an independent contractor and not an employee of the City for any purpose. Consultant shall have the complete responsibility for the performance of this Agreement. Consultant shall provide workers' compensation coverage as required in ORS Chapter 656 for all persons employed to perform Work pursuant to this Agreement. Consultant is a subject employer that will comply with ORS 656.017.

13. Assignment: Consultant shall not assign this Agreement or subcontract any portion of the Work without the written consent of City. Any attempted assignment or subcontract without written consent of City shall be void. Consultant shall be fully responsible for the acts or omissions of any assigns or subcontractors and of all persons employed by them, and the approval by City of any assignment or subcontract of the Work shall not create any contractual relation between the assignee or subcontractor and City.

- 14. Default.** The Consultant shall be in default of this Agreement if Consultant: commits any material breach or default of any covenant, warranty, certification, or obligation under the Agreement; institutes an action for relief in bankruptcy or has instituted against it an action for insolvency; makes a general assignment for the benefit of creditors; or ceases doing business on a regular basis of the type identified in its obligations under the Agreement; or attempts to assign rights in, or delegate duties under, this Agreement.
- 15. Insurance.** Consultant shall, at its own expense, maintain the following insurance:
- a. Worker's Compensation insurance in compliance with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers
 - b. Professional Liability insurance with a combined single limit, or the equivalent, of not less than \$2,000,000 (two million dollars) per occurrence. This is to cover any damage caused by error, omission or negligent acts related to the Work to be provided under this Agreement.
 - c. General Liability insurance with a combined single limit, or the equivalent, of not less than \$2,000,000 (two million dollars) per occurrence for Bodily Injury, Death, and Property Damage.
 - d. Automobile Liability insurance with a combined single limit, or the equivalent, of not less than \$1,000,000 (one million dollars) for each accident for Bodily Injury and Property Damage, including coverage for owned, hired or non-owned vehicles, as applicable.
 - e. Notice of cancellation or change. There shall be no cancellation, material change, reduction of limits or intent not to renew the insurance coverage(s) without thirty (30) days' prior written notice from the Consultant or its insurer(s) to the City.
 - f. Additional Insured/Certificates of Insurance. Consultant shall name the City of Ashland, Oregon, and its elected officials, officers and employees as Additional Insureds on any insurance policies, excluding Professional Liability and Workers' Compensation, required herein, but only with respect to Consultant's services to be provided under this Agreement. The consultant's insurance is primary and non-contributory. As evidence of the insurance coverages required by this Agreement, the Consultant shall furnish acceptable insurance certificates prior to commencing the Work under this Agreement. The certificate will specify all of the parties who are Additional Insureds. Insuring companies or entities are subject to the City's acceptance. If requested, complete copies of insurance policies; trust agreements, etc. shall be provided to the City. The Consultant shall be financially responsible for all pertinent deductibles, self-insured retentions, and/or self-insurance.
- 16. Nondiscrimination:** Consultant agrees that no person shall, on the grounds of race, color, religion, creed, sex, marital status, familial status or domestic partnership, national origin, age, mental or physical disability, sexual orientation, gender identity or source of income, suffer discrimination in the performance of any Work under this Agreement when employed by Consultant. Consultant agrees to comply with all applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations. Further, Consultant agrees not to discriminate against a disadvantaged business enterprise, minority-owned business, woman-owned business, a business that a service-disabled veteran owns, or an emerging small business enterprise certified under ORS 200.055, in awarding subcontracts as required by ORS 279A.110.
- 17. Consultant's Compliance with Tax Laws:**
- 17.1 Consultant represents and warrants to the City that:

17.1.1 Consultant shall, throughout the term of this Agreement, including any extensions hereof, comply with:

- (i) All tax laws of the State of Oregon, including but not limited to ORS 305.620 and ORS Chapters 316, 317, and 318;
- (ii) Any tax provisions imposed by a political subdivision of the State of Oregon applicable to Consultant; and
- (iii) Any rules, regulations, charter provisions, or ordinances that implement or enforce any of the foregoing tax laws or provisions.

17.1.2 Consultant, for a period of no fewer than six (6) calendar years preceding the Effective Date of this Agreement, has faithfully complied with:

- (i) All tax laws of the State of Oregon, including but not limited to ORS 305.620 and ORS Chapters 316, 317, and 318;
- (ii) Any tax provisions imposed by a political subdivision of the State of Oregon applicable to Consultant; and
- (iii) Any rules, regulations, charter provisions, or ordinances that implement or enforce any of the foregoing tax laws or provisions.

- 18. Notice.** Whenever notice is required or permitted to be given under this Agreement, such notice shall be given in writing to the other party by personal delivery, by sending via a reputable commercial overnight courier, by mailing using registered or certified United States mail, return receipt requested, postage prepaid, or by electronically confirmed at the address or facsimile number set forth below:

If to the City:

City Department
Attn: Contract Administrator
Address
Ashland, Oregon 97520

With a copy to:

City of Ashland – Legal Department
20 E. Main Street
Ashland, Oregon 97520
Phone: (541) 488-5350

If to Consultant:

XXXXXXXX
XXXXXXXXXX
XXXXXXXXXX

- 19. Governing Law.** This Agreement shall be governed by the laws of the State of Oregon without regard to conflict of laws principles. Exclusive venue for litigation of any action arising under this Agreement shall be in the Circuit Court of the State of Oregon for Jackson County unless exclusive jurisdiction is in federal court, in which case exclusive venue shall be in the federal district court for the district of Oregon. Each party expressly waives any and all rights to maintain an action under this Agreement in any other venue, and expressly consents that, upon motion of

the other party, any case may be dismissed, or its venue transferred, as appropriate, so as to effectuate this choice of venue.

20. **Amendments.** This Agreement may be amended only by written instrument executed by both parties with the same formalities as this Agreement.
21. **Nonappropriations Clause.** Funds Available and Authorized: City has sufficient funds currently available and authorized for expenditure to finance the costs of this Agreement within the City's fiscal year budget. Consultant understands and agrees that City's payment of amounts under this Agreement attributable to Work performed after the last day of the current fiscal year is contingent on City appropriations, or other expenditure authority sufficient to allow City in the exercise of its reasonable administrative discretion, to continue to make payments under this Agreement. In the event City has insufficient appropriations, limitations or other expenditure authority, City may terminate this Agreement without penalty or liability to City, effective upon the delivery of written notice to Consultant, with no further liability to Consultant.
22. THIS AGREEMENT AND THE ATTACHED EXHIBITS CONSTITUTE THE ENTIRE UNDERSTANDING AND AGREEMENT BETWEEN THE PARTIES. NO WAIVER, CONSENT, MODIFICATION OR CHANGE OF TERMS OF THIS AGREEMENT SHALL BIND EITHER PARTY UNLESS IN WRITING AND SIGNED BY BOTH PARTIES. SUCH WAIVER, CONSENT, MODIFICATION OR CHANGE, IF MADE, SHALL BE EFFECTIVE ONLY IN THE SPECIFIC INSTANCE AND FOR THE SPECIFIC PURPOSE GIVEN. THERE ARE NO UNDERSTANDINGS, AGREEMENTS, OR REPRESENTATIONS, ORAL OR WRITTEN, NOT SPECIFIED HEREIN REGARDING THIS AGREEMENT. CONSULTANT, BY SIGNATURE OF ITS AUTHORIZED REPRESENTATIVE, HEREBY ACKNOWLEDGES THAT HE/SHE HAS READ THIS AGREEMENT, UNDERSTANDS IT, AND AGREES TO BE BOUND BY ITS TERMS AND CONDITIONS.
23. **Certification.** Consultant agrees to and shall sign the certification attached hereto as "Exhibit C" and incorporated herein by this reference.

IN WITNESS WHEREOF the parties have caused this Agreement to be signed in their respective names by their duly authorized representatives as of the dates set forth below.

CITY OF ASHLAND:

XXXXXXXXXX (CONSULTANT):

By: _____
Joseph L. Lessard, City Manager

By: _____
Signature

Date

Printed Name

Title

Purchase Order No. _____

Date

(W-9 is to be submitted with this signed Agreement)

APPROVED AS TO FORM:

City Attorney

Date



1600 Valley River Drive, Suite 380 ■ Eugene, OR 97401 ■ Phone (541)-228-9353

June 23, 2023

Thomas McBarlett III
Electric Director
City of Ashland
90 N. Mountain Avenue,
Ashland, OR 97520

Attn: Mr. Thomas McBarlett

Subject: Electrical Engineering Services for Electrical System Master Plan

Stoddard Power Systems, LLC (SPS) is pleased to provide the attached engineering proposal for the 10-year planning master plan for the City's electric utility in accordance with the City of Ashland request for proposal.

SPS is a small, Oregon based consulting firm with consulting engineers having many years of experience providing services to municipal utilities. We hope you get an opportunity to speak with some of our utility client references to find out more about us and the expertise and customer service we can bring to you.

