

**CONSERVATION SERVICE PROVIDER (“CSP”) APPLICATION
FOR REGISTRATION IN THE COMMONWEALTH OF PENNSYLVANIA**

Conservation Service Providers (“CSPs”) have a specific role under Act 129, which requires a covered Electric Distribution Company’s Energy Efficiency and Conservation (EE&C) plan to include one or more CSPs to implement at least a portion of the EE&C Plan. 66 Pa.C.S. § 2806.1(b)(1)(i)(E). CSPs provide information and technical assistance to EDCs on *measures* that enable a person to increase energy efficiency or reduce energy consumption. CSPs must have no direct or indirect ownership, partnership or other affiliated interest with an EDC. 66 Pa.C.S. § 2806.1 (m). Only registered CSPs may advise an EDC and/or provide consultation, design, or administration or management services to an EDC related to the implementation of the EDC’s EE&C Plan. As such, registration of business entities as approved CSPs is required before entering into a contractual agreement with an EDC exclusively for the provision of consultation, design, administration, management or advisory services regarding that EDC’s EE&C plan. This registry is not intended as a resource for business, whose sole purpose is the installation of measures, supplying of equipment or other contracting work for use by the general public and EDC customers. If providing such services, registration as a CSP is not required for entering into an agreement with an EDC.

Any CSP subcontractor with an annual contract cost that equals or exceeds 10% of the CSP annual contract cost and is directly performing services pursuant to a contract with a CSP which has contracted with an EDC after Commission approval should also register as a CSP. This does not include third party contractors which participate in or support an EE&C Plan but are not directly contracted with a CSP which has a direct contractual relationship with the EDC subject to Act 129.

To qualify an applicant must have at least two years of experience in providing program consultation, design, administration, management or advisory services related to energy efficiency and conservation services. CSP registration is not required of entities that limit their services to the installation of energy efficiency measures or the provision of equipment or materials to EDC customers or the public in general.

1. IDENTITY OF THE APPLICANT

- a. Legal Name of Applicant: *Cohen Ventures, d.b.a. Energy Solutions*

Attach proof of compliance with appropriate Pennsylvania Department of State filing requirements.¹

¹ A copy of any document from the Pennsylvania Department of State (Pa. Dept. of State) documenting the Applicant’s Pa. Dept. of State entity number is adequate. However, the document must indicate that the Applicant’s Pa. Dept. of State registration is “active.” Certified copies of Pa. Dept. of State documents are not required.

b. Trade or Commercial or Fictitious Names Used by Applicant (d/b/a)—List all that apply.

The Applicant will be using a fictitious name or doing business as (“d/b/a”). Identify names below. If more space is needed, list names on the back of this page or append list to completed application.

The Applicant will not be using a fictitious name.

c. Applicant Address: 444 15th St.
Oakland, CA 94612

d. Applicant Telephone No: (510) 482-4420

e. Applicant Email Address: compliance@energy-solution.com

f. Contact Information for Applicant. PLEASE NOTE: Upon approval of this application, this Contact Information will be listed on the Commission’s CSP Registry.

- Name Kayla Merchant
- Mailing Address 444 15th St.
Oakland, CA 94612
- Telephone (510) 482-4420
- Email Address compliance@energy-solution.com

g. Predecessor(s) & Other Names used by Applicant for past five (5) years of date of this application. Provide Name(s), Address(es) and Telephone No.(s).

Check Box if any Predecessor(s) is currently or was previously registered in Pennsylvania as a CSP. If affirmative, please provide Docket No(s). (A-[Year]-[Seven (7) Digits]) and names for all registered CSPs.

h. Parent & Subsidiary Companies & Affiliates:

- Parent Name and Contact Information. Provide name and contact information for parent company. Check Box if any parent company is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If "None," do not check the box and answer "None" below.

None

- Subsidiaries and Contact Information. Provide name and contact information for all subsidiary companies. Check Box if any subsidiary is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If "None," do not check the box and answer "None" below.

None

- Affiliate(s) and Contact Information. Provide name and contact information for all affiliate companies. Check Box if any affiliate is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If "None," do not check the box and answer "None" below.

None

i. Contracts & Business Partnerships:

- Check Box if Applicant intends to or has operated under contract with or has partnered with an EDC within the past five (5) years. If "None," do not check the box and answer "None" below.
- Check Box if Applicant intends to or has operated under contract (subcontractor) with or has partnered with a CSP within the past five (5) years. If "None," do not check the box and answer "None" below.

If any box above is checked, please provide name(s) of EDC(s) and CSP(s) and contact information for each and briefly describe the nature of business services associated with each contract and/or partnership.

Franklin Energy Services, LLC
102 N. Franklin St.
Port Washington, WI 53074

Carl Weston - cweston@franklinenergy.com - (805) 255-9294

Exhibit A



j. Identify principal officers (owners, executives, partners and/or directors), as appropriate for Applicant's organizational structure. Provide an organizational chart and the names, titles, business addresses and telephone numbers for each office.

Please see attached organizational chart. Please see next page for office contact information.

k. Attach to this Application a brief biography or single page professional resume for all principal officers and management directly responsible for Applicant's operations.

l. Provide Applicant's Employer Identification No. (EIN): 94-3374199

2. REGISTERED AGENT

a. If the Applicant does not maintain a principal office in the Commonwealth, the Applicant is required by the Pennsylvania Department of State to designate an approved Registered Agent as its representative in the Commonwealth. Check one of the Boxes below, as applicable:

YES, the Applicant has registered its business with the Pennsylvania Department of State. Following is the Name and Contact information for the Applicant's Department-Approved Registered Agent.

- Registered Agent's Name : AAAGENT SERVICES, LLC
- Registered Agent's Mailing Address : 125 Locust St., Harrisburg, PA 17101
- Registered Agent's Telephone : (717) 232-5505
- Registered Agent's Email Address : agents@aaagentservices.com

NO, the Applicant has not registered its business with the Pennsylvania Department of State. STOP—To avoid denial of your application and forfeiture of your application fee, you should contact the Pennsylvania Department of State Bureau of Corporations to register as a business entity within the Commonwealth PRIOR TO completion and filing of this application with the Pennsylvania Public Utility Commission.

Boston Office: 77 Franklin St.
7th Fl.

Boston, MA 02110
(617) 440-5470

Oakland Office: 444 18th St.
Ste. 400
Oakland, CA 94612
(510) 482-4420

Orange Office: 4050 W. Metropolitan Dr.
Fl. 3
Orange, CA 92668
(714) 787-1070

New York Office: 233 Broadway
Ste. 2740
New York, NY 10279
(Phone # coming soon)

Chicago Office: 104 S. Michigan Ave.
Ste. 725
Chicago, IL 60603

Portland Office: 838 SW 1st Ave.
Ste. 300
Portland, OR 97204

b. Applicant has registered its business with the Pennsylvania Department of State. Please check appropriate registration type for Applicant as designated with the Department.

- Sole proprietor (15 Pa. C.S. §4124)
- Domestic corporation (none)
- Domestic general partnership (15 Pa. C.S. §4124)
- Domestic limited liability company (15 Pa. C.S. §8913)
- Domestic limited liability partnership (15 Pa. C.S. §8201)
- Foreign corporation (15 Pa. C.S. §4124)
- Foreign general or limited partnership (15 Pa. C.S. §4124)
- Foreign limited liability company (15 Pa. C.S. §8981)
- Foreign limited liability general partnership (15 Pa. C.S. §8211)
- Foreign limited liability limited partnership (15 Pa. C.S. §8211)

c. If Applicant is not domiciled in the Commonwealth of Pennsylvania and is registered as a "foreign" entity as identified in Question 2.b., please identify all other states where applicant is registered and name the appropriate state department(s):

1. Massachusetts - Secretary of the Commonwealth
2. California - Secretary of State
3. New York - Department of State
4. Illinois - Secretary of State
5. Oregon - Secretary of State

1. RFMA
2. NACUFS
3. FEBA
4. MAFSI
5. FCSI
6. CA School Nutrition Association
7. Blue Flame Alliance
8. California Restaurant Association
9. ACCA
10. ILSH
11. ANSI C137 Lighting Systems Committee
12. MA Restaurant Association
13. ACHR NEWS
14. NHCC
15. ~~MAHRI~~ HARLI
16. AEST
17. CEDMIAC
18. ACEEE

4. **COMPLIANCE**

Respond to each of the following Questions. Provide a statement as to the resolution or present status of any such proceedings, if applicable.

- a. In the past three years has the Applicant, the parent company, an affiliate or predecessor or partner (contractor/subcontractor business relationship) of the Applicant, or any person identified by the Applicant in this Application, been investigated or convicted of a crime involving fraud, theft, larceny, deceit, violation of consumer protection law, violation of deceptive trade law or similar activity, whether before an administrative body or in a judicial forum, in which the Applicant, an affiliate, a predecessor of either, or a person identified herein has been a defendant or a respondent?

- No
 Yes. Provide explanation:

- b. Is the Applicant, the parent company, an affiliate, or a predecessor of either, currently delinquent with any state or federal taxing authority?

- No
 Yes. Provide explanation:

- c. Identify all bankruptcy or liquidation proceedings for the prior three years. If none, state "None" below.

None

- d. Identify all customer complaints filed with a regulatory or prosecutor agency for the prior three years of the date of this application. In none, state "None" below.

None

5. **FALSIFICATION**

The Applicant understands that the making of false statement(s) herein may be grounds for denying the Application, or if later discovered, for revoking any authority granted pursuant to the Application. This Application is subject to 18 Pa. C.S. §§4903 and 4904, relating to perjury and falsification in official matters.

Signature of Principal Official: Samuel O. Cohen

Official's Name & Title : Sam Cohen, CEO
(Please Print)

Date : 11-29-30

APPENDIX A - AFFIDAVIT

[Commonwealth/State] of MASSACHUSETTS :

: SS.

County of NORFOLK :

RICHARD BOHLER, Affiant, being duly [sworn/affirmed] according to law, deposes and says that:

[He/she is the SENIOR DIRECTOR, (Office of Affiant) of ENERGY SOLUTIONS Name of Applicant);] ENERGY EFFICIENCY

[That he/she is authorized to and does make this affidavit for said Applicant;]

That the Applicant herein ENERGY SOLUTIONS has the burden of producing information and supporting documentation demonstrating its technical and financial fitness to be registered as a conservation service provider pursuant to Act 129 of 2008.

That the Applicant herein ENERGY SOLUTIONS acknowledges that it has answered the questions on the application correctly, truthfully and completely and has provided supporting documentation as required.

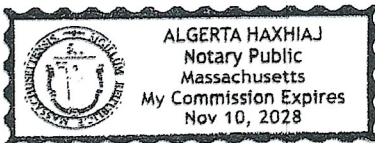
That the Applicant herein ENERGY SOLUTIONS acknowledges that it is under a duty to update information provided in answer to questions on this application and contained in supporting documents.

