As everyone at Western Allied likely knows, we belong to a national peer group of seven mechanical contractors including us. No two of the contractors regularly work in the same market, which allows us all to be completely open and devoted to our mutual successes.

Of the seven contractors, five in the group have service operations. Western Allied Mechanical has the largest amount of service volume among the groups.

The last ten years at Western Allied, in Menlo Park, has seen the most growth in our Northern California history. Our business philosophy has never been to grow rapidly for reasons of quality control. Bigger is not necessarily better. Although our volume of sales has grown somewhat over this time, the number of employees has grown slightly more due to the advent of additional departments and the growth of other divisions. As our business transitions, the demands to keep our employees working comfortably, safely, and with no impedances on our day-to-day activities has also changed. The business spaces that have worked for us in the past have new demands, due in part to the new and expanded departments, and new technologies.

With great pride and a vision toward the future, I'm happy to report on the expansion of our facilities in Menlo Park, CA. We moved into our 1180 O’Brien Drive building in 1976. For approximately twenty years, the Sheet Metal shop, Construction, and Service offices operated out of 1180 O’Brien. In the mid 1990’s, we had an annex space located at 20 Kelly Court used primarily for storage, as well as our small Piping shop. From 2004 to 2005, we moved our Piping, Service, Engineering and Accounting operations into our 1170 O’Brien Drive building. Since then, we have been most impacted by our limited parking and storage space.

Later this year we will be moving our Sheet Metal and Piping fabrication shops into a larger building at 1 Casey Court, located across the street from our offices. In conjunction with this move, we’ll be equipping the shops with some more updated tools to improve our capabilities. This facility will have offices

Continued on Page 3
Defining Net Zero

A net zero building, also known as a “zero net energy building,” is a building with zero net energy consumption and zero carbon emissions annually. Buildings that produce a surplus of energy over the year may be called “energy-plus buildings” and buildings that consume slightly more energy than they produce are called “near-zero energy buildings.”

Traditional buildings consume 40% of the total fossil fuel energy in the United States and are significant contributors of greenhouse gases. The zero net energy consumption principle is viewed as a means to reduce carbon emissions and reduce dependence on fossil fuels. There are not many of these buildings around, but they are gaining importance and popularity, particularly in the United States. The Packard Foundation corporate headquarters (which WAM just completed) is an example of one of these buildings.

There are many combinations that are used to achieve net zero. Most of the buildings use the electrical grid for energy storage, but some are independent of the grid. Solar photovoltaic panels are a key component to achieving freedom from the electrical grid. Sometimes wind technology is used and most often thermal storage is a large component in these buildings. Another key is reducing the overall use of energy with highly efficient HVAC and lighting technologies. The zero-energy goal is becoming more practical as the costs of alternative energy technologies decrease and the costs of traditional fossil fuels increase.

This technology is possibly going to be mandated in the near future. The California Public Utilities Commission (CPUC) has laid out a plan that calls for all new commercial construction in California to be zero net energy by 2030! The Packard Foundation’s primary goal was to show the developers and builders in California that it can be done. Their 40,000 square foot head quarters is complete and operating currently. They are monitoring it daily and making any required adjustments to ensure that they achieve the NET ZERO status at the end of their first year. Congratulations to the Packard Foundation for this cutting edge building!
On May 14th and 15th of this year, we hosted a Service Summit for the service companies, which was very successful. This was the first time since we have joined the group that a summit was held. It has been their regular practice, with several subjects being covered in the past – including detailing, project management, and shop productivity.

The summits are used by the peer group to bring all the best and brightest staff together so they can share their knowledge, tricks, and best practices. We’re extremely lucky to have this resource available to us, and we’ll actively participate in the future programs to learn and share.

From Western Allied, the following people were involved for the full two days: Rob Monaghan, Bob Dills, James Kastelic, Jeremy Goodland, and Dawn Hahn (who readily accepted the challenge of recording and publishing the meeting notes).

From around the country, the other firms participating were Dee Cramer Heating & Cooling of Michigan, HPE Inc. of Colorado, Miller-Bonded Inc. of New Mexico, and Hermanson of Washington.

During the course of the two days, some of the peer group reached out to Caasi Bonura in sales/marketing and Jamie Green in dispatch. The group also requested and reviewed a number of service accounting reports.

