

Consulting Services

Capability Statement



THE CHANGING GRID

With the evolving generation mix, technology developments, cyber security risks, and ever-shifting NERC targets, the grid and its reliable operation is morphing at a faster rate than ever before. These changes can be difficult for utilities, generators, developers, and those that support them. The challenge in understanding grid and market issues, operations, changing regulatory requirements, and cyber security can create uncertainty about how to survive and thrive considering all the changes. GridSME's team can provide your organization with the engineering, operations, technology, and market experience and expertise required to meet your organization's objectives.

CORE COMPETENCIES

Grid Subject Matter Experts, LLC is a results oriented consulting firm based in Folsom, California, representing a diverse group of talented and experienced utility and energy industry experts. The collective experience of our subject matter experts (SMEs) creates a robust network behind each of our engagements to ensure every client is provided a team possessing relevant expertise. Our consulting teams assist clients by leveraging their extensive skill-sets, always striving to help facilitate change in this ever-evolving industry. Through industry expertise and careful collaboration, we pride ourselves on helping clients prepare for the future, grow their business, meet compliance obligations, and reduce business risk.



FIRM PROFILE

GridSME was founded in 2011 by two industry insiders who experienced the best and worst sides of consulting during their careers operating power plants and managing the power grid. In building GridSME, they instilled certain philosophies and rules to ensure GridSME consistently delivers outstanding service to its clients. GridSME has now delivered its consulting services to more than 150 clients in the power industry. Those clients consist of a very diverse group, ranging from small renewable energy companies to large regional utilities and everything in-between. To be able to serve such a diverse client base, GridSME utilizes a team of more than 50 SMEs located throughout the U.S. and Canada. These SMEs provide pragmatic solutions on a wide range of operational, technical, regulatory, and business challenges, leveraging industry best-practice knowledge gleaned over the many decades of collective experience amassed by our team. Client references are available upon request.



WHY US?

- We've been in your shoes. Our consultants have spent the majority of their careers working for utilities, system operators, independent power producers, and technology providers. We understand the industry from the inside.
- Our experts focus on delivering results. We're committed to implementing solutions that are realistic, feasible, and acceptable within the culture of the client's organization.
- Our experts have extensive experience on the utility, generator, and regulatory sides of the business.
- Our experts are adept at analyzing and responding to the numerous changes our clients experience due to the rapid transformations in regulations, operations, markets, and technology.



NERC/REGULATORY COMPLIANCE

Our experienced team of SMEs assist clients in many aspects of regulatory compliance, including the following:

- Regulatory Compliance expertise, including NERC, FERC, PUC, and Regional Standards
- Managed Compliance Services
 - Generate and update NERC compliance program documentation and procedures
 - Monitor NERC and regional entity developments affecting your facility
 - Manage reporting and data submittals to reliability entities
 - Develop and manage an internal compliance program for your personnel
 - Perform periodic evidence gathering and collection to support ongoing compliance
- Compliance Program Development
- Training Program Development (e.g., CBT's) & Implementation
- Internal Controls Program Development, Evaluation, & Testing
- Policies, Processes, & Procedures: Design, Development, Documentation, & Analysis
- Critical Infrastructure Protection (CIP) Standards
- Operations & Planning (693) Reliability Standards
- Staff Augmentation
- Wildfire Mitigation Plan (WMP) Independent Evaluator (IE) Reviews

GRIDSECURITY

Our skilled and knowledgeable team of technology and cyber security experts serve clients in the following technology-related areas:

- Managed Cyber Security and Network Operations
 - Electronic Access Management
 - Configuration & Change Management
 - Vulnerability Management
 - Logging & Alerting
 - Incident Response
- Cyber Vulnerability Assessments
- Penetration Testing
- Network Architecture & Design
- IT & OT CISO/CIO Advisory Services
- Control Cataloging and Assessments
- Technical Remediation Services
- Staff Augmentation (short & long-term)
- Policies, Processes, & Procedures: Identify, Design, Develop, Implement, & Assess
- Disaster Recovery & Business Continuity Planning
- Security Awareness

ENGINEERING AND INTERCONNECTION SERVICES

Our dedicated team of power system engineers have extensive experience in transmission planning, operations planning, and system modeling to meet clients' needs in the following areas:

- Transmission Capacity Assessments
- Utility or RTO/ISO Interconnection Requests
- Power Flow Analysis and Impact Studies
- Generator Power Flow and Dynamic Modeling
- Resource Adequacy Assessments
- Independent Engineering Analysis and Due-Diligence Support
- Preliminary Design and Cost Estimates
- CIP Criteria Evaluations
- Interconnection Agreement Support
- Under-Voltage Load Shedding Assessments

POWER SYSTEM SERVICES

The Power System Services team has a mix of technology expertise, engineering experience, project management skill, and operational know-how, making GridSME an effective partner for almost any part of your organization.

- EMS, SCADA, ADMS, DTS, GMS:
 - Assessments
 - Requirement Developments
 - Vendor Selection
 - Factory Acceptance Testing
 - Implementation
 - Project Management
 - Staff Augmentation
- Advanced Applications improvements or implementation (State Estimation, Contingency Analysis, Power Flow, Voltage, and Transient Stability)
- Control Center Design, Source, Procure, & Build
- Visualization and GIS services
- Grid Operations Assessments & Analysis
- Operations and technology metrics program development
- Operational Planning Assessment and Realtime Assessment design, implementation, and continuous improvement.
- Operational integration project management (RC integration, market integration)

GRID SUPPORT SERVICES

GridSME also supports clients across a multitude of industry topics, such as electricity market guidance, ISO advisory and navigation, energy storage expertise, IT Leadership consulting, and more.

- Electricity Market Services
- eStorm™: Energy Storage Operations and Revenue Modeling
- Power Purchase Agreement Origination Support
- Electricity Markets: Product & Service Analysis
- Integrated Resource Planning
- Scheduling, Bidding, & Settlements
- ISO Tariff, Procedure, and BPM Services
- ISO/RTO Stakeholder Representation
- IT Leadership Services
- IT Program / Project Management
- SSAE 18 Audit Preparation & Support



COMPANY DATA

PRESIDENT: Eric T. Whitley

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D&B No.: 040680836

Articles of Organization:

Limited Liability Corporation, Delaware

NAICS Code Identifiers:

541690; 541330; 541611; 541618

FEDERAL ID (EIN): 27-5366362

Certifications:

State of California, Small Business - Micro (Certificate No. 1749743)

State of CA Business Classifications:

261116; 261318; 432336; 721515; 801015; 801117; 81117; 811024; 831018

CA CORP ID: 20112301

Certificate of Insurance Levels:

Commercial General Liability, Automobile Liability, Professional Liability, Cyber Security, Workers Compensation and Employers' Liability