

Diesel Fuel, Invitation for Bids

Bid Form

Section 2: Franklin County Metered Pump Truck

Each Section shall apply only to the Awarding Authorities listed in the Section.

OPTION 1

Daily New Haven Low Spot Market Price

Vendors Margin and Overhead above the daily New Haven Low Spot Market price, as defined in Section A, item 9 of these bid specifications, for delivered ULS Additive Premium Diesel Fuel:

\$ .2295 per Gallon (to 4 decimal places)

OPTION 2

Fixed Price Futures Program

Vendor's Margin and Overhead, as defined in Section A, Item 9 of these bid specifications, for delivered ULS Additive Premium Diesel Fuel:

FY 2018: January 2018 NYMEX closing price \$ .2650 per Gallon (to 4 decimal places)

FY 2019: January 2019 NYMEX closing price \$ .3395 per Gallon (to 4 decimal places)

FY 2020: January 2020 NYMEX closing price \$ .3395 per Gallon (to 4 decimal places)

Extra Kerosene (if requested) Certain Customers may require a blend of extra kerosene and diesel, this is the Margin and Overhead cost per gallon over the New Haven Low spot market price of kerosene, on the day of delivery, for this service.

\$ .2500 per Gallon (to 4 decimal places)

Biodiesel Blend (if requested) Certain Customers may require a blend of biodiesel and diesel, this is the Margin and Overhead cost per gallon over the rack price of biodiesel, on the day of delivery, for this service.

\$ .2000 per Gallon (to 4 decimal places)

I do hereby agree to supply and deliver ULS Additive Premium Diesel Fuel as specified:

Signature: [Signature] Date: 5/10/2017

Name (Please Print): Frank Roberts

Title: President

Company: Roberts Energy, LLC

Address: 237 Albany St City/State/Zip: Springfield, MA 01105

Phone: 413 736 9611 Fax: 413 781 8185 E-mail: fr Roberts@robertsurg.com

Diesel Fuel, Invitation for Bids

Bid Form

Section 2: Franklin County Metered Pump Truck

Each Section shall apply only to the Awarding Authorities listed in the Section.

OPTION 1

Daily New Haven Low Spot Market Price

Vendors Margin and Overhead above the daily New Haven Low Spot Market price, as defined in Section A, item 9 of these bid specifications, for delivered ULS Additive Premium Diesel Fuel:

\$ .5500 per Gallon (to 4 decimal places)

OPTION 2

Fixed Price Futures Program

Vendor's Margin and Overhead, as defined in Section A, Item 9 of these bid specifications, for delivered ULS Additive Premium Diesel Fuel:

FY 2018: January 2018 NYMEX closing price \$ .6900 per Gallon (to 4 decimal places)

FY 2019: January 2019 NYMEX closing price \$ .7000 per Gallon (to 4 decimal places)

FY 2020: January 2020 NYMEX closing price \$ .7100 per Gallon (to 4 decimal places)

Extra Kerosene (if requested) Certain Customers may require a blend of extra kerosene and diesel, this is the Margin and Overhead cost per gallon over the New Haven Low spot market price of kerosene, on the day of delivery, for this service.

\$ .70 per Gallon (to 4 decimal places)

Biodiesel Blend (if requested) Certain Customers may require a blend of biodiesel and diesel, this is the Margin and Overhead cost per gallon over the rack price of biodiesel, on the day of delivery, for this service.

\$ .70 per Gallon (to 4 decimal places)

I do hereby agree to supply and deliver ULS Additive Premium Diesel Fuel as specified:

Signature: Joe Cote Date: 5/10/2017

Name (Please Print): Joseph Cote

Title: Chief Financial Officer

Company: Dennis K. Burke, Inc.

Address: 555 Constitution Drive City/State/Zip: Taunton, MA 02780

Phone: 800-289-2875 Fax: 617-884-7638 E-mail: joe.cote@burkeoil.com

Diesel Fuel, Invitation for Bids

Bid Form

Section 2: Franklin County Metered Pump Truck

Each Section shall apply only to the Awarding Authorities listed in the Section.