Please direct any questions regarding our proposal to Martin Stoddard per the following:

Martin Stoddard, P.E.
Principal - Stoddard Power Systems, LLC
1600 Valley River Drive - Suite 380
Eugene, OR 97401
Office: 541-228-9353
Cell: 541-250-5646
martin.stoddard@stoddardpower.com

We appreciate the opportunity to be of service to the City of Ashland. We look forward to hearing from you and hope to meet you in person in the near future.

Sincerely,

Martin Stoddard, P.E.
Stoddard Power Systems, LLC

Enclosure

Original Copy.

EXHIBIT A


Request for Proposals ELECTRIC SYSTEM MASTER PLAN May 24, 2023

Proposal Submission Form

The undersigned proposer submits this proposal in response to the City's Request for Proposals (RFP) for **Electric System Master Plan**, released on May 24, 2023. The proposer warrants that the proposer has carefully reviewed the RFP and that this proposal represents the proposer's full response to the requirements described in the RFP. The proposer further warrants that if this proposal is accepted, the proposer will contract with the City, agrees to the terms and conditions found in the attached contract and RFP or has submitted terms and conditions acceptable to the City, and will provide all necessary labor, materials, equipment, and other means required to complete the work in accordance with the requirements of the RFP and contract documents.

The proposer hereby acknowledges the requirement to carry or indicates the ability to obtain the insurance required in the contract. Indicate in the affirmative by initialing here: ms

The proposer hereby acknowledges receipt of Addendum Nos. 1, 2, _____, _____, _____ to this RFP.


Full legal name of company:	Stoddard Power Systems
Principle owner's name:	Martin Stoddard
Business Address:	1600 Valley River Drive, <i>Suite 380</i> Eugene, Oregon 97401
State and location of company headquarters:	Eugene, Oregon
Year business established:	2021
Telephone Number:	541 228 9353
Fax Number:	N/A
Email Address:	martin.stoddard@stoddardpower.com
Authorized Signature:	
Printed/Typed Name:	Martin Stoddard
Title:	Principle Engineer, President
Date:	06/23/2023



TECHNICAL PROPOSAL FOR ELECTRICAL SYSTEM MASTER PLAN

For City of Ashland, Oregon

Date: 06/23/2023

By: 
Martin Stoddard, President
Stoddard Power Systems

Original Copy

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SECTION 1: INTRODUCTION

1.1 Project Understanding

The City of Ashland (City) is seeking proposals for developing an electrical master plan for the City's electric utility. The City serves customers from three step-down substations - Ashland, Mountain Avenue, and Oak Knoll, with a total of 10 feeders currently serving approximately 13,000 customers (meters). Mountain Avenue Substation was recently purchased by the City from BPA. The other two substations are owned by PacifiCorp. In the past ten years, the City has implemented various upgrades to the system but significant growth from new developments along with the age of some of the electric assets has resulted in the need for an evaluation to determine prioritized improvements to allow the system to serve the City's customers while supporting growth without overstressing components.

This proposal is organized based on the required submittal contents. Section 1 presents our understanding of the project. Section 2 summarizes our experience and qualifications and describes the structure of our project team. Section 3 describes the scope of work (task list) and timeline to complete the Electrical System Master Plan. Section 4 provides similar projects performed by the project team and their associated references. Section 5 introduces our assumptions and cost estimate.

1.2 Company Profile

Stoddard Power Systems, LLC (SPS) is a Veteran Owned Small Business home based in Eugene, Oregon serving power generation, utility, industrial, and heavy commercial customers throughout the United States. Our staff consists of a group of professional engineers (licensed in Washington, Oregon, Alaska, Florida, California, Montana, Idaho, New Mexico, and Texas) and power systems experts with many decades of experience. Stoddard Power Systems offers a variety of electrical engineering services including power system design, electrical analysis and studies, troubleshooting, failure analysis, controls, and more. Our team is proficient in all elements of utility engineering services including substation design, distribution design (overhead and underground), transmission design, protective relaying, planning studies, risk mitigation plans, power factor correction, interconnect studies, power systems analysis, and SCADA design and integration.

SECTION 2: QUALIFICATIONS

2.1 Qualifications

Stoddard Power Systems is a qualified engineering firm providing consulting services to utility and other clients. We regularly provide system planning analysis for utility clients. Our typical approach includes an early comprehensive review with the customer to ensure a clear project definition and expectations. For this project the objective is well defined as evaluating the existing electrical system, load forecast, and major equipment inventory to develop a system improvement/upgrade plan. Additionally, our engineers have many years of experience providing system planning studies and engineering services directly to the City of Ashland and we will be able to begin the project with an extensive knowledge of the City's system. However, we will also take this opportunity to take a fresh look at the City's infrastructure and needs to ensure the recommendations presented are optimized for the current and expected needs.

2.2 Project Staffing

Our project team will consist of the following personnel with their specific roles and expected project utilization. Resumes of significant team members are included in Appendix (Section 7). We do not anticipate services from any sub-consultants.

Martin Stoddard, P.E. (10%) – Project Manager, Engineer of Record.

Jiajia Song, P.E. (50%) – Lead Project Engineer.

Jerry Witkowski, P.E. (30%) – Project Engineer.

Staff Designer/Drafter/Admin (10%) – Document Drafting and Assembly

Note: Engineers' credential, experience, and proof of license (PE Licence No.) is provided in the personal resume in Appendix B.

Table 1: Project Team Structure

Project Manager / Engineer of Record Martin Stoddard, P.E. Stoddard Power Systems <i>10% allocated to project</i>		
Administrative	Electrical Engineers	Sub-Consulting Engineers
Design/Drafting/Admin General Office Staff Stoddard Power Systems <i>10% allocated to project</i>	Lead Project Engineer Jiajia Song, P.E. Stoddard Power Systems <i>50% allocated to project</i>	---
	Project Engineer Jerry Witkowski, P.E. Stoddard Power Systems <i>30% allocated to project</i>	---

SECTION 3: RELEVANT EXPERIENCE

3.1 Experience

SPS currently is the on-call engineering service provider to several municipal utilities and electrical cooperatives. The table below lists and describes several recent projects with scope elements similar to the City's project. This is a small subset of recent relevant projects completed by our engineers. Additional project examples can be provided upon request.

Table 2: List of Related Experience

Project Name	Project Description
<p>City of Bandon 10-Years System Planning Study [Emphasis: System Planning Study] Client: Jim Wickstrom, City of Bandon, Electric Department 555 US-101, Bandon, OR 97411 541-347-2437 x 233 PM: Martin Stoddard Engineers: Jiajia Song</p>	<p>Description: The engineers at SPS are performing an electrical system evaluation and developing an orderly and economical improvement plan for the City. The evaluation and capital improvement plan is intended to help ensure the electrical system has the operational capacity, reliability and flexibility to meet its planning criteria. Date Completed: Ongoing, to be completed in December 2023.</p>
<p>City of Drain 10-Years System Planning Study [Emphasis: System Planning Study] Client: Harold Burris, City of Drain, Electric Department 129 West C Avenue Drain, OR 97435 541-836-2037 PM: Martin Stoddard Engineers: Jerry Witkowski, Jiajia Song</p>	<p>Description: The engineers at SPS performed an electrical system evaluation and developed an orderly and economical improvement plan for the City. The evaluation and capital improvement plan was developed to help the City ensure the electrical system has the operational capacity, reliability and flexibility to meet its planning criteria. The study identified and recommended system improvements that would allow the City to supply adequate quality power to serve customers into the intermediate future (10 years), and practical improvements that will provide service into the long-term future. An arc-flash hazard risk evaluation was performed as a part of the project. Date Completed: January 2021</p>
<p>City of Milton-Freewater 10-Years System Planning Study [Emphasis: System Planning] Client: Mike Watkins, City of Milton-Freewater 722 S Main St. Milton-Freewater, OR 97862 541-938-5531 PM: Jerry Witkowski</p>	<p>Description: The engineers at SPS performed an electrical system evaluation and developed an orderly and economical improvement plan for the City. The evaluation and capital improvement plan was developed to help ensure the electrical system has the operational capacity, reliability and flexibility to meet its planning criteria. The study identified and recommended system improvements that will allow the City to supply adequate quality power to serve customers into the intermediate future (10 years), and practical improvements that will help in providing service into the long-term future. An arc-flash hazard risk evaluation was performed as a part of the project. Date Completed: June 2020</p>