That the Applicant herein ENERGY SOLUTIONS acknowledges that it is under a duty to supplement information provided in answer to questions on this application and contained in supporting documents as requested by the Commission.

That the facts above set forth are true and correct to the best of his/her knowledge, information, and belief, and that he/she expects said Applicant to be able to prove the same at hearing.

[Signature]
Signature of Affiant

Sworn and subscribed before me this 28 day of NOVEMBER, 2023.



[Signature]
Signature of official administering oath

My commission expires: Nov 10, 2028.

Pennsylvania Department of State
Bureau of Corporations and Charitable Organizations
PO Box 8722 | Harrisburg, PA 17105-8722
T: 717-787-1057
dos.pa.gov/BusinessCharities

Regarding: Cohen Ventures, Inc.
Request Type: Certificate of Registration
Request No.: 025532320
Receipt No.: 769554
Filing Type: Foreign Business Corporation
Initial Filing Date: September 18, 2020
Status: Active

Issuance Date: November 15, 2023
File No: 0007131573

TO ALL WHOM THESE PRESENTS SHALL COME, GREETING:

I DO HEREBY CERTIFY THAT

Cohen Ventures, Inc.

is a foreign association duly registered to do business in this Commonwealth as of the issuance date herein.

I DO FURTHER CERTIFY THAT this Certificate of Registration shall not imply that all fees, taxes and penalties owed to the Commonwealth of Pennsylvania are paid.



IN TESTIMONY WHEREOF, I have hereunto set my hand and caused the seal of my office to be affixed, the day and year above written.

A handwritten signature in cursive script, appearing to read "Albert Schmidt".

Albert Schmidt
Secretary of the Commonwealth

Verify this certificate online at www.file.dos.pa.gov



449 15th Street
Oakland, CA 94612

Customer List

Alliance for an Energy Efficient Economy
Avista - WA
Avista - ID
Baltimore Gas and Electric (BGE)
Berkshire Gas Company
California Public Utilities Commission (CPUC)
California State Water Resources Control Board
Cape Light Compact
California Energy Commission (CEC)
Central Coast Community Energy (3CE)
Lancaster Choice Energy
City of Colorado Springs - (CO)
ComEd
ConEd (Consolidated Edison Company of New York)
Center for Sustainable Energy (CSE)
Pacific Gas & Electric (PG&E)
Southern California Gas Company (SoCal Gas)
Southern California Edison (SCE)
DTE Energy
Duke Energy Carolinas (NC)
Duke Energy Carolinas (SC)
Duke Energy - IN
Duke Energy Progress (NC)
Duke Energy Progress (SC)
Duke Energy Kentucky
Duquesne Light
Energy Council
Energy Foundation
Veolia
Eversource NH (formerly PSO NH)
Eversource (formerly NSTAR)
San Diego Gas & Electric Co. (SDG&E)
Unitil - NH
Illinois Power Agency (IPA)
Illume
Liberty Utilities - [MA]
Los Angeles Department of Water & Power (LADWP)
Marin Clean Energy (MCE)

Illinois Department of Commerce
PPL/Narragansett Electric Company (former NG)
National Grid - MA
MassCEC
National Grid - New York
New Hampshire Electric Coop
New York State Energy Research and Development Authority (NYSERDA)
North Carolina Justice Center (NCJC)
Northeast Energy Efficiency Partnerships (NEEP)
Northwest Energy Efficiency Alliance
Oregon Public Utilities Commission (OPUC)
Platte River Power Authority - Estes Park/Fort Collins/Longmont/Loveland
PSD
Puget Sound Energy (PSE)
Recurve
Sacramento Municipal Utility District (SMUD)
Seattle City Light (SCL)
Snohomish County PUD (SnoPUD)
Southern California Public Power Authority (SCPPA)
Southwest Gas - California
Southwest Gas - Nevada
Unitil - MA
University of California Davis
Wisconsin Focus on Energy
Xcel Energy - Colorado
Efficiency Works
City of Fort Collins
City of Longmont
City of Loveland - (CO)



Chief Executive Officer/President
Executive
Oakland office
Sam Cohen

Chief Information Officer
Information Technology
Remote (Crest, WA)
David Weisong

Chief People Officer
People & Culture
Remote (Georgia)
Jamilah Spears

Chief Operating Officer/Executive
Vice President
Business Services
Oakland office
Chris Burnester

Chief Financial Officer
Finance
Oakland office
Angela Rodriguez

Executive Assistant
Oakland office
Marta Bautista

Executive Assistant
Information Systems
Oakland office
Jenny Kim

DEI Project Manager
People & Culture
Remote (Vermont)
Karia Salazar

Growth Management Strategy
Business Services
Oakland office
LeAndra Archuleta

Controller
Finance
Remote (Pennsylvania)
Lisa Konopelki

Director
People & Culture
Oakland office
Kimberly Kingen

Vice President of Business Strategy
Business Services
Orange office
Daniel Cornejo

Senior Manager, Accounting
Finance
Remote (Pennsylvania)
Rebecca Sarbower

Recruiting Manager
People & Culture
Oakland office
Sophia McCum

Vice President of Policy & Ratings
Business Services
Oakland office
Michael McGaraghan

Senior Accountant
Finance
Oakland office
Erika Matos

Recruiter
People & Culture
Remote (Portland, OR)
Emily Munro-Ludders

Director of Distributed Energy Resources
Business Services
Remote (Denver, CO)
Christine Riker

Junior Accountant
Finance
Remote (New York)
Shanie Herskko

Senior Recruiter
People & Culture
Oakland office
Angela Sagabseen

Vice President of Energy Efficiency
Business Services
Oakland office
Hector Lebad

Billing/Contracts Associate
Finance
Oakland office
Karan Sidhu

Recruiter
People & Culture
Remote (California)
Simran Mann

Senior Director
Business Operations
Portland office
Sheryl Bunn

Senior Director
Finance
Oakland office
Jason Biggs

Coordinator
People & Culture
Oakland office
Zachary Weed

Associate Director
Business Operations
Oakland office
Alanna Torres

Tax Administrator
Finance
New York
Jeanette Lachman

Assistant
People & Culture
Oakland office
Alaa Saleh

Senior Manager, Exec and Admin Services
Business Services
Oakland Office
Lynda Churhawet

Finance Systems Administrator
Finance
Remote (Missouri)
Emily Lachajczyk

Manager
People & Culture
Oakland office
Mary DeMain

Administrative Facilities Partner
Business Services
Chicago Office
Jordan Weed

Financial Analyst
Finance
Remote (Texas)
Leon Ramirez III

Payroll Specialist
People & Culture
Oakland office
Megan Derheim

Administrative Assistant
Business Services
Oakland
Sequoia Jackson

Associate Director, Contracts
Finance
Remote (New York, NY)
Jessica Mahoney

Benefits Specialist
People & Culture
Remote (North Carolina)
Tiana Davis

Administrative Assistant I
Business Operations
Orange Office
Kevin Balk

Contracts Manager
Finance
Remote (Texas)
Mark Berumen

Associate Director
Learning & Development
People & Culture
Oakland office
Karen Harris

Administrative Assistant I
Business Services
New York
Stephen Steiger

Contracts Manager
Finance
Remote (Texas)
Luther Lottler

Administrative Facilities Partner
Business Services
Boston
Shelly Taylor

Administrative Assistant I
Distributed Energy Resources
Remote (Southern California)
Stephanie How

Contracts Manager
Finance
Oakland office
Shannon Osterberg

Director of Trade Ally Strategy
Business Services
Orange office
Jeff Johnston

Administrative Facilities Partner
Business Services
Chicago
Savannah Carlin

General Counsel
Finance
Remote (Massachusetts)
Mark Morrow

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Assistant Counsel
Distributed Energy Resources
Chicago Office
David Moskowitz

Compliance Manager
Finance
Remote (Oklahoma)
Kayla Merchant

Senior Fellow Trade Ally Management
Energy Efficiency
Oakland Office
Howard Merson

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Accounts Payable Assistant
Finance
Oakland Office
Jaime Saephan

Senior Manager
Trade Ally Strategy
Orange office
Joe Buerba

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Accounts Payable Accountant
Finance
Oakland office
Leah Rodriguez

Senior Trade Ally Manager
Business Services
Remote (Vermont)
John Terborgh

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Senior Billing Manager
Finance
Remote (Pittsburgh, CA)
Jacki Getty

Senior Trade Ally Manager
Trade Ally Management
Oakland office
Corissa Ng

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Accounts Payable Assistant
Finance
Oakland Office
Jaime Saephan

Trade Ally Manager II
Business Services
Remote (Texas)
Melodi Burtholder

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Accounts Payable Assistant
Finance
Oakland Office
Jaime Saephan

Associate
Trade Ally Management
Remote (New Mexico)
Kualhelani Burgess

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Accounts Payable Assistant
Finance
Oakland Office
Jaime Saephan

Trade Ally Manager
Trade Ally Management
Oakland office
Lillian Carrell

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Accounts Payable Assistant
Finance
Oakland Office
Jaime Saephan

Trade Ally Manager I
Trade Ally Management
Remote (Texas)
Valeria Nicolls

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Accounts Payable Assistant
Finance
Oakland Office
Jaime Saephan

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Senior Billing Manager
Finance
Remote (Pittsburgh, CA)
Jacki Getty

Billing Assistant
Finance
Remote (Texas)
Ashlynn Walton

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Senior Billing Manager
Finance
Remote (Pittsburgh, CA)
Jacki Getty

