

## **ATTACHMENT C**

# MARGUERITE L. MILLER

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## EXPERIENCE SUMMARY

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Mrs. Miller is a licensed Certified Public Accountant (CPA) who possesses more than 20 years of energy and finance related experience. Mrs. Miller has specialized experience in managing wholesale energy transactions in multiple interconnections located across the United States since the beginning stages of energy deregulation. Mrs. Miller is experienced with all aspects of wholesale electricity procurement for both direct customers and energy supply companies of all sizes. Mrs. Miller has extensive experience with all the technical requirements of operating in deregulated interconnections, including the bidding and scheduling of wholesale load, customer settlement, and EDI transmission requirements.

## ECM

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*Energy Management Services*

*Buffalo, NY 2007-Present*

### **Vice-President, Energy Procurement Operations**

- Currently manages the wholesale procurement operations for multiple customers in the following interconnections: PJM, NYISO and ERCOT, with limited customers in NEISO.
- Operations cover the following activities:
  - Bidding and Scheduling of Wholesale Energy and Ancillary Services
  - Bidding of ICAP and UCAP Requirements
  - Bidding and Scheduling of Transmission Obligations
  - Bidding of Financial Transmission Rights (FTR's) and Auction Revenue Rights (ARR's)
  - Customer Settlements with the respective ISO's
  - Wholesale Load Reconciliation
  - Credit Requirements and Obligations with the respective ISO's
  - Management of customer participation in Emergency Demand Response programs of the respective ISO's
  - Trading of Derivative Instruments for Risk Management Purposes
  - Negotiate and schedule bilateral transactions for customers.
- Manages the preparation of reporting to disaggregate meter data for monthly cost reporting and/or billing functions for clients.
- Manages application process to Interconnection, applicable Transmission Owners and State Public Utility Commissions.
- Manages the EDI transmissions between the Transmission Owners and Clients.
- Manages all financial reporting, budget preparation and analysis services provided to customers and prospective customers.
- Manages a team of engineers and financial specialists trained to perform the above referenced wholesale transactions.
- A sample of clients include: Credit Suisse, (USA), Inc, Morgan Stanley, Time Warner, Inc., The Trane Company, HSBC Bank (USA), Inc., Partners Health Care.

## FLUENT ENERGY CORPORATION

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*Energy Management Services*

*Buffalo, NY 2000 - 2007*

### **Manager/ Senior Financial Analyst**

- Successfully performed and managed all the wholesale energy procurement functions listed under the ECM description of services above. Seven years of direct hands on experience with the specific functions involved in procuring wholesale electricity and natural gas.
- Successfully worked on and completed the development of a proprietary database system to manage wholesale costs, reporting and EDI data for wholesale energy transactions.

- Worked with a team of engineers to develop a bidding and scheduling program for bidding wholesale electricity into the New York Interconnection.
- A sample of clients include: Credit Suisse (USA), Inc., Liberty Power Corp., County of Erie, SUNY at Buffalo, Kaleida Health, 3M, Wegmans, Pro Energy Development.

**LUMSDEN & MCCORMICK, LLC/SELIGMAN SUNSHINE & COMPANY**

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*Certified Public Accountants*

*Buffalo, NY 1990 - 2000*

**Certified Public Accountant (CPA)/ Manager/Senior Accountant**

- Senior Audit Accountant for Buffalo's largest CPA firm. Specialized in Commercial Audits of large publicly traded companies and non-profit organizations.

**EDUCATION**

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**Yale University, New Haven, Connecticut, Bachelor of Arts – 1982, Graduated Cum Laude**

**State University of New York at Buffalo (SUNY), Masters of Business – Accounting and Finance – 1988**

REFERENCES FURNISHED UPON REQUEST

# EUGENE GARCIA

22 Woodlea Road, North Andover, MA 01845 – (PH) 978-974-9974 email: egarcia@ecmcompany.com

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## EXPERIENCE SUMMARY

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Mr. Garcia possesses more than 20 years of energy, engineering and finance related experience. He has provided operational and strategic planning to meet the needs of internal business requirements as well as those of external customers. His technical experience includes the design, procurement, and production of energy and its' related systems. His market knowledge is derived from both domestic and international experiences related to the deregulation and privatization trends surrounding the energy industry.