Project Name	Project Description
<p>Columbia Basin Electric Cooperative 10-Years System Planning Study [Emphasis: System Planning] Client: Brian Kollman, Columbia Basin Electric Cooperative 171 W Linden Way Heppner, OR 97836 541-676-9146 PM: Martin Stoddard</p>	<p>Description: The engineers at SPS performed an electrical system evaluation and develop an orderly and economical improvement plan for CBEC. The evaluation and capital improvement plan was intended to help ensure the electrical system has the operational capacity, reliability and flexibility to meet its planning criteria. The study identified and recommended system improvements that will allow the Coop to supply adequate quality power to serve customers into the intermediate future (10 years), and practical improvements for long-term future operation. Date Completed: February 2015</p>
<p>Lane Electric 10-Years System Planning Study [Emphasis: System Planning] Client: Doug Stockdale, Lane Electric, 787 Bailey Hill Road Eugene, OR 97402 Phone: 541-484-1151 PM: Jerry Witkowski</p>	<p>Description: The engineers at SPS performed an electrical system evaluation and develop an orderly and economical improvement plan for Lane Electric. The evaluation and capital improvement plan was intended to help ensure the electrical system has the operational capacity, reliability and flexibility to meet its planning criteria. The study identified and recommended system improvements that would allow Lane to supply adequate quality power to serve customers into the intermediate future (10 years), and practical improvements that should be valid to provide service into the long-term future. Date Completed: July 2014</p>
<p>Vera Water and Power 10-Years System Planning Study [Emphasis: System Planning] Client: Kevin Wells, Vera Water and Power 601 N Evergreen Rd. Spokane Valley, WA 99216 Phone: 509-924-3800 PM: Jerry Witkowski</p>	<p>Description: The engineers at SPS performed an electrical system evaluation and develop an orderly and economical improvement plan for VERA. The evaluation and capital improvement plan was intended to help ensure the electrical system has the operational capacity, reliability and flexibility to meet its planning criteria. The study identified and recommended system improvements that would allow Vera to supply adequate quality power to serve customers into the intermediate future (10 years), and practical improvements that should be valid to provide service into the long-term future. Date Completed: June 2014</p>
<p>City of Ashland Hersey Street Underground Project [Emphasis: Underground Feeder Design] Client: Tom McBartlett, City of Ashland, Electric Department 90 N. Mountain Avenue Ashland, OR 97520 541-552-2314 PM: Martin Stoddard Electrical Engineers: Jerry Witkowski,</p>	<p>Description: Following the preparation of a 10 Year Planning Study, the engineers at SPS developed a design for approximately 1.2 miles of multiple conduit underground 15-kV feeder circuits from the Mountain Avenue Substation along Hersey Street to N. Main Street, a busy residential and commercial area. The work included underground circuit ductbanks details and vault designs, with contract document preparation consisting of drawings and technical specifications for bidding. Prepared cost estimates and assisted with Contractor award. Project Total Cost: ~\$1.4M Date Completed: October 2019</p>

3.2 Previous Work with the City of Ashland

SPS engineers Martin Stoddard, Jerry Witkowski, and Jiajia Song have been providing engineering services to the City for several decades. The following is a short list of some of the significant projects completed with the City.

On-Call Engineering Service Provider, for over two decades. Providing engineering support to the Electric Department on various equipment sizing, design, protection setting review, large subdivision development, large EV charge station, line extensions, residential/commercial PV source interconnection, technical document development/update, grant application, etc.

Wildfire Mitigation Plan, 2022. The intent of the wildfire mitigation plan is to document and review the City's existing wildfire policies and procedures and develop an up-to-date wildfire mitigation plan that meets all requirements of the 2021 SB 762 and Oregon Public Utility Commission (OPUC). The overall objective of developing and executing a wildfire mitigation plan is to minimize possible sources of ignition, improve the system resiliency of the electric network, and identify and correct ineffective procedures.

City of Ashland Hersey Street Underground Project, 2019. Following the preparation of a 10 Year Planning Study, the engineers at SPS performed design for approximately 1.2 miles of multiple conduit underground 15-kV feeder circuits from the Mountain Avenue Substation along Hersey Street to N. Main Street, a busy residential and commercial area. The work included underground circuit detail ductbanks and vault designs, with contract document preparation consisting of drawings and technical specifications for bidding. Prepared cost estimates and assisted with Contractor award.

Oak Knoll Substation Feeder Controller Upgrade, 2018. Engineering design to replace the feeder protection controllers with Cooper Form 6, and provide updated protection and control settings.

City of Ashland PV Generation Interconnect Analysis, 2017. This project is a review of options, interconnect feasibility, and cost estimate for adding a large-scale PV generation facility and connecting it into the City's existing electrical distribution system.

Mountain Avenue Substation Expansion, 2010. Engineering design to add three additional feeders to the MAS substation, including distribution rack expansion, control and protection design, etc.

Reeder Gulch Hydro Power and Control Upgrade, 2009. Engineering design of new generator switchgear and all controls. Control equipment included new protective relays, PLCs, HMI Touchpanels, auto synchronizers, inverters, and all associated controls. We also provided complete control programming and startup and commissioning of the system.

10-Years System Planning Study, 2013. The engineers at SPS performed an electrical system evaluation and develop an orderly and economical improvement plan for the City. The evaluation and capital improvement plan was intended to help ensure the electrical system has the operational capacity, reliability and flexibility to meet its planning criteria. The study identified and recommended system improvements that would allow the City to supply adequate quality power to serve customers into the intermediate future (10 years), and practical improvements that should be valid to provide service into the long-term future.

Ashland Substation Feeder Controller Upgrade, 2011. Engineering design to replace the feeder protection controllers with Cooper Form 6, and provide updated protection and control settings.

10-Years System Planning Study, 2003. The engineers at SPS performed an electrical system evaluation and develop an orderly and economical improvement plan for the City. The scope was identical to the one discussed above for 2013.

SECTION 4: SCOPE OF WORK

Our typical approach for a system planning study for small utility systems is to provide evaluation and analysis for a 10-year span. Specific elements include:

Data Collection: Perform a walk-through of the City's electrical network with the City's Electrical Department to document system conditions for all major components. Inspection will include an evaluation of condition. We also work with City personnel to obtain system protection data including major fuses and relays as well as historical meter data from the City and BPA.

Load Forecast: Evaluate the City's system-wide growth patterns based on historical, recent (prior 10-year period) and expected future growth, from data provided by the Electric Department and population/load projections from the City and BPA. Evaluate past electric energy and demand usage, in the month and seasonal patterns, to forecast future loading to be presented in summation tables. This data will be used to estimate feeder and substation peak loading through system analysis and to determine recommended system improvements.

System Planning Criteria: Establish realistic planning criteria and objectives upon which short-term and long-term planning should be based. These planning standards are used to determine loading guidelines, the appropriate level of backup under outage conditions, economic conductor sizes, acceptable voltage drop levels, and improvement timing.

Transmission and Substation Evaluation: Evaluate the existing transmission system facilities serving the City for interconnection and switching flexibility, looping capabilities, isolated segments, and overall operation and performance for power supply and delivery to the City's facilities. Also, evaluate the existing substation points-of-delivery for equipment ratings, capacities, and configurations. This effort is to include consideration of reliability, protection components, protection philosophy, interruption frequency and duration, power availability and the ability to serve growth, and operation and maintenance programs.

Analysis of the Existing System: Evaluate the ability of the existing electric system to provide economical, high-quality service in terms of component loading, voltage levels, line losses, power factor, and reliability in the short-term and intermediate future. This effort includes a review of the existing system performance based on the following criteria to identify and determine cost-effective measures that can improve system performance:

- System reliability
- System capacity
- System flexibility
- System and feeder peak loads
- System construction practices
- Operation and maintenance policies
- Environmental sensitivity
- System equipment aging
- Identification of trouble spots and poorly performing equipment
- Review adequacy of system record keeping

Major Equipment Inventory Review and Replacement Schedule: Working with the city staff to review transformer, pole, and conductor inventory, and create a practical replacement schedule based on the forecast and system improvement recommendations.

Other Considerations from Renewable Energy Resource Addition, Increased EV Charging Demand, Climate & Energy Action Plan, and Wildfire Mitigation Plan:

- Evaluate the feasibility of adding large and small scale renewable energy sources such as solar, wind, small hydro, etc.
- Provide system improvement recommendations based on the forecasted EV addition and associated demand pattern.
- Recommendations for integration of the City's Climate and Energy Action Plan in the Electric System Master Plan
- Recommendations for integration of the City's Wildfire Mitigation Plan in the Electric System Master Plan

Power Flow Analysis: Analyze the electric system circuits using computer modeling software. The system will be modeled on a system-wide three-phase basis using the *EasyPower* software package. The power flow analysis modeled the system for the High and Low load conditions:

The Power Flow analysis is to be performed for the conditions noted above to identify various system configuration voltage drops, load balance, real and reactive power flows, and system losses at each system bus as labeled.

Short Circuit Analysis: A short circuit analysis will be performed under the Base Case configuration to update the maximum fault availability throughout the system. The results will be presented in the Short Circuit Chapter with detailed fault data examples and analysis output reports. The short circuit ratings for all equipment will be evaluated for adequacy based on the expected maximum short circuit currents.

Protective Device Coordination: Using the system model developed for the power flow and short circuit calculations, the system coordination and protection will be evaluated. For each distribution feeder a time-current curve coordination chart showing the devices listed below will be presented:

- Transformer damage curve
- Conductor or insulation damage curve
- Maximum available short circuit symmetrical and asymmetrical fault current
- Time-current curves of primary protection devices
- Time-current curves of secondary protection devices
- Time-current curves of major backbone protection devices

The results will be presented in detailed tabulation with recommended settings for existing protective devices. In addition, analyses of coordination charts and recommended protective device changes that will improve system reliability will be prepared and included. The development of a fusing application guide for the sizing of downstream fuses will also be provided.

