



RFP 23-08: ENTERGY LOUISIANA, LLC'S

## Future Ready Resilience Plan (Phase I)

DOCKET NUMBER: U-36625

DUE DATE: MARCH 9, 2023

LOUISIANA PUBLIC SERVICE COMMISSION

**CSRS** | BUILDING STRONGER,  
SMARTER COMMUNITIES  
TOGETHER.

**FIRM'S FULL LEGAL NAME:** CSRS, LLC

**ADDRESS:** 8555 United Plaza Blvd, Baton Rouge, LA 70809

**PHONE NUMBER:** (833) 523-2526



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March 9, 2023

Kimberly N. O'Brian  
Kathryn H. Bowman  
Louisiana Public Service Commission  
602 North Fifth Street  
Baton Rouge, Louisiana 70802

**RE: CSRS Response to RFP 23-08 for Entergy Louisiana, LLC's Future Ready Resilience Plan (Phase I), Docket No. U-36625**

Dear Mses. Bowman & O'Brian:

As a Louisiana company, we at CSRS, LLC (CSRS) understand the urgent need for electric grid infrastructure improvements to build energy resilience. While we applaud Entergy Louisiana, LLC's (ELL) efforts to develop a grid resilience plan, we believe it is critical that this plan be developed pursuant to the priorities of the Louisiana Public Service Commission ("Commission") and the ratepayers they represent. This is best done by aligning the plan with a state-wide grid resilience framework. The CSRS team has been developing this framework under docket R-36227 and is therefore best positioned to conduct this assessment. Our expertise in resilience planning is complemented by the technical expertise of our partners, Strategen Energy Economics, Inc. and E Source.

If awarded, the CSRS team will review ELL's proposed Plan to determine if it is substantially related by common factual, legal, and regulatory issues considered in Docket No. R-36227. CSRS will also analyze the supporting pre-filed testimony of the seven ELL witnesses and review responses to further data requests. If necessary, our firm will cross-answer testimony regarding the Plan to determine if the public interest criteria for resilience and grid hardening improvements is being met. Additionally, we will assist in the drafting of applicable motions, exceptions, briefing sheets and orders of the Commission. CSRS will participate in informal and formal meetings between the Commission and ELL staff, as well as attend necessary Business & Executive (B&E) sessions.

As Louisianans, we share the goal of this effort with the Commission and ratepayers to ensure Louisiana has the most effective hardened grid. If we can provide any additional information, please contact me at 225.270.5581 or [mark.goodson@csrsinc.com](mailto:mark.goodson@csrsinc.com).

Thank you for your consideration.

Sincerely,



**Mark Goodson**  
Principal & Resilience Practice Lead





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## FIRM PROFILES



## PRIME FIRM OVERVIEW

REQUEST FOR PROPOSALS



**CSRS is a firm leading the way in the emerging resilience sector. For over 40 years, we have leveraged our innovation and leadership expertise to improve and revitalize our communities. With a culture of creative thinking, we provide a balance between big ideas and the technical ability to deliver a successful project every time, no matter how large, complex, or challenging.**

CSRS is a leader in complex program and project delivery for public and private organizations. We are thought leaders, urban planners, program managers, social scientists, landscape architects, engineers, architects, development advisors, government advisory consultants, grant managers, climate adaptation specialists, and disaster recovery professionals. Whether we manage the process or perform the work ourselves, we understand every facet of successful project and program implementation.

Our Planning and Resilience Practice is working at the forefront of the discipline, from managing the first federally funded climate relocation program in the United States to designing statewide climate adaptation programs to support balanced approaches to watershed management. At the same time, our Planning and Resilience Practice is adept at managing more conventional planning processes, from area planning to code development.

We offer client focused solutions designed to meet the unique requirements of projects of all types and sizes. Our reputation for excellence is a product of a strong commitment to collaborative, multi-disciplinary, problem-solving. We work side-by-side and office-to-office, combining the skills, energy and focus needed to create and implement solutions in partnership with our clients.

**Fides Consulting, LLC, a subsidiary of CSRS,** was founded in November 2020 and is headquartered in Baton Rouge, Louisiana. Fides Consulting employs an in-house engineering staff specializing in all disciplines, including process, mechanical, piping, civil/structural, electrical, and control systems engineering. Fides serves the renewable fuels, refining chemical and petrochemical, midstream markets. The company provides services for program and project management, procurement, and project controls, to name a few.

### FULL LEGAL NAME

CSRS, LLC + FIDES Consulting

### CORPORATE STRUCTURE

Limited Liability Company

### YEARS IN BUSINESS

Established in 1978

### NUMBER OF EMPLOYEES

200+

### OFFICE LOCATIONS

#### Headquarters:

8555 United Plaza Blvd, Suite 100  
Baton Rouge, LA 70809

#### Additional Locations:

New Orleans, LA  
Lafayette, LA  
Lake Charles, LA  
Houston, TX  
Dallas, TX  
Victoria, TX  
Miami, FL  
Long Beach, CA

### CONTACT

Office: (833) 523-2526  
Fax: (225) 767-0060

## KEY HIGHLIGHTS

Over 25 Professional Engineers and Professional Project Managers on staff

Project Management experience in leading capital improvement projects with a collective value exceeding \$11B

Platform Partner to 100 Resilient Cities



## SUBCONSULTANT FIRM OVERVIEW

REQUEST FOR PROPOSALS



**E Source is a solutions-based consulting, research and advisory, and data science firm that's been a change agent in the utility industry for over 30 years. We have worked with more than 600 utilities. To enhance relationships with the people you serve, achieve the next generation of savings, grid modernization, and lead the carbon-reduction effort, you'll need to think differently, make data useful, and learn from the best strategies across the industry.**

Our mission is to build a sustainable future in partnership with utilities and cities. We do this by guiding utilities to flip their thinking, helping them design solutions that solve customers' specific energy problems. All of our solutions are meant to give your customers the best options and experience so they can make smart energy choices. We don't just help utilities with their role in sustainability—we hold ourselves to a high standard with our carbon impacts.

Working with utilities to create and implement energy-efficiency programs, E Source quickly realized that it had to understand the customer side of these programs. That naturally meant an expansion of E Source's work to include market research, customer experience, marketing, and communications.

Nearly 35 years later, we're still helping electric, gas, and water utilities solve their efficiency and reliability problems, but we're taking a different approach. In today's world, it's not just about providing a reliable commodity. Utilities must also understand customers' desire for comfort, productivity, self-reliance, environmental benefits, and security. This creates a need for much more sophisticated data models, predictive data science, and hands-on implementation solutions. To become an even stronger partner with utilities, E Source acquired a number of companies in 2020 that increase our ability to meet your most pressing needs. Our people, our experience, our curated industry insights, and our network will help you get there.

### FULL LEGAL NAME

E Source

### CORPORATE STRUCTURE

Privately Held Corporation

### YEARS IN BUSINESS

37 years (Establish in 1986)

### NUMBER OF EMPLOYEES

200

### OFFICE LOCATIONS

Baton Rouge, LA  
Buffalo, NY  
Boulder, CO  
Birmingham, AL

### CONTACT

Office: 1-800-ESOURCE  
(1-800-376-8723)

## KEY HIGHLIGHTS

We understand utilities because we've made them our business for 35 years.

E Source partners with utilities and cities to help them:  
Reduce costs, Evolve their technologies, Increase customer satisfaction, and Create programs that make an impact.

We're a solutions-based research, consulting, and data science firm that has been a change agent in the utility sector for over 30 years.





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## **Future Ready Resilience Plan (Phase I)**

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# PROPOSED APPROACH



# PROPOSED APPROACH

## POINT OF CONTACT



### Mark Goodson

*Principal & Resilience Practice Lead*

8555 United Plaza Blvd., Ste. 100,  
Baton Rouge, LA 70809

O: (225) 769-0546

C: (225) 270-5581

mark.goodson@csrsinc.com

*Mr. Goodson will be the sole point of contact for this proposal and with regard to contractual matters, including payment of any and all charges resulting from the contract.*

## RESPONSE DATE

March 9, 2023 at 12:00 PM



Our approach to reviewing Entergy Louisiana LLC's (ELL) proposed Future Ready Resilience Plan (Plan) assumes the CSRS team will provide guidance the Louisiana Public Service Commission (Commission) with insightful information on the Plan's inner workings, supporting analysis, evaluations, and an assessment of gaps, merits, drawbacks, and key opportunities for improvement.

CSRS can modify this approach to meet the specific needs of the Commission and Staff as needed.



# PROPOSED APPROACH

## I. REVIEW & ANALYSIS OF ENTERGY'S PROPOSED RESILIENCE PLAN & MONITORING PLAN

The CSRS team will start with a review and evaluation of the entire plan proposed by Entergy, including the monitoring plan and accompanying testimony. We will evaluate the proposed plan using the framework developed for the Commission for statewide resilience planning, under docket R-36227 as well as emerging examples from other jurisdictions, where applicable. This evaluation will include the goals, scope, measure screening criteria, measure prioritization, and cost-effectiveness analysis of the proposed resilience investments and the cost recovery mechanism and cost allocation proposed to support these investments. We will provide the Commission with a summary of our comments and recommended process, an outline of key topic areas to inform the data requests and testimony, and a road map for next steps.

The CSRS team will draw upon our experience in electric utility resilience plans, transmission and distribution system standards, and providing analyses on construction, design, and operation of electric utility infrastructure. Key questions we will seek to answer include:

- Will the proposed investments likely result in significant resilience benefits in the Louisiana communities that most need electric grid resilience?
- Which proposed investments to improve and modernize the grid should be considered standard capital replacement upgrades included in annual operations and maintenance activities and supported by existing distribution and transmission rate mechanisms versus what investments constitute resilience projects that should be supported with additional funding?
- How can smart regulation align the incentives for investor-owned utilities and Louisiana communities facing severe grid risks such that both receive the benefits and rewards for investing in grid resilience?
- How can innovative regulation leverage private and local investment in grid resilience so that rate payers do not shoulder the entire cost burden and so the costs are fairly borne by those who also benefit?