We’re pleased about the range of subjects we were able to cover, and we learned a great deal from our friends. Most of all, we learned there are many ways to obtain results in this segment of our business. Some of the topics were:

• Differentiation – what makes our service offerings better than our competitors?

• Measurement of customer satisfaction and other key performance indicators

• Tactical practices in our service operations, from dispatch to completion and transmittal of field paperwork

• Current and near-future technological opportunities to improve operations

• Expand service offerings such as energy auditing/retrofits

It was not all hard work, as we were able to treat our friends to a nice dinner Monday evening and a Giants versus Rockies baseball game on Tuesday.

We gave the Rocky Mountain region folks bragging rights—the Giants let that game get away, but everyone left knowing one another better, and we continue to benefit from what we learned!
Health – Health Fair & Wellness Program

Western Allied Mechanical wants to promote a fun and healthy workplace by offering programs and information to help everyone maintain and improve their health.

As a first step in creating a healthy workplace, Western Allied Mechanical held its first Health Fair on June 14. It was a great way to celebrate Flag Day and kick off the summer on the right foot. Our Insurance Brokers, Johnson & Dugan, helped to coordinate the event. Several vendors and insurance companies were at the event: Anthem Blue Cross, Kaiser, MetLife Dental, Sports Basement, Farm Fresh to You, and University of East-West Medicine (acupuncture). Each of the vendors and insurance companies brought promotional materials, giveaways, and raffle prizes. There were some great handouts including: hiking trail guides, healthy eating ideas, sunscreen, and discount coupons. Raffle Prizes included Giants tickets, fruits and veggies, hiking books, gift cards, and many fun games.

Throughout the lunch hour, employees stopped by to talk with the vendors and enjoy the Farmers’ Market presented by Johnson & Dugan and the healthy lunch provided by Western Allied. It was such a success that it will likely be an annual event.

The next phase of the program was also met with great enthusiasm. The first Wellness Program is called “Get Up and Get Moving!” This program was chosen because it was the program that showed the most interest from our web questionnaire and it is perfect for the beautiful California weather of August and September. The features of the program include:

- A Walking Contest courtesy of the American Heart Association’s “StartWalkingNow” program. The program keeps up-to-date totals of the number of steps WAM participants have registered.
- A Group Personal Trainer working with employees in the WAM Gym on Tuesdays and Thursdays, at a minimal cost to employees.
- Lunch and Learn programs to cover health topics and the success of the program, while enjoying a healthy lunch.

The program has created a healthy atmosphere and fun competition. More people are walking at lunch time and after work. The personal trainers have all the participants discovering muscles they didn’t know they had. A common phrase heard around the office is “it all hurts” – but it is a good hurt, and we will soon be the fittest employees around!

Get Up and Get Moving Today!

Safety - The Evolution of the Safety Coordinator Position

In 2010, WAM made the decision to create a position for a dedicated safety person. Since this was to be a new position, we opted to start with a recently retired WAM field employee, working part-time.

John Russi, a long-time, top-producing construction trade veteran, who was with WAM from 1999 until his retirement as a sheet metal worker in 2009, offered up his services. What a score for WAM! John has become a huge asset for WAM, with his commitment to the safety discipline and his point-blank approach to the often challenging tasks of supporting our crews and the conditions on our jobs. To say John has been instrumental in the advent of our vastly improved safety program is an understatement. Thanks to John’s dedication and efforts, a new safety culture at WAM has grown into one of the finest in the industry.

Our agreement with John was to work with him for a couple of years to get our safety program further evolved, and get our new Safety Coordinator position established for the long-term. Having successfully retired from the construction trade, an admirable feat by any means, neither John nor WAM intended for his employment as Safety Coordinator to be long-term. His employment as Safety Coordinator was as much a gesture of his continued dedicated service to WAM, as it was an occupation for him. But the time has come to transition John along into his well-earned retirement (again), to spend his time where he should in retirement, with his family. Knowing John, his backlog of personal projects and adventures is already extensive.

We sincerely wish John the best in his retirement, hoping he continues to find pleasure in his work ethic placed where it now belongs. We’re very grateful and feel lucky to have had the benefits of his services as our first Safety Coordinator.