Junior Accountant
Finance
Remote (California)
Christina Ho

Senior AR/AP Manager
Finance
Oakland office
Grace Reyes

Senior Billing Manager
Finance
Remote (Pittsburgh, CA)
Jacki Getty

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Finance
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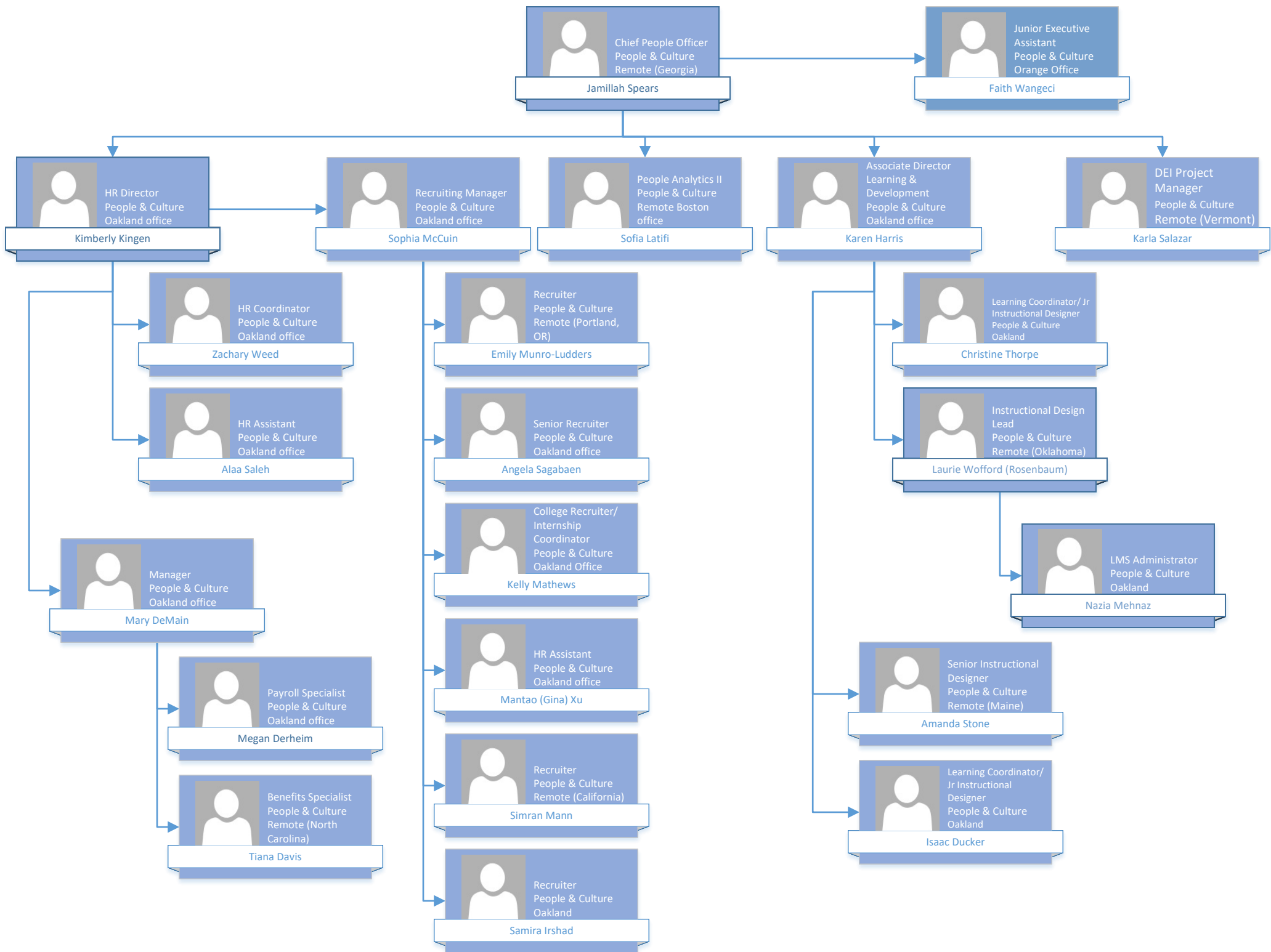
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Finance
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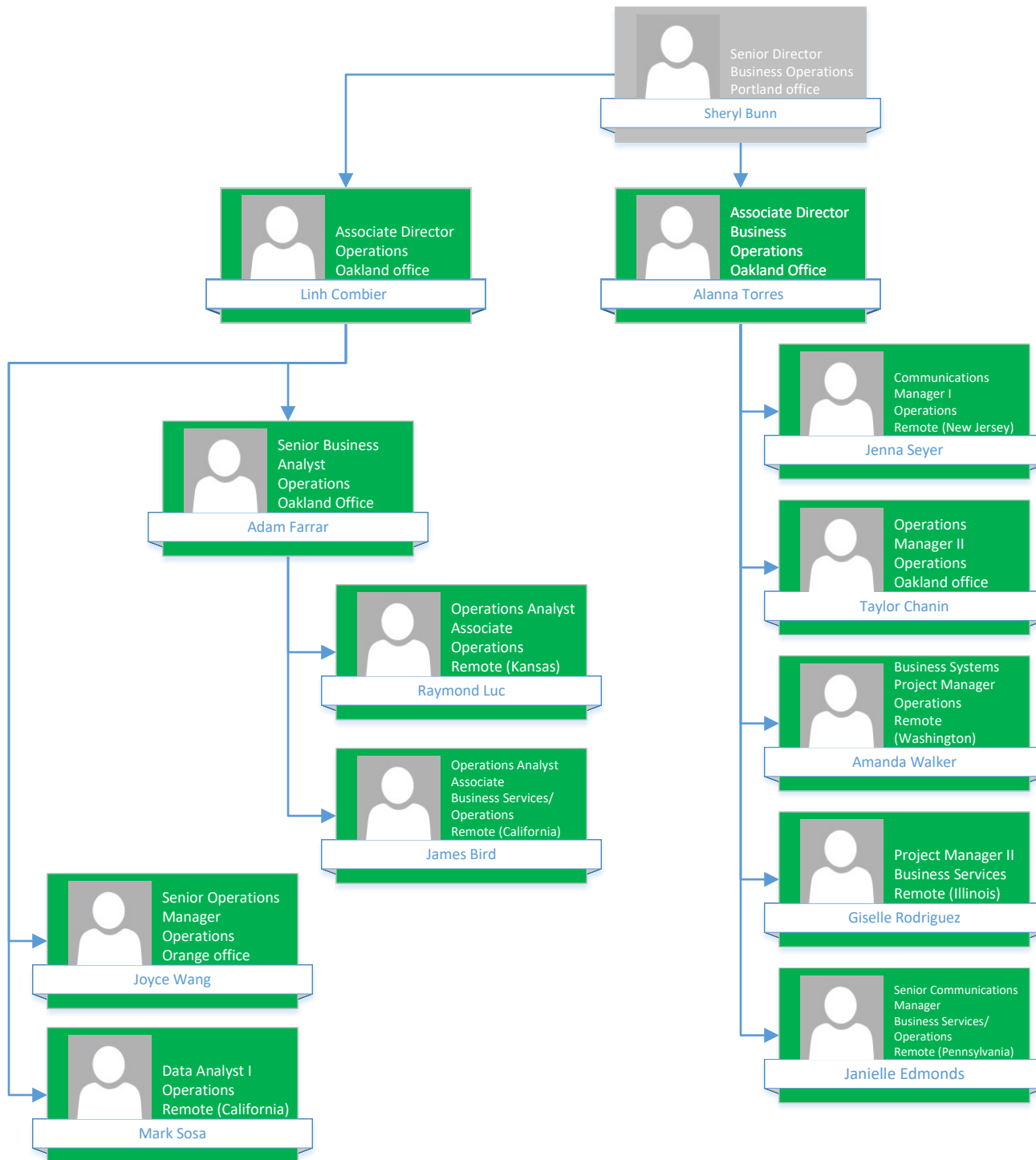
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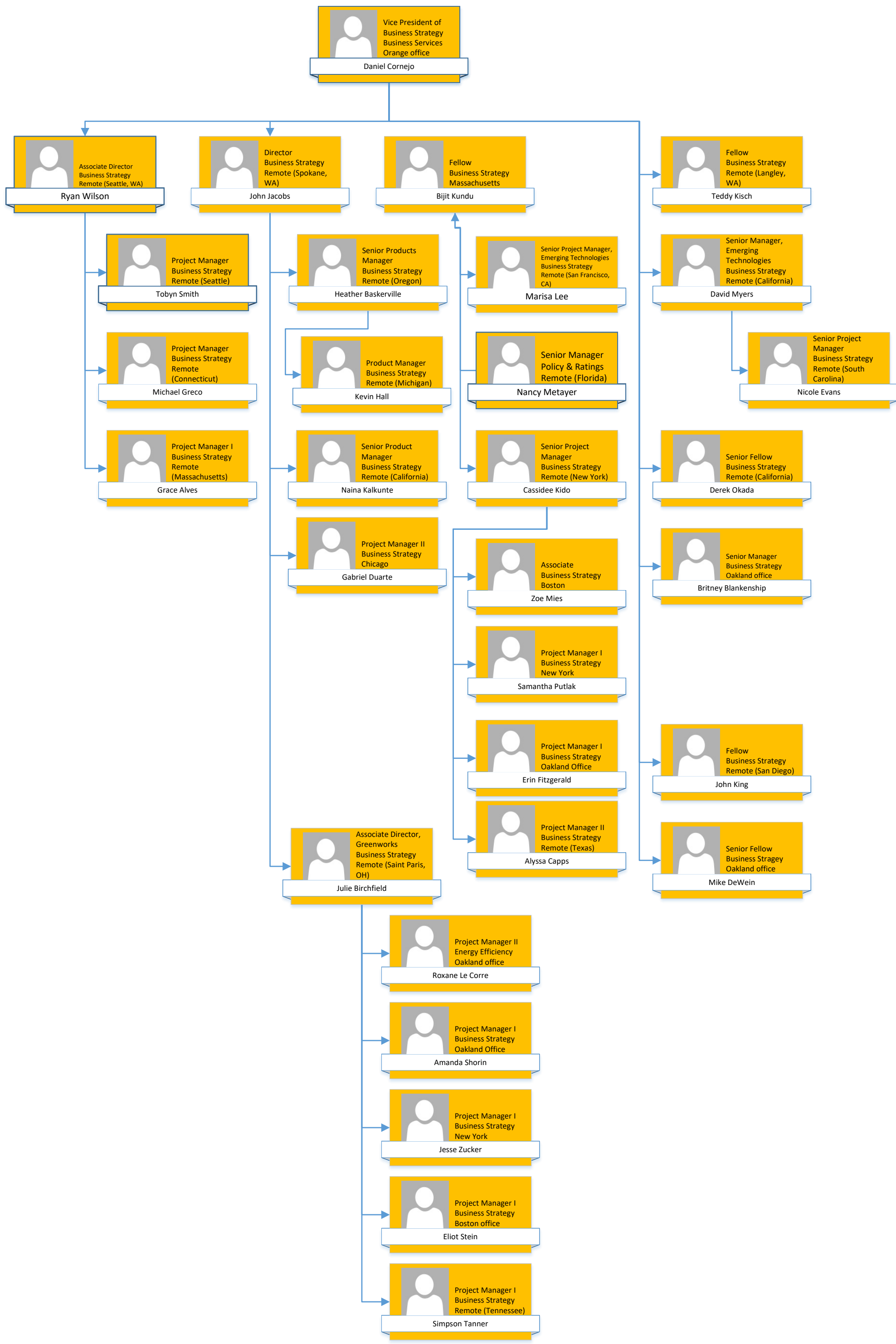
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Grace Reyes