Prepare Electric System Study Report: A report summarizing the results of the study will be prepared that includes:

- Documentation of references, planning criteria, related calculations, computer reports, and techniques used in the analysis.
- Analysis and evaluation of the existing electric system, identification of alternative improvement options and suggested areas that need focused attention.

- A list of conclusions, recommendations, and proposed system improvements with projected construction timing and estimated costs.
- System maps and analysis plots showing the configurations and results of the various study cases, including recommended system improvements.

4.1 Work Plan and Schedule

We will be ready to commence work within one week of notice to proceed. Based on this an approximate schedule for major tasks is provided in Table 3. This is a preliminary schedule and can be expedited or deferred as directed by the City. We will work closely with the City staff to develop a schedule that meets your requirements.

Table 3: Work Schedule

Task	After Notice to Proceed
Kickoff Meeting and Data Collection	2 Week
System Analysis	8 Weeks
Report Development	12 Weeks
Submit Draft Report	14 Weeks
Comments From City	16 Weeks
Final Report Submission	18 Weeks

SECTION 5: REFERENCES

5.1 References

Table 4: List of References

Contact Info	Services Provided
<p>Columbia Basin Electric Cooperative</p> <p>Brian Kollman / Manager of Operations</p> <p>171 W Linden Way Heppner, OR 97836 Phone: 541-676-9146 briank@columbiabasin.com</p>	<p>The engineers at SPS have provided engineering services for CBEC since 2002 including multiple substation designs, power system studies, capacitor bank designs and programming, transmission line designs, and 10-year planning studies.</p>
<p>Vera Water and Power</p> <p>Kevin Wells / General Manager</p> <p>601 N Evergreen Rd. Spokane Valley, WA 99216 509-924-3800 kwells@verawaterandpower.com</p>	<p>Complete substation design in 2015 and 2016. Performed a 10-year planning study in 2014. Provided design which included provisions for easy expansion to implement second transmission source and transformer bank, plus distribution rack extension. Provided design basis for other further substation improvements of other substations with design work done by Vera's in-house engineers. We provided a complete SCADA system replacement in 2017.</p>
<p>Monmouth Power and Light</p> <p>Mike Gregory / Acting Operation Superintendent</p> <p>780 Echols St. S Monmouth, OR 97361 503-838-3526 mgregory@ci.monmouth.or.us</p>	<p>Provided engineering services for multiple developments and extensive underground design projects, including the feeder getaways from their newer substation. Provided on-call support for substation technical concerns. We are actively providing engineering services to MPL.</p>
<p>City of Drain</p> <p>Harold Burris / Lineman</p> <p>431 Payton Avenue Drain, OR 97435 541-836-2037 pwforeman@cityofdrain.org</p>	<p>Provided engineering services for multiple developments, power system studies, wildfire mitigation plan, and on-call support for substation technical concerns. Performed a 10-year planning study in 2021. We are actively providing engineering services to the City.</p>
<p>City of Bandon</p> <p>Jim Wickstrom / Superintendent</p> <p>City of Bandon, Electric Department 555 US-101, Bandon, OR 97411</p>	<p>Provided engineering services for multiple developments, coordination studies, and on-call support for substation technical concerns. We are currently performing a 10-year planning study (2023). We are actively providing engineering services to the City.</p>

Contact Info	Services Provided
541-347-2437 x 233 jwickstrom@ci.bandon.or.us	
Northern Wasco County PUD Garrett Mauritsen / Staff Engineer 2345 River Rd, The Dalles, OR 97058 Phone: 541-298-3318 Garrett-Mauritsen@nwascopud.org	The engineers at SPS have provided engineering services including four substation designs/upgrades (two of them are ongoing), hydro powerhouse upgrade, power system studies, backup generator design, etc..
City of Milton-Freewater Mike Watkins / Electric Superintendent City of Milton-Freewater 722 S Main St. Milton-Freewater, OR 97862 Phone: 541-938-5531 Mike.Watkins@milton-freewater-or.gov	The engineers at SPS have provided engineering services for CMF since early 2000 including two substation designs, power system studies, wildfire mitigation plan, and 10-year planning studies.

SECTION 6: TERMS AND CONDITIONS

6.1 Contractual Terms and Conditions

Stoddard Power Systems has a standard contract based on EJCDC contract specifications. However, we are currently under contract with the City of Ashland and have accepted the City's terms and conditions. The contract between SPS and the City of Ashland is dated March 30, 2022 and we expect similar terms and conditions will be used for this contract. We do not anticipate any concerns regarding contract terms with the City.

SECTION 7: APPENDIX

7.1 Appendix A – Stoddard Power Systems Standard Rates

Attached externally.

7.2 Appendix B – Resumes

Attached externally.

Stoddard Power Systems, LLC

STANDARD HOURLY BILLING RATES

Standard Hourly Rates are set forth in this Attachment A and include salaries and wages paid to personnel in each billing class plus the cost of customary and statutory benefits, general and administrative overhead, non-project operating costs, and operating margin or profit.

The Standard Hourly Rates are subject to annual review. The rates set for in this Attachment are effective through **January 1, 2024**.

SCHEDULE OF HOURLY RATES

CLASS	DESCRIPTION	RATE
EN5	Principal Engineer	\$195.00/hr
EN4	Senior Engineer	\$160.00/hr
EN3	Lead Engineer	\$130.00/hr
EN2	Staff Engineer	\$115.00/hr
EN1/CAD	Engineer/Designer/Inst Technician/Drafter	\$90.00/hr
ADMIN	Office/Administrative Support	\$55.00/hr

EXPENSES

Direct Expenses billed at cost plus 10%.
Subconsultant invoices billed at invoice plus 10%
All materials billed at cost plus 15%

Martin L. Stoddard, P.E.
Principle Electrical Engineer



Education

MS, Electrical Engineering, University of Washington
BS, Electrical Engineering, Oregon State University

Professional Engineering Registration

Oregon 70823PE
Washington 51452
Montana PEL-PE-LIC-31107
Florida 84826
Alaska 130554

Work Experience

Mr. Stoddard has over 25 years of experience in power system design and analysis and is the owner and president at Stoddard Power Systems, LLC. Prior to starting Stoddard Power he was the Chief Engineer and director of engineering at OS Engineering, the engineering division of Olsson Industrial Electric, where he managed a department of ~40 engineers and technicians and provided engineering support to over 200 electricians. Prior to OS Engineering he was co-owner of CVO Electrical Systems, LLC, a small consulting firm specializing in power system design and analysis. Mr. Stoddard was a researcher at the Pacific Northwest National Laboratory (PNNL) in Richland, Washington where he conducted research in power system analytics and control system security. Prior to PNNL, Mr. Stoddard worked as a consulting engineer at Electrical Systems Analysis (ESA) where his responsibilities included the performance of power system studies and the design and integration of electrical system IEDs and SCADA control systems.

Mr. Stoddard was also a U.S. Navy Submarine Officer where he operated and maintained a submarine nuclear propulsion plant. His responsibilities included the maintenance and operation of the 450 VAC distribution system, the mechanical systems, and the control systems associated with the ships nuclear propulsion plant. During his tour he qualified as a Naval Nuclear Engineer and served as the ship's Assistant Engineer.

Mr. Stoddard has considerable expertise in the design, programming and integration of a wide range of Intelligent Electronic Devices (IEDs), Programmable Logic Controllers (PLCs), and Supervisory Control and Data Acquisition (SCADA) systems. He has also performed numerous power system studies including short circuit calculations, equipment duty evaluations, protective device coordination, arc-flash hazard analysis, and harmonic analysis.

Representative Projects at Stoddard Power Systems

RS Kerr GSU Transformer Relocation – Lead design engineer for a design build project to relocate two 80 MVA GSU transformers from the hydroelectric dam tailrace to a new switchyard extension. Provided site plans, containment design, transmission tower design, fire walls, and 2000 A cable bus duct design.

Foster Dam Electrical Reliability Upgrade – Lead design engineer for a major electrical renovation of the Foster Dam powerhouse including new 4160V switchgear, double ended 480V substation, three 480V MCCs, 1700 Ahr battery bank, redundant battery chargers, redundant preferred AC inverters, battery monitoring system, relay control panels, and a renovated and upgraded diesel generator room.

Representative Projects at OS Engineering

Little Goose Station Service Transformers – Lead engineer for the prime contractor on a station service upgrade involving the replacement of two class 1, water cooled power transformers. Responsibilities include coordinating supplier selection, submittal reviews, technical interface with the US Army Corps of Engineers design team, writing commissioning plans and serving as commissioning engineer.

The Dalles Navlock– Lead engineer for the electrical contractor on a complete electrical and controls replacement of The Dalles Navlock system involving the replacement of a double ended unit substation, motor control centers, switchboards, and controls and drive systems for an upstream radial arm gate and a downstream miter gate. Responsibilities include coordinating supplier selection, submittal reviews, technical interface with the US Army Corps of Engineers design team, writing commissioning plans and serving as commissioning engineer.

