# REFERENCES

RFP-5367-24-KF

 Date: March 13-22, 2024

Solicitation: Electric Vehicle Carshare Feasibility and Readiness Study

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| Firm: Felsburg Holt & Ullevig, 6400 S Fiddlers Green Cir Ste 1500 | Greenwood Village, CO 80111**Reference: Michael King, Assistant Director of Electrification & Energy** **Client: CDOT** **Phone:** 732-690-2049 **Email:** michael.king@state.co.us **Address:** 2829 W. Howard Place | Denver CO 80204 **Project Timeline: December 2020 - September 2021** **Project Budget: $106,276** **Final Project Cost: $106,271****Project: Statewide CDOT Transit ZEV Roadmap**FHU led the development of the Transit ZEV Roadmap, which included data collection, assessment of the national landscape and trends, roles of utilities in ZEV adoption, policy, and programmatic recommendations, as well as financial modeling to support Colorado’s greenhouse gas emissions reduction and transit electrification goals. The work included an extensive stakeholder engagement effort to engage all transit agencies in Colorado, including those in urban, rural, and resort communities. The Transit ZEV Roadmap charted a strategic course for transit agencies across the state to transition to alternative fuel vehicles to help meet the goals of House Bill 19-1261, which identifies 100 ZEV transit vehicles by 2030 and full fleet transition by 2050.Key project elements included an assessment of state and national trends, an inventory and assessment of all transit agency fleets in Colorado, identification of goals and strategic actions, and development of a financial model to quantify the cost of transitioning to ZEVs. The financial model is a working tool that CDOT uses to help transit agencies across the state plan for their ZEV transition and to understand the incremental cost difference compared to maintaining the status quo.**Questions:**1. How would you rate the consultant's ability to deliver comprehensive and well-written reports or presentations that were data-driven? I rate the consultants very highly based on my experience working with them on a comprehensive, data-driven statewide planning effort called the Colorado ZEV Transit Roadmap.
2. Did the consultant require extensive guidance or supervision from your project team or were they able to work independently and efficiently? The consultants demonstrated the ability to accept guidance and feedback from the CDOT team, work independently to implement recommendations or develop new content, and then return to the CDOT team and relevant stakeholders for further input and feedback.
3. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project? I felt that the consultants were approachable and welcoming in their communication style with outside stakeholders while being direct and action oriented with the CDOT project management team.
4. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed? Our project did encounter several unexpected challenges and in all cases the consultant team assessed the situation, developed multiple potential solutions, and then worked with the CDOT team to select the best option and implement it. The final product was actually strengthened as a result of these unexpected challenges.
5. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables? Yes, the consultant team was very flexible and adaptable in the face of both external challenges and shifting priorities within CDOT. They kept us on task even when other priorities were competing for our attention.
6. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project? The consultants are excellent collaborators and very skilled at meeting different types of stakeholders where they are rather than assuming a particular level of knowledge or perspective.
7. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations? Yes, the consultant team clearly added value to our project both in developing and implementing the concept.
8. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract? Yes, on multiple occasions the consultant team went above and beyond the minimum SOW requirements and improved the final product in the process.
9. Would you recommend this consultant for similar projects in the future based on your experience working with them? Yes, I would strongly recommend working with this consultant on a project and I expect to do so again myself in the near future.