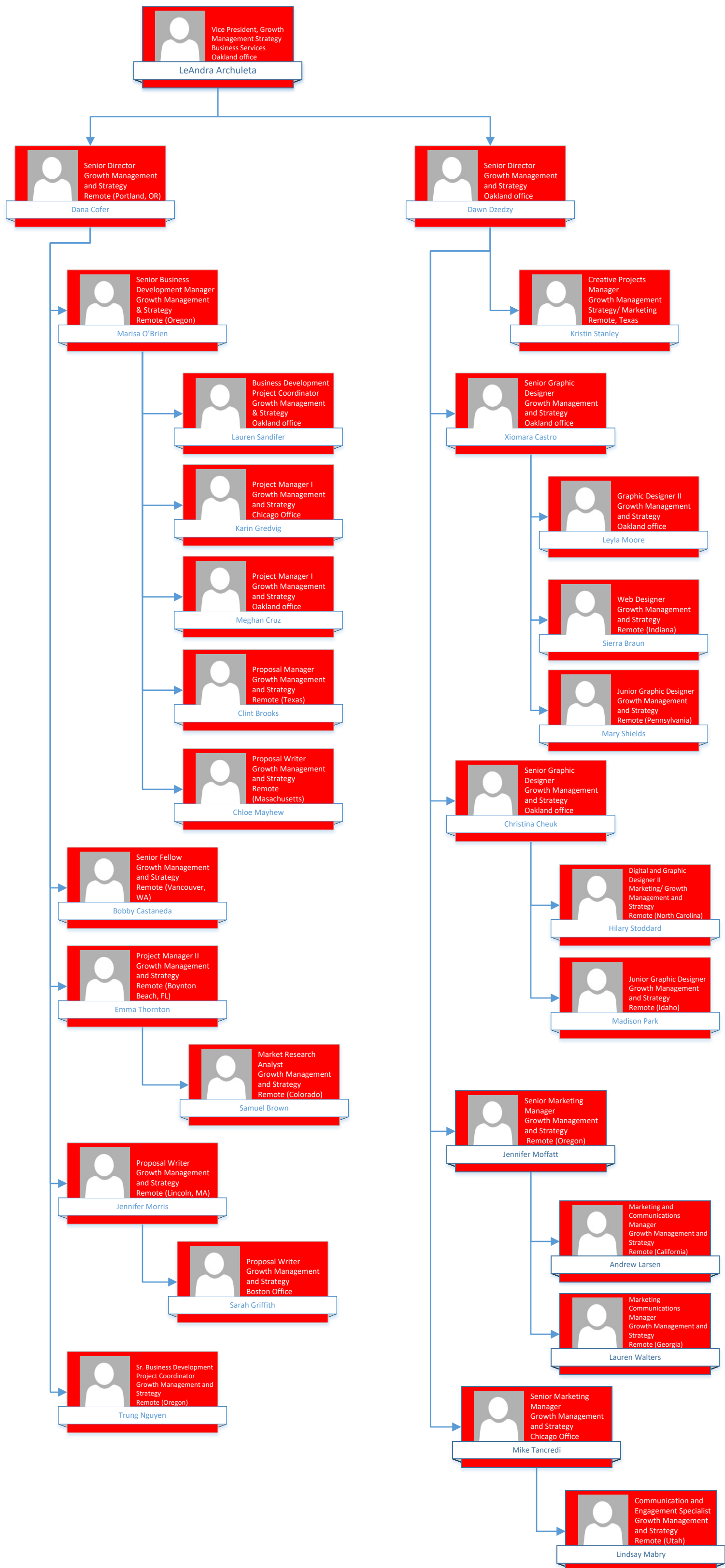
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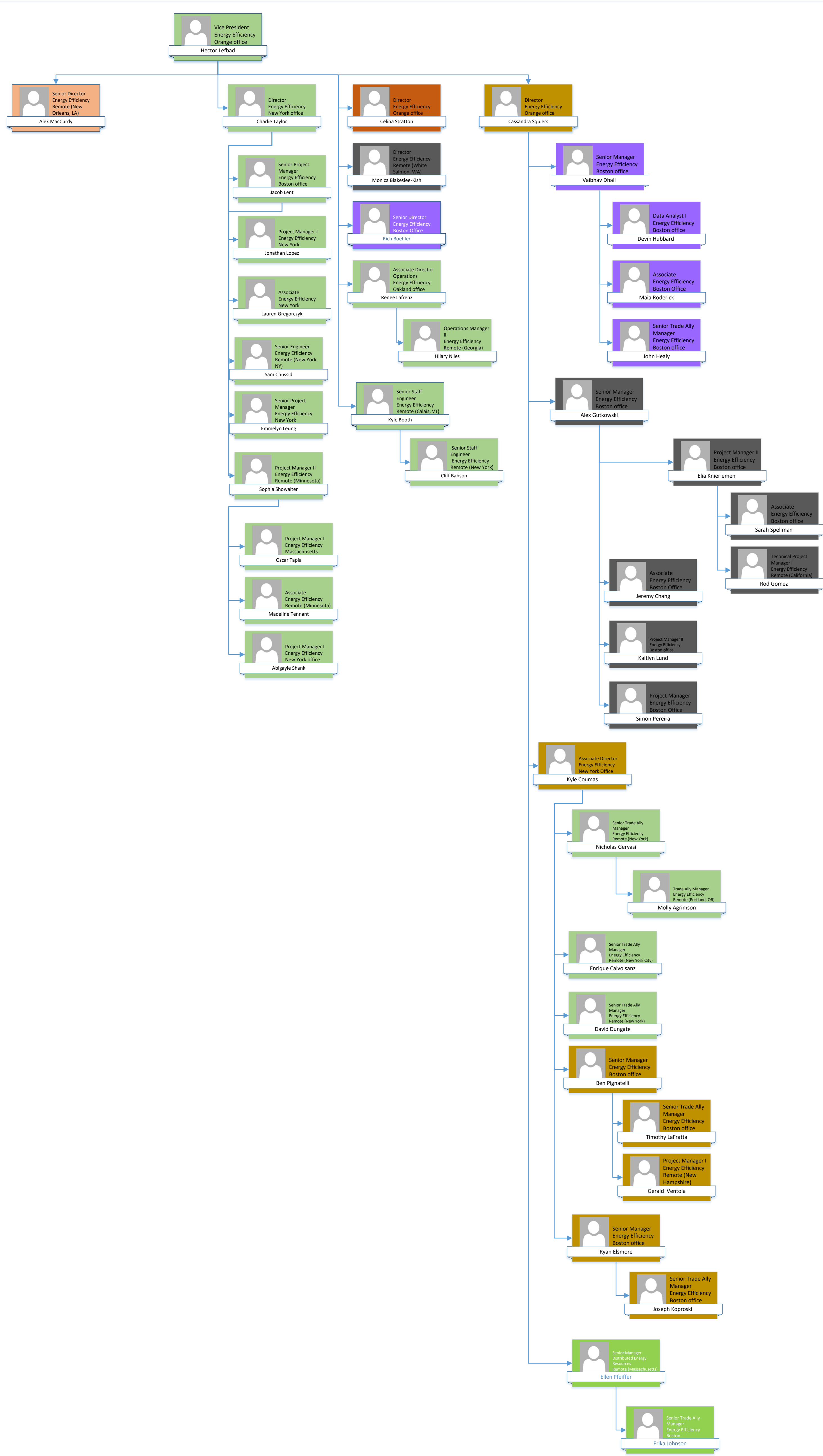
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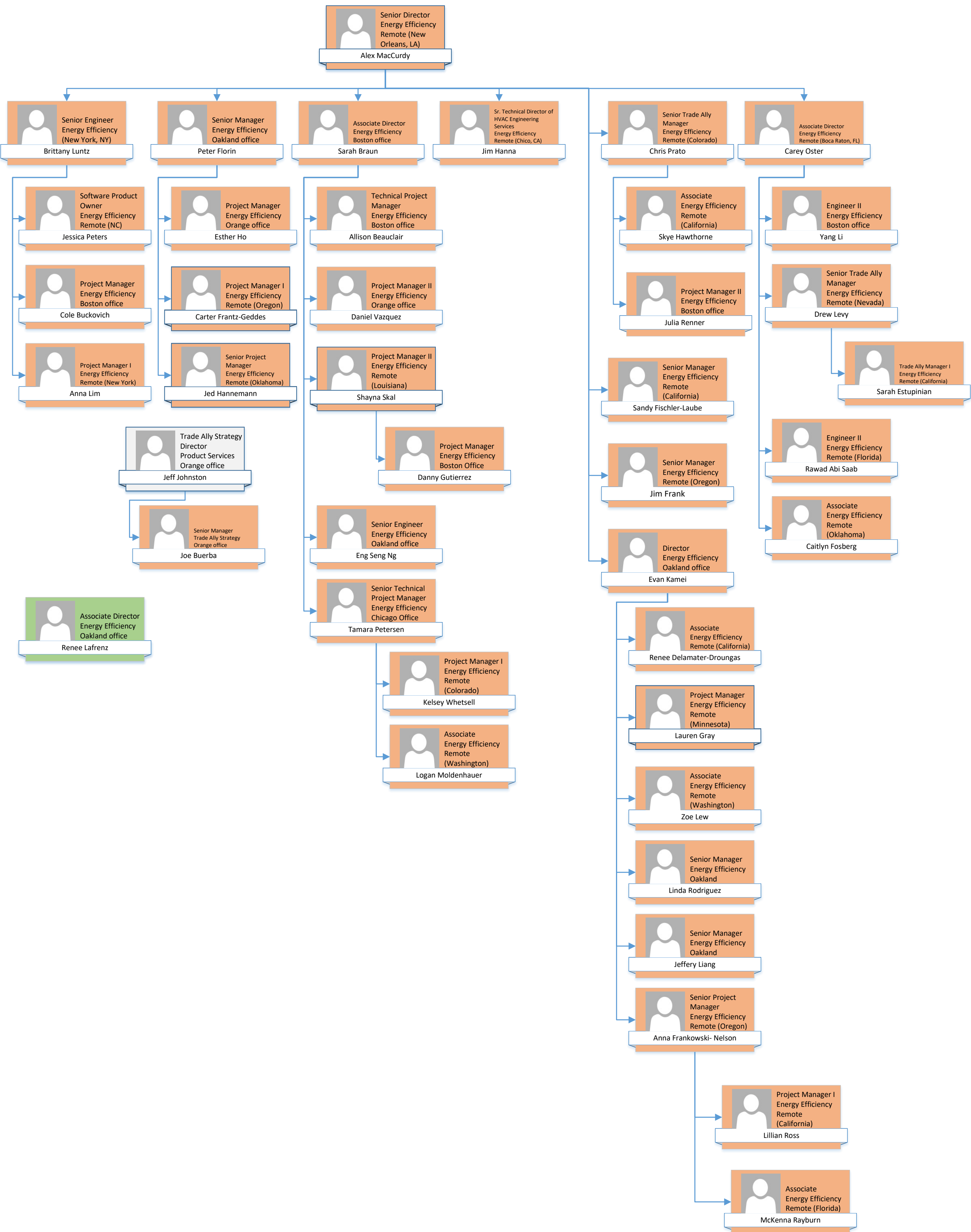