We are excited to announce that we have hired a new full-time Safety Coordinator, John Korpics. The new John comes to us with a strong safety background, having worked at Airgas as their Environmental Health and Safety Specialist. John has some experience in the mechanical construction trade, having worked a short period for a mechanical contractor in Pennsylvania. His insight into the safety discipline and his genuine concern for our employees’ safety and health will be a great asset for WAM. We welcome John Korpics to the WAM team and look forward to a successful venture.

John Russi will stick around for a few weeks to help John Korpics with the transition. Both safety John’s will be involved in all pre-task safety planning and jobsite safety services, working with project managers, foremen, and service technicians through this period. Please make a point to offer John Russi your best wishes, while making John Korpics feel welcome.

If you have any questions regarding WAM’s safety program or wish to learn more, please talk to either Pete Kelly or Bob Dills, the Chairmen of WAM’s safety program, or stop in and talk to John, our Safety Coordinator. Don’t forget that jobsite safety starts with you. The company’s success relies on sustained safety. Always be aware of safety and continue to follow safe working practices.
Employee Profiles

Ted Tiongo

Ted is a native to the Bay Area, and with the exception of living in Kentucky for four years as a child, Ted has been here his entire life. Ted and his wife, Maureen, have been married for 24 years, and are the proud parents of two girls, Natalie, 18 and Jackie, 15. Ted is preparing himself for his oldest daughter’s departure for her first year at Oregon State. Previously working at Southland Industries, Ted has an extensive background in detailing and coordination. Ted began his journey at Western Allied in 2010, working as a detailer and coordinator for our BIM department. “I like the people here. Everyone really works well together; people have great chemistry. There is longevity here, which is a sign it’s a good place to work,” Ted says of WAM. Ted finished his Sheetmetal Apprenticeship from Local 104, and has taught a number of Auto-CAD and detailing classes through the local JAC (Joint Apprentice Committee), now referred to as ITI. Recently, Ted resigned his position as a coach for all girls soccer and softball club teams in the area. Ted loves camping and traveling in his spare time. In fact, Ted has been to 40 of the 50 US states! His favorite trip so far has been to Boston for a foliage tour. Ted would like to go on a hot air balloon ride and go skydiving sometime in the future.

Si Upton

Si was born and raised on the west side of Modesto, California. Si and his wife, Françoise, have been happily married for 27 years. He has two sons, Randal and Richard, and two granddaughters, Zach (18) and Becky (15). Before coming to join the Western Allied team, Si had been working for Therma in a similar position for 9 years. Si then made the move to Western Allied on April 4, 2011. As the Operations Manager, Si has been working extremely hard to make the processes at Western Allied more organized. “It’s really hard to describe, but the people that work here are the best part about being a part of this company. We really have a truly excellent group of people in every department,” Si said of his experience here at WAM. Some of Si’s hobbies include metal sculpture, fishing, and traveling. His favorite place he has traveled to so far is Montreal, Canada. “It’s absolutely beautiful; it’s old and it’s historical.” Although Si has done some serious traveling, he says “I have always wanted to go to the wine country in the South of France,” making it a personal goal. Si recently bought a house in Mariposa, CA on 14 acers. He looks forward to his retirement on the new property, and making metal sculpture his full-time hobby.

Mike Aurelio

Mike came to Western Allied as a journeyman and learned very quickly that WAM is a family. He appreciates that the office and field staff alike share a sense of belonging and mutual respect that is not common at other companies. Mike encourages that type of atmosphere with his own friendly and cheerful personality. Mike has represented Western Allied proudly through his skill and professionalism, as seen in the Attaboy section in this issue. Some of Mike’s hobbies include restoring his Craftsman style home in San Francisco and listening to Tony Bennett. Mike is in a committed relationship with his girlfriend, Roxana, of 2-1/2 years and her 6-year old son Benji. Mike says, “I’ve been in the trade for 17 years; I have 20 more years to go. I hope to stay busy for the next 20 and make it out in one piece.” And we hope the next 20 will be with WAM where Mike will continue to be a source of pride for us all.