Vera Water and Power 16th Avenue Substation, Spokane, WA – Project engineer on a complete substation design for a new distribution substation with a new 115kV tap, 15/20/25 MVA transformer, regulator bank, distribution rack, and four (4) feeders with reclosers and controls. Provided protective device relays settings, design reviews, customer training, commissioning, and final acceptance inspection.

LUS NFPA 70E Training– Developed a training course and instructed approximately 35 operators and technicians in electrical safety and breaker operations associated with the Lafayette Utility System (LUS) steam and combined cycle power plants. Course instruction included topics from NFPA-70E, NESC, and other standards.

Western Interlock Power Quality Study and Analysis, Rickreal, OR – Principle engineering for the investigation and correction of power system deficiencies at the plant in Rickreal, Oregon. Power quality issues leading to system trips were investigated and a number of deficiencies were found both in the distribution equipment and service supply. Electrician support for the project was provided by Olsson.

Roseburg WM PT Analysis – Lead engineer for the investigation of PT failures on the distribution line intertie between the Roseburg Waste Management generation system and the utility distribution line. Performed system monitoring and analysis of ferroresonance conditions and provided recommended corrective actions.

EWEB Crest Pump Station Design, Eugene, OR – Lead design engineering for the design of replacement distribution equipment for the utility pump station to bring the station up to code compliance. The project included a field verification of existing components, written report of recommended corrective actions, design drawings of system modifications, and services during construction.

HC&S System Analysis– Lead engineer in the investigation of surge events and stability problems associated with the electrical distribution of the HC&S Sugar Mill in Maui, Hawaii. Performed detailed review and analysis of relaying, grounding, and transient conditions in the system and provided a detailed report with recommendations for corrective actions.

Dexter Dam ERU– Lead engineer for the prime contractor on an electrical reliability upgrade involving the replacement of three double ended station service unit substations. Responsibilities include coordinating supplier selection, submittal reviews, technical interface with the US Army Corps of Engineers design team, writing commissioning plans and serving as commissioning engineer.

Grace Arc-Flash Study, Albany, OR – Principle engineering for an arc-flash hazard and short circuit study for the Grace Chemical Plant in Albany, OR. Study included a complete inspection of the existing system and the development of system improvement recommendations and analysis results.

RFP Missoula Forming Line – Principle electrical engineer on a new service tap and substation for a particle board forming line that included a new electrical room at the Roseburg Forest Products Missoula Particleboard plant. Included specification and design of a replacement 2000kVA substation transformer, PDC, MCCs, lighting, grounding, variable frequency drives, and metering. Responsible for all drawings, specifications, and protective device settings.

Hydroelectric Powerhouse Startup, Dorena Hydro LLC, Cottage Grove, OR – Designed generator high resistance ground system, air terminal chamber, and surge protection for a two 12.47kV generator hydroelectric power plant. Performed engineering assessment of the system and commissioned the generators and protective relays. Performed analysis and design assistance for a shunt excited DC motor drive hydraulic pump for the gate operators.

Compressor Room Design and H-Frame Reconstruction, Roseburg Forest Products, Weed, CA – Senior engineer on a new compressor room electric distribution system including retrofit of existing substation PDC to add new grounding transformer and 800A feeder to compressor room, new 800A PDC, lighting, grounding, and distribution equipment. Provided feasibility analysis and preliminary design for the replacement of an H-Frame tower with 2400V distribution to a padmount VFI configuration.

Pump 4 Disassembly and Forensic Analysis, US Army Corps of Engineers John Day Dam, Rufus, OR – Technical lead for the prime contractor on a deconstruction and forensic assessment of a 450Hp, vertical drive pump for the John Day Dam North Shore Fish Ladder system. Coordinated development of disassembly scope and let technical teams from Advanced American Construction, the US Army Corps of Engineers, and Power Engineering.

Substation Main Breaker Troubleshooting, Oregon State University Energy Center, Corvallis, OR – Electrical engineer, provided technical troubleshooting when the main 20.8kV breaker (breaker 52-1) failed to close following an external fault. Identified the root cause as a remote trip and enable system with the utility supplier Pacificorp and designed a seal in annunciation system to provide operators indication of remote trip.

North Shore Hydroelectric Powerplant Backup Generator, Northern WASCO County PUD, The Dalles, OR – Designed a backup generator system and outdoor building to provide automated backup power for the north shore fish ladder hydro electric power plant. System included a 125kW generator, load back, transfer switches, generator building, underground distribution, and automated load shedding scheme. Provided design drawings, specifications, and bid documents.

Veneer Dryer Replacement, Roseburg Forest Products, Weed, CA – Lead design electrical engineer on a replacement Veneer Dryer and new electrical room for the RFP Weed Veneer plant. Included specification and design of a replacement 1500kVA substation transformer, PDC, MCCs, lighting, grounding, and metering. Developed drawings, specifications, and protective device settings. Developed short circuit model for system analysis.

Stud Mill and Mill A Load Flow Study, Seneca Sawmill, Eugene, OR – Senior electrical engineer for a load flow study of the Seneca Sawmill Stud Mill and Mill A medium voltage feeders and Substation A1, A2, and A3 480V distribution. Coordinated metering points, data collection, analysis and reporting for the load flow analysis. Provided written report of analysis results.

Board Edger Replacement, Dillard Sawmill, Roseburg Forest Products, Dillard, OR – Lead design engineer a new MCC room and high resistance ground system for a replacement board edger. Designed included PDC retrofit, 1200A MCC, lighting, auxiliary systems, lockout panels, cable and conduit schedules, and substation high resistance ground system. Provided stamped design drawings and components specifications. Modeled system in EasyPower and provided coordinated protective device settings.

Mill Load Flow Study, Weed Veneer Plant, Roseburg Forest Products, Weed, OR – Senior engineer a mill wide load flow study. Included data collection for most major 2400V feeders and 480V substations. Provided a written report detailing system loading and recommendations for system improvements.

Class I, Division I, Chemical Storage Building, Roseburg Forest Products, Dillard, OR – Senior engineer for the design of electric distribution for a hazardous material storage building. Design included sealed Class I, Division I electrical distribution and lighting. Provided stamped design drawings.

Non-Combustible Gas Tower Grounding, International Paper, Springfield, OR – Lead design engineer for the grounding and lightning protection of a NCG lattice tower. Provided stamped design drawings with grounding and lightning protection details and equipment bill of materials.

Distribution Improvements Feasibility Study, Timber Products, Yreka, CA – Provided feasibility analysis and preliminary design of replacement medium voltage service and main 480V substations. Design included medium voltage feeders, substation transformers, and main power distribution centers.

69kV Breaker CT Replacement, Weed Veneer Plant Substation, Roseburg Forest Products, Weed, CA – Provided engineering assistance in the replacement of bushing current transformers on a 69kV substation breaker. Engineering assistance included coordination of metering accuracy, secondary circuit verification, breaker SF6 evacuation, and post replacement testing.

The Dalles SCC Functionality Modifications, US Army Corps of Engineers The Dalles Dam, The Dalles, OR – Senior engineer for the design of a replacement annunciation system, governor controls upgrade, main unit metering, and redundant governor PLC network architecture for The Dalles dam. Design services included a 30% feasibility design report and review, 60% preliminary design report and review, and 100% complete design and review.

Paper Machine #2 Transformer Replacement, Georgia Pacific, Halsey, OR – Designed a replacement transformer system and enclosure with medium voltage primary disconnect, four 1000kVA 12.47kV to 480V transformers, and primary and secondary fusing. Design included equipment specifications and detailed drawings.

Preferred AC Inverter and Distribution Replacement, The Dalles Lock and Dam, US Army Corps of Engineers, The Dalles, OR – Lead design engineer for a replacement fully redundant preferred AC system for The Dalles Dam. System consisted of dual 30kVA inverters, dual 10kVA inverters, backup transformers, main distribution boards, dual feeders, and the replacement of all remote panels. Design included detailed drawings, specifications, commissioning specifications, functional test plans, and submittal coordination.

Representative Projects at CVO Electrical Systems, LLC

Bonneville PH2 480V Station Service Switchgear Replacement, US Army Corps of Engineers, Cascade Locks, OR – Lead engineer for the prime contractor on a station service upgrade involving the replacement of three double ended station service unit substations. Responsibilities include coordinating supplier selection, submittal reviews, technical interface with the US Army Corps of Engineers design team, writing commissioning plans and serving as commissioning engineer. Specific engineering scope included transient analysis for vacuum breaker switching transients, customized switchgear layout and design, relaying and transfer control programming, fiber optic arc-flash detection design, air terminal chamber design, and the technical challenges associated with the replacement of station service switchgear in an operating power plant without a loss of service or reliability

GSU Substation and Relaying Replacement for The Dalles North Shore Hydro, Northern Wasco County PUD, The Dalles, OR – Lead engineer for the design, procurement, installation, and commissioning of a replacement primary unit substation and protective relaying for a 6.5MW hydroelectric power project on the north fish ladder of The Dalles Dam. Developed detailed design drawings, procurement specifications, and provided all protective relay settings.