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| Firm: Felsburg Holt & Ullevig, 6400 S Fiddlers Green Cir Ste 1500 | Greenwood Village, CO 80111**Reference: Allan Smith**, procurement contact**Client:** **Colorado Department of Public Health and Environment** **Phone:** 303-692-2000, **Email:** allan.smith@state.co.us **Address:** 4300 Cherry Creek Drive South | Denver, CO 80246 **Project Timeline: February 2022 - May 2022** **Project Budget: $84,890** **Final Project Cost: $84,890**Steve McCannonMobile Sources Program DirectorAir Pollution Control DivisionP: (303) 692-3126Colorado Department of Public Health and Environment4300 Cherry Creek Drive South, Denver, CO 80246steve.mccannon@state.co.us | [www.colorado.gov/cdphe](https://urldefense.proofpoint.com/v2/url?u=http-3A__www.colorado.gov_cdphe&d=DwMFaQ&c=sdnEM9SRGFuMt5z5w3AhsPNahmNicq64TgF1JwNR0cs&r=9M5n0NgBgFtkNa0bWxTZKM7ui9fflyFAS9XY2zw4YsI&m=RTovOS0-ouO3xYsOg1hS36RkhRwaPNSjp6j0yVNXA24&s=05XKdVDJ0OYYBbEIgSt-1hPsvrMnqhOBxPl3dTT6xgs&e=)**Project: Colorado Department of Public Health and Environment Clean Fleet Enterprise 10-Year Plan**FHU collaborated with the Colorado Department of Public Health and Environment (CDPHE) to complete the Clean Fleet Enterprise (CFE) 10-Year Plan, the plan provides a framework to meet the business purpose of the CFE to improve air quality and reduce emissions by incentivizing, supporting, and accelerating the transition of motor vehicle fleets to clean technologies.The plan development process included completing a literature review, conducting stakeholder outreach and engagement, and identifying 10-Year Plan timelines. Other tasks included developing program portfolio recommendations, reviewing revenue projections, creating portfolio budgets, and making recommendations for the next steps for the CFE and CFE Board. The CFE Board unanimously adopted the plan in May 2022.**Questions:**My responses are below. Overall, FHU was excellent to work with. I was a pretty demanding customer, with a statutory deadline, with a completely new board I was managing. It was a stressful project and Rachel Ackerman and her team went so far above and beyond. Pardon the short answers, I’m heading out on a trip.1. How would you rate the consultant's ability to deliver comprehensive and well-written reports or presentations that were data-driven? FHU's ability to deliver comprehensive and well-written reports/presentations was excellent.
2. Did the consultant require extensive guidance or supervision from your project team, or were they able to work independently and efficiently? FHU did not need much direction and were driven and responsive. However, I had pretty strong ideas on what I wanted to see in the end product so me and my team were heavily involved. They accepted that and it turned out to be a great partnership where we could deploy everyone's subject matter expertise.
3. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project? We met bi-weekly at a minimum and FHU was very responsive to customer needs. Project Manager Rachel Ackerman and I had many one-on-one meetings on weekends and evenings when deliverables were being developed.
4. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed? There were no challenges beyond it being a challenging project with a hard end date due to statute.
5. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables? Yes, this was a fast-paced, short turnaround project and FHU delivered everything we needed on time and in a professional manner.
6. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project? Excellent.
7. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations? Yes, they did. Their knowledge of stakeholder engagement and their approach to running virtual meetings (this was during COVID) while gaining valuable feedback was critical. We would have had a more limited product if it was just our state team since we did not have the necessary skills in that space. My team gained new skills through the process.
8. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract? They did this the whole project. The timelines were statutorily driven and the new board of directors for the new Clean Fleet Enterprise were learning on the fly as well as staff. It was an incredibly challenging project.
9. Would you recommend this consultant for similar projects in the future based on your experience working with them? Absolutely. I enjoyed their approach, and they stepped up every time we asked.
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| Firm: Felsburg Holt & Ullevig, 6400 S Fiddlers Green Cir Ste 1500 | Greenwood Village, CO 80111**Reference: Curtis Nosal** **Client: NDOT** **Phone:** 402-479-~~3706~~ **4417****Email:** curtis.nosal@nebraska.gov **Address:** PO Box 94759 | Lincoln, NE 68509 **Project Timeline: December 2022 - September 2023** **Project Budget: $114,000** **Final Project Cost: $44,133****NDOT National Electric Vehicle Infrastructure Plan**Following authorization of the Infrastructure Investment and Jobs Act (IIJA), Nebraska and peer states were given an unprecedented timeline to prepare a National Electric Vehicle Infrastructure (NEVI) plan that included research of industry and best practices, robust engagement of disparate stakeholders and the public, legal review of options and limitations, and conformance to loosely defined equity-based outcomes. FHU supported the research and priority ranking methods proposed in the inaugural plan and provided a case study context of how the Justice40 outcome would be applied successfully. In 2022, the Directors and FHWA accepted the NDOT plan for further implementation to distribute project funding according to the documented procedures.**Questions:**1. How would you rate the consultant's ability to deliver comprehensive and well-written reports or presentations that were data-driven? The consultant team from FHU that I had was comprised of Jesse Poore and Marcus Coenen. I would rate their ability to deliver comprehensive and well-written reports as more than competent. They are professionals and do quality work.
2. Did the consultant require extensive guidance or supervision from your project team, or were they able to work independently and efficiently? As anyone who hires work out to consultants knows, this is always a difficult tightrope for any consultant: balancing the risk of having to do rework vs. constantly reaching out to the client for guidance. I would note that FHU’s team did a good job of walking that tightrope well.
3. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project? FHU was responsive throughout the entirety of the project. I’m not really sure what is desired by inquiring about their “communication style” though. I would simply say that they were professional, and I recommend them.
4. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed? With any project, obstacles and challenges arise. I would say that for the obstacles and challenges that arose for our project, FHU handled with aplomb.
5. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables? Yes. Very much so.
6. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project? This was one of FHU’s strengths and one of the reasons we wanted them a part of the project.
7. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations? Without question.
8. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract? It’s hard to recall at the moment. I would hate to say no and then later on recall an instance where they had. So, I will just reiterate that FHU did an excellent job for us.
9. Would you recommend this consultant for similar projects in the future based on your experience working with them? Yes, absolutely.
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| Firm: Iconergy, LTD, 1905 Sherman St Ste 1040 | Denver, CO 80203-1155*We are proud of the projects we have completed and the references we’ve gained. Please note that information in this entire section is* ***STRICTLY CONFIDENTIAL*** *and is not to be shared beyond the selection committee members who are directly responsible for evaluating the proposals. The City of Grand Junction may not distribute this information outside of those staff without Iconergy’s or IBE’s written permission.***Reference:** Beth Luther, Operation Administrator, Clear Creek County, (303) 679-2312, bluther@co.clear-creek.co.us **Project Dates:** April 2021-June 2022 **Starting/End Contract Cost:** Beginning Price: $44,670- Ending Price: $44,670Clear Creek County, Electric Vehicle Readiness Plan | Georgetown, COAs a longtime decarbonization partner for Clear Creek County (CCC), Iconergy was selected by the County to secure a DOLA grant from the State of Colorado to then produce CCC’s Electric Vehicle Readiness Plan. Iconergy provided electric vehicle plan development, analysis, consulting, and construction management services as part of CCC’s efforts to increase the adoption of EVs and infrastructure within its own fleet and within the county’s various stakeholder groups. Through the planning process, Iconergy engaged key stakeholders and assessed existing conditions within the County to inform and drive the roadmap for an electrified transportation future. Additionally, Iconergy provided a high-level telematics study for select fleet vehicles to provide insight into the feasibility of conversion to EV. Iconergy assisted the County in selecting the location where the chargers were to be installed and provided sensitivity pricing analysis to help the County select a fee structure that would balance the County’s goals of EV adoption, EV charger use, and revenue generation.**Questions:**1. How would you rate the consultant's ability to deliver comprehensive and well-written reports or presentations that were data-driven? This is what Iconergy excels at doing! Not only did they assist us with our readiness plan but also walked us through the setup of our first two electric-vehicles stations ensuring we didn’t pay $5k/month to Xcel Energy—yikes! Without their assistance and calibration of the stations, our return-on-investment would have taken much longer. Like Grand Junction we host I-70 and probably see the same amount of cars a day that we do. Our communities are almost obligated to being electric-vehicles ready. Iconergy understands the local demographics and statistics which drives their efficient and effective decision making. The team at Iconergy is extremely professional in the weekly OAC meetings ensure all questions are answered and there is consensus among all stakeholders. The best part of the OAC meetings is it leaves little-if-no punchlist at the end of a project. Iconergy has always arrived and presented to my County Commissioners with openness, approachability, and eagerness to answer any questions. This made my job exceptionally easy as after my brief introduction and background, Iconergy took it away and performed exceptionally.
2. Did the consultant require extensive guidance or supervision from your project team, or were they able to work independently and efficiently? Iconergy is and has always been the consultant, in the know. They do their research before arrival and demonstrate their abilities during Request-for-Proposal interviews. We have advertised several Request-for-Proposal projects and every time Iconergy responded, they were successful. Their professionalism and desire to execute solutions that benefit the client outshines the competition every time. We have also witnessed their review of prior projects noting some inefficiencies left behind by prior contractors. Once we completed our energy-performance-contract with Iconergy, I found myself sharing other projects the County was considering and would it be of interest to them. Not every project, but most, they were eager and up for the challenge. During the energy-performance-contract, the County initiated a courthouse remodel of the courts and probation wings. Iconergy bid the project and not only, performed amazingly but also provided the County and the State Judicial offices recommendations for energy savings in construction and assisted us in the grant application to Department of Local Affairs. I do not believe I have met many other consultants who would assist in a grant application 😊

And, yes, independently, and efficiently—every time. Being a small County, we do not have the staff to be on site for every project every day. Iconergy and their Construction Manager/General Contractor—Lee Macke, are strong self-driven leaders. They get the job done and if there are ANY questions, they report back as soon as possible to ensure client understanding and decision.1. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project? As noted earlier, the team at Iconergy are all friendly, approachable, and professional. I could ask the dumbest question and they would never laugh but support the understanding of the ask and clearly and concisely explain the answer in layman's terms as I am not an engineer or an energy expert. They love the art of education in what they do. They want the client to understand the process, and the repercussions of decisions, and ensure the client team understands all options in order to make strategic and sustainable decisions.