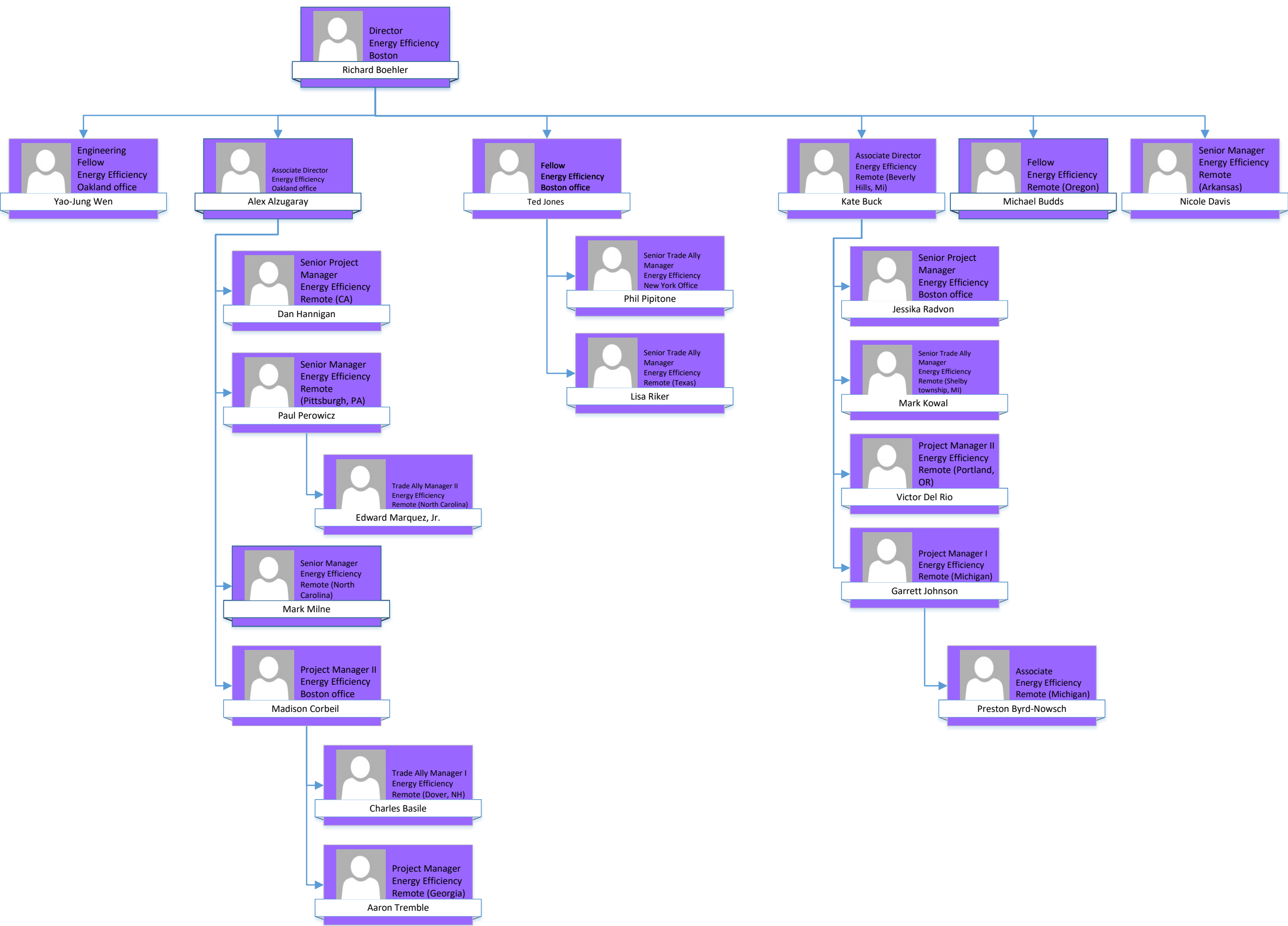


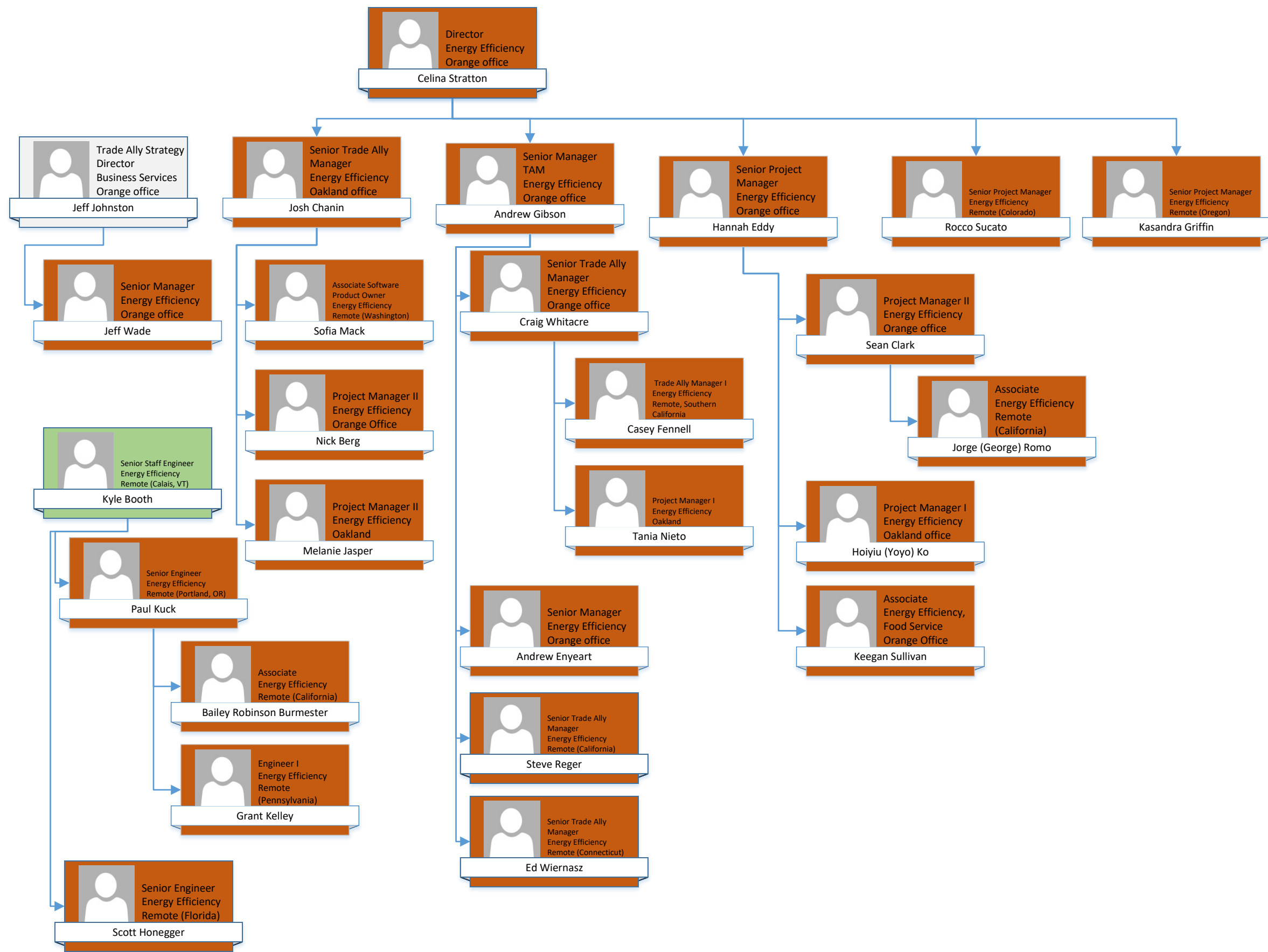


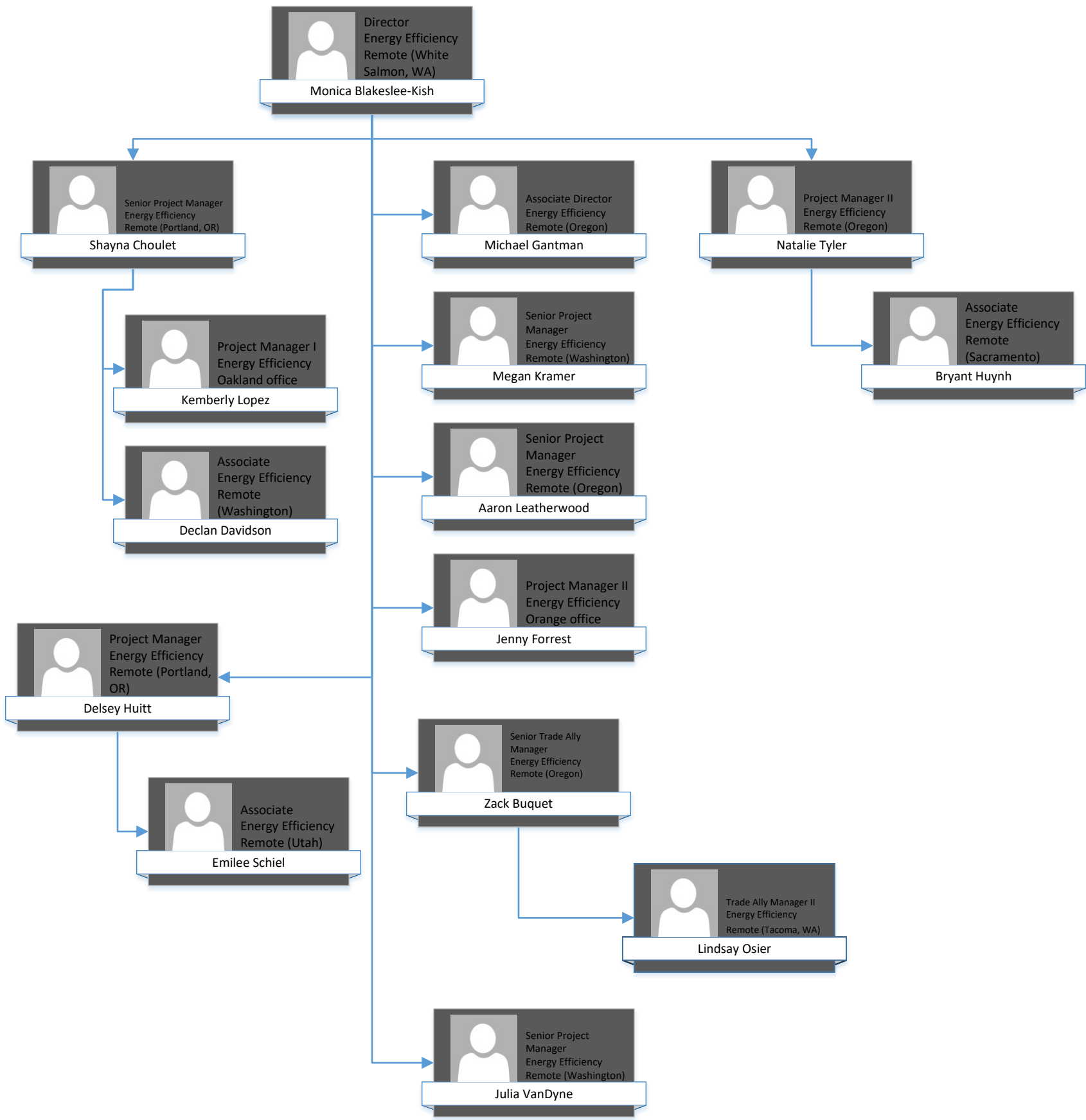




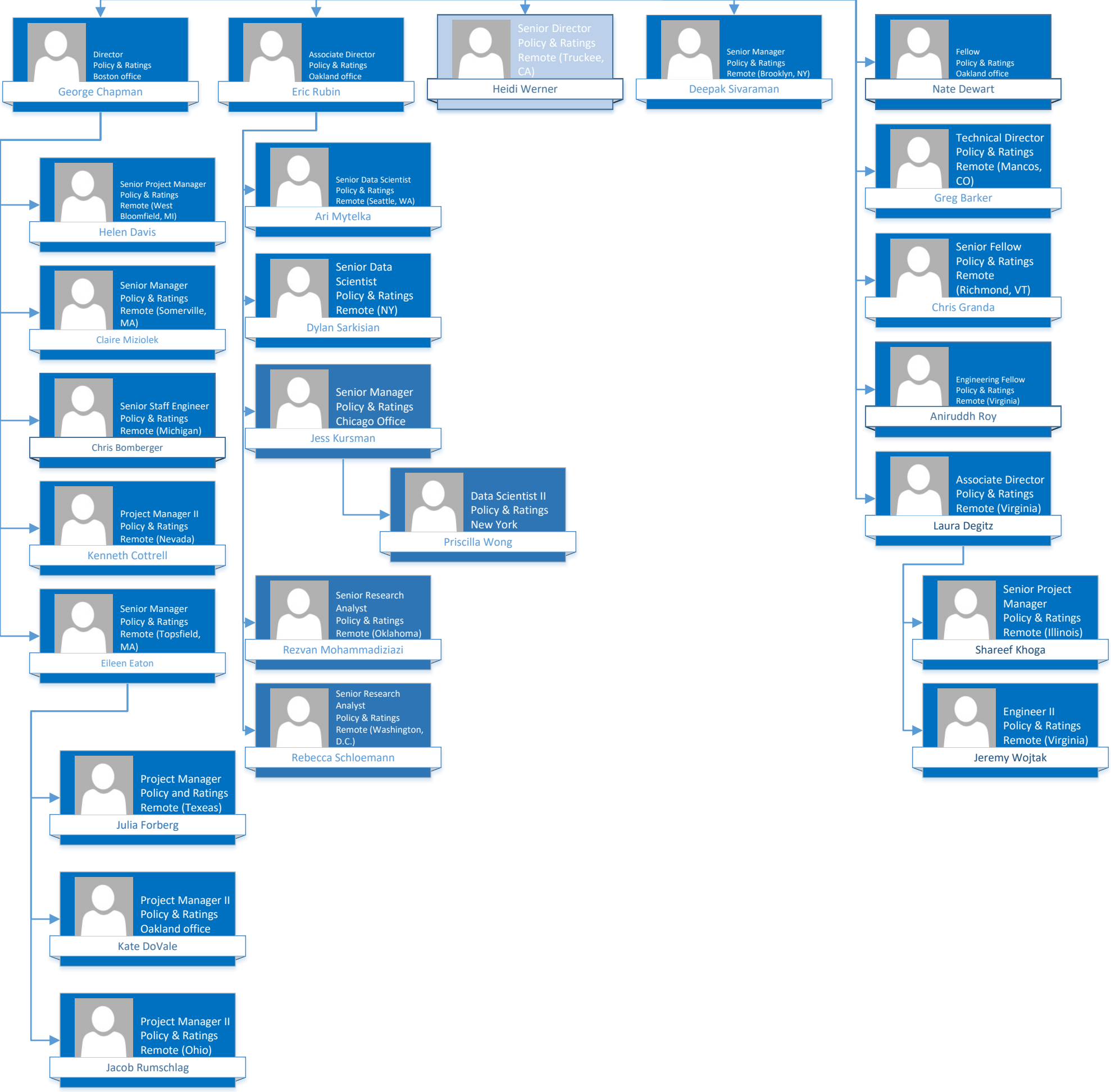


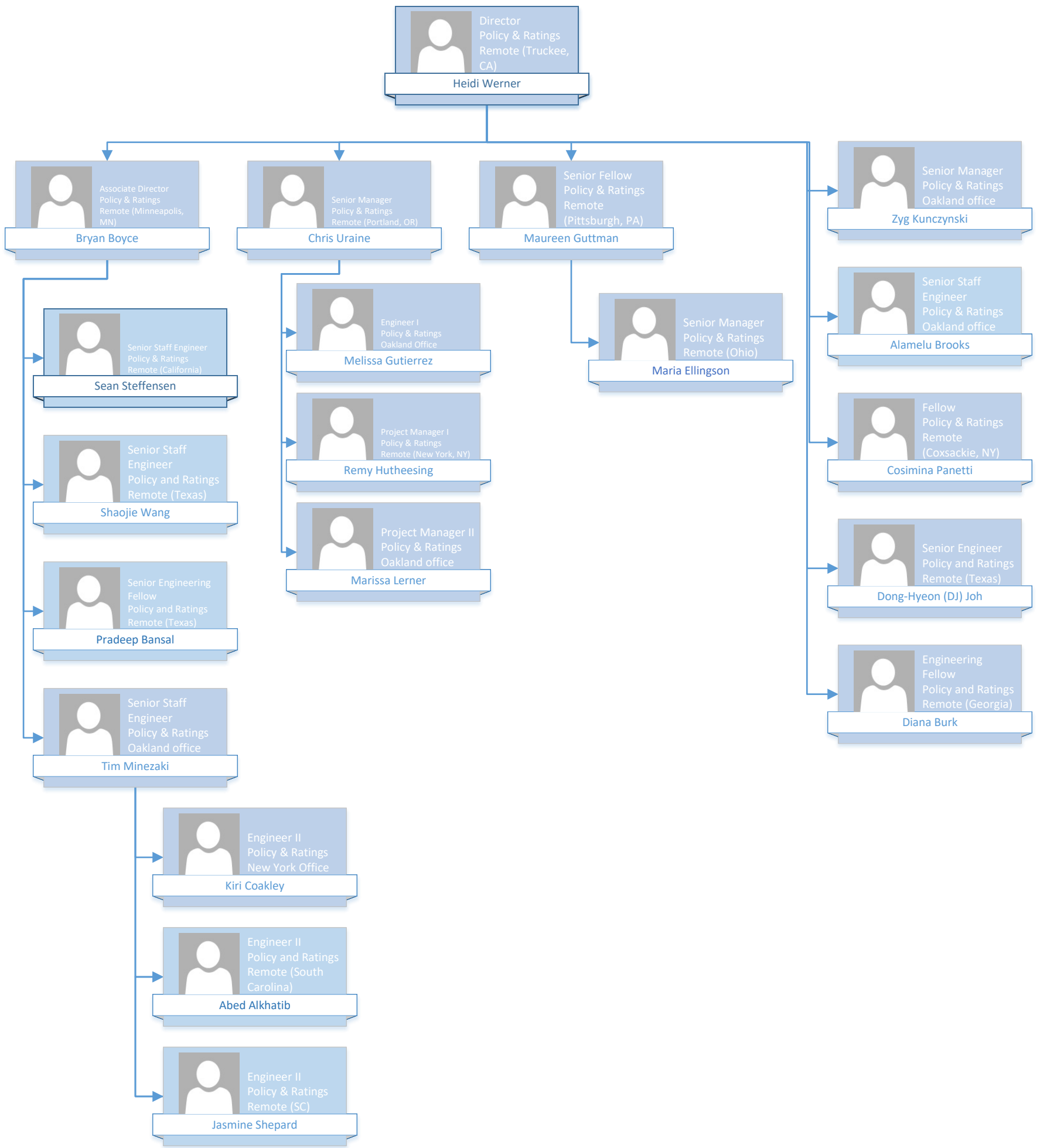






 Vice President of Policy & Ratings
Business Services
Oakland office
Michael McGaraghan





David Weisong
Vice President of Information Systems
Information Systems
Remote (Camas, WA)

Lowell Kaufman
Senior Director
Information Systems
Remote (Reston, VA)

Marla Parker
Senior Director
Information Systems
Oakland office

Sarah Naugle
Senior Software Product Owner
Information Systems
Oakland office

Diane Walker
Associate Director,
Software Solutions
Information Solutions
Remote (Santa Cruz)

David Shinabarger
Senior Software Product Owner
Information Systems
Remote (Ann Arbor, MI)

David Steingesser
Software Product Owner
Information Systems
Remote (Amesbury, MA)

Michael Douglas
Senior Engineering Product Owner
Information Systems
Remote (Texas)

Derek Yale
Software Product Owner
Information Systems
Remote (Washington D.C.)

Chukwuka Orji
Software Product Owner
Information Systems
Remote (Texas)

Stephanie Young
Associate Director of Software Solutions
Information Systems
Remote (Kansas)

Soumya Bharadwaj
Business Systems Analyst
Information Systems
Remote (Georgia)

James Marin
Senior Business Systems Analyst