Chris Miller

Chris has been at Western Allied for 16 years; 13 of those years as a sheetmetal foreman. Chris is one of our senior foremen whose years of experience and success at Western Allied makes him a vital member of our Sheetmetal Department. Chris is known for his great organizational skills and ability to anticipate the needs of a project. He has also been a good mentor to the younger foremen. He is admittedly demanding, but his experience has taught him that persistence and being proactive is what makes the difference for a successful job. Originally from the outskirts of Boston, MA, Chris came to California with his family when he was 17, and now lives in Belmont. Chris is very involved with his two teenage daughters. He has coached fast-pitch softball for his daughters for over 10 years. Some of Chris’ hobbies include dirt biking, skiing, ice hockey and mountain biking. He has been happily married for 20 years with his wife, Julie. Chris exemplifies the kind of breadth in leadership and skill that WAM is proud to have in our ranks.
Rodrigo Reyes

Congratulations to Rodrigo Reyes!

In case you were not aware, congratulations are due to Rodrigo. He has become a permanent member of Stanford University’s sheet metal crew, working with another former Western Allied sheet metal technician, Terry Hopkins.

We enjoy a wonderful working relationship with many departments at Stanford, including their internal HVAC shop. About two years ago they approached us to assist them with staffing a temporary sheet metal position. From the great experience they had over time, they specifically asked if they could have Rodrigo work there full-time, whenever possible.

So for two full years, Rodrigo worked nearly full-time on campus. While still a member of Western Allied’s team, they made him one of their own. People constantly mention seeing our red van parked on El Camino. He would park there each day, wear a Stanford uniform, and he got to know every bit of the campus. Once funding became available, they invited him to work directly for the University.

Congratulations to you and your family Rodrigo! You served us well while you were on our team. And you proved yet again to Stanford the quality of our people. We wish you great success.

Justin Murray

Justin Murray brightened the spirit of Western Allied when he began his career as a Junior Design Engineer on February 2, 2004, following his graduation from Cal Poly, San Luis Obispo. He lived in the Bay Area until 2008, when he relocated to Ohio with his wife Becky as she began her surgical veterinary residency. Justin continued to be a member of the WAM team, telecommuting and making visits to the Menlo Park office occasionally to assist his team, check job sites, and compete for the ever-elusive Cook-Off trophy! He became a Senior Engineer and provided leadership and guidance to many. In June of this year, Becky received an offer for a position in Washington that she couldn’t refuse, and the Murray’s relocated. Justin was offered a position as a Design Engineer with one of our Peer Group Partners, Hermanson, and is currently working for them in Kent, WA. We will all miss Justin and his wonderful, fun personality, and hope that he will visit his friends at WAM soon!

Mark Garrett

A long time member of the WAM family retired on May 31, 2012. Mark Garrett started at Western Allied right out of high school in 1978 and spent over 31 years as a great WAM employee. He was honored with a retirement lunch, where shop, field and office employees were able to wish him good luck in his next stage of life! Good Luck Mark! Enjoy retirement – we will miss you!
Now that it’s September, our great group of summer interns are starting to prepare for their return to school. This summer, we hosted 5 interns at WAM in a variety of departments. Two interns in Construction, one in Service, one in Engineering, and one in our Sheet Metal shop. We appreciate all the time and hard work those individuals have given to us here at WAM, and we hope that we have provided them with a good learning experience.

Kelli Riley was born and raised in San Carlos, California. She is currently a student at San Jose State University studying Mechanical Engineering. Kelli will be graduating in Spring of 2013 and looks forward to a bright future. Clearly showing Kelli’s great academic standing, she was awarded a $25,000 academic scholarship from the Sheet Metal Worker Local 104. She is only the 3rd person in 16 years to be awarded this particular scholarship. Kelli looks forward to graduation, as she would like to pursue graduate school in either Engineering Management or Aerospace. When Kelli is not studying or working, she enjoys outdoor activities like snowboarding and visiting the beach.

Greg Lyons, a native to this area, comes from San Mateo, California. Greg is an intern in our Sheet Metal shop this year. Recently graduating from Aragon High School, Greg will be attending the University of Texas this fall. Greg will be studying Petroleum, but has hopes to transfer into Mechanical Engineering. Greg still has 4 years of school ahead of him and plenty of time to think about what he wants to do after graduation. However, he did say that it all depends on whether he changes his major. Greg enjoys all sports, including basketball, baseball, and football—football taking the slight lead as his favorite.