The CSRS team will explore whether there are lessons and methods in the Entergy Louisiana plan that can be applied to the grid resilience framework being developed by the CSRS team under docket R-36227, and just as importantly, how can Entergy's plan be improved by adhering to the proposed rule being developed under that same docket.





# PROPOSED APPROACH

### CONFIDENTIAL MATERIALS

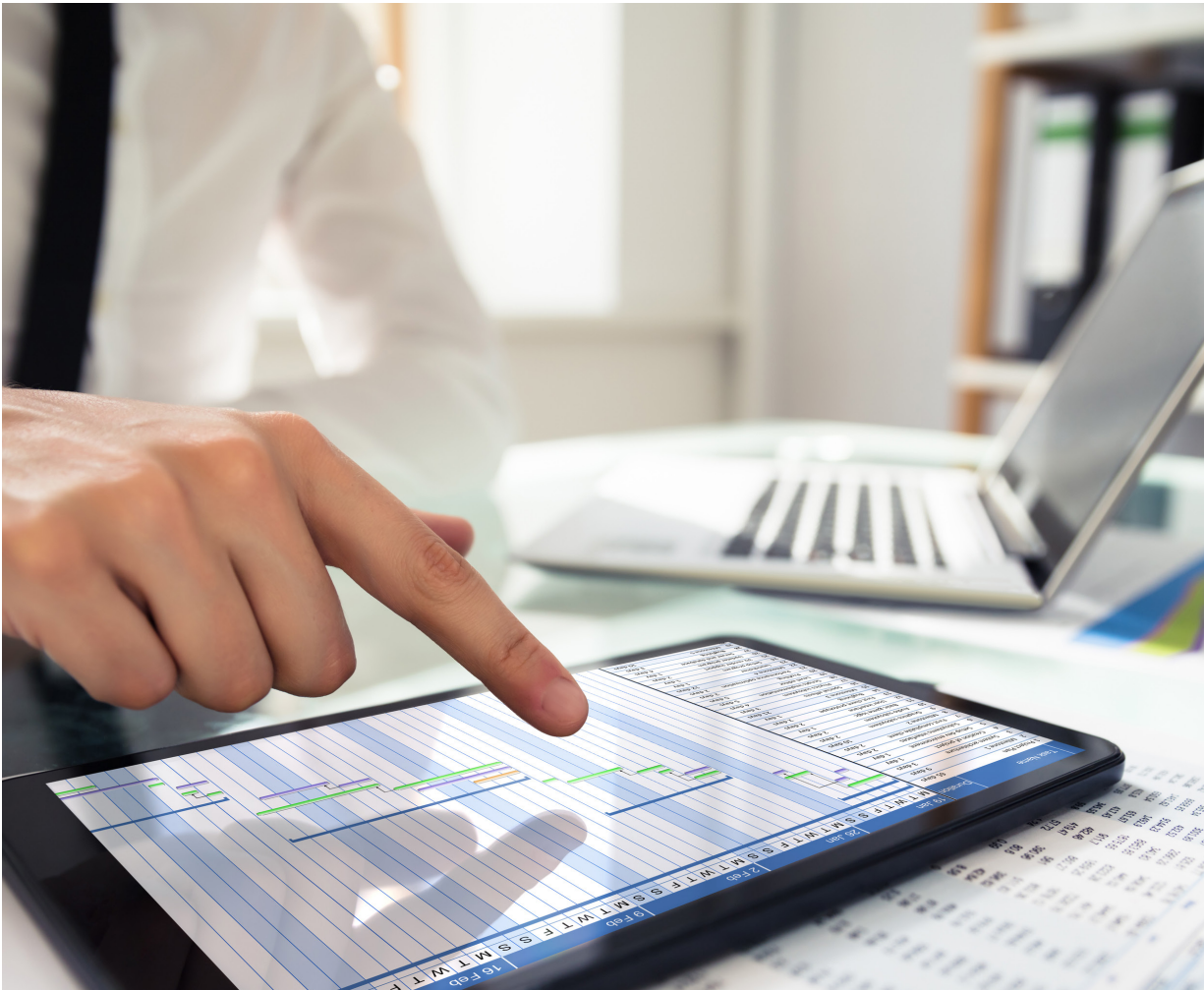
Beyond the information available in the public plan, the CSRS team, subject to approved confidentiality agreements, will request access to the Highly Sensitive and Protected Material (HSPM) exhibits to fully understand the methods used to develop the proposed Resilience Plan. This information will be critical to assessing the underlying assumptions and calculations.

### GAP ANALYSIS

Once the docket R-36227 resilience framework is finalized, CSRS will also review the proposed plan using the framework as well as emerging examples and well-designed practices from other jurisdictions, where applicable, to identify any gaps or methods that should be improved. The CSRS team may request additional data beyond what was already filed with the plan if it is material to provide a comprehensive review of the plan.

**DELIVERABLES:**

- Summary of comments
- Recommended process & next steps
- Outline of key topic areas to inform data requests and testimony



# PROPOSED APPROACH

## II. PREPARATION FOR AND PARTICIPATION IN COMMISSION PROCEEDINGS

The CSRS team will support the scope of services anticipated for the proceeding as identified in the solicitation, which includes drafting data requests and reviewing responses, preparing testimony, preparing for and participating in formal (technical conference/deposition) and informal (status conference) meetings, testifying, reviewing and analyzing stipulation terms, and providing input into draft motions, briefs, and orders.

For budgeting purposes, we assume three rounds of data requests (of approximately 20 questions or data points for a total of approximately 60 data requests), two rounds of testimony by a panel of two individuals for a total of 35 pages each round (direct and rebuttal), two multi-hour formal meetings (technical conference/deposition), five hour-long informal meetings (status conference), a 2-day hearing, two motions, two briefings (initial and rebuttal), and one order. We assume three individuals will prepare testimony and testify at the hearing in person. We assume that we will be able to participate virtually in all other meetings.

The CSRS team will provide drafts of all written materials that we develop (data requests and testimony) to the Commission and host a call to review the drafts and solicit feedback. We will review and integrate one round of consolidated red-lines from Staff and provide a final version of all written materials to Staff for filing. Because we will prepare sworn individual testimony, the sponsors will have the final say over its content. We will also provide input into other written materials that Commission Staff will take the lead on producing (motions, briefs, and the order). We will have a call to review our input with Staff and discuss any significant questions. We will be available by email for any additional clarifications that do not require a call to resolve.





# PROPOSED APPROACH



## STAKEHOLDER/INTERVENOR PARTICIPATION AND COMMENTS

CSRS anticipates stakeholder and intervenor participation in this proceeding. We plan to review any comments or testimony received from, and discovery responses provided to or from, these parties and integrate stakeholder and intervenor input into all draft and final materials.

## COORDINATION/CONSOLIDATION WITH OTHER COMMISSION DOCKETS AND REGIONAL EFFORTS

Resilience planning is part of comprehensive statewide and regional planning efforts and interconnected with a variety of other efforts. Wherever feasible, the CSRS team will seek to streamline the work performed under this scope within the related work being carried out under docket R-36227. The consultant team will seek to align schedules and proceedings, where possible, to make the process more efficient and aligned with the statewide goals and recommendations that would apply to all utilities. The CSRS team will work with Staff to develop a project schedule that tracks that procedural schedule and seeks to anticipate what level of effort will be needed from the consultant team across the various types of meetings and procedures including status conferences and hearings and assisting in policy development such as drafting applicable motions and orders.

Some existing Commission dockets and riders may already be supporting reliability and resilience efforts and should be accounted for in this process and maybe even incorporated into this process. CSRS will raise and document any efforts that are contingent upon or are prerequisites to work in other dockets and proceedings to ensure barriers to resilience are removed and efforts are well coordinated.

We will also consider grid vulnerabilities or resilience challenges in the regional transmission and distribution systems to determine whether the plan is well coordinated with and addresses challenges identified by others.

**NOTE:** The budget is dependent on the Commission’s enforcement of reasonable confidentiality protections and responsive, detailed, and timely responses from Entergy to data requests and other inquiries. Without Entergy’s cooperation, the full scope may not be achievable as written.

### DELIVERABLES:

- **Data requests**
- **Initial testimony**
- **Rebuttal testimony**
- **Memos with input for motions, briefs, and orders.**



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# PROJECT EXPERIENCE





## Louisiana Public Service Commission

**BATON ROUGE, LA**

**FIRM: CSRS**

**CLIENT**

- Louisiana Public Service Commission

**SERVICES PROVIDED**

- Resilience Planning

**PROJECT COST**

- \$330 thousand

**SCHEDULE**

- 2022 - Present

**CLIENT REFERENCE**

Noah Hoggatt  
 Staff Attorney  
 Louisiana Public Service Commission  
 602 North Fifth Street  
 PO Box 91154  
 Baton Rouge, LA 70821-9154  
 (225) 342-4999  
 noah.hoggatt@la.gov

After several locations in Louisiana suffered extended outages from extreme weather events, the Louisiana Public Service Commission opened docket R-36227 to explore the best approaches to developing grid resilience across the state and to develop a proposed rule to require the implementation of grid resilience investments, in partnership with the many utilities under its jurisdiction.

The Commission selected CSRS to lead this effort. The CSRS team has researched leading practices from around the country and interfaced with utility representatives and subject matter experts to develop a statewide grid resilience framework. The CSRS team will next work with Commission staff, utilities, and intervenors to elaborate this framework into a proposed rule for Commission consideration.

The goal of this initiative is to deliver the most benefit to Louisiana rate payers while reducing the duration and impact of extended outages and seeking additional funding, including federal infrastructure fund, to support broad-based resilience investments.