OPTION 1

Daily New Haven Low Spot Market Price

Vendors Margin and Overhead above the daily New Haven Low Spot Market price, as defined in Section A, item 9 of these bid specifications, for delivered ULS Additive Premium Diesel Fuel:

\$ .2834 per Gallon (to 4 decimal places)

OPTION 2

Fixed Price Futures Program

Vendor's Margin and Overhead, as defined in Section A, Item 9 of these bid specifications, for delivered ULS Additive Premium Diesel Fuel:

FY 2018: January 2018 NYMEX closing price \$ .4188 per Gallon (to 4 decimal places)

FY 2019: January 2019 NYMEX closing price \$ .4329 per Gallon (to 4 decimal places)

FY 2020: January 2020 NYMEX closing price \$ .4470 per Gallon (to 4 decimal places)

Extra Kerosene (if requested) Certain Customers may require a blend of extra kerosene and diesel, this is the Margin and Overhead cost per gallon over the New Haven Low spot market price of kerosene, on the day of delivery, for this service.

\$ .3834 per Gallon (to 4 decimal places)

Biodiesel Blend (if requested) Certain Customers may require a blend of biodiesel and diesel, this is the Margin and Overhead cost per gallon over the rack price of biodiesel, on the day of delivery, for this service.

\$ .3834 per Gallon (to 4 decimal places)

I do hereby agree to supply and deliver ULS Additive Premium Diesel Fuel as specified:

Signature: Ken Whalley Date: 5/8/17

Name (Please Print): Ken Whalley

Title: V.P. Wholesale Supply

Company: Diesel Direct

Address: 74 Maple St City/State/Zip: Stoughton, MA 02072

Phone: 339-221-0638 Fax: 781-767-6241 E-mail: Ken.whalley@dieseldirect.com



Santa Buckley Energy, Inc.  
P.O. Box 1141  
Bridgeport, CT 06601-1141

P 800-800-4427  
F 203-367-2412

Lower Pioneer Valley Educational Collaborative  
Paul W. Schroeder  
Manager, Energy Services  
174 BRUSH HILL AVENUE, WEST SPRINGFIELD, MA 01089

Dear Paul,

Unfortunately, Santa Buckley Energy Inc. is withdrawing both the Diesel bid and the Unleaded Gasoline bid. As discussed, the calculations made on the fixed price portions of the bids were based on NYMEX's (RBOB & HO) monthly contracts. This was an oversight, and we will not be able to perform based on the January 2018 contract only.

Thank you for your consideration. We look forward to working with you and the Lower Pioneer Valley Educational Collaborative on future bids.

Sincerely,

Bryan O'Connor  
Petroleum Sales Manager



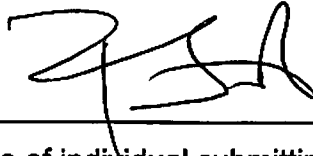
Santa Buckley Energy, Inc.  
154 Admiral Street • Bridgeport, CT 06605  
(O) 203-362-3332, 1367 • (C) 203-260-7440 • (F) 203-367-2412

Diesel Fuel, Invitation for Bids

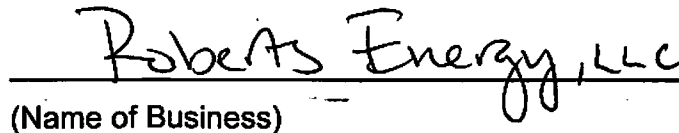
Attachment 3

***CERTIFICATE OF NON-COLLUSION***

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

A handwritten signature in black ink, appearing to be 'ZSA', written over a horizontal line.

(Signature of individual submitting bid or proposal)

The handwritten name 'Roberts Energy, LLC' in black ink, written over a horizontal line.

(Name of Business)

Diesel Fuel, Invitation for Bids

Attachment 4

**TAX COMPLIANCE CERTIFICATION**

Pursuant to M.G.L. Chapter 62C, § 49A, I certify under penalties of perjury that I have, to my best knowledge and belief, complied with the law of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

81-3450263  
Social Security Number or  
Federal Identification Number

Roberts Energy, LLC  
Business or Corporate Name

by: RSB  
Signature of Individual Corporate Officer (if applicable)