### ECM

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*Energy Management Services*

N. Andover, MA 2003-Present

#### **President**

- ECM provides energy management for all phases of an assets' life cycle, development/purchase through on-going operations, and ending with a redevelopment/sale. Services are focused on improving the energy risk/reward profile for an owner's specific business goals and philosophy. Value is maximized by providing high level strategic planning and at the same time, the skills to dive into the details of implementation and on-going management.
- ECM focuses on Energy Commodity Procurement (both retail and wholesale), Risk Management, Rate Analysis, and Central Plant Financial Analysis. ECM's efforts have resulted in individual Customers saving millions of dollars on an annual basis.
- Sample Customers include: Morgan Stanley, Credit Suisse, SL Green Realty Corp., State Street Bank, Tufts Health Plan, Avon and The Trane Corporation.

### SOURCEONE

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*Energy Outsourcing Solutions Provider for Mission Critical Facilities*

Boston, MA 1997-2003

#### **Executive Vice President – Operations**

- Successfully managed operations for an interdisciplinary senior management team – engineers, finance, IT – providing outsourced energy solutions on a national basis. Responsible for resource planning, customer retention, profitability and network cross selling. Maintained 100% customer retention, stabilized gross operating margins at 50%, and averaged over \$300K in annual sales revenue.
- Demonstrated success in providing creative engineering design/energy solutions, meeting tight deadlines and ensuring profitability for both mission critical and base building operations (over 100 million square feet), inclusive of utility T&D, back-up systems, CHP and “inside the fence” cogeneration.
- Leveraging customer-centric philosophy, developed integrated energy management products, and scalable procedures and training systems, including: Commodity (Electric/Natural Gas) Procurement, Infrastructure Development (central plant/on-site generation), Energy Master Planning, Due Diligence, and Metering/Billing integration.
- Secured savings for diverse segment customer base – \$600K+ annual commodity procurement for high tech manufacturer (commodity procurement services averaged 10% savings across portfolio), \$300K+ annual utility rate negotiations for commercial real estate, \$1M annual electric leakage and tenant rebilling for a data center – focusing on mission critical facilities and Class “A” real-estate. 2002 customer savings exceeded \$10 million.
- Provided internal as well as external strategic business direction by leveraging market knowledge related to deregulation trends, customer needs, and expected financial returns.
- Co-founded company and served as secretary on Board of Directors.
- Clients include: SL Green, Durst Organization, Taconic Investment Partners, Biogen, Novartis, Merck, Sun Microsystems, Level 3, and specific real estate arms of Goldman Sachs and Morgan Stanley.

R.W. BECK

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*International Power Consultant*

Framingham, MA 1994-1997

**Consulting Engineer / Internal Business Strategist**

- Developed internal competitive market analysis within the power industry. Leveraging deregulation and privatization experiences from around the world: South America, Middle East, and North America.
- Assisted in the development of plans for potential new business ventures and planned partnerships with entities such as American Express and AT&T.
- Reduced client risk via technical, contractual, and financial due diligence for power infrastructure projects around the world. Responsible for review of multiple integrated contracts: power purchase agreements, fuel, steam, and O&M. Developed project proformas with capital cost, schedule, contracts, and technical performance components.
- Project management and conceptual engineering for both central plant and distributed generation facilities; consistently met deadlines and reduced project cost by providing alternative balance of plant designs for turbine, reciprocating engine and fuel cell technology.

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**PUBLIC FACILITIES DEPARTMENT**

*City of Boston, Economic Development Department*

Boston, MA 1993-1994

**Business Consulting Manager**

- Developed and launched a small-business consulting group, responsible for the strategy and the implementation for the services of the group.
- Provided finance, marketing, and operational expertise for over a dozen businesses – by maximizing internal government and external private resources – ranging from supermarkets to high-tech chip manufacturers.
- Streamlined internal government process and procedures, ultimately expediting the delivery of services to end-users.

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**SYSKA & HENNESSY**

*MEP Engineering Design Firm*

New York, NY 1988-1991

**HVAC Design Engineer / CAD Supervisor**

- Responsible for design, field inspection, and project management related to HVAC capital projects. Consistently met project budgets and deadlines while providing excellent client service.
- Initiated one of the first Computer Aided Design ("CAD") departments; responsible for creating standards, managing workload, and overall QA/QC. Within the first year, this newly formed group developed company wide standards and grew revenues to \$1M+.
- Integral part of task force dedicated to improving client satisfaction, increasing profitability, and retaining quality employees.

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**EDUCATION**

Boston University, BS Mechanical Engineering - 1988

Northeastern University, MBA, Concentration in Finance - 1993

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**INTERESTS**

Bilingual: English – Spanish,

Foreign travel and business experience in the Europe, South America, and Middle East

REFERENCES FURNISHED UPON REQUEST

## **Anthony J. Trocchia, P.E.**

### **Senior Vice President**

Corporate Account Services – Jones Lang LaSalle Americas, Inc.