## 100 Resilient Cities Platform Partnership

**WASHINGTON, D.C. AND BOULDER, COLORADO, AND LATIN AMERICA REGION**

**FIRM: CSRS**

**CLIENT**

- 100 Resilient Cities, pioneered by the Rockefeller Foundation

**SERVICES PROVIDED**

- Resilience Advisory Services
- Adaptation Advisory Services
- Capital Planning

**PROJECT COST**

- N/A (Pro bono)

**SCHEDULE**

- 2017 - 2019

**CLIENT REFERENCE**

Jeb Brugmann  
Principal  
Resilient Cities Catalyst  
(416) 371-0705  
jbrugmann@rcc.city

CSRS is a 100 Resilient Cities Platform Partner and Subject Matter Advisor (SMA) and was asked to provide guidance to help shape D.C.'s planning process.

When Washington, D.C. was part of the 100 Resilient Cities' member city network and developing its Resilience Strategy, CSRS was asked to share best practices from previous work related to using the capital improvement processes to foster co-design and mutual-benefit capital projects. Washington D.C. has confronted a range of challenges through the strategy development process, including economic inequality, extreme heat and rainfall flooding, infrastructure failure, lack of affordable housing and shifting macroeconomic trends. In addition to general guidance and advisory services, CSRS provided a sample decision support tool for evaluating capital expenditures for infrastructure.

In the wake of successive natural disasters, the City of Boulder created the Sustainability and Resilience Framework as well as the Resilience Strategy to position its communities to rebound, positively adapt to, and thrive amidst changing conditions or challenges. In this project, Boulder sought to move beyond resilience planning toward the institutionalization of resilience through its city budgeting process. To support budget decision making and service delivery model optimization, CSRS and its partner developed tangible key performance indicators for resilience and sustainability outcomes and evaluation criteria that position the City and local stakeholders to prioritize services and programs in the General Fund, while providing guidance on how to replicate the process for other funds and cities.





## Isle de Jean Charles Community Resettlement Program

**TERREBONNE PARISH, LA**

**FIRM: CSRS**

**CLIENT**

- State of Louisiana, Division of Administration, Office of Community Development, Disaster Recovery Unit (OCD-DRU) Phase II (Master Plan)
- Louisiana Land Trust (LLT) Phase III – Development of the new community

**SERVICES PROVIDED**

- Master Plan Development
- Community Outreach
- Green Infrastructure Design
- H & H Modeling
- Cost Estimates
- Geotechnical Investigation
- Surveying & Wetlands Delineation
- Green Building/Sustainable Design

**PROJECT COST**

- \$48 million

**SCHEDULE**

- 2017 – Present

**CLIENT REFERENCE**

Michael Taylor  
 Executive Director  
 Louisiana Land Trust  
 (318) 613-7701  
 mtaylor@lalandtrust.us

Isle de Jean Charles (IDJC) is a place of exceptional beauty, biodiversity, and deep cultural roots. However, the island has lost 98% of its land mass over the past 60 years and is now a narrow strip of marshland off the Louisiana Coast, vulnerable to storms, high tides, and rising sea levels. The IDJC community and the State of Louisiana have partnered to carry out the first major climate resettlement project in the country. Using CDBG-NDR funds, awarded through the National Disaster Resilience Competition, they are developing a new settlement that offers economic, environmental, cultural, and social sustainability for current residents and future generations as well.

CSRS has been a partner and consultant on this project since it first began. Having led an intensive community engagement and design process to complete a comprehensive Community Master Plan for the new community and the overall program design, CSRS is now fully engaged to design and manage the construction of the new community itself. The new community features sustainable and resilient design, including:

- Green Infrastructure
- Resilient Home Design
- Economic Opportunity
- Solar & Microgrid Feasibility



## Mandeville Resilience Pilot Plan and Modeling Study

**MANDEVILLE, LA**

**FIRM: CSRS**

**CLIENT**

- State of Louisiana, Coastal Protection and Restoration Authority in coordination with the City of Mandeville and St. Tammany Parish

**SERVICES PROVIDED**

- Master Plan Development
- Community Outreach
- Green Infrastructure Design
- H & H Modeling
- Cost Estimates

**PROJECT COST**

- \$225 thousand

**SCHEDULE**

- 2021 – Present

**CLIENT REFERENCE**

Cara Bartholomew  
 Director, Dept. of Planning & Development  
 City of Mandeville  
 (985) 624-3103  
 cbarholomew@cityofmandeville.com

CSRS is leading the first community scaled resilience planning pilot project funded by the Coastal Protection and Restoration Authority (CPRA). The pilot program is intended to inform a framework for CPRA to assist coastal communities in determining an acceptable level of risk, identify hazards and creating policy and project solutions to reduce risk and improve community resilience. As a part of this effort, CSRS will work with key stakeholders and the public in Mandeville to identify the local context for resilience and inform grounded strategies that improve the community’s ability to respond to and recover from natural hazards.

Following identification of the community’s desired resilience goals, CSRS will develop detailed surface 2D hydraulic and hydrologic (H&H) models that factor in storm surge, fluvial flood risk and their complex interactions for the areas of St. Tammany Parish located south of Interstate-12. Layered into this analysis will be an assessment of what critical infrastructure, housing, commercial and industrial real estate are at risk from flooding under various scenarios, including the impact of different growth scenarios.

The risk modeling and hazard identification will inform opportunities to position projects, including initial assessments of benefits and costs, and develop policies that reduce existing risk and inform future growth. CSRS will work with CPRA and the City of Mandeville to identify grounded project and policy strategies that respond to the available funding landscape and political constraints.





**BREC Resilience Strategy**  
**BATON ROUGE, LA**

<b>FIRM: CSRS</b>
<b>CLIENT</b>
<ul style="list-style-type: none"> <li>BREC - Recreation and Park Commission for the Parish of East Baton Rouge</li> </ul>
<b>SERVICES PROVIDED</b>
<ul style="list-style-type: none"> <li>Project Selection Analysis</li> <li>Beneficial Land Use Planning</li> <li>Resilience Planning</li> </ul>
<b>PROJECT COST</b>
<ul style="list-style-type: none"> <li>N/A (Pro bono)</li> </ul>
<b>SCHEDULE</b>
<ul style="list-style-type: none"> <li>2018 - 2019</li> </ul>
<b>CLIENT REFERENCE</b>
Reed Richard, CPRP, AICP, ASLA Assistant Superintendent System Planning BREC (225) 273-6405 ext. 1369 rrichard@brec.org

Cities around the world are recognizing the promise that parks hold in reducing the risks of extreme weather, environmental degradation, and threats to public health. The Great Flood of 2016 devastated the Baton Rouge area and highlighted the importance of the Recreation and Park Commission for the Parish of East Baton Rouge (BREC). BREC parks already provide resilience benefits and naturally serve as flood storage due to their natural areas. However, with intentional design, investment, and maintenance, BREC can greatly expand the range and depth of these benefits, reducing risk for the entire Parish while improving its own operations.

To understand BREC's parish-wide positive impacts, CSRS conducted eight site assessments, interviewed staff, and researched existing programs and initiatives to create BREC's first Resilience Strategy. Working directly with BREC staff, CSRS helped craft both system-wide and park-specific resilience-building action items in response to the Great Flood of 2016. The report also highlights high-risk watershed zones and BREC's opportunity to invest in future resilience planning.

CSRS provided specific action items to both improve the resilience of BREC's facilities, and increase the resilience benefits that BREC can provide to communities in East Baton Rouge Parish.

BREC already has several plans and programs to improve the resilience and sustainability of its parks and facilities, and to educate the public about the related benefits its parks provide. In addition to some new recommendations, the Resilience Strategy helped to consolidate BREC's great work in one place and provide recommendations to institutionalize some of the initiatives that were successful at a smaller scale.





**850,000 Electric Meters**  
**PORTLAND, OR**

**FIRM: E SOURCE**

**CLIENT**

- Portland General Electric

**SERVICES PROVIDED**

- Data Analysis
- Vendor Procurement
- Selection Services
- Alignment Optimization Technology

**PROJECT COST**

- Estimated \$1.5 to \$2.5 million

**SCHEDULE**

- 2014-2019

**CLIENT REFERENCE**

Ms. Jamie Swails  
 Network Data Operations Supervisor  
 Portland General Electric  
 (503) 464-7541  
 Jamie.swails@pgn.com

E Source’s Excery personnel conducted the strategic implementation planning and project for Portland General Electric’s Distribution Technology Platform (DTP). This encompassed AMI, MDMS, GIS, Work Management Systems (WMS), Outage Management System (OMS), and External Asset Management (EAM) technologies and delivered a business case and technology roadmap. Our staff also supported PGE in their planning and deployment of an AMI to its entire service territory. We then assessed MDMS technologies and provided a roadmap that PGE used to guide its meter data strategies and plan for the replacement of its in-house developed MDMS. In 2015, PGE engaged us to support Data Analytics activities.

Our solution architects implemented the Data Analytics solution using Microsoft SQL Server, SSIS, SSAS, and SSRS tools to provide daily AMI performance, event, and billing metrics for their 850K meters, and ESRI based ArcGIS Online reporting/display on the success rate of AMI data delivery. In 2017, we were hired to look at opportunities to leverage their systems for greater value to the utilities and their customer bases.

Because we have extensive experience working with several different utilities to explore and implement such “Day 2” benefits, PGE requested that we share the insights from that experience and general industry insights in a report that documents the different possible options available to PGE and how they could proceed to implement those options to leverage the installed system going forward.





## ElectriCities of North Carolina

**RALEIGH, NC**

**FIRM: E SOURCE**

**CLIENT**

- ElectriCities of North Carolina

**SERVICES PROVIDED**

- Data Analysis
- Vendor Procurement
- Selection Services
- Alignment Optimization Technology

**PROJECT COST**

- N/A

**SCHEDULE**

- 2017 - 2018

**CLIENT REFERENCE**

Mr. Andy Fusco  
 Vice President of Member Services  
 ElectriCities of North Carolina  
 (919) 760-6219  
 afusco@electricities.org

When ElectriCities of North Carolina needed to identify future technology offerings for its approximately 80 Member utilities, they turned to E Source’s Excerpt for our strategy development expertise. Using state-of-the-art alignment optimization technology from SchellingPoint, staff helped the organization identify which future informational and operational technology (IT/OT) offerings were most beneficial to the public power communities across North Carolina and in parts of South Carolina and Virginia.