Information Systems
Remote (Southern California)

Dan Lewis
Senior Business Systems Analyst
Information Systems
Remote (Southern California)

Cassius Kim
Associate Business Systems Analyst
Information Systems
Remote (Washington)

Mythili Kandalam
Associate Director
Information Systems
Remote (Michigan)

Randi Moscoe
Business Systems Analyst
Information Systems
Remote (Portland)

Candace Seu
Senior Software Technical Writer
Information Systems
Remote (Pasadena, CA)

Simone Rowe
Senior Software Technical Director
Information Systems
Remote (Oklahoma)

Jacob Tehrani
Software Product Owner
Information Systems
Oakland office

Yemi Quadri
Business Systems Analyst
Information Systems
Remote (Maryland)

Sonya Barry
Associate Director
Information Systems
Oakland office

Erica Corbett
Software Project Manager I
Information Systems
Remote (Albany, GA)

Matilda O'Neill
Software Project Manager I
Information Systems
Remote (California)

Tom Swinburne
Software Project Manager
Information Systems
Oakland office

Rosie Wetzel
Software Project Manager I
Information Systems
Remote (California)

Matt Ward
Senior Software Project Manager
Information Systems
Oakland Office

Michael Paradis
Software Project Analyst
Information Systems
Remote, New York

Emily Tryer
Software Project Manager II
Information Systems
Remote (Cloverdale, CA)