The best part is when they present to your leadership. You can see they are “hungry” to share their knowledge and solutions and ensure the leadership is happy. In short, they make you/I look really good in front of our bosses—if that helps.1. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed? As with any project in recent years, supply chain issues, rising construction costs, and labor shortages, all happen. This does not deter Iconergy. They do not stop hustling until the project is lined up. They are always diplomatically candid in their updates if there are challenges. One example, we have is, I had about 7 capital projects to complete and advertised Request-for-Proposals for all of them—twice-- and received no bidders. Iconergy offered to complete all the projects if they were bundled as one large capital project and have them completed in less than a year. I am sure you understand capital allocations and funding like ARPA. You plan and sometimes only have the funding one time before it is absorbed into another department’s project or the General Fund. Thanks to Iconergy, our team looked really insightful and efficient by combining the 7 (completely unrelated) projects into one contract and completed in less than one year. Iconergy is resourceful, connected in their industry, and financially savvy to find a solution that works for your leadership.
2. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables? Absolutely, Yes! Every time! We recently had the challenge of updating an HVAC system in an animal shelter which is not like replacing a furnace. It is extremely intense in the HVAC calculations or air circulation and exchanges---etc. By combining this HVAC update with a small ground mount solar, we became eligible for Department of Local Affairs renewable funding and it cut the County’s overall project cost in half! Again, Iconergy assisted with the grant application, the presentation to the Department of Local Affairs, and the communications with the County leadership. Once contracts were signed and work was to begin, we were alerted this specialized HVAC equipment had an 8 month lead time. Argh! This did not deter Iconergy’s excitement about the project and they immediately did as much pre-project work, calculations, and coordination with our power company—Xcel Energy, our generator maintenance company, and our electricians. Simultaneously, another Iconergy staff member was working on federal tax credits to be paid back to the County from the project since we added solar. Yes, challenges require flexibility and Iconergy was able to pivot and still make progress on the project.
3. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project? As mentioned before, I am not an engineer or energy consultant and I ask some probably, dumb questions. Iconergy is always engaged and respectful to any question or perspective no matter who is asking. As you can imagine, working at an animal shelter involves extremely passionate animal lovers with only the concern of the best for the animals. Construction projects in their facility create anxiety for them for fear something will go wrong, or an animal will be harmed. Again, Iconergy was able to communicate respectively with all stakeholders whether the question was from the County Commissioner or from the Shelter worker who cares for the animals. Everyone’s questions and ideas are important to Iconergy and they work very hard to comfort the client to the point that the client is not afraid to ask questions or share concerns. Just this simple, professional communication has created several successful projects with very happy staff.
4. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations? Absolutely! Every time! While working on the energy-performance-contract, they shared all their knowledge on ways to save money for the County and hence, their success in landing the court's remodel Request-for-Proposal. Their recommendations and insights alone gained the trust and support of not only the Judicial staff but also the architect, Anderson Hallas, who is well respected in their industry for courthouse remodels and design. Following an energy-performance-contract, there is a 3-year Measurement & Verification process to ensure that the client saves as much money as the consultant, Iconergy, predicts. During this time, of measurement---which actually the savings exceeded their prediction, their participation in State boards and committees, led them to recommend we apply for some state funding to offset the costs at our local Transfer Station (landfill). The grant was small at first---around $10k/year and has since grown to some $200k for new, more efficient equipment, thereby saving more money at the station.
5. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract? Yes, every time! I am thinking some of the examples I just shared in the first few questions would provide evidence of their overachiever-status! Albeit they have a more formal mission statement for the company, I would say this is really their mission. Always to go above and beyond and to find additional ways to assist the client with even more cost efficiencies and sustainability.
6. Would you recommend this consultant for similar projects in the future based on your experience working with them? I bet you can guess my answer. YES! If you are having trouble finding contractors or receiving bids or a capital project you believe you will never find the money for---call Iconergy! All of these things have happened to us and Iconergy always found a solution substantiated by data evidence, future projections, and a very happy leadership council. I am just one of many staff at Clear Creek County who worked with Iconergy and I am certain, all staff, are still satisfied with the Iconergy work proposal and solutions.