Pairing this approach with our standard technology roadmap methodology resulted in a more viable, valuable and endorsed plan, setting a new standard of practice for our clients. The Strategic Technology Roadmap extends ElectriCities’ existing technology and services offerings to its members to address pressing industry trends. The Roadmap identified offerings in the areas of project delivery services, CIS and customer engagement, design and mapping, AMI, demand response, distributed energy resources, Smart Cities/Internet of Things, and operations.

We also provided data analytics vendor procurement services and supported the creation of an analytics offering for ElectriCities members, which included analytics vendor procurement and selection services.





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DOCKET NUMBER: U-36625

LOUISIANA PUBLIC SERVICE COMMISSION



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# PROPOSED PERSONNEL



# ORGANIZATIONAL CHART



**PRINCIPAL-IN-CHARGE**  
■ Mark Goodson

**PROJECT MANAGER**  
■ David Lessinger

**RESILIENCE PLANNER**  
■ Sophia Nelson  
Assistant Project Manager

**SUBJECT MATTER EXPERTS**

■ Tim Barfield, JD Government & Utilities Relations	■ Joel Westvold, PMP AMI & Smart Grid
■ James Corwin Electrical Engineer	■ Steve Catanach, PE Regulatory & Smart Grid
■ David Sterken Electrical Engineer	■ Todd Barlow Material Acquisition & Cost Modeling
■ Tom Martin Data Science	

■ CSRS  
■ Fides  
■ E Source



## Mark Goodson

**ROLE ON PROJECT:** PRINCIPAL & RESILIENCE PRACTICE LEAD  
**PHONE.** (225) 769-0546 | **EMAIL.** mark.goodson@csrsinc.com  
**ADDRESS.** 8555 United Plaza Blvd., Suite 100, Baton Rouge, LA 70809

**FIRM: CSRS**

**EDUCATION**

- Bachelor of Landscape Architecture, Louisiana State University, Baton Rouge, LA, 2004
- Master of Public Administration, Louisiana State University, Baton Rouge, LA, 2006

**TRAINING & CERTIFICATIONS**

- Vacant Property Leadership Institute Certificate, Emory University Law School, 2013
- Community Progress Leadership Institute Certificate, Harvard Law School, 2012

**AREAS OF EXPERTISE**

- Project & Program Management
- Brownfields Redevelopment
- Real Estate Transactions
- Community Outreach
- Resilience and Adaptation Planning
- Land Banking
- Public Finance & Alternative Financing
- Stakeholder Engagement

**YEARS OF EXPERIENCE**

With Firm: 5      Total: 18

Throughout his career, Mr. Goodson has concentrated on issues relating to resiliency, urban planning and redevelopment, public finance and budgeting, and the operations of local governments. As the Resilience Practice Lead for CSRS, he assists both commercial and governmental clients in developing the capabilities necessary to adapt and thrive, regardless of the shifting conditions with which they are faced. In order to accomplish the goal of resilience, Mr. Goodson and the other members of his team provide technical assistance to identify risks and vulnerabilities, develop strategic interventions, design and implement resilience programs, and integrate resilience and sustainability into existing capital programs.

**RELEVANT AND RELATED EXPERIENCE**

**Mandeville Resilience Plan. Mandeville, LA. Principal-in-Charge.** The Louisiana Coastal Protection and Restoration Authority (CPRA) hired CSRS to develop a flood resilience strategy for the City of Mandeville focused on non-structural solutions such as elevations, acquisitions/buyouts, and floodproofing measures to adapt to the combined riverine and coastal storm surge risks the city faces. The scope of solutions also features an update to the city’s development regulations to reduce risk and improve stormwater management. Mr. Goodson was responsible for providing guidance and ensuring the team has the resources it needs to deliver the project. (2018–Present)

**Lafayette Parish Comprehensive Stormwater Plan. Lafayette Parish, LA. Resilience Advisor.** LCG selected CSRS to develop an accurate and complete understanding of the Parish’s drainage infrastructure and potential solutions to drainage issues. Mr. Goodson’s role includes Flood Hazard Risk Assessment and public engagement. (2021–Present)

**City of Central Drainage Master Plan. Central, LA. Senior Project Manager.** The City of Central engaged CSRS with a Technical Assistance contract to guide the City in funding and management decisions related to the 1,000-year flood that catastrophically impacted the City and its citizens in August 2016. Mr. Goodson was responsible for developing recommendations for creating a Resilience District within the City of Central, including policy and project recommendations and an implementation plan. (2016–Present)

**East Baton Rouge Stormwater Master Plan. Baton Rouge, LA. Senior Program Manager.** Mr. Goodson led the development of the initial flood risk assessment at the beginning of the planning process. CSRS is the Policy Task Lead and conducted the evaluation of existing development codes and guidelines, a comparative analysis with regulations in neighboring parishes, and peer cities with similar climates and topography (including Jacksonville, FL). The team used the flood hazard analysis to identify the root causes of flood risk and focused policy recommendations on three root causes: urbanization, climate change,





## Mark Goodson

**ROLE ON PROJECT:** PRINCIPAL & RESILIENCE PRACTICE LEAD

**PHONE.** (225) 769-0546 | **EMAIL.** mark.goodson@csrsinc.com

**ADDRESS.** 8555 United Plaza Blvd., Suite 100, Baton Rouge, LA 70809

### RELEVANT AND RELATED EXPERIENCE CONTINUED

and development in the floodplain. Mr. Goodson led the drafting of revised development codes and design guidelines and managed extensive stakeholder engagement throughout the process. The recommendations are finalized and will next be considered by the Metro Council. He also supports the development of a decision framework for prioritizing and selecting capital improvement projects. (2018 – Present)

**Ascension Parish Floodplain Management. Ascension Parish, LA. Senior Project Manager.** The East Ascension Consolidated Gravity District #1 engaged HNTB with its partner CSRS to implement a parish-wide floodplain management plan. CSRS is responsible for research, data collection, review, and assessment of all Parish's flooding history documentation, risk assessments, floodplain recommendations, and implementation strategies. Mr. Goodson was responsible for flood risk characterization and policy recommendations regarding floodplain management. (2019–Present)

**Louisiana Watershed Initiative. Statewide, LA. Principal.** CSRS is one of the state's program management consultants for the Louisiana Watershed Initiative (LWI), primarily funded with \$1.2 billion in CDBG-Mitigation funding allocated to Louisiana. As Principal, Mr. Goodson serves as the primary Point of Contact for the Office of Community Development and as an advisor to the state on program design and regional-scale watershed planning. The LWI seeks to manage future flood risks in Louisiana through watershed-based solutions and is overseen by the Governor's five-agency Council on Watershed Management. (2019–Present)



## David Lessinger

**ROLE ON PROJECT:** PROJECT MANAGER

**PHONE.** (225) 769-0546 | **EMAIL.** david.lessinger@csrsinc.com

**ADDRESS.** 935 Gravier Street, Suite 1650, New Orleans, LA 70112

**FIRM: CSRS, LLC**

**EDUCATION**

- B.A., Environmental Studies, Oberlin College, Oberlin, OH, 2000
- M.A., Regional Planning, City and Regional Planning, Cornell University, Ithaca, NY, 2007

**TRAINING & CERTIFICATIONS**

- Certificate in Urban Redevelopment, University of Pennsylvania, Philadelphia, PA, 2008
- Rockefeller Foundation Redevelopment Fellow, Center for Urban Redevelopment

**AREAS OF EXPERTISE**

- Project Management
- Resilience Planning & Program Design
- Public Policy and Finance

**YEARS OF EXPERIENCE**

With Firm: 4                      Total: 22

Mr. Lessinger has 22 years of experience in urban planning, community revitalization, resilience planning, and city government operations. He is a mission-driven professional skilled at managing teams and working across disciplines. An excellent communicator and resourceful problem-solver, Mr. Lessinger is known for facilitating solutions through collaboration.

**RELEVANT AND RELATED EXPERIENCE**

**Louisiana Public Service Commission, Electric Grid Resilience Assessment, Docket R-36227. Baton Rouge, LA. Project Manager.** Leading the development of an assessment and recommendations for the commission’s regulation of electric grid resilience activities and positioning the state for competitive funding from Infrastructure Investment and Jobs Act. This project involves collaborating with investor-owned utilities and co-ops to develop a standardized approach to benefit-cost analyses and performance metrics related to grid resilience investments and distributed generation projects (2022 – Present)

**St John the Baptist Parish Stormwater Management and Low Impact Development Program. St John the Baptist Parish, LA. Project Manager.** Mr. Lessinger served as the project manager, providing analysis of municipal codes and plans, recommending development standards and policies, and delivering training materials to incorporate best practices for low-impact development and green infrastructure. The Parish adopted the code amendments in 2019 to provide environmental and flood risk reduction benefits. Mr. Lessinger also manages all aspects of the project, including coordinating subject matter experts and project logistics. (2019-2020)

**Mandeville Flood Resilience Strategy. Mandeville, LA. Project Manager.** The Louisiana Coastal Protection and Restoration Authority (CPRA) hired CSRS to develop a flood resilience strategy for the City of Mandeville focused on non-structural solutions such as elevations, acquisitions/buyouts, and floodproofing measures to adapt to the combined riverine and coastal storm surge risks the city faces. The scope of solutions also features an update to the city’s development regulations to reduce risk and improve stormwater management. Mr. Lessinger serves as the Project Manager, coordinating all aspects of the project and ensuring that climate science, hydrologic and hydraulic modeling, and community engagement are woven into an actionable set of projects, policies, and programs. (2018-Present)

**Louisiana Watershed Initiative. Statewide, LA. Project Manager.** CSRS is one of the state’s program management consultants for the Louisiana Watershed Initiative (LWI), primarily funded with \$1.2 billion in CDBG-Mitigation funding and focused on transforming the state’s approach to flood risk by regionalizing watershed and floodplain management. As Project Manager, Mr. Lessinger leads a team that designs and manages capacity-building programs and policy development for local governments related to regional watershed management. The LWI seeks to manage future flood risk in Louisiana through a combination of state-led and regional watershed-based solutions and is overseen by the Governor’s five-agency Council on Watershed Management. (2019-Present)





## Sophia Nelson

**ROLE ON PROJECT:** ASSISTANT PROJECT MANAGER / RESILIENCE PLANNER

**PHONE.** (225) 769-0546 | **EMAIL.** sophia.nelson@csrsinc.com

**ADDRESS.** 935 Gravier Street, Suite 1650, New Orleans, LA 70112

**FIRM: CSRS, LLC**

**EDUCATION**

- BS Coastal Environmental Science, Louisiana State University, Baton Rouge, LA, 2021

**AREAS OF EXPERTISE**

- Scheduling
- Environmental Consulting
- MATLAB
- ArcGIS

**YEARS OF EXPERIENCE**

With Firm: <1      Total: 2

Ms. Nelson has over two years of experience working in environmental science. She is a good leader and can work well with a team. She conducts research, analyzes information, creates project outlines, and organizes teams. She has a multiple disciplinary background.