Senior Director, Information Systems
Oakland office
Marla Parker

Software Engineering Manager
Information Systems
Oakland office
Ben Kremer

Software Engineering Manager
Information Systems
Remote (California)
Raina Carter

Senior Quality Control Engineer
Information Systems
Oakland Office
Don Phair

Senior Software Engineer
Information Systems
Remote (Texas)
Atul Kumar

Software Engineer III
Information Systems
Orange Office
Andrew Springfield

Software Engineer II
Information Systems
Oakland office
Nick Marozick

Software Quality Control Engineer III
Information Systems
Oakland office
Gauri Sharma

Senior Software Engineer
Information Systems
Oakland office
Scot Hacker

Software Engineer III
Information Systems
Oakland office
Kibret Fisseha

Software Engineer II
Information Systems
Remote, Texas
Chaitali Patel

Software Quality Control Engineer III
Information Systems
Oakland Office
Kenneth Chan

Senior Software Engineer
Information Systems
Oakland office
Jorge Medina

Software Engineer III
Information Systems
Remote (New Hampshire)
Maverick Adams

Software Engineer III
Information Systems
Remote (Medford, OR)
Greg Kaleka

Software Quality Control Engineer III
Information Systems
Oakland office
Ami Naik

Senior Software Engineer
Information Systems
Remote (Bend, OR)
Rob Harvey

Software Engineer III
Information Systems
Remote (Florida)
Pyie Zone

Dev Ops Engineer II
Information Systems
Remote (Minnesota)
Bill Kremer

Tech Support Engineer III
Information Systems
Oakland office
Keith Kaste

Senior Software Engineer
Information Systems
Remote (Chapel Hill, NC)
Erin Mullaney

Software Engineer III
Information Systems
Oakland
Joshua Jackson

Quality Control Engineer III
Information Systems
Remote (San Jose, CA)
Rina Desai

Senior Manager/ Data Architect
Information Systems
Remote (New York)
Kamal Saini

Senior Software Engineer
Information Systems
Remote (California)
Nick Dickey

Software Technical Support Engineer
Information Systems
Chicago Office
Jason Zhan

Senior Data Engineer
Information Systems
Remote (Georgia)
Emmanuel Maduka

Quality Control Engineer I
Information Systems
Remote (Massachusetts)
Fiona Eckert

Data Engineer I
Information Systems
Oakland office
Kate James

Technical Support Engineer
Information Systems
Remote (California)
Bryan Williams

Data Engineer II
Information Systems
Remote (Seattle, WA)
Ben Neiman

Data Engineer I
Information Systems
Remote (Virginia)
John Reynolds

Software Engineering Manager
Information Systems
Remote (Arkansas)
Branden Von Rohr

Software Quality Control Manager
Information Systems
New York
Mika Wells

Senior Software Engineer
Information Systems
Remote (Georgia)
Yonas Nebro

Quality Control Engineer I
Information Systems
Remote (Kansas)
Adam Musinski

Software Engineer I
Information Systems
Remote (Texas)
M. Bilal Ghazi

Software Quality Control Engineer I
Information Systems
Oakland
Aleksandra Rusak

Software Engineer II
Information Systems
Oakland office
Emily Keller

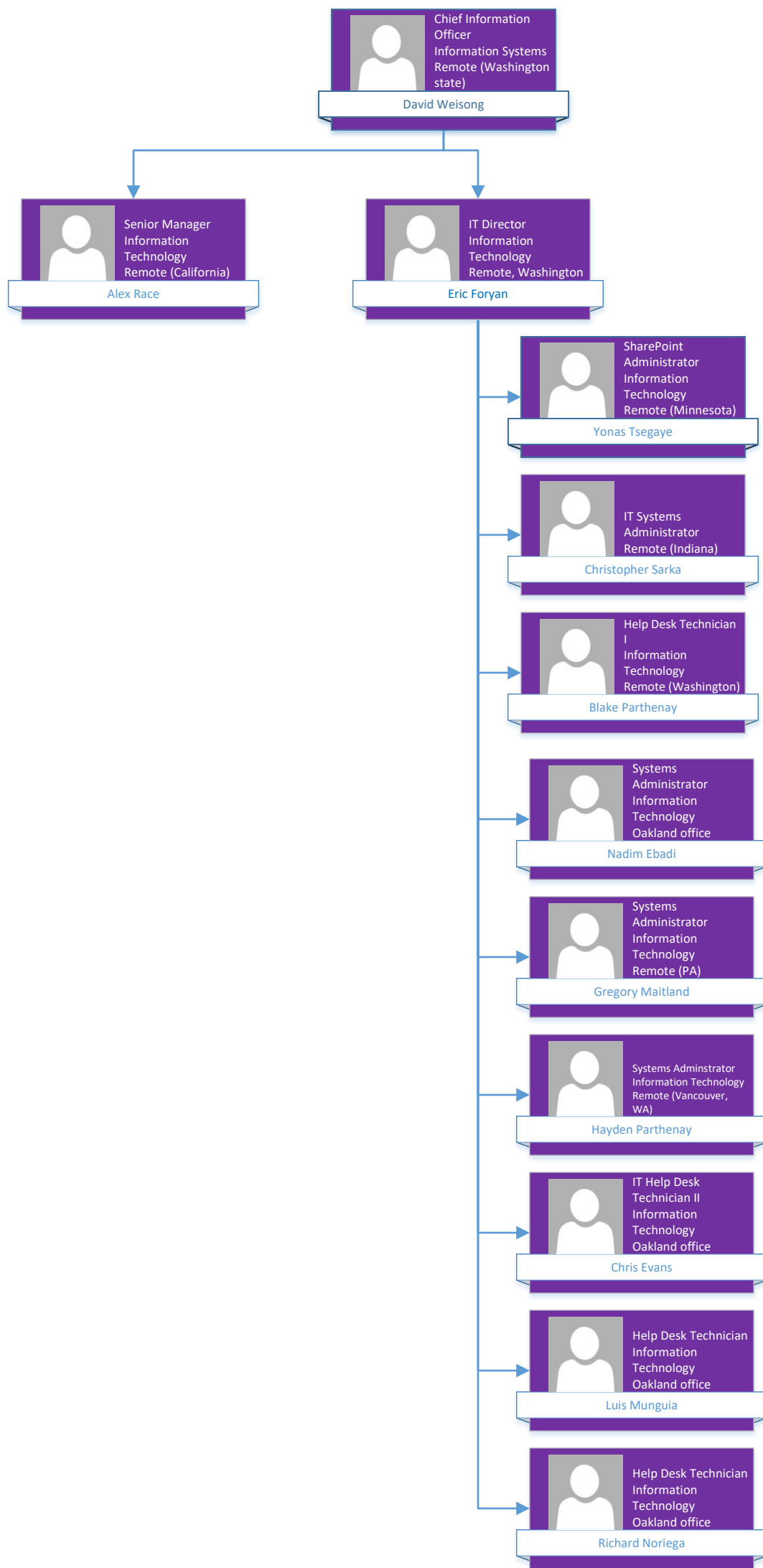
IS Associate
Information Systems
Oakland Office
Leo Saeteurn

Associate
Information Systems
Remote (New York)
Christian Vasquez

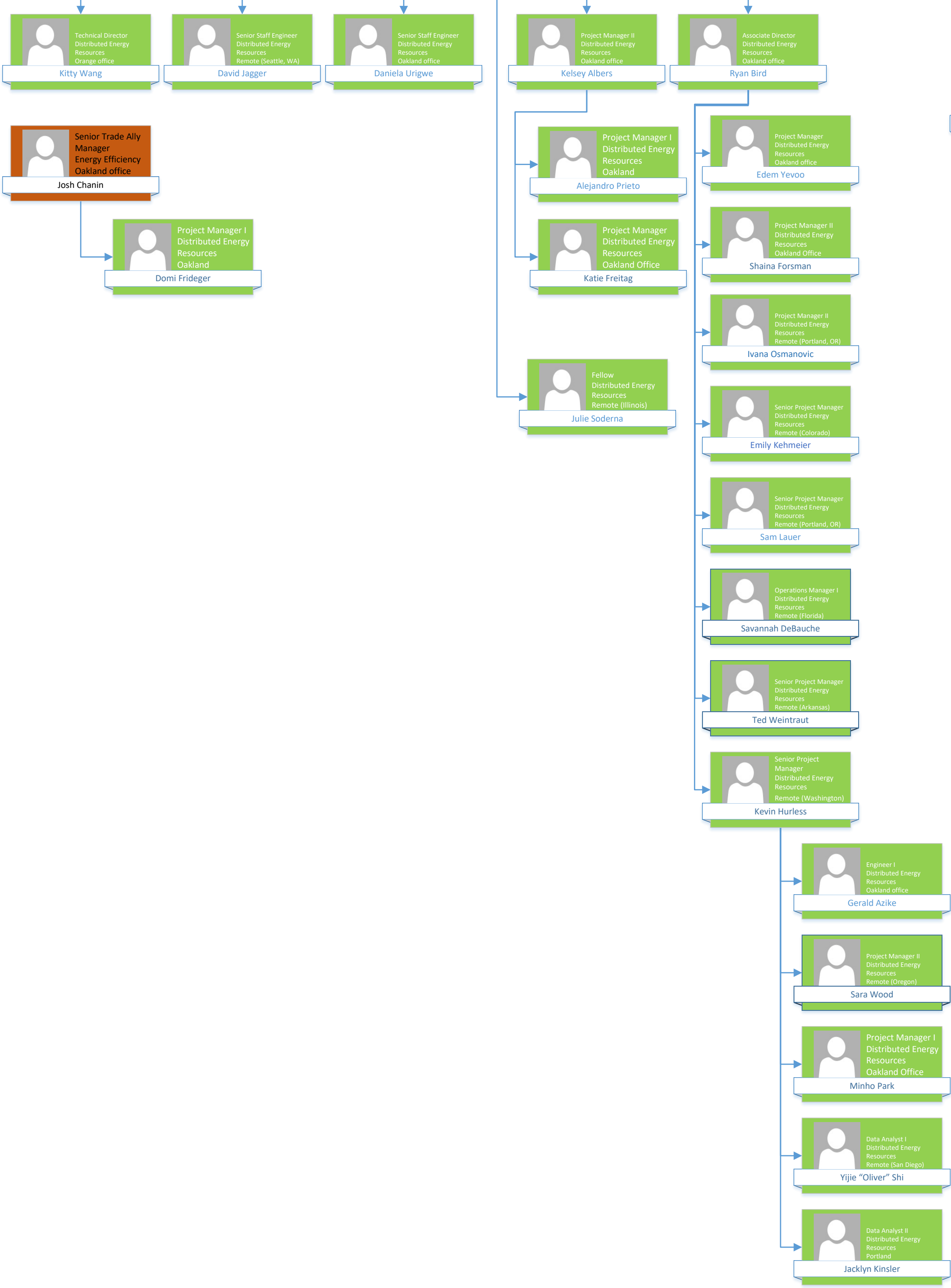
Quality Control Engineer II
Information Systems
Oakland Office
Sabrina Niyamathullah