Whew! I hope that was enough! Ha-ha I completely understand vetting consultants. We do the same thing. Good luck in your decision-making and in your projects! You have my email and phone contact if you have questions. Thanks so much!Additional question: Thank you so much for offering such invaluable information and insight. The team Iconergy, LTD proposed for our RFP consists of Grant Stump, Natan Simhai, and Josh Decker. Additionally, the collaborating subcontractor is with IBE for community engagement, with team members Clayton Bartczak, Jennifer Schill, Josie Plaut, and Elicia Ratajczyk. Have you had the pleasure of working with any of these individuals? I have worked on several projects with all 3 of the Iconergy folks!  They are super-smart, insightful and amazing. |

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| Firm: Iconergy, LTD, 1905 Sherman St Ste 1040 | Denver, CO 80203-1155*We are proud of the projects we have completed and the references we’ve gained. Please note that information in this entire section is* ***STRICTLY CONFIDENTIAL*** *and is not to be shared beyond the selection committee members who are directly responsible for evaluating the proposals. The City of Grand Junction may not distribute this information outside of those staff without Iconergy’s or IBE’s written permission.***Reference:** Jason Jones, Southern Texas Campus Manager, ~~(432) 270-4072~~ changed or disconnected.**Budget:** $15,000 (Part of Larger Project) **Project Dates:** Late 2018-2019 During late 2018 and early 2019, Iconergy conducted analysis for converting a corporate fleet that was located on a Southern Texas mixed-use campus. The campus and fleet owner had a variety of light gas-powered vehicles in use on the campus – some for long durations of time but for short distances, others for longer trips that took place regularly but not constantly, and yet others that would be used periodically in any number of ways. Iconergy’s premise was that the fleet owner could save a large amount of money and greenhouse gases by converting to an EV fleet. Iconergy analyzed each vehicle for replacement by an EV including appropriateness of use/function, meeting needs not currently met by the existing fleet (e.g. would a gas-powered sedan be best replaced by an EV SUV), overall cost and GHG savings. EV charging strategies and tactics include charging levels of future EV charging stations, impact on utility metering, cost and types of EV chargers, impact on campus traffic/parking, and other corporate fleet and campus operations.**Questions:**1. n/a
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| Firm: Iconergy, LTD, 1905 Sherman St Ste 1040 | Denver, CO 80203-1155*We are proud of the projects we have completed and the references we’ve gained. Please note that information in this entire section is* ***STRICTLY CONFIDENTIAL*** *and is not to be shared beyond the selection committee members who are directly responsible for evaluating the proposals. The City of Grand Junction may not distribute this information outside of those staff without Iconergy’s or IBE’s written permission.***Reference:** Lisa Knoblauch, Sustainability Program Manager, (303) 651- 8403, lisa.knoblauch@longmontcolorado.gov **Project Dates:** January - July 2020 **City of Longmont, Climate Action & Just Transitions | Longmont, CO**In early 2020, IBE facilitated the City of Longmont’s Climate Action Task Force and Just Transitions Plan Committee on an accelerated timeline to meet the urgency of a resolution passed by City Council that declared a climate emergency. IBE collaborated with City Sustainability staff to guide the two groups through the process of developing equitable climate action recommendations in response to the resolution.IBE facilitated the entire process – incorporating a credible just transitions, social justice, and equity lens – including community engagement activities specifically focused on historically underrepresented communities. IBE designed and delivered the public outreach strategy, messaging and collateral, community events, and a bilingual public-facing questionnaire that we analyzed (356 responses) to inform working group recommendations. IBE also structured and managed the process for developing and reviewing recommendations, leading the group toward consensus for recommendations to the Council.**Questions:**1. How would you rate the consultant's ability to deliver comprehensive and well-written reports or presentations that were data-driven?
2. Did the consultant require extensive guidance or supervision from your project team, or were they able to work independently and efficiently?
3. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project?
4. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed?
5. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables?
6. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project?
7. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations?
8. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract?
9. Would you recommend this consultant for similar projects in the future based on your experience working with them?

Yes – we did work with IBE on our climate action recommendations report and would highly recommend them. They are very knowledgeable and had a great approach to equity and community engagement (albeit COVID hit shortly after we got going). |

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2. Did the consultant require extensive guidance or supervision from your project team, or were they able to work independently and efficiently?
3. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project?
4. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed?
5. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables?
6. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project?
7. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations?
8. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract?
9. Would you recommend this consultant for similar projects in the future based on your experience working with them?

3/14/24 emailed questions. 2nd email 3/22 |

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| Firm: movmi Shared Transportation Services, Inc., 5633 Nickerson Rd | Sechelt, BC/Canada V7Z 0M6Client: Capital District Transportation Authority. Albany, NY, USAPrimary Contact: Jonathan Scherzer, Director of Business Development. Jonathans@cdta.org+1 518 437-6165Project: **Develop EV carsharing playbook for Public Agencies covering Launch,****Evaluation and Growth phases,** Apr 2023 – Ongoing**Problem Statement:** To create a playbook for public agencies (similar to the CDTA) to integrate and manage station-based EV carsharing services through operational phases of launch, evaluation, and growth.**Questions:**1. How would you rate the consultant's ability to deliver comprehensive and well-written reports or presentations that were data-driven? THEY HAVE DONE A GOOD JOB, THIS IS A FIRST OF ITS KIND PROJECT SO THEY HAD PLAYBOOK EXPERIENCE BUT TO INCLUDE THE VENDOR AND TRANSIT AGENCY WAS THE CORE DIFFERENCE. IF ANYTHING, MAYBE A BIT TOO TECHNICAL.
2. Did the consultant require extensive guidance or supervision from your project team, or were they able to work independently and efficiently? WORKED INDEPENDENTLY AND EFFICIENTLY.
3. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project? THEY ARE DETAIL-ORIENTED AND PATIENT. THEY USE EMAIL AS WE ARE SEPARATED BY MOIST OF THE CONTINENT BUT VIRTUAL AS WELL. STRAIGHT FORWARD WITH THE END GOAL IN MIND.
4. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed? JUST TRYING TO CREATE SOMETHING NEW SO THE FIRST ONE OR TWO CHAPTERS HELPED IDENTIFY NEEDS.
5. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables? YES, OUR PROJECT GOT DELAYED ABOUT 6 MONTHS SO THEY WERE FLEXIBLE AND WE UPDATED THE DELIVERABLE AS WELL.
6. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project? THEY HAVE BEEN GREAT TO WORK WITH, NO COMPLAINTS ON COLLABORATION.
7. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations? THEY HAVE BEEN GREAT TO WORK WITH, NO COMPLAINTS ON COLLABORATION.
8. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract? THEIR PATIENT IN PAYMENTS, ABILITY TO BE FLEXIBLE ON THE DELIVERABLE AND FUN TO WORK WITH.
9. Would you recommend this consultant for similar projects in the future based on your experience working with them? YES.
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| Firm: movmi Shared Transportation Services, Inc., 5633 Nickerson Rd | Sechelt, BC/Canada V7Z 0M6Client: Ministry of Transportation. LuxembourgPrimary Contact: Christophe Reuter, First Government Advisor.Christophe.Reuter@mob.etat.lu (+ 352) 247-84971Project: **Pragmatic Strategy for Carsharing in Luxembourg,**Jun 2021 – Dec 2021**Problem statement:** To develop recommendations for regulations to support the expansion of carsharing across the entire State of Luxembourg, which includes 100 municipalities and many rural areas.**Questions:**1. How would you rate the consultant's ability to deliver comprehensive and well-written reports or presentations that were data-driven? Highly professional, impeccable.
2. Did the consultant require extensive guidance or supervision from your project team, or were they able to work independently and efficiently? They found the perfect balance between putting their expertise to use independently and asking us questions to make sure they were working to the client’s needs.
3. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project? Efficient.
4. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed? No challenges. We were impressed by both their deep expertise and the way of conducting the project.
5. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables? Yes, but the offer they had made to us was so realistic already that not many adjustments were necessary thereafter.
6. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project? Highly profession all pleasant and constructive.
7. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations? Invaluable value. We sought global best practice (we are based in Luxembourg, Europe) and got it from movmi.
8. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract? Yes, several.
9. Would you recommend this consultant for similar projects in the future based on your experience working with them? They will be our first choice if we have another project related to carsharing.