**RELEVANT AND RELATED EXPERIENCE**

**Louisiana Public Service Commission: Electric Grid Resilience. Statewide, LA. Project Coordinator.** CSRS is an independent engineering consultant for the Louisiana Public Service Commission program to strengthen Louisiana’s electrical grid. As a Project Coordinator, Ms. Nelson works with a team to conduct research and develop solutions for a more resilient grid. (2022 – Present)

**Coastal Protection and Restoration Authority: Mandeville Resiliency Plan. Mandeville, LA. Project Coordinator.** Under the direction of CPRA, CSRS is tasked as environmental consultants to design a resiliency plan for the city of Mandeville to help them be better prepared for damages hurricanes cause in coastal Louisiana. As a Project Coordinator, Ms. Nelson assists the Project Manager by attending meetings to help establish a standard for flood resiliency. (2022 – Present)

**Terrebonne Parish Consolidated Government: Strategic Recovery Plan. Terrebonne Parish, LA. Project Coordinator.** CSRS is serving as the head consultant on a strategic recovery plan for Terrebonne Parish with the goal to develop a more resilient, sustainable, and economically competitive parish. Ms. Nelson’s duties as a project coordinator involve creating informational PowerPoints and communicating with the sub-consultants. (2022 – Present)



## Tim Barfield

**ROLE ON PROJECT:** SME - GOVERNMENT & UTILITY RELATIONS

**PHONE.** (225) 769-0546 | **EMAIL.** tim.barfield@csrsinc.com

**ADDRESS.** 8555 United Plaza Blvd., Suite 100, Baton Rouge, LA 70809

**FIRM: CSRS, LLC**

**EDUCATION**

- Executive Development Program, Kellogg School of Management, Northwestern University, 1999
- J.D., Paul M. Hebert Law Center, Louisiana State University, 1989
- B.S., Business Administration - Finance, Louisiana State University, 1986

**AREAS OF EXPERTISE**

- Debt Issuance
- Budgeting
- Finance
- Strategic Planning
- Policy Development

**YEARS OF EXPERIENCE**

With Firm: 6      Total: 33

Mr. Barfield serves as the President of CSRS. As President, Mr.Barfield oversees all aspects of corporate operations and liaises between CSRS’ Principals and major corporate and government clients. He brings with him years of expertise in legal and budgetary matters that positively impact our ability to meet the needs of both our private and public clients. He previously served as CSRS’ Executive Vice President. During that time, he interfaced with numerous public clients to assist in the betterment of communities by providing project oversight, planning, and advisory services. Before joining CSRS, Mr. Barfield worked many years in the corporate arena, followed by more recent experience in Louisiana State Government. He maintains professional relationships with key stakeholders, including business leaders, industry groups, taxpayers, taxpayer advocates, similar groups, statewide elected officials and state departments, legislative leaders, committees, and other staff members. In addition to the experience listed below, Mr. Barfield served as a senior executive at The Shaw Group Inc. (now part of CB&I) for over 12 years and as a practicing corporate finance attorney for Houston-based Vinson & Elkins, LLP for four years, and has significant experience in public and private financing arrangements and transactions (including debt issuances) and budgeting and financial matters.

**RELEVANT AND RELATED EXPERIENCE**

**City of New Orleans Grants Management and Administration. New Orleans, LA. Advisory Services.** Mr. Barfield’s expertise and experience in negotiations and advisory roles enhanced his ability to put together a team for CNO’s roads and sewer project with a potential value of \$2 billion. (2016–Present)

**Louisiana Community and Technical College System (LCTCS) Act 360 Statewide Facilities Improvement Program. Statewide, LA. Advisory Services.** CSRS is providing program management services for the delivery of 50+ projects, which includes projects located at 14 community and technical colleges throughout the state with a total value of \$450+ million. Using his knowledge and expertise, Mr. Barfield was instrumental in planning, assembling the team, and implementing the Public-Private Partnership to enhance revenue opportunities for the campuses. He regularly interfaced with associated agencies and entities to assist the successful implementation of the P3 plan. (2016–Present)

**Louisiana Department of Revenue, Louisiana State Government. Baton Rouge, LA. Secretary.** Mr. Barfield served as the agency’s head and a cabinet member in Governor Bobby Jindal’s Administration, where he led significant culture change and performance improvements within the agency. He was responsible for oversight of more than \$9 billion of annual gross cash collections, over \$7.5 billion of annual net cash collections, and the processing of over \$2.5 million returns and refunds annually. The department included 700 employees and had annual budgets as high as \$115 million. (2012–2015)





## James L. Corwin, PE

**ROLE ON PROJECT:** SME - DISTRIBUTION SYSTEMS

**PHONE.** (225) 769-0546 | **EMAIL.** james.corwin@fidesconsulting.com

**ADDRESS.** 8555 United Plaza Blvd., Suite 100, Baton Rouge, LA 70809

**FIRM: FIDES**

**EDUCATION**

- BS, Electrical Engineering, 1990

**TRAINING & CERTIFICATIONS**

- LA PE: 29404, 2001

**YEARS OF EXPERIENCE**

With Firm: 2                      Total: 33

Mr. Corwin brings over three decades of experience in the Petro-Chemical Industry, emphasizing midstream. He has performed the duties of a Lead Control Systems Engineer, producing engineering and design documents for construction. His additional roles have included Department Manager for Controls & Electrical and Engineering Manager with the responsibilities of identifying and hiring engineers, designers and drafters.

**RELEVANT AND RELATED EXPERIENCE**

**Wink Engineering, Westminster, Louisiana. Sr. Engineer.** Mr. Corwin was responsible for providing leadership, supervision and guidance to an engineering staff through the Department Managers in the various departments ensuring the delivery of cost effective, safe and reliable engineering via designs, specifications and deliverables to clients. Specific duties include coordinating between the different department man-power staffing/scheduling, organizing department standards and procedures, establishing quality assurance programs, competitive estimating, monitoring project management interfaces with engineering, resolving technical issues by finding efficient engineering solutions, and setting goals and objectives for department managers. (2016–2020)

**Davies Engineering/Excel Engineering, Inc./Excel Midstream Solutions, Inc. Baton Rouge, Louisiana. Manager of Engineering/Sr. Project Manager.** Mr. Corwin was responsible for coordinating between the different department man-power staffing/scheduling, organizing department standards and procedures, establishing quality assurance programs, competitive estimating, monitoring project management interfaces with engineering, resolving technical issues by finding efficient engineering solutions, and setting goals and objectives for department managers. Responsible for providing leadership, supervision and guidance to the engineering and design staff ensuring the delivery of cost effective, safe and reliable engineering via designs, specifications and deliverables to clients. (2011–2016)



## David E. Sterken

**ROLE ON PROJECT:** SME - ELECTRICAL ENGINEER

**PHONE.** (225) 769-0546 | **EMAIL.** david.sterken@fidesconsulting.com

**ADDRESS.** 8555 United Plaza Blvd., Suite 100, Baton Rouge, LA 70809

**FIRM: FIDES**

**EDUCATION**

- BS, Electrical Engineering, 1990

**TRAINING & CERTIFICATIONS**

- Certificate in Basic Electricity and Electronics, Keesler Air Force Base
- Graduate of Baton Rouge Vocational Technical Institute, Industrial Electricity

**YEARS OF EXPERIENCE**

With Firm: 2                      Total: 33

Mr. Sterken has more than 30 years of experience in electrical engineering, design, construction and project management. He has expertise in electrical distribution systems, medium voltage switchgear and breakers, transformers, five kV motor controllers, 480-volt motor control centers, variable frequency drives, automatic transfer switches, uninterrupted power supplies and high voltage cables. He has performed various engineering studies, including short circuit studies, protective device coordination studies, load flow studies and arc flash studies. Mr. Sterken has performed and supervised the design, installation and management of numerous projects in the chemical/ petrochemical/liquid terminal industry.

**RELEVANT AND RELATED EXPERIENCE**

**Vulcan Chemicals Substation, Harmonic Filter Project. Geismar, LA.** *Project Engineer, Brown & Root.* Mr. Sterken was the project engineer for a turnkey 34.5kV Harmonic Filter Project. Managed engineering, design, procurement and construction to remove an existing 5th & 7th harmonic filter, demoed an existing foundation and reinstalled the 5th & 7th harmonic filter with a new 11th & 13th harmonic filter during a 7-day outage. Generated specifications for civil/structural engineering scope, civil contractor scope, steel fabricator scope and electrical contractor scope. Created equipment specifications for bid and purchase as well as managed quipment procurement.

**Occidental Chemicals, Rectifier Relay Upgrade Project. Convent LA.** *Project Engineer, Brown & Root.* Project engineer for a turnkey Rectifier Relay Upgrade Project. Managed engineering, design and construction to fabricate six 15kV switchgear doors, mount and wire devices, removed the existing doors and installed the new doors during an outage.