John Day Dam North Fish Ladder AWS Pump Replacement Project, US Army Corps of Engineer, Rufus, OR – Lead engineer for the prime contractor on a fish ladder auxiliary water supply system replacement involving the design and installation of a complete control building and electrical distribution system. Performed detailed designs of the electric distribution system including double ended substation, distribution panels, VFDs, UPS, building auxiliaries, cable vault, and pump chamber cable tray. Provided cable pull calculations for 15kV cable pulls. Coordinated all manufacturer designs. Developed commission plans and served as lead commissioning engineer.

The Dalles Dam Station Service Improvements, US Army Corps of Engineers Dalles Dam and Lock, Dalles, OR – Lead engineer for the prime contractor on a major reliability upgrade to the Dalles dam hydroelectric station service system including the replacement or modification of the majority of the medium voltage and low voltage station service distribution system. Responsibilities included coordinating manufacturer designs, submittal reviews, technical interface with the US Army Corps of Engineers design team, commissioning plan development and serving as commissioning engineer. Lead designer for several design build changes including new multi-zone GSU relaying for T1 transformer, 480V transfer controls, complete DC system design, replacement unit substations FSQ5 and FSQ6, medium voltage lighting feeder transfer switches, and an automated control system for station service transformer cooling..

Detroit/Big Cliffs Dam Electric Reliability Upgrades, US Army Corps of Engineers, Detroit, OR – Lead commissioning engineer for prime contractor on LVA and MVA equipment. Coordinated submittals, developed commissioning plans and served as commissioning engineer for replacement medium voltage and low voltage switchgear, current limiting reactors, and station service transformers.

Wren Substation Relaying, Consumers Power Inc., Philomath, OR – Lead engineer, provided protective device relay settings for replacement SEL311C and SEL787 relays installed to replace existing ABB MSOC and older electromechanical relays at the Wren Substation.

John Day Dam North Fish Ladder 13.8kV Feeder, US Army Corps of Engineer, Rufus, OR – Lead engineer for the electrical contractor responsible for new feeder taps and distribution equipment. Coordinated all engineering activities associated with two isophase bus taps, current limiting reactors, and medium voltage switchgear. Developed commissioning plans and served as lead commissioning engineer.

2.0 MG Reservoir Improvements, Canby Utility Board WTP, Canby, OR – Lead systems integrator and electrical engineer for the 13th Street 2.0 million gallon reservoir expansion project. Designed and integrated level controls and PLC programming for reservoir integration into City water control system.

Reeder Gulch Hydro Power Plant Improvement, City of Ashland, Ashland, OR – Lead design engineer and project manager for the replacement of the switchgear and control system for the City's Reeder Gulch hydro power plant. Design included a fully automated autosynchronizing system and complete generator protection system. Designed and integrated a SCADA system utilizing the City's existing fiber optic network integrating substation IEDs, hydro generation controls, and remote capacitor banks. Provided analysis and settings for feeder sectionalizing with new reclosers for the power plant tie. Developed commissioning plans and served as lead commissioning engineer.

Power System Study, Providence St. Vincent Medical Center, Portland, OR – Lead engineering for an arc-flash hazard and short circuit study for normal and emergency systems for the Providence St. Vincent Medical Center

Campus including Critical Care, West Pavillion, Main Hospital, East Tower, Surgery Tower, and East Pavilion buildings. The study involved the development, field verification, and analysis of an 800 bus model in SKM software.

Backwash Pond System Improvements, Canby Utility Board WTP, Canby, OR – Lead systems integrator for the integration of new backwash pond controls, river intake pumping, raw water quality, washwater control, and remote pump station controls. Included Cimplicity HMI programming, GE Series 90-30 PLC programming, Horner PLC and touchpanel programming, wireless network integration, and replacement autodialer system.

Condon Substation and 115kV Conversion Project, Columbia Basin Electric Cooperative, Heppner, OR – Project engineering in a conversion project to increase transmission voltage from 69kV to 115kV. Project included replacement of Condon Substation transformer and backfeed of Snipion Substation. Represented the utility at factory witness testing at the transformer manufacturer facility. Provided replacement substation relaying design and assisted with replacement circuit switcher and transmission line design.

SCADA System Integration, Consumers Power Inc., Philomath, OR – Provided SCADA system integration and design for Wonderware control system. Integrated multiple IED platforms and maintained the SCADA system covering the complete utility system. Integrated new, motor operated transmission disconnects and new Lebanon Substation relays.

Power System Study, Hickam Air Force Base, HI – Lead engineer for the performance of a complete power system study including short circuit evaluation, protective device coordination, load flow analysis, and arc-flash hazard analysis on a newly constructed C17 hangar and maintenance shop.

Motor Start Analysis, Columbia Basin Electric Cooperative, Inc., Heppner, OR – Provided computer modeling of the distribution system under multiple scenarios for motor start evaluation and power flow analysis. Provided feeder improvement recommendations to allow anticipated system growth.

Water Treatment Plant Expansion, Canby Utility Board WTP, Canby, OR – Lead systems integrator for the Water Treatment Plant Expansion project and Backwash Pond project with responsibilities including programming GE Series 90-30 PLCs, Horner PLCs, PLC communications with GE Proficy Machine Edition, and HMI programming and screen development with GE Cimplicity HMI. Provided startup and testing assistance including PID loop tuning and troubleshooting with closed loop control of high service pump VFDs.

Representative Projects at Electrical Systems Analysis

Generator Power Quality Analysis, Vestas-American Wind Technology, Portland, OR – Field engineer, performed data collection and analysis for wind turbine generators determining generator characteristics and measuring characteristic harmonics of operating turbines. Project engineer in a laboratory analysis of failed capacitor banks.

EasyPower Software Analysis Instructor, Various – Provided classroom instruction to engineers on the use of EasyPower software for building system models and performing short circuit, coordination, load flow, and arc flash analysis. Provided instruction for open enrolled classes in various locations as well as custom site instruction for PPL in Butte, Montana, Colonial Pipeline in Alpharetta, Georgia, and Boise Cascade in DeRidder, Louisiana.

Power System Analysis, Century Aluminum, West Virginia – Project engineer, coordinated field data collection, developed EasyPower model, and performed analysis for a power system study including arc-flash analysis for the Century Aluminum plant in West Virginia.

Power System Analysis, NEGT Salem Harbor, Salem, Mass – Project engineer, coordinated field data collection, developed EasyPower model, and performed analysis for a power system study including arc-flash analysis for the NEGT Salem Harbor power plant in Salem, Massachusetts.

Power Factor and Capacitor Bank Placement Study, City of Milton-Freewater, OR – Project engineer, developed system models of the City of Milton-Freewater 12.47kV distribution system. Modeled system loading and power factor correction capacitor bank placement impacts for correction and voltage effects.

Evaluation of IEEE 519 Compliance at Maher Terminal, Rockwell Automation, Maher Terminal, NJ – Served as project engineer for the field data collection and harmonic analysis of DC drives on Maher Terminal cranes. Analyzed system loading conditions, IEEE 519 compliance, and voltage distortion at 26kV point-of-common-coupling.

Substation Relay Replacement, City of Milton-Freewater, OR – Served as lead project engineer for the design, integration, and programming of replacement substation feeder relays from older electromechanical relays to modern microprocessor based SEL351S relays.

SCADA System Integration, Canby Utility Board, Canby, OR – Lead engineer providing innovative SCADA system integration for the substation automation control system including fiber optic system interfacing with Intelligent Electronic Devices (IEDs), IED programming and configuration, report generation, time synchronization, and WonderWare Human Machine Interface (HMI) configuration.

Municipal SCADA System Replacement, City of Milton-Freewater, OR – Served as lead project engineer for the design and integration of a complete distributed SCADA control system for the upgrade of the City's Electric and Water systems utilizing an Ethernet backbone on a fiber optic network. Provided computer simulation modeling of distribution feeders and customer motors for the determination of motor starting effects on system parameters. Coordinated and programmed substation distribution breaker controllers and transformer protection relays.

Interconnection Study, Boise Cascade, Medford, OR – Project engineer, developed one-line diagrams of the plant electric distribution system and assisted in the completion of a small generating facility interconnection request for interconnection with the Pacific Power and Light distribution system.

Power System Analysis, Alcoa Corporation – Intalco Works, Ferndale, WA – Project engineer, performed computer calculations for Arc Flash hazard determination and Personnel Protective Equipment (PPE) requirements for the electric distribution system of a large aluminum smelter facility.

Power System Analysis, Georgia Pacific, Camas, WA – Lead engineer for a short circuit, coordination, and arc-flash study of the Camas Mill in Camas, Washington. The study involved the development of an over 400 bus model and the analysis of electrical equipment from 69kV down to 208V.