We were extremely pleased with movmi’s services and definitely recommend them.  |

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| Firm: movmi Shared Transportation Services, Inc., 5633 Nickerson Rd | Sechelt, BC/Canada V7Z 0M6Client: City of Vancouver. Vancouver, BC, CanadaPrimary Contact: Billy Dong (P. Eng), Parking Engineer, Parking Management Branch.billy.dong@vancouver.ca +1 604 829-9204Project: **Policy recommendations for electrification of carshare in City of Vancouver,** Jun 2021 - Aug 2021**Problem statement:** To develop recommendations for a carshare parking discount strategy that incentivizes the shift towards zero emission fleets both for the existing local providers (Modo, Evo) and potential new entrants.**Questions:**1. How would you rate the consultant's ability to deliver comprehensive and well-written reports or presentations that were data-driven? Great we had a clear concise report with graphics and tables of data and research for the project.
2. Did the consultant require extensive guidance or supervision from your project team, or were they able to work independently and efficiently? We had a few online meetings; the consultant was very responsive to emails and changes to the analysis.
3. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project? Good with asking questions, resolved issues via emails. Meetings only when needed.
4. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed? No issues.
5. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables? Yes, was reasonable in making changes to assumptions to analysis when we provided new data sets.
6. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project? Great communication skills and responsive. Understood the project and objectives well and the big picture.
7. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations? Yes, we were able to add some new changes to our bylaws and use the report to supplement this.
8. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract? Was pretty flexible with doing a little bit of additional analysis and keeping work on the budget.
9. Would you recommend this consultant for similar projects in the future based on your experience working with them? Yes.
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| Firm: movmi Shared Transportation Services, Inc., 5633 Nickerson Rd | Sechelt, BC/Canada V7Z 0M6Client: City of Moncton. Moncton, NB, CanadaPrimary Contact: Tim Moreman, Director - Environmental Planning and Management.tim.moerman@moncton.ca +1 506 859-2660Project: **Carsharing Viability Assessment for Moncton,** Sep 2023 - Oct 2023**Problem statement:** To understand the cost implications of funding a carshare service in the city until the operations reach self-funding levels.3/18/24 During a phone conversation with Tim, it was clarified that the contract was primarily with Pam Cooley from Choosethical Ventures, Inc., and all interactions were with her. Tim was unaware that movmi was a subcontractor until final reports were provided. However, he found the deliverables compared favorably to those of other consultants and felt that movmi added value to the project.Tim, whose background is in Urban Planning, expressed a perspective that prioritizes carshare over electric vehicles (EVs), considering EVs as secondary due to potential charging issues. He emphasized the importance of efficient carshare booking, noting that customers often wait for cars to be returned. Tim agreed to provide responses to reference questions and share his report. He remains open to further communication for any additional inquiries or discussions.3/20/24 As preface, we engaged ChooseEthicals Ventures (Pam Cooley’s consultancy) for this work; Pam’s company was chosen because of her prior experience actually founding a car-share company in Halifax, which was subsequently sold to Communauto. Pam either partnered with or subcontracted to Movmi for parts of the work. It is difficult to distinguish which work came from Choosethical and which came from Movmi.Good luck with your study! If you like, I can also dig up the study itself as well as an internal bit of background research that we did around car-sharing. Might be helpful to your team to see how we went about it.**Questions:**1. How would you rate the consultant's ability to deliver comprehensive and well-written reports or presentations that were data-driven? The report we received was well-written and drew clearly on data.
2. Did the consultant require extensive guidance or supervision from your project team, or were they able to work independently and efficiently? We did not deal directly with Movmi; we engaged Choosethical Ventures who subcontracted some of the work to Movmi. All of our contact was with Pam Cooley of Choosethical Ventures, who rates very highly on this question.
3. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project? We did not deal directly with Movmi; we engaged Choosethical Ventures who subcontracted some of the work to Movmi. All of our contact was with Pam Cooley of Choosethical Ventures, who rates very highly on this question.
4. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed? There were no significant challenges or obstacles.
5. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables? We did not deal directly with Movmi; we engaged Choosethical Ventures who subcontracted some of the work to Movmi. All of our contact was with Pam Cooley of Choosethical Ventures, who rates very high on this question.
6. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project? We did not deal directly with Movmi; we engaged Choosethical Ventures who subcontracted some of the work to Movmi. All of our contact was with Pam Cooley of Choosethical Ventures, who rates very high on this question.
7. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations? This report added significant value to the project.
8. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract? We did not deal directly with Movmi; we engaged Choosethical Ventures who subcontracted some of the work to Movmi. All of our contact was with Pam Cooley of Choosethical Ventures, who rates very high on this question.