**Carbo Ceramics, Power Systems Study. Eufaula, AL.** *Project Engineer, Brown & Root.* Project engineer for a Power Systems Study. Generated electrical one-line diagrams, fault analysis study, load flow study, coordination study and economical power factor analysis.

**Kaiser Aluminum, Plant Loop Feeder System. Gramercy, LA.** *Lead Electrical Engineer, Brown & Root.* Mr. Sterken was the lead electrical engineer to design the demolition and installation of a 13.8kV plant loop feeder system. Generated construction specifications, 15kV cable and termination specifications, switching sequences, construction and engineering estimates, material estimates and one-line diagrams. Supported construction start-up.





## Steve Catanach, PE

**ROLE ON PROJECT:** SME - REGULATORY & SMART GRID

**PHONE.** (314) 210-7575    **EMAIL.** steve.catanach@esource.com

**ADDRESS.** 1745 38th Street, Boulder, CO 80301

**FIRM: E SOURCE**

**EDUCATION**

- BS, Electrical Engineering with a focus on Power Systems, New Mexico State University

**TRAINING & CERTIFICATIONS**

- Certified Professional Engineer
- Licensed Electrical Engineer

**AREAS OF EXPERTISE**

- Project Management and Delivery
- Customer Relations and Community Engagement
- Strategic Planning
- Business Case Assessments and Process Improvements
- AMI / Smart Metering / Smart Grid
- Planning, Design, Modeling & Analysis
- Utility System Operation & Maintenance
- CIP Development
- Microgrid Design
- Expert Witness
- Policy and Legislation Development
- Contract Negotiations

**YEARS OF EXPERIENCE**

With Firm: 5                      Total: 35

Mr. Catanach is an accomplished utility executive manager with 35 years of experience. He has the proven ability to successfully direct multiple departments responsible for a diverse set of functions and activities and develop new ordinances, legislation, and policies in support of electric utility operations and programs. Mr. Catanach brings exceptional experience in the development of short-, medium-, and long-range strategic plans with the goal of providing direction, shaping culture, and strengthening employees and the organization, with a focus on safety, team building, employee growth and continuous improvement. His expertise includes delivering large scale complex projects with multiple paths on time and within budget. He was awarded the 2014 Energy Central KITE (Knowledge, Innovation, Technology and Excellence) Award for the Small Utility Operations Executive of the Year.

**RELEVANT AND RELATED EXPERIENCE**

- Successfully negotiated Franchise, Settlement and Partnership agreements between the City of Boulder and Xcel Energy.
- Worked as both a consultant and director to successfully carry a case through the PUC and FERC, which allowed the City of Boulder to move forward with the acquisition of the electric distribution facilities within the City.
- Lead the development of the FortZED (Fort Collins Zero Energy District) implementation of a microgrid on two of the utilities electrical feeders serving downtown Fort Collins. Along with multiple partners successfully demonstrated the coordinated operation of multiple distributed resources to reduce peak load.
- Led the City of Fort Collins participation in the American Public Power Reliable Public Power Program (RP3), which is a peer reviewed program where electric utilities are reviewed in four categories: Reliability, Safety, Workforce Improvement, and System Improvement. Over three review periods scores improved from 90.5% to 98% to 100%.



## Tom Martin

**ROLE ON PROJECT:** SME - DATA SCIENCE

**PHONE.** (314) 210-7575 | **EMAIL.** tom.martin@esource.com

**ADDRESS.** 1745 38th Street, Boulder, CO 80301

**FIRM: E SOURCE**

**EDUCATION**

- Master of Business Administration, University of Notre Dame, 2013
- Bachelor of Science in Electrical Engineering, University of Notre Dame, 2008

**YEARS OF EXPERIENCE**

With Firm: 4                      Total: 14

Mr. Martin has 10+ years of utility and engineering expertise focused on delivering impactful results through the implementation and strategic alignment of new technology to the utility sector. As a leader at PG&E, Mr. Martin managed the deployment of more than \$50 million of new technology demonstrations and pilot projects focusing on grid analytics, DERs, and smart meter applications.

**RELEVANT AND RELATED EXPERIENCE**

**E Source. Seattle, WA. Vice President – Commercialization, Data Science.** Support the delivery of high-powered analytics use cases ensuring they meet the end business and process needs of TROVE’s customers. (2018 – Present)

**Pacific Gas & Electric. San Francisco, CA. Manager, Emerging Grid Technology.** Business Lead for \$50M portfolio of technology demonstration projects including SmartMeter algorithms supporting safety, reliability, and affordability, and the installation and operations of wirelessly communicating line sensors. Business lead and Product Manager for development of situational intelligence platform visualizing internal and external data for support of electric operations end users in control centers and in the field; responsibilities included use case development, stakeholder engagement, vendor management, and project management. Manager of high performing team leading the technology demonstration and strategy of PG&E’s Grid Integration and Innovation team. Successfully led the execution of Distributed Energy Resource Management System (DERMS) pilot, Smart Inverter technology demonstration, and utility controllable behind-the-meter energy storage demonstration. (2013 – 2018)

**Booz Allen Hamilton. O’Fallon, IL. Management Consultant.** (2012)

**Black & Veatch. Overland Park, KS. Electrical Engineer Section Head.** (2008–2011)





## Joel Westvold, PMP

**ROLE ON PROJECT:** SME - AMI AND SMART GRID  
**PHONE.** (314) 210-7575 | **EMAIL.** Joel.westvold@esource.com  
**ADDRESS.** 1745 38th Street, Boulder, CO 80301

**FIRM: E SOURCE**

**EDUCATION**

- Executive MBA, University of Washington, Seattle
- BS, Chemical Engineering, Oregon State University

**TRAININGS & CERTIFICATIONS**

- Certified Project Management Professional, Nationwide
- Six Sigma and Numerous other Professional Development/Quality courses

**AREAS OF EXPERTISE**

- Program and Project Management
- Smart Metering/Grid Modernization Programs
- Management Consulting
- Utility Data Analytics
- System Integration & Implementation

**PRESENTATIONS & PUBLICATIONS**

- “Successful Utility Project Management – The Art and Science,” Co-instructor, DistribuTECH 2018 and 2019
- “Smart Metering 101 and Advanced Smart Metering,” Co-instructor, EUCI March 2018
- “Overcoming Challenges in AMI at Silicon Valley Power,” Co-presenter, DistribuTECH 2016

**YEARS OF EXPERIENCE**

With Firm: 4                      Total: 35

Joel Westvold, PMP, brings a unique perspective to addressing Smart Utility issues based on his experience in implementing programs at utilities and providing technology solutions to utility customers to meet their Smart metering needs. With 35 years of experience, Mr. Westvold has served in a senior management capacity for a large electric utility and as management executive with a technology solutions provider to the utility industry. While working for Portland General Electric, Mr. Westvold led a team that implemented an award-winning AMI project that involved the installation of over 800,000 electric meters, the network to communicate with the meters and integration of the technology with utility systems to gain the most financial benefit and efficiency possible. Mr. Westvold has led teams of Engagement Directors and Project Managers in the delivery of nearly a hundred Smart Grid projects, including an area of focus on several large projects of over 1M meters/endpoints. Mr. Westvold’s passion is doing everything possible to see clients succeed in their Smart Metering projects. He brings a number of skills ranging from project management, engineering expertise, strong people management, and communications at all levels within the organization. As Vice President, PMO, of E Source’s Technology Planning and Implementation Consulting Division, Mr. Westvold leverages his core strength in system implementation and integration in support of the firm’s complex implementation and other larger projects.

**RELEVANT AND RELATED EXPERIENCE**

- Examining business and technical issues related to migrating from existing systems to smart meter solutions
- Providing direct project and program management services for key strategic and large projects—from business case and vendor selection, through contract negotiation and deployment (including field services and testing)
- Successfully delivering complex, multidimensional projects for utility Smart Meter & Grid Modernization
- Managing or supporting more than 60+ AMI projects; including 25+ full implementations in the past 10 years
- Developing roadmaps, strategies, implementation plans, and business cases
- Overseeing organizational change and business process transformation activities



## Todd Barlow

**ROLE ON PROJECT:** SME - MATERIAL ACQUISITION AND COST MODELING

**PHONE.** (314) 210-7575 | **EMAIL.** todd.barlow@esource.com

**ADDRESS.** 1745 38th Street, Boulder, CO 80301

**FIRM: E SOURCE**

**EDUCATION**

- B.S. Petroleum Engineering, Louisiana State University

**TRAININGS & CERTIFICATIONS**

- Numerous professional development courses related to utility automation, project management, and public procurement.

**INDUSTRY RECOGNITION**

- Principal in Charge for Smart Grid Project of the Year in 2010 (Ruston, LA) by Utility Automation and Engineering T&D Magazine. Awarded at DistribuTECH
- Principal in Charge for Best Smart Infrastructure/Grid Project (City of San Marcos, TX) in 2010 by CS Week

**YEARS OF EXPERIENCE**

With Firm: 5                      Total: 30

Todd Barlow is an Executive Consultant with over 30 years of experience guiding clients through the development and delivery of complex infrastructure and IT projects in the utilities industry. He is co-founder of a smart grid consulting / systems integration business that he directed from startup to acquisition in 2014. His expertise includes strategic planning, feasibility studies, project definition, procurement planning, vendor selection, executive oversight quality assurance during project implementation. Todd combines application knowledge with a practical understanding of commercial transactions involving multiple stakeholders for an end-to-end project delivery. He spends time engaging customers, partners, and vendors to ensure that contract delivery fully supports the technical and business objectives for the project.