Ryan Flatland joined Western Allied for his second year as an intern! Ryan is from Foster City, California, and worked at WAM last summer as an intern in our Pipe Shop. This year, Ryan joined the Engineering Department. He is still a student at Cal Poly San Luis Obispo, and will have a few more years until graduation. Ryan is hoping to get up to Lake Tulloch for some more water skiing this summer.

Zach Koehnke, originally from Anaheim California, is a new intern for Western Allied and is working for Zach Russi. He is a student at Cal Poly San Luis Obispo, studying Mechanical Engineering. This year, Zach applied for a scholarship and was awarded a $1,000 from San Jose ASHRAE. Zach is expected to graduate in June 2013. After spending time in Sweden for a study abroad program, Zach’s got the travel bug! He hopes to get some traveling in after he finishes his studies at Cal Poly. Zach enjoys playing basketball and loves to go to concerts. He recently attended an Earth, Wind and Fire concert!

Ian Bergman is also native to this area, born and raised near Woodside, California. He is also a student at Cal Poly San Luis Obispo, studying Mechanical Engineering. Ian is currently interning in the Special Projects Construction Department. Ian will be graduating in June 2014, and would love to spend some time traveling after graduation. Ian is very interested in heavy machinery and would possibly like to end up designing it. Ian’s hobbies include downhill mountain biking, dirt biking, and swimming. Ian will be leaving Western Allied in two weeks for a study abroad program in Germany! He will be studying over there for two quarters, 8 months total. Have fun Ian, we are all very jealous!
Celebrating Service Awards

The anniversaries listed are for employees celebrating significant milestones with the company. Congratulations and thank you to all!

30 Years
Jim Muscarella- 01/2013

25 Years
Angie Simon- 06/2012
Randy Freitas- 08/2012
John Barbucia-10/2012

15 Years
Robert Balcioni- 06/2012
Dave Miske- 09/2012
Lela Walker- 01/2013

10 Years
Catalino Alfonso- 08/2012
Aleia Kissinger-Pubill- 02/2013

5 Years
Dave Masinter- 07/2012
Justin Young- 07/2012
Steve Billberry- 08/2012
Joseph Kaz- 09/2012
Graham Hogan- 09/2012
Sharon Carman- 10/2012
Kevin Johnson- 11/2012
Joe Rasmussen-11/2012
Dawn Hawn- 01/2013
Joe Ryan- 02/2013

Celebrating Family Events!

James Cordell, James Kastelic, Randy Frietas, & Rob Chalfant were the 1st place winners!!! Randy also won 1st place for the individual score.

Lisa Oneto WAM winner for the Women’s High Score!

Bryan and Sarah Thorne welcomed their 4th child on July 27th! Welcome to the world baby Jeremy Russell!! Congrats!

Greg Health and his wife, Krissy welcomed baby girl Taylor Sophia on May 21st! Congratulations!

Congratulations to Steven Grassi and his new wife, Megan! They were married on June 8th 2012!

2012 Sporting Clays Tournament

The annual Sheetmetal Union (Local 104) Sporting Clays tournament was held on August 25th at the Coyote Valley Sporting Clays range in Morgan Hill. Once again, Western Allied Mechanical was represented in four teams with a total of 14 WAM employees participating. Taking 1st place for the team competition was WAM’s “A-team”, consisting of Randy Freitas, James Kastelic, Rob Chalfant and James Cordell. Randy also took 1st place in individual scores, hitting 90 targets out of 100. Rounding out the WAM winners was Lisa Oneto for the “High Lady” score. Tim Casson-Norman Wright, Walter Ying - Trane, Shahram Ameli – Bayside Insulation and Western Allied Mechanical were all proud sponsors for this
## Current Large WAM Projects