Associate
Information Systems
Remote (California)
Chris McCain

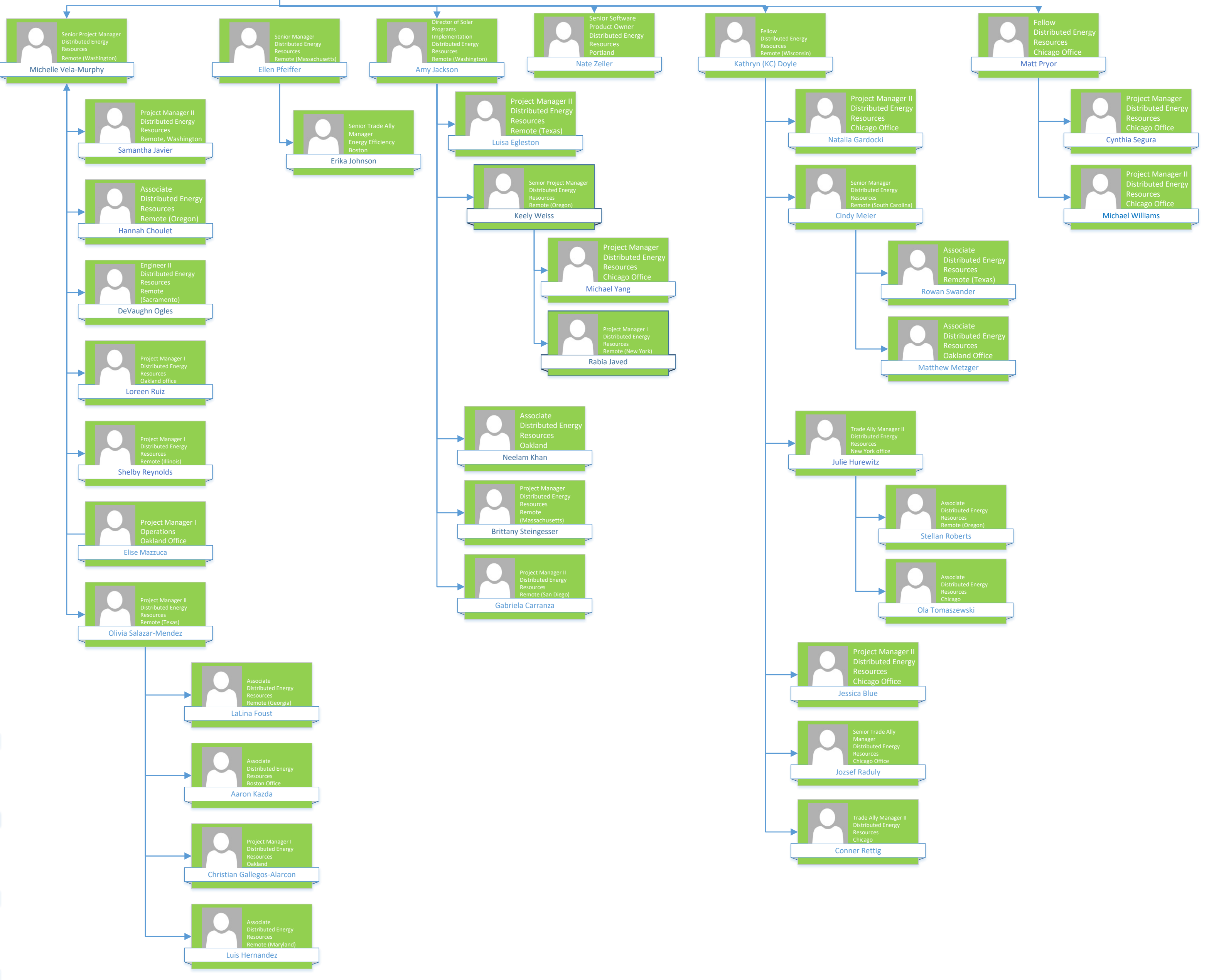
Software Engineer I
Information Systems
Oakland office
Jack Semirdzhyan



Senior Director of Distributed Energy Resources Products & Services Remote (Denver, CO)
Christine Riker



Senior Director Distributed Energy Resources Remote (Oregon)
Patrice Flynn





Samuel Cohen

President

Mr. Cohen founded Energy Solutions in 1995 with a focus on providing utility, government and commercial clients with Demand Side Management (DSM) program design, marketing, and implementation. His mission for the company was – and still is – to create large-scale environmental benefits by implementing market-based solutions that leverage key market actors. With this vision in mind, Mr. Cohen has grown Energy Solutions from a one-person company in his house to a nationwide energy services firm with over 200 mission-driven professionals. As Energy Solutions has scaled, the company's mission and Sam's vision for company culture have endured.

Professional Experience

Energy Solutions
1995 – Present

President, 1995–present

- Guides the strategic direction and growth of Energy Solutions.
- Grew Energy Solutions from a one-person company to a comprehensive energy services firm with 200+ mission-driven professionals.
- Led Energy Solutions to be a recognized thought leader and service provider for upstream/midstream equipment incentive programs, codes and standards advocacy programs, emerging technology demonstrations and commercialization, and information systems for the energy services industry.
- Featured in a June 2012 newsletter article from ZweigWhite titled, Maintaining Firm Culture – Ongoing Effort.
- Initial program design, launch, implementation, and ongoing enhancements to the upstream distributor incentive program model that has outperformed downstream models on average by 900 percent in the HVAC market.
- Primary implementation consultant for Pacific Gas and Electric's 1998-2000 Express Efficiency program, which was then adopted – and is still implemented – statewide in California by all four investor owned utilities.
- Helped develop some of the early small commercial direct install programs and then trained two non-profits that continue to provide these services.

ASWB Engineering
2013 – 2014

Secretary, 2013–2014
Director, 2013–2014

**Barakat &
Chamberlin**
1992 – 1995

Associate, 1992–1995

- Specialized in DSM program design and implementation.
- Managed the company's technology database and was the firm's specialist in lighting, motors, and adjustable speed drives.

**Lawrence Berkeley
National Laboratory**
1989 – 1992

Senior Research Associate, 1989–1992

- Evaluated energy savings and economics of retrofitting single-family homes, incorporating environmental externalities into utility planning and DSM bidding.

Education

University of California, Berkeley

Master of Science, Energy and Resources, 1991.

University of California, Berkeley

Bachelor of Science, Mechanical Engineering. 1988.



Sheryl Bunn

Energy Solutions Senior Director of Operations

Sheryl Bunn is a Senior Director in Business Operations at Energy Solutions, where she leads the Business Operations team who support company growth, strategic planning, operational efficiencies, project risk management, data analytics, budgeting and forecasting. She is currently spear-heading the planning of a significant ERP improvement initiative, evaluating controls and processes and supporting the Business Operations leaders who oversee Corporate Operations & Insights, Corporate Services & Systems and Corporate Administrative & Facilities Services. Ms. Bunn has over 10 years' experience in energy efficiency and carbon mitigation projects and 20+ years working in environment conservation and sustainability. Additionally, she has 9 years' experience managing technology solutions projects. She has been a director and senior director for over 15 years.

Additional points:

- Rebuilding Center Board Chair January 2021 – Present
- PMP Certified (2015 through 2024)
- PMI Agile Project Manager (2018)
- ITIL Foundation Certification (2017)
- Komen Race for the Cure Volunteer

Professional Experience

- | | |
|---|--|
| Energy Solutions
Start – 8/28/23 | Senior Director of Operations, Business Solutions <ul style="list-style-type: none">• Lead and coach Operations teams• Oversee key business initiatives• Review and develop policies and procedures related to business operations and organizational objectives• Oversee and implement risk management processes• Manage operations and administrative budgets and forecasting |
| CorSource
Technology
Group
2020 – 2023 | Senior Director Technology Solutions <ul style="list-style-type: none">• Led the technology solutions division and provided direct support to the President and CEO on strategy and operationalization of initiatives• Developed and executed on strategic initiatives, leading to the successful process improvements to financial forecasting, employee engagement, contract management, scoping and estimating, client satisfaction and internal status and health tracking and reporting.• Responsible for division-level resourcing, scoping, estimating, contracts, hiring and onboarding processes, performance management, status reporting and client relations for 8 clients.• Supported 1-2 sales and client engagements per month |
| North Highland
World Wide
Consulting Svcs
2018 - 2020 | Portfolio Director & Process Improvement Manager (Nike Global Analytics) <ul style="list-style-type: none">• Managed the global portfolio for over 50 teams and 300 workstreams across 5 geographies• Aligned key strategic areas of focus to quarterly work planning• Organized, trained, and coached 50 teams on agile ways of working to increase productivity and value outputs.• Onboarded and integrated dozens of teams into an 'incremental' planning and delivery model. |

- Responsible for all portfolio reporting and significantly advanced manual reporting process to automated processes

Consulting Roles
2015 - 2018

Expert Program Manager/Initiative Lead, Key Strategic Advisor, Chief of staff (Nike)

- As a management consultant, I held multiple roles and oversaw, implemented several significant projects.
- Optimized vendor and contract management practices and purchase of hardware, software, telecom, and discretionary spending to successfully identify \$2M in savings opportunities including security, collaboration, and enterprise suite software solutions.
- Created and management of detailed project scopes, schedules, and budgets for over 15 projects spanning multiple countries including:
 - ITSM/Service Management implementation
 - Server divestitures, consolidation, and improved security processes
 - Global Operating System Upgrades for 30,000+ users
 - Global Sharepoint divestiture and migration project in collaboration with Microsoft Team

ClearResult
2012-2014

Senior Director

- Accountable for staff management, program management and budget management for 100 employees and contract management and client engagement for dozens of projects.
- Responsible for the performance of cross-matrixed teams and multiple stakeholder teams that included clients, third party vendors and internal team members.
- Directed and mentored analyst staff to conduct analytic methodology and data quality assurance to evaluate program performance in achieving energy savings targets.
- Provided significant support for business development and program design and regularly engaged with a diverse set of stakeholders to understand key market conditions impacting implementation.

Ecova
2007 - 2011

Director

- Lead large project teams across 4 states, to successfully deliver projects on time and on budget, utilizing comprehensive work plans, schedules, and milestones.
- Responsible for financial management, budgeting and forecasting to successfully meet profitability goals year over year.
- Negotiated all new contracts and budgets and managed all scope, schedule and cost changes with clients and third-party vendors.
- Implemented project evaluations, data analysis and Six Sigma process reviews to evaluate program performance and resolve performance issues.

Education

- **Portland State University**
Master's Public Administration: International Program Management (2005 courses completed)
- Bachelor of Arts (1995)