**RELEVANT AND RELATED EXPERIENCE**

- Strategic Planning for Electric, Gas and Water Utilities
- Conceptual Project Development with Business Case
- Procurement and Delivery Strategy
- Vendor Evaluation and Selection
- Vendor Contracting and Negotiation
- Program Management
- Corporate Vision and Management





RFP 23-08: ENTERGY LOUISIANA LLC'S

## **Future Ready Resilience Plan (Phase I)**

DOCKET NUMBER: U-36625

LOUISIANA PUBLIC SERVICE COMMISSION



**CSRS** | BUILDING STRONGER,  
SMARTER COMMUNITIES  
TOGETHER.

# PROPOSED PRICING

# PROPOSED PRICING

CSRS proposes to perform the ELL Resilience Plan review on a time and materials basis, for an amount not to exceed \$129,250

LPSC - ELL RESILIENCE PLAN REVIEW PRICING	
Review & Analysis of ELL Plan	\$16,575
Prep & Participation in Proceedings	\$76,875
Project Management & Coordination	\$29,800
Expenses	\$6,000
<b>Total Fee</b>	<b>\$129,250</b>

TITLE	RATE
CSRS Principal	\$300
CSRS Project Manager	\$225
CSRS Sr. Resilience Planner	\$185
CSRS Jr. Resilience Planner	\$110
CSRS Project Coordinator	\$95
E Source SME	\$285





RFP 23-08: ENERGY LOUISIANA LLC'S

## **Future Ready Resilience Plan (Phase I)**

DOCKET NUMBER: U-36625

LOUISIANA PUBLIC SERVICE COMMISSION



**CSRS** | BUILDING STRONGER,  
SMARTER COMMUNITIES  
TOGETHER.

# ATTACHMENTS



**LIMITED LIABILITY COMPANY AUTHORIZATION RESOLUTION**

I, Tim Barfield, certify that I am the manager of, or a member designated to act on behalf of CSRS, LLC, a limited liability company, organized and existing under the laws of the State of Louisiana and domiciled in the City of Baton Rouge, Louisiana, and that Mark Goodson, Principal of CSRS, LLC, be, and is hereby authorized and empowered to execute any and all proposals, contracts, documents and agreements of whatever kind on behalf of the Limited Liability Company for professional services related to Docket No. U-36625 for Entergy, LA, LLC's Future Read Resilience Plan (Phase 1) for the Louisiana Public Service Commission, State of Louisiana.

**IN TESTIMONY WHEREOF**, I have hereunto set my hand this 30<sup>th</sup> day of January 2023.

A handwritten signature in blue ink, appearing to read 'Tim Barfield', is written over a horizontal line. The signature is fluid and cursive.

Tim Barfield, Manager



  
**State of Louisiana**  
State Licensing Board for Contractors

This is to Certify that: CSRS, LLC  
8555 UNITED PLAZA BLVD  
SUITE 100  
Baton Rouge, LA 70809

is duly licensed and entitled to practice the following classifications  
BUILDING CONSTRUCTION; HEAVY CONSTRUCTION; HIGHWAY, STREET AND BRIDGE CONSTRUCTION;  
MUNICIPAL AND PUBLIC WORKS CONSTRUCTION



Witness our hand and seal of the Board dated,  
Baton Rouge, LA 18th day of June 2022

 Director       Chairman  
 Treasurer

Expiration Date: June 17, 2023  
License No: 53980      This License Is Not Transferrable

  
**State of Louisiana**  
State Licensing Board for Contractors

This is to Certify that: CSRS, LLC  
8555 United Plaza Boulevard Suite 100  
Baton Rouge, LA 70809

is duly licensed and entitled to practice the following classifications  
RESIDENTIAL CONSTRUCTION



Witness our hand and seal of the Board dated,  
Baton Rouge, LA 23rd day of March 2023

 Director       Chairman  
 Treasurer

Expiration Date: March 22, 2024  
License No: 884470      This License Is Not Transferrable



LOUISIANA PROFESSIONAL  
 ENGINEERING & LAND SURVEYING BOARD  
 (LAPELS)  
 9643 Brookline Avenue, Suite 121  
 Baton Rouge, LA 70809  
 Phone (225) 925-6291  
 www.lapels.com

Mr. Michael B. Songy

License/Certificate Type - Number      Expiration Date  
 PE.0021029                                      03/31/2025  
 Status: **Active**



LOUISIANA PROFESSIONAL  
 ENGINEERING & LAND SURVEYING BOARD  
 (LAPELS)  
 9643 Brookline Avenue, Suite 121  
 Baton Rouge, LA 70809  
 Phone (225) 925-6291  
 www.lapels.com

Mr. Michael B. Songy

License/Certificate Type - Number      Expiration Date  
 PE.0021029                                      03/31/2025  
 Status: **Active**



LOUISIANA PROFESSIONAL  
 ENGINEERING & LAND SURVEYING BOARD  
 (LAPELS)  
 9643 Brookline Avenue, Suite 121  
 Baton Rouge, LA 70809  
 Phone (225) 925-6291  
 www.lapels.com

Mr. James Linn Corwin

License/Certificate Type - Number      Expiration Date  
 PE.0029404                                      03/31/2025  
 Status: **Active**

**Licensee Information**

*This serves as primary source verification\* of the license.*

\*Primary source verification: License information provided by the Colorado Division of Professions and Occupations, established by 24-34-102 C.R.S.

Name	Public Address
Steven D. Catanach	Longmont, CO 80504

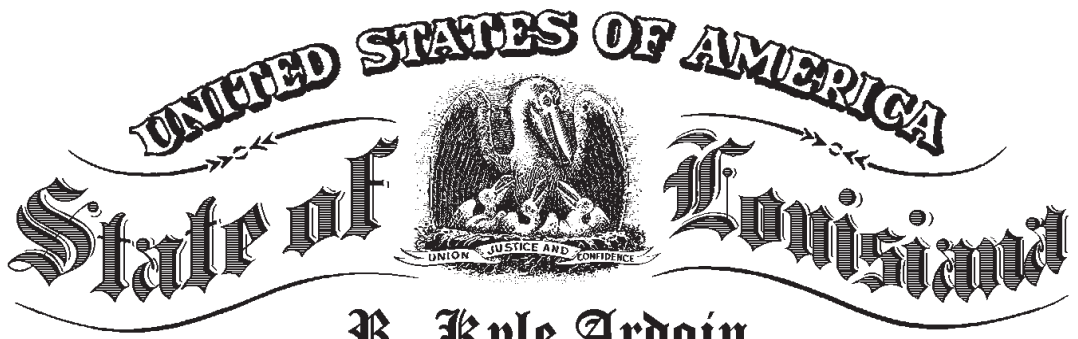
**Credential Information**

License Number	License Method	License Type	License Status	Original Issue Date	Effective Date	Expiration Date
PE.0032919	Examination	Professional Engineer	Active	07/15/1998	11/01/2021	10/31/2023

**Board/Program Actions**

Discipline
There is no Discipline or Board Actions on file for this credential.





**R. Kyle Ardoin**  
 SECRETARY OF STATE

*As Secretary of State of the State of Louisiana, I do hereby Certify that*

**CSRS, LLC**

A limited liability company domiciled in BATON ROUGE, LOUISIANA,

Filed charter and qualified to do business in this State on March 10, 1978,

I further certify that the records of this Office indicate the company has paid all fees due the Secretary of State, and so far as the Office of the Secretary of State is concerned, is in good standing and is authorized to do business in this State.

I further certify that this certificate is not intended to reflect the financial condition of this company since this information is not available from the records of this Office.

In testimony whereof, I have hereunto set my hand and caused the Seal of my Office to be affixed at the City of Baton Rouge on,

July 11, 2022

*Secretary of State*

Web 32130960K



Certificate ID: 11596544#FTL73

To validate this certificate, visit the following web site, go to **Business Services, Search for Louisiana Business Filings, Validate a Certificate**, then follow the instructions displayed.  
[www.sos.la.gov](http://www.sos.la.gov)

Last updated by Suzanne Roberts on Sep 15, 2022 at 12:49 PM

CSRS LLC



# CSRS LLC

Unique Entity ID <b>RF4EYUHVKHP5</b>	CAGE / NCAGE <b>1MD42</b>	Purpose of Registration <b>All Awards</b>
Registration Status <b>Submitted Registration</b>	Expiration Date <b>Sep 15, 2023</b>	
Physical Address <b>8555 United Plaza BLVD STE 100 Baton Rouge, Louisiana 70809-2258 United States</b>	Mailing Address <b>8555 United PLZ BLVD Baton Rouge, Louisiana 70809-2260 United States</b>	

## Business Information

Doing Business as <b>(blank)</b>	Division Name <b>(blank)</b>	Division Number <b>(blank)</b>
Congressional District <b>Louisiana 06</b>	State / Country of Incorporation <b>Louisiana / United States</b>	URL <b>http://www.csrinc.com</b>
MPIN <b>****0809</b>		

## Registration Dates

Activation Date <b>(blank)</b>	Submission Date <b>Sep 15, 2022</b>	Initial Registration Date <b>Jul 12, 2001</b>
-----------------------------------	--	--

## Entity Dates

Entity Start Date <b>Mar 10, 1978</b>	Fiscal Year End Close Date <b>Dec 31</b>
--	---

## Immediate Owner

CAGE <b>(blank)</b>	Legal Business Name <b>(blank)</b>
------------------------	---------------------------------------

## Highest Level Owner

CAGE <b>(blank)</b>	Legal Business Name <b>(blank)</b>
------------------------	---------------------------------------

## Executive Compensation

In your business or organization's preceding completed fiscal year, did your business or organization (the legal entity to which this specific SAM record, represented by a Unique Entity ID, belongs) receive both of the following: 1. 80 percent or more of your annual gross revenues in U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements and 2. \$25,000,000 or more in annual gross revenues from U.S. federal contracts, subcontracts, loans, grants, subgrants, and/or cooperative agreements?  
**No**

Does the public have access to information about the compensation of the senior executives in your business or organization (the legal entity to which this specific SAM record, represented by a Unique Entity ID, belongs) through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986?  
**Not Selected**

## Proceedings Questions

Is your business or organization, as represented by the Unique Entity ID on this entity registration, responding to a Federal procurement opportunity that contains the provision at FAR 52.209-7, subject to the clause in FAR 52.209-9 in a current Federal contract, or applying for a Federal grant opportunity which contains the award term and condition described in 2 C.F.R. 200 Appendix XII?  
**No**

Does your business or organization, as represented by the Unique Entity ID on this specific SAM record, have current active Federal contracts and/or grants with total value (including any exercised/unexercised options) greater than \$10,000,000?  
**Not Selected**

Within the last five years, had the business or organization (represented by the Unique Entity ID on this specific SAM record) and/or any of its principals, in connection with the award to or performance by the business or organization of a Federal contract or grant, been the subject of a Federal or State (1) criminal proceeding resulting in a conviction or other acknowledgment of fault; (2) civil proceeding resulting in a finding of fault with a monetary fine, penalty, reimbursement, restitution, and/or damages greater than \$5,000, or other acknowledgment of fault; and/or (3) administrative proceeding resulting in a finding of fault with either a monetary fine or penalty greater than \$5,000 or reimbursement, restitution, or damages greater than \$100,000, or other



Last updated by Suzanne Roberts on Sep 15, 2022 at 12:49 PM

CSRS LLC

acknowledgment of fault?