Power System Analysis, Hawaiian Commercial and Sugar Company, Maui, HI – Project engineer, provided computer simulation of high, medium and low voltage systems for power flow and short circuit analysis of the HC&S power distribution system. Created Time Coordination Curves (TCCs) for the coordination study of all major breakers and relays.

Generation Intertie Relaying, Roseburg Forest Products, Roseburg, OR – Project engineer, programmed and interfaced the cogeneration plant Siemens meters and the intertie SEL-311C relays. Provided computer simulations evaluating system alterations and providing updated short circuit study data.

Power System Analysis, City of Blaine, Blaine, WA – Project engineer, provided a computer model of the City's distribution system for load flow and motor starting analysis, and for protective device coordination.

Jiajia Song, Ph.D., P.E.
Senior Electrical Engineer



Education

Ph.D. in Electrical Engineering, Oregon State University
B.S. in Electrical Engineering, Zhengzhou University of Aeronautics, China

Professional Engineering Registration

Oregon	90661PE
Washington	20110017
California	E24431
Texas	138215

Work Experience

Mr. Song is a Senior Electrical Engineer at Stoddard Power Systems with more than ten years of experience in engineering research, analysis, and design of electrical systems from transmission down to distribution levels. He is the lead engineer in the engineering analysis group. Prior to joining Stoddard Power Systems, Mr. Song worked at OS Engineering/Olsson Industrial Electric as an Electrical Engineer directly after graduating from Oregon State University in 2015. During his time at OS Engineering, his roles and responsibilities mainly focused on designing utility and industrial electrical systems, power system studies (including arc-flash, short circuit, load flow, protective protection, harmonic analysis, transient studies, and NERC PRC compliance analysis), system planning and feasibility studies, and site investigation and data collection.

Mr. Song also worked as a Research & Teaching Assistant at Oregon State University from 2010 – 2015. His research specialized in dynamic modeling of power system cascading outages and mitigation schemes, energy storage, and PMU placement in various applications. Mr. Song has published multiple technical papers in IEEE journals and conferences.

Representative Projects

VERA Water and Power, 16th Avenue Substation, Spokane, WA – Project engineer participating in the transformer and circuit switcher control schematic, station service, protective setting, and control panel design.

Columbia Basin Electric Coop., Fossil Substation, Heppner, OR – Project engineer participating in the transformer and circuit switcher control schematic, station service, protective setting, and control panel design.

Columbia Basin Electric Coop., Sand Hollow Substation, Heppner, OR – Project engineer participating in substation structure and foundation, transformer and circuit switcher control schematic, station service, protective setting, and control panel design.

Providence St. Vincent Medical Center, Power System Study, Portland, OR – Project engineer for an arc-flash risk assessment and short circuit study for both normal and emergency scenarios. The study includes field data collection, model development & verification in SKM, analysis, and reporting the findings such as code violation, protective device miscoordination, over-duty equipment, etc.

Oregon State University, Corvallis, OR – Project engineer for an arc-flash risk assessment and short circuit study. The study includes field data collection, model development & verification in EasyPower, analysis, and reporting findings such as code violation, protective device miscoordination, and over-duty equipment.

Old Castle Materials, River Bend Sand and Gravel, Salem, OR – Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Old Castle Materials, Eugene Sand and Gravel, Eugene OR – Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

ATI Cast Products, Building H, Salem, OR – Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

LSQ System Study, USACE, The Dalles Dam – Project engineer for an arc-flash risk assessment and short circuit

study for various scenarios. The study includes data collection, model development & verification in SKM, analysis, and reporting the findings such as code violation, protective device miscoordination, over-duty equipment, etc.

Seneca Sawmill, Eugene, OR — Project engineer to provide engineering support for arc-flash risk assessment and protective device coordination settings while the project progresses.

57th St. Pump Station, Springfield Utility Board — Project engineer for electrical distribution design of the pump station.

Hamlin Pump Station, Springfield Utility Board — Project engineer for electrical distribution design of the pump station.

Harmonic Analysis (IEEE 519 Compliance) at FSO2, USACE, John Day Dam — Project engineer for a harmonic analysis of three 450 hp VFDs in order to confirm that the voltage and current distortions caused by the drives are within the acceptable limits that are specified in IEEE Standard 519.

75MW PV Farm Feasibility Study, Columbia Basin Electric Coop., Heppner, OR — Project engineer for an analysis of interconnecting feasibility for adding a large-scale Photovoltaic (PV) generation facility into the Columbia Basin Electric Cooperative's (CBEC's) transmission system.

10MW PV Generation Interconnect Analysis, City of Ashland, OR — Project engineer for an analysis of interconnecting feasibility for connecting a large-scale Photovoltaic (PV) generation facility into the City's existing electrical distribution system. This engineering investigation evaluated integrating photovoltaic systems with different generation outputs ranging between 2.5 MW and 10 MW.

Grain Millers, Eugene, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Van's Aircraft, Aurora, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Northern Gold Foods, Junction City, OR — Project engineer to support the industrial power distribution design for a large food processing plant in compliance with NEC and NESC codes.

MGC Pure Chemicals, Forest Grove, OR — Project engineer to support the industrial power distribution design for a Mitsubishi chemical processing plant in compliance with NEC and NESC codes.

NORPAC Foods Inc., Brooks, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

SENECA Sawmill, Noti, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Weyerhaeuser TOPS Facility, Springfield, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Weyerhaeuser Snow Peak, Lebanon, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Montpelier Generating Station, Montpelier Indiana — NERC PRC-025-2 and PRC-027-1 compliance evaluation of the Montpelier station to verify the load-responsive protective relay settings provide the desired protection while meeting NERC PRC requirements.

Panda Hummel Station, Selinsgrove, Pennsylvania— NERC PRC-025-2 and PRC-027-1 compliance evaluation of the Hummel station to verify the load-responsive protective relay settings provide the desired protection while meeting NERC PRC requirements.

Tejas Power Generation Station, Houston, Texas — NERC PRC-019-2, PRC-024-3, PRC-025-2, and PRC-027-1 compliance evaluation of the Tejas station to ensure the generator capability, voltage and frequency controls and

protection, and protective relay loadability and coordination comply with NERC PRC requirements.

Shell Polymers, Monaca, Pennsylvania – NERC PRC-024-3, PRC-025-2, and PRC-026-1 compliance evaluation of the Shell Polymers power station to ensure generator voltage and frequency controls and protection, protective relay loadability, and the relay performance during power swing events comply with NERC PRC requirements.

Franz Bakery, Springfield, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Springfield Utility Board, Springfield, OR - Project engineer for a power system study of their water facilities including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Rainbow Water District, Springfield, OR - Project engineer for a power system study of their water facilities including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Genesis HealthCare, Mose Lake, WA - Project engineer for a power system study of the Columbia Crest Center including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

City of Drain, OR - Project engineer for a system planning study and arc-flash study of their electrical distribution system to ensure that the City's electrical system has the operational capacity, reliability, and flexibility to meet long-term planning criteria, as well as arc-flash exposures of their major facilities.

Pleasant Valley Compressor Station, Centerville, VA - Project engineer for reliability analysis of motor fast bus-transferring, including options of transferring sources at 13.8 kV or 480 V.

Readiness Center, Tri-City, WA – Project engineer to support the commercial power distribution design for a military readiness center in compliance with NEC and NESC codes.

Stella Jones, Tacoma, WA - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

WR Grace, Albany, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Lafarge, Eugene, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Parker Hannifin, Eugene, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Seneca Sawmill, Eugene, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Seven Feathers Casino, Canyonville, OR - Project engineer for a power system study including data collection, modeling, arc-flash risk assessment, short circuit study, and equipment duty analysis for various scenarios.

Newark Energy Center, Newark, NJ – NERC PRC-019-2 and PRC-024-3 compliance evaluation of the Newark facility to ensure properly coordinated voltage protective system settings, generating unit controls, limit functions, and equipment capabilities per the requirements of NERC PRC-019-2 and PRC-024-3.

Green Country Energy, Jenks, OK – NERC PRC-019-2 and PRC-024-3 compliance evaluation of the Green Country facility to ensure properly coordinated voltage protective system settings, generating unit controls, limit functions, and equipment capabilities per the requirements of NERC PRC-019-2 and PRC-024-3.

Jerry D. Witkowski, P.E.
Senior Electrical Engineer



Education

B.S. in Electrical Engineering, Oregon State University

Professional Engineering Registration

Washington 30577,
Oregon 16733PE,
California E14639, Idaho 7872,
New Mexico 13273

Work Experience

Mr. Witkowski has been providing electrical utility, industrial design and study services for the past 38 years. His design involvement includes detailed design, project management and lead engineering experience in transmission, substation, and overhead/underground distribution systems. He has unique underground design experiences which include multiple circuit arrangements up 6 miles in length, and distinctive aspects such as, routes paralleling and crossing scenic highways, I-5 crossings, river crossings, railroad crossings, bridge crossing, unique bore and casing crossings, wetland and cultural conditions requiring archeological on-site excavation investigations.