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

3/9/2017

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Webber & Grinnell 8 North King Street  Northampton MA 01060	<b>CONTACT NAME:</b> Jenna Rodrigue, CISR <b>PHONE (A/C No. Ext):</b> (413) 586-0111 <b>FAX (A/C No.):</b> (413) 586-6481 <b>E-MAIL ADDRESS:</b> jrodrigue@webberandgrinnell.com																					
<b>INSURED</b> Roberts Energy Group Roberts Energy LLC 275 Albany Street Springfield MA 01105	<table border="1"><tr><th colspan="2">INSURER(S) AFFORDING COVERAGE</th><th>NAIC #</th></tr><tr><td>INSURER A</td><td>Philadelphia Insurance Company</td><td>23850</td></tr><tr><td>INSURER B</td><td>MA Trade SIG/CoverRisk</td><td>16608</td></tr><tr><td>INSURER C</td><td>Acadia Insurance Company</td><td>31325</td></tr><tr><td>INSURER D:</td><td></td><td></td></tr><tr><td>INSURER E:</td><td></td><td></td></tr><tr><td>INSURER F:</td><td></td><td></td></tr></table>	INSURER(S) AFFORDING COVERAGE		NAIC #	INSURER A	Philadelphia Insurance Company	23850	INSURER B	MA Trade SIG/CoverRisk	16608	INSURER C	Acadia Insurance Company	31325	INSURER D:			INSURER E:			INSURER F:		
INSURER(S) AFFORDING COVERAGE		NAIC #																				
INSURER A	Philadelphia Insurance Company	23850																				
INSURER B	MA Trade SIG/CoverRisk	16608																				
INSURER C	Acadia Insurance Company	31325																				
INSURER D:																						
INSURER E:																						
INSURER F:																						

**COVERAGES** **CERTIFICATE NUMBER:** Exp 11/2017 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS														
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		PHPK1566780	11/1/2016	11/1/2017	<table border="1"><tr><td>EACH OCCURRENCE</td><td>\$ 1,000,000</td></tr><tr><td>DAMAGE TO RENTED PREMISES (Ea occurrence)</td><td>\$ 50,000</td></tr><tr><td>MED EXP (Any one person)</td><td>\$ 5,000</td></tr><tr><td>PERSONAL &amp; ADV INJURY</td><td>\$ 1,000,000</td></tr><tr><td>GENERAL AGGREGATE</td><td>\$ 2,000,000</td></tr><tr><td>PRODUCTS - COM/PROP AGG</td><td>\$ 2,000,000</td></tr><tr><td>Empl Practices Liab Ins</td><td>\$ 250,000</td></tr></table>	EACH OCCURRENCE	\$ 1,000,000	DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 50,000	MED EXP (Any one person)	\$ 5,000	PERSONAL & ADV INJURY	\$ 1,000,000	GENERAL AGGREGATE	\$ 2,000,000	PRODUCTS - COM/PROP AGG	\$ 2,000,000	Empl Practices Liab Ins	\$ 250,000
EACH OCCURRENCE	\$ 1,000,000																			
DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 50,000																			
MED EXP (Any one person)	\$ 5,000																			
PERSONAL & ADV INJURY	\$ 1,000,000																			
GENERAL AGGREGATE	\$ 2,000,000																			
PRODUCTS - COM/PROP AGG	\$ 2,000,000																			
Empl Practices Liab Ins	\$ 250,000																			
A	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS		PHPK1566785	11/1/2016	11/1/2017	<table border="1"><tr><td>COMBINED SINGLE LIMIT (Ea accident)</td><td>\$ 2,000,000</td></tr><tr><td>BODILY INJURY (Per person)</td><td>\$</td></tr><tr><td>BODILY INJURY (Per accident)</td><td>\$</td></tr><tr><td>PROPERTY DAMAGE (Per accident)</td><td>\$</td></tr><tr><td>Uninsured motorist BI split limit</td><td>\$ 250,000</td></tr></table>	COMBINED SINGLE LIMIT (Ea accident)	\$ 2,000,000	BODILY INJURY (Per person)	\$	BODILY INJURY (Per accident)	\$	PROPERTY DAMAGE (Per accident)	\$	Uninsured motorist BI split limit	\$ 250,000				
COMBINED SINGLE LIMIT (Ea accident)	\$ 2,000,000																			
BODILY INJURY (Per person)	\$																			
BODILY INJURY (Per accident)	\$																			
PROPERTY DAMAGE (Per accident)	\$																			
Uninsured motorist BI split limit	\$ 250,000																			
A	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTIONS		PHUB560667	11/1/2016	11/1/2017	<table border="1"><tr><td>EACH OCCURRENCE</td><td>\$ 5,000,000</td></tr><tr><td>AGGREGATE</td><td>\$ 5,000,000</td></tr><tr><td></td><td>\$</td></tr></table>	EACH OCCURRENCE	\$ 5,000,000	AGGREGATE	\$ 5,000,000		\$								
EACH OCCURRENCE	\$ 5,000,000																			
AGGREGATE	\$ 5,000,000																			
	\$																			
B	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y/N <input checked="" type="checkbox"/> N	N/A	021-004100198117	1/1/2017	1/1/2018	<table border="1"><tr><td><input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER</td><td></td></tr><tr><td>E.L. EACH ACCIDENT</td><td>\$ 500,000</td></tr><tr><td>E.L. DISEASE - EA EMPLOYEE</td><td>\$ 500,000</td></tr><tr><td>E.L. DISEASE - POLICY LIMIT</td><td>\$ 500,000</td></tr></table>	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER		E.L. EACH ACCIDENT	\$ 500,000	E.L. DISEASE - EA EMPLOYEE	\$ 500,000	E.L. DISEASE - POLICY LIMIT	\$ 500,000						
<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER																				
E.L. EACH ACCIDENT	\$ 500,000																			
E.L. DISEASE - EA EMPLOYEE	\$ 500,000																			
E.L. DISEASE - POLICY LIMIT	\$ 500,000																			
C	<b>Transportation</b>		CIM5276226	11/1/2016	11/1/2017	Single Conveyance/\$30,000 Deduct/1,000														