**Not Selected****Exclusion Summary**

Active Exclusions Records?

**No****SAM Search Authorization**

I authorize my entity's non-sensitive information to be displayed in SAM public search results:

**Yes****Entity Types****Business Types**

Entity Structure

**Corporate Entity (Not Tax Exempt)**

Entity Type

**Business or Organization**

Organization Factors

**(blank)**

Profit Structure

**For Profit Organization****Socio-Economic Types**

Check the registrant's Reps & Certs, if present, under FAR 52.212-3 or FAR 52.219-1 to determine if the entity is an SBA-certified HUBZone small business concern. Additional small business information may be found in the SBA's Dynamic Small Business Search if the entity completed the SBA supplemental pages during registration.

**Financial Information**

Accepts Credit Card Payments

**No**

Debt Subject To Offset

**No**

EFT Indicator

**0000**

CAGE Code

**1MD42****Electronic Funds Transfer**

Account Type

**Checking**

Routing Number

**\*\*\*\*\*0153**

Lock Box Number

**(blank)**

Financial Institution

**HANCOCK WHITNEY BANK**

Account Number

**\*\*\*\*\*8078****Automated Clearing House**

Phone (U.S.)

**2288716012**

Email

**(blank)**

Phone (non-U.S.)

**(blank)**

Fax

**2288684630****Remittance Address****CSRS LLC****8555 United Plaza BLVD****Suite 100****Baton Rouge, Louisiana 70809****United States****Taxpayer Information**

EIN

**\*\*\*\*\*7459**

Type of Tax

**Applicable Federal Tax**

Taxpayer Name

**CSRS LLC**

Tax Year (Most Recent Tax Year)

**2017**

Name/Title of Individual Executing Consent

**Secretary**

TIN Consent Date

**Sep 15, 2022**

Address

**8555 United Plaza BLVD**

Signature

**Domoine D Rutledge****Baton Rouge, Louisiana 70809****Points of Contact****Accounts Receivable POC**<https://sam.gov/entity/RF4EYUHV/KHP5/coreData?status=Submitted>

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CSRS LLC

🔗  
**Steve Laplace, CFO**  
 steve.laplace@csrsinc.com  
 2257690546

**Electronic Business**

🔗  
**THOMAS A. BARFIELD, President**  
 tim.barfield@csrsinc.com  
 2252292133

**8555 United Plaza BLVD**  
**Suite 100**  
**Baton Rouge, Louisiana 70809**  
**United States**

Denny Lazarus, Contract Administrator  
 denny.lazarus@csrsinc.com  
 2257690546

8555 United Plaza BLVD.  
 Suite 100  
 Baton Rouge, Louisiana 70809  
 United States

**Government Business**

🔗  
**CHRISTOPHER J. PELLEGRIN, Exec VP**  
 christopher.pellegrin@CSRSINC.COM  
 2259394377

**8555 United Plaza BLVD**  
**Suite 100**  
**Baton Rouge, Louisiana 70809**  
**United States**

Elif Chiasson, Exec. Vice President  
 elif.chiasson@csrsinc.com  
 2257690546

8555 United Plaza BLVD.  
 Suite 100  
 Baton Rouge, Louisiana 70809  
 United States

**Proceedings Alternate POC**

🔗  
**MICHAEL Songy, CEO**  
 michael.songy@csrsinc.com  
 2257690546

**8555 United Plaza BLVD.**  
**Suite 100**  
**Baton Rouge, Louisiana 70809**  
**United States**

**Security Information**

Company Security Level  
 (blank)

Highest Level Employee Security Level  
 (blank)

**Service Classifications**

**NAICS Codes**

Primary	NAICS Codes	NAICS Title
Yes	541330	Engineering Services
	541320	Landscape Architectural Services
	541370	Surveying And Mapping (Except Geophysical) Services
	541611	Administrative Management And General Management Consulting Services
	541620	Environmental Consulting Services
	541990	All Other Professional, Scientific, And Technical Services
	562910	Remediation Services

**Size Metrics**

**IGT Size Metrics**

Annual Revenue (from all IGTs)  
 (blank)

**Worldwide**

Annual Receipts (in accordance with 13 CFR 121)	Number of Employees (in accordance with 13 CFR 121)
\$25,000,000.00	125

**Location**

Annual Receipts (in accordance with 13 CFR 121)	Number of Employees (in accordance with 13 CFR 121)
(blank)	(blank)

<https://sam.gov/entity/RF4EYUHVKHP5/coreData?status=Submitted>

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CSRS LLC

**Industry-Specific**

Barrels Capacity  
(blank)

Megawatt Hours  
(blank)

Total Assets  
(blank)

**Electronic Data Interchange (EDI) Information**

This entity did not enter the EDI information

**Disaster Response**

This entity does not appear in the disaster response registry.





## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
12/5/2022

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

<b>PRODUCER</b> Arthur J. Gallagher Risk Management Services, Inc. 235 Highlandia Drive, Suite 200 Baton Rouge LA 70810	<b>CONTACT NAME:</b> Ashley Kennard <b>PHONE (A/C, No, Ext):</b> 225-906-0114 <b>FAX (A/C, No):</b> 225-292-3893 <b>E-MAIL ADDRESS:</b> Ashley_Kennard@ajg.com														
<b>INSURED</b> CSRS, LLC 8555 United Plaza, Suite 100 Baton Rouge, LA 70809	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: left;">NAIC #</th> </tr> </thead> <tbody> <tr> <td>INSURER A : Charter Oak Fire Insurance Company</td> <td>25615</td> </tr> <tr> <td>INSURER B : The Travelers Indemnity Company of CT</td> <td>25682</td> </tr> <tr> <td>INSURER C : Capitol Specialty Insurance Corporation</td> <td>10328</td> </tr> <tr> <td>INSURER D : Arch Specialty Insurance Company</td> <td>21199</td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </tbody> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Charter Oak Fire Insurance Company	25615	INSURER B : The Travelers Indemnity Company of CT	25682	INSURER C : Capitol Specialty Insurance Corporation	10328	INSURER D : Arch Specialty Insurance Company	21199	INSURER E :		INSURER F :	
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INSURER D : Arch Specialty Insurance Company	21199														
INSURER E :															
INSURER F :															

**COVERAGES** **CERTIFICATE NUMBER: 351825019** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:			6805H070410	12/5/2022	12/5/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMPI/OP AGG \$ 2,000,000 \$
A	<b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			BA2R1624812147	12/5/2022	12/5/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			CUP3827T870	12/5/2022	12/5/2023	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	N/A	UB8J242201	12/5/2022	12/5/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A D C	Rented/ Leased Equipment Professional/Errors & Omissions Pollution Liability			6805H070410 AEP006801800 EV2021063802	12/5/2022 5/17/2022 7/19/2022	12/5/2023 5/17/2023 7/19/2023	Leased Equipment Claim/Agg \$50,000 \$500,000/1,000,000 \$500,000/500,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**

See Attached...

<b>CERTIFICATE HOLDER</b>  Bid Only	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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AGENCY CUSTOMER ID: \_\_\_\_\_

LOC #: \_\_\_\_\_



**ADDITIONAL REMARKS SCHEDULE**

Page 1 of 1

AGENCY Arthur J. Gallagher Risk Management Services, Inc.		NAMED INSURED CSRS, LLC 8555 United Plaza, Suite 100 Baton Rouge, LA 70809	
POLICY NUMBER		EFFECTIVE DATE:	
CARRIER	NAIC CODE		

**ADDITIONAL REMARKS**

**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,**

**FORM NUMBER: 25 FORM TITLE: CERTIFICATE OF LIABILITY INSURANCE**

General Liability:  
Blanket Additional Insured (Form #CGD3810907) & Waiver of Subrogation, as required by written contract, as respects the General Liability coverage.

Business Auto:  
Blanket Additional Insured (Form #CAT4200710) & Waiver of Subrogation, as required by written contract, as respects the Business Auto coverage.

Workers' Compensation:  
Blanket Waiver of Subrogation, as required by written contract, as respects the Workers' Compensation coverage.

Umbrella:  
Umbrella is follow form of the underlying liability coverages.

Form **W-9**  
(Rev. October 2018)  
Department of the Treasury  
Internal Revenue Service

### Request for Taxpayer Identification Number and Certification

Give Form to the  
requester. Do not  
send to the IRS.

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type.  
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.  
**CSRS, LLC**

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC     C Corporation     S Corporation     Partnership     Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ **P**

**Note:** Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is **not** disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

Other (see instructions) ▶

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) \_\_\_\_\_

Exemption from FATCA reporting code (if any) \_\_\_\_\_

*(Applies to accounts maintained outside the U.S.)*

5 Address (number, street, and apt. or suite no.) See instructions.  
**8555 United Plaza**

6 City, state, and ZIP code  
**Baton Rouge, LA 70809**

7 List account number(s) here (optional)

Requester's name and address (optional)

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

**Social security number**

			-					
--	--	--	---	--	--	--	--	--

or

**Employer identification number**

7	2	-	0	8	3	7	4	5	9
---	---	---	---	---	---	---	---	---	---


**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

**Sign Here**

Signature of U.S. person ▶ 

Date ▶ **12/1/2021**

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*