He has also provided many unique design services including special grounding applications, SCADA systems, var control, system voltage conversions, and various co-generation interconnection designs. His engineering services have included technical specification and contract document preparation, contract review, award recommendations, cost estimating, construction scheduling, management and on-site resident services. He has also performed many electric utility system planning studies, system analysis, and protection studies, plus various specialized studies for utility and industrial clients. These studies typically contain the following tasks: growth forecasts, existing system evaluation, establish design criteria, system power flow and short-circuit analysis, protective device coordination, improvement alternatives, recommendations and improvement plans, plus associated costs estimates.

Representative Projects (Reduced, additional examples available upon request)

Tahoe- Donner Association, Truckee-Donner, PUD: Underground Feasibility Study, Truckee, CA – This project although completed in 2006, is very similar to The Dalles Utility Undergrounding Feasibility Study described in the NWCPUD RFP. This work involved determining an approach to underground all utility overhead infrastructure in a heavily wooded mountainous area adjacent to the Tahoe National Forest consisting of over 7,000 homes, and local commercial facilities. The overhead facilities included the PUD's electric primary, secondary and service circuits, two communication company facilities and the utility's SCADA system. The work involved determining underground design plan and elevation configurations without interfering with existing below grade infrastructure, cost estimates, construction phases and scheduling, complications, cost sharing and potential approaches to funding.

Dufur Substation and System Voltage Conversion, City of Dufur, OR – NWCPUD

Performed design, contract documents and technical specifications for the substation voltage conversion and upgrade which included major equipment and Contractor award, field construction inspection, and startup services. Substation equipment was arranged with a flexible switching open-rack outdoor configuration. All components and control systems utilized modern state-of-the-art technology. This project included design and sequencing for voltage conversion of the entire Dufur community.

West 2nd Street Substation, City of the Dalles, OR – NWCPUD

Performed design, contract documents and technical specifications for the substation new control house and relay/control conversion, which included major equipment and Contractor award, field construction inspection, and startup services.

Substation and Transmission Line Design, Columbia Ridge Substation, WA – Prepared substation and transmission line design for a Waste Management Columbia Ridge 25 MW gas- to-energy co-generation facility to interface with CBEC/BPA, including the 115 kV x 4.16 kV substation design with a connection to the generator facility and 4 miles 115 kV pole design to interconnect with CBEC and BPA.

Mountain Avenue Substation Distribution Rack Design, City of Ashland, Ashland, OR – Performed design for the expansion of the City of Ashland, Mountain Avenue Substation distribution rack including site-work, structure details, sectionalizing devices and controllers, control house modifications and feeder getaways. Services included controller configuration, settings and programming in addition to SCADA system configuration to implement fiber-optic communications. The project included complete contract document preparation with technical specifications for material procurement and construction.

City of Milton-Freewater, Milton Substation, Milton-Freewater, OR – Performed design for the expansion of the Milton Substation including site-work, structure details, sectionalizing devices and controllers, control house modifications and feeder getaways. Services included controller configuration, settings and programming in addition to SCADA system modifications. The project included complete contract document preparation with technical specifications for material procurement and construction.

Monmouth Power and Light South Substation Getaways and OR99W Underground Projects, Monmouth, OR – Performed design for six underground 15 kV substation feeder getaways, including four miles of congested underground routed circuit detail ductbank and vaults design, with contract documents and technical specifications for Contractor construction. More recently performed design for approximately one (1) mile of multiple conduit underground 15 kV feeder circuits along State Highway OR99W and through the congested Monmouth downtown commercial area. The work included underground circuit detailed ductbanks and vaults designs, with contract document preparation consisting of drawings and technical specifications for bidding purpose, cost estimates and contract award.

Canby Utility Westcott Substation and Knights Bridge Substation Projects, Canby, OR – Performed design, contract document and technical specifications preparation for Owner furnished equipment and Contractor award, site inspection, and startup services for the 115-57 x 12.47/7.2 kVA Westcott Substation consisting of two 20/26.7/33.3 MVA transformers, feeder regulation, and ten getaway feeders. Substation equipment arrangement was a traditional outdoor configuration, consisting of main and transfer bus with considerable switching flexibility. All components and control systems utilized modern state-of-the-art technology, allowing the non- traditional implementation of substation monitor/control functions. Performed design, contract document and technical specifications preparation for Owner furnished equipment and Contractor award, site inspection, and startup services for the 115-57 x 12.47/7.2 kVA Knights Bridge Substation consisting of a 20/26.7/33.3 MVA transformer, feeder regulation, and five getaway feeders.

16th Avenue Substation Project, Vera Water and Power, Spokane Valley, WA – Prepared 20-Year Long Range System Planning Study, after which prepared design, contract documents and technical specifications for Owner furnished equipment and Contractor award, field construction inspection, and startup services for the 115 x 13.8/7.9 kVA 16th Avenue Substation consisting of a 20/26.7/33.3 MVA transformer, regulation, and five getaway feeders. Substation equipment was arranged with flexible switching open-rack outdoor configuration. All components and control systems utilized modern state state-of-the-art technology. The site was arranged so that the substation could be expanded to add a second transformer bank and distribution rack.

Columbia Basin Electric Cooperative, Heppner, OR – Prepared 10-Year Long Range System Planning Study, followed by design, contract document and technical specifications for upgrades of CBEC Sniption Switch Station, Condon, Fossil, Sand Hollow and Ruggs substations, consisting of transformer replacement, circuit switcher and by-pass configuration construction and protection/metering/control and modular control building upgrades. The project included completed contract document preparation with technical specifications for material procurement and construction. The Condon upgrade included a 10-mile 115 kV steel pole design with interconnection to BPA.


City of Ashland Hersey Street Underground Project, Ashland, OR – Following the preparation of a 10-Year Planning Study performed design for approximately 1.5 miles of multiple conduit underground 15 kV feeder circuits from the Mountain Avenue Substation along Hersey Street to N. Main Street, a busy residential and commercial area. The work included underground circuit detail ductbanks and vault designs with contract document preparation consisting of drawings and technical specifications for bidding. Also prepared cost estimates and assisted with Contractor award.



COST PROPOSAL FOR ELECTRICAL SYSTEM MASTER PLAN

For City of Ashland, Oregon

Date: 06/23/2023

By: 
Martin Stoddard, President
Stoddard Power Systems

Original Copy

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SECTION 1: FEE SCHEDULE

Based on the discussed Scope of Work in the Technical Proposal, we propose to perform the 10-year planning study or electrical master plan development on time and materials not to exceed a total of \$78,159 for the base project.

Since the City obtained Mountain Avenue Substation recently, as an optional item, SPS can provide a two-day of substation training for an adder of \$9,800 including training materials.

Compensation will be on the basis of actual hours worked and shall not exceed the cost estimate indicated without written authorization from the City. The cost estimate is based on the following tasks:

Table 1: Cost Estimate

Task	Est. Cost
Base Project Total <ul style="list-style-type: none"> • Data Collection • Load Forecast • System Planning Criteria • Transmission and Substation Evaluation • Analysis of the Existing System • Major Equipment Inventory Review and Replacement Schedule • Other Considerations from Renewable Energy Resource Addition, Increased EV Charging Demand, Climate & Energy Action Plan, and Wildfire Mitigation Plan. • Power Flow Analysis • Short Circuit Analysis • Protective Device Coordination • Prepare Electric System Study Report 	\$78,159
(OPTIONAL) Onsite Substation Training, including the following topics: <ul style="list-style-type: none"> • Substation configuration • Transmission interface and primary equipment • Power transformer • Voltage regulator • Auxiliary system • Monitoring and Protection (Transformer and Feeder) • Grounding • Operation and maintenance 	\$9,800

- NOTES:**
- 1) The engineering rate schedule is enclosed in Appendix A of the Tech Proposal.
 - 2) This base cost estimate covers all tasks listed in the scope of work.
 - 3) No sub-consultant was considered in the above cost estimate.

EXHIBIT B

Certificate of Compliance

Compliance with Oregon Tax Laws:

In compliance with OAR 137-047-0260(2)(e), I hereby attest or affirm under penalty of perjury: That I am authorized to act on behalf of the proposer in this matter, that I have authority and knowledge regarding the payment of taxes, and that contractor is, to the best of my knowledge, not in violation of any Oregon Tax Laws, as defined in ORS 305.380.

Compliance with Nondiscrimination Laws:

In compliance with ORS 279A.110(4), OAR 137-046-0210(2) and OAR 137-047-0260(2)(a)(E), I hereby attest or affirm under penalty of perjury that I am authorized to act on behalf of proposer in this matter, and to the best of my knowledge the proposer has not discriminated and will not discriminate, in violation of ORS 279A.110(1), against a minority, women or emerging small business enterprise certified under ORS 200.055 or against a business enterprise that is owned or controlled by or that employs a disabled veteran as defined in ORS 408.225 in obtaining a required subcontract.

Corporate Officer:

By:  _____
Signature

Martin Stoddard
Print Name

Title: President/Principle Engineer

Date: 06/23/2023