<table>
<thead>
<tr>
<th>Project Description</th>
<th>Contact Name</th>
<th>Details</th>
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<tbody>
<tr>
<td>College of San Mateo</td>
<td>James Kastelic</td>
<td>Districtwide NOX Boiler burner replacement project. 3 replacements at CSM, and 2 at Cañada.</td>
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<tr>
<td>Fresenius Medical</td>
<td>Zach Russi</td>
<td>185,000 Sq. Ft. office building with equipment change out, tenant improvement and new WAM DDC controls throughout.</td>
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<td>Abbott Vascular Clean Room</td>
<td>Angie Simon</td>
<td>One week shutdown to replace all existing duct connections and relocated exhaust fume hood ductwork.</td>
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<tr>
<td>Depomed</td>
<td>Angie Simon</td>
<td>50,000 Sq. Ft. tenant improvement office/lab build-out at BMR Building 7. 69 CAV/VAV zones, ISO 8 cleanroom.</td>
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<tr>
<td>Stanford LTHW Hot Water Conversion Stations</td>
<td>Angie Simon</td>
<td>Furnish and install (2) new Steam-to-Hot Water heat exchanger stations and increase capacity to (1) existing station. Piping tie-ins to existing underground steam, condensate return, and heating hot water utilities.</td>
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<tr>
<td>SFPUC Biofuel</td>
<td>Peter Kelly</td>
<td>Installation of a custom double-wall stainless steel receiving tank, pump &amp; welded stainless steel process piping with heat trace piping for FOG (fats, oils &amp; grease) that will be converted to biodiesel at the city of San Francisco's biofuel process plant.</td>
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<tr>
<td>Stanford Hoover Building</td>
<td>Peter Kelly</td>
<td>We are the prime contractor for an HVAC &amp; Lighting Upgrade at the Hoover Tower, a historic icon on the Stanford Campus. Replacement of ten steam radiators with new 4-pipe floor mounted fan coils.</td>
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### Attaboys

- **Bob Dills**
  - For obtaining his IFMA Sustainable Facilities Professional Certification! Congratulations!

- **Daniel Wong**
  - Congratulations Daniel for becoming NEEB Certified!!

- **Greg Heath, Randy Freitas, & Kelly Johnson**
  - For all completing their fabricator class certification!! Congratulations gentlemen!

- **Chris Heinz**
  - “The unit is back online thanks to our star vendor Western Allied”
    - Codexis

- **Duncan Green, Kevin Juri, & Leon Matthews**
  - Congratulations on completing the UC Berkeley Extension course on HVAC Controls and Energy Management Systems!!

- **Mike Henderson & WAM Team**
  - “For supporting our facility with the cooling tower repair of the factory piping defect and the water leak/coupling issue. Your team was very pleasant to work with, they worked very hard in a very difficult location without a single negative comment, and they cleaned up after they were done. I am very impressed with the WAM team.”
    - Roche

- **Mike Aurelio**
  - “Mike is an example of Western Allied’s commitment to get a job done while providing an excellent skill set and a sense of professionalism. I personally enjoyed having him as a part of my crew and would like to extend our gratitude to you, Mike and the rest of Western Allied.”
    - W.L. Hickey Sons

- **Chad Kruckewitt, Bryan Thorne, & Mark Edwards**
  - “The members of your crew sent to the job were great to work with. It’s getting harder and harder now a days to find companies that emphasize service to their clients, many reference service in their mission statements but few practice it. Chad, Bryan, Mark and the others do practice good client relations. From a GC’s perspective it is important because we are in a very tough business. Thanks for all your help on this.”
    - NASA

- **Andy Menicou**
  - Excellent workmanship on a JOB! Although one word answers are hard to come by :)

- **Terry Juri & James Kastelic**
  - Thank you for establishing our healthy lifestyle program and forcing us to get into the gym with terrifying personal trainers. :)

- **Joe Byrne**
  - Despite the technical and political challenges on one of Joe’s recent projects, he maintained a professionalism throughout the job that did not go unnoticed, as the customer praised him for his efforts. We’re proud to have you representing Western Allied, Joe!

- **Terry Juri**
  - Thank you for always going above and beyond! You’re amazing!

Remember, we welcome attaboys from all! The nicest compliments are the ones from your teammates. All attaboy contributors will remain anonymous. Drop a note to attaboy@westernallied.com!!
Calendar

**SEPTEMBER 2012**

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<td>Birthday Celebrations</td>
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<td>Sun. Local ASHRAE</td>
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**NOVEMBER 2012**

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**DECEMBER 2012**

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**JANUARY 2013**

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**FEBRUARY 2013**

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**Contributors**

Caasi Bonura  
Lisa Oneto  
Terry Juri  
Robert Dills  
Angie Simon  
Diana Kadash  
Dona Neilson  
Sharon Carman  
Pete Kelly  
Krystal Matthews

* Building Trade holidays only