9. Would you recommend this consultant for similar projects in the future based on your experience working with them? We did not deal directly with Movmi; we engaged Choosethical Ventures who subcontracted some of the work to Movmi. All of our contact was with Pam Cooley of Choosethical Ventures, who rates very high on this question.
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| Firm: movmi Shared Transportation Services, Inc., 5633 Nickerson Rd | Sechelt, BC/Canada V7Z 0M6Client: TransLink. Metro Vancouver Region, BC, CanadaPrimary Contact: Niklas Kviselius, Sr. Manager New Mobility. niklas.kviselius@TransLink.ca +1604 218-7528Project: **Shared Mobility Pilot - Phase 1,** Oct 2019 – Aug 2020**Problem statement:** To create a pilot program that offers seamless access to public transit, carshare (Evo, Modo), and bikeshare for work-related travel.**Questions:**1. How would you rate the consultant's ability to deliver comprehensive and well-written reports or presentations that were data-driven? High
2. Did the consultant require extensive guidance or supervision from your project team, or were they able to work independently and efficiently? They managed to work independently and at the same time knew when to check in with us as customers.
3. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project? Worked very well remotely with effective Zoom/Teams meetings and courteous and speedy communication.
4. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed? Some members had to leave for family emergencies and some changed their roles, but it was always handled smoothly by CEO Sandra P.
5. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables? Yes – the project was intense and changed scope several times and the team handled that great.
6. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project? Very good.
7. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations? Yes, they did. Especially the founder Sandra has a background in shared mobility, and she could apply her experience very well to help make decisions in the project.
8. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract? I would say that they worked well outside normal work hours if needed, and also had an “all hands-on deck” approach when needed in sprints.
9. Would you recommend this consultant for similar projects in the future based on your experience working with them? Yes
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| Firm: movmi Shared Transportation Services, Inc., 5633 Nickerson Rd | Sechelt, BC/Canada V7Z 0M6Client: ReachNow (Carsharing by BMW). Seattle, Portland, New York (US)Primary Contact: Steve Banfield. sbanfield@gmail.com +1 206-265-2762Project: **Operational planning for mixed fleet free-floating carshare/ridehail by BMW in Seattle, Portland and New York,** Mar 2016 - Jan 2017**Problem statement:** To develop the launch and stakeholder engagement strategy for the launch of BMW ReachNow services — a free-floating carsharing service — in Seattle, Portland, and New York.**Questions:**1. How would you rate the consultant's ability to deliver comprehensive and well-written reports or presentations that were data-driven? Sandra has extensive experience in with designing and building mobility services. Her ability to take complex logistical and operational topics and put them into simple, easy for anyone to understand language is a very powerful part of what makes her and Movmi so good at what they do. I would rate her very high in this area.
2. Did the consultant require extensive guidance or supervision from your project team, or were they able to work independently and efficiently? The Movmi team works well on their own and without extensive or cumbersome supervision. Once the project scope and deliverables are agreed they do a wonderful job executing on them.
3. Can you describe the consultant's communication style and their responsiveness to inquiries or concerns during the project? I’ve worked very closely with Sandra and her team twice. They are clear, concise, and direct in their communication style. They make sure they get their point across and listen well to concerns as they are raised.
4. Were there any challenges or obstacles encountered while working with the consultant, and if so, how were they addressed? None. Things come up because when you’re dealing with transportation projects things \*always\* come up. Moving vehicles, pedestrians, rules, regulations, parking, etc. is complicated. When things get in the way Sandra and her team acknowledge them and figure out how to adapt to the challenge at hand.
5. Did the consultant/firm exhibit flexibility and adaptability in accommodating changes or adjustments to project timelines, scope, or deliverables? Yes, see my previous answer. Very adaptable and accommodating.
6. How would you characterize the consultant's collaboration with stakeholders and other project team members throughout the project? I hope I’ve made clear that the entire Movmi team are great collaborators and works well both in person and remotely.
7. In your opinion, did the consultant/firm add significant value to the project through their expertise, insights, or recommendations? ReachNow would not have launched without Sandra’s involvement. She was instrumental in making it happen.
8. Were there any instances where the consultant went above and beyond the scope of work outlined in the contract? I honestly don’t have enough time to write them all. Sandra was so committed to our project and pushed herself so hard to deliver because she believed in it so much that she almost worked round the clock in the early days. We couldn’t have asked for more from her.
9. Would you recommend this consultant for similar projects in the future based on your experience working with them? I would work with Sandra and the Movmi team again on a mobility project in a heartbeat.
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