### **Experience**

Mr. Trocchia has over 25 years experience in the real estate and engineering field. His responsibilities have included management of large organizations; design, construction and operations of building systems and district cooling and heating systems. He also has extensive experience in energy conservation and energy procurement.

### **Senior Vice President, Account Manager – Jones Lang LaSalle**

As Account Manager, Mr. Trocchia is responsible for providing property management services for HSBC: a 9 million sq. ft portfolio of commercial and retail buildings in several US markets. Mr. Trocchia's responsibilities include budget management, customer satisfaction, capital improvements and energy management.

Mr. Trocchia developed HSBC's wholesale electricity procurement program in New York State back in 2004 and led HSBC to be the first Direct Wholesale Customer in New York City with Consolidated Edison Company of New York. Mr. Trocchia is intimately familiar with all the processes of wholesale electricity procurement and has been active in teaching groups about wholesale procurement with such agencies as BOMA (Building Owners and Managers Association).

### **Northeast Division Engineer – Jones Lang LaSalle**

As Division Engineer for the Northeast, Mr. Trocchia was responsible for providing technical expertise and support for the startup of new assignments, new business initiatives, major renovation projects, troubleshooting and value engineering.

Mr. Trocchia also assured the implementation of programs and systems within the Division through training and the application of the annual standards compliance audit. In addition, Mr. Trocchia assisted in the internal development and external recruiting of technical personnel.

### **Other Positions**

Prior to joining Jones Lang LaSalle, Mr. Trocchia held positions of increasing responsibility at Columbia University's Facilities Management Department. In his latest position, Mr. Trocchia was Assistant Vice President for Facilities Operations overseeing approximately 400 personnel including a \$30 million dollar operating budget and a \$25 million capital budget for infrastructure projects. He was responsible for the development and construction of the campus' infrastructure to support over 60 buildings which included data centers, critical research, and rare book storage areas;

managed numerous building system upgrades; energy management and utilities purchasing; and daily operations of all building systems. Mr. Trocchia has also held a position of Engineer with Stone and Webster Engineering Corp. where his duties included design of building systems and power plants.

### **Education and Affiliations**

Mr. Trocchia holds a Bachelor of Science degree and a Master of Business Administration degree from Columbia University. He is an active member of the Building Owners and Managers Association, and former member of the National Society of Professional Engineers, the American Society of Heating and Refrigerating Engineers, and the International District Energy Association (IDEA). Mr. Trocchia is a past chair of IDEA's cooling conference.. He has authored and presented papers on technical topics and has participated in many panel discussions on de-regulation of electric markets and emergency preparedness.

## **Bret Olson CEM, LEED AP**

### **Energy and Sustainability Manager**

Corporate Account Services – Jones Lang LaSalle Americas, Inc.

#### **Experience**

Mr. Olson has 6 years experience in the real estate, energy management and engineering field. His responsibilities have included energy and procurement management for large portfolio's and individual buildings.

#### **Sustainability and Energy Manager – Jones Lang LaSalle**

As Sustainability and Energy Manager, Mr. Olson is responsible for providing energy management services for HSBC: a 9 million sq. ft portfolio of commercial and retail buildings in several US markets. Mr. Olsons responsibilities include budget management, energy management, energy procurement, water use management.

#### **Sustainability and Energy Manager – Jones Lang LaSalle**

As Sustainability and Energy Manager, Mr. Olson is responsible for providing energy management services for Bank of America: a 100 million sq. ft portfolio of commercial and retail buildings in several US markets. Mr. Olsons responsibilities include budget management, energy management, energy procurement, water use management. During Mr. Olson's time at Bank of America he assisted in procuring over \$400,000,000 in electricity and natural gas for bank of America in various deregulated markets, New York, Illinois, New Jersey, Texas, Connecticut, Maryland, Delaware. Further, Mr. Olson led initiatives that led directly to over \$2,000,000 in energy savings.

#### **Energy Engineer – Sieben Energy Associates**

As energy engineer, Mr. Olson was responsible for providing energy audits, building commissioning, LEED consulting and energy analysis for commercial buildings, hospitals, museums, large multi-residential buildings and shopping malls. Mr. Olson also led energy procurement for over 25 clients and procured over \$200,000,000 in electricity and natural gas in markets of New York, Illinois, New Jersey, Texas, Connecticut, Maryland, Delaware, Ohio and California.

#### **Education and Affiliations**

Mr. Olson holds a Bachelor of Science in Mechanical Engineering from Rose-Hulman Institute of Technology. He is an active member of the Association of Energy Engineers and the USGBC.