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Pioneer Valley Educational Collaborative is listed as Additional Insured with respects to General Liability as per the terms and conditions of the policy.

## CERTIFICATE HOLDER

Pioneer Valley Educational Collaborative 175 Brush Hill Avenue West Springfield, MA 01089	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	<b>AUTHORIZED REPRESENTATIVE</b> J Rodrigue, CISR/JER

© 1988-2014 ACORD CORPORATION. All rights reserved.

Unleaded Gasoline Invitation for Bids

Attachment 5  
**BUSINESS REFERENCE FORM**

Bidder: Roberts Energy, LLC  
Bid: Unleaded Gasoline

The Bidder must provide 3 business references from Massachusetts based companies, schools, institutions or governments indicating their names, addresses, telephone numbers, contact persons, dates of service and annual volume of fuel service. The references will demonstrate that during at least the past five (5) years, the bidder has provided safe and efficient services for organizations which have needs that are similar to those of this cooperative. One reference will be from a former customer no longer buying diesel from the bidder.

Reference Name: LPVEL Contact: Paul Schroeder  
Address: 174 Brush Hill Ave W. Springfield MA Phone #: (413) 735-2200  
Fax: 413-735-2280 E-mail: paul@ijod.net  
Dates of Service: 5+ yrs Product Provided: gasoline, diesel, heating oil  
Approximate Annual Volume: 1mm gallons

Reference Name: FRLOG Contact: Andrea Woods  
Address: 12 Olive St. Suite 2, Greenfield MA 01301 Phone #: (413) 774-3167  
Fax: 413-774-3169 E-mail: bids@frlog.org  
Dates of Service: 5+ yrs Product Provided: gasoline, diesel  
Approximate Annual Volume: 200,000 gallons

Former Customer:

Reference Name: City of Warwick Contact: Mary LaFontaine  
Address: 3275 Post Rd Warwick RI 02886 Phone #: (401) 738-2009  
Fax: 401-738-2012 E-mail: mary.lafontaine@warwickri.com  
Dates of Service: 4/1/17-current Product Provided: diesel  
Approximate Annual Volume: 1mm gallons



May 11<sup>th</sup>, 2017

**Roberts Energy, Financial Narrative for LPVEC Bid**

Roberts Energy is a Massachusetts based limited liability company, headquartered in Springfield, MA. The business was incorporated in August of 2016 and operational on November 1<sup>st</sup>, 2016. In late 2016, F.L. Roberts & Co., Inc. divested its retail assets including its gas stations, car washes, and Jiffy Lubes, in order to facilitate the retirement of its majority shareholder, Steven Roberts. Frank Roberts, great-grandson of the founder, purchased the remaining wholesale, commercial fuel, and transportation businesses. The business was spun off into two entities: Roberts Energy, LLC a fuel supplier, and Brown Bear Transportation, LLC, a common carrier of motor fuels and heating fuels.

Roberts Energy, LLC currently supplies over 500 commercial customers in five states, including portions of the current LPVEC bid. The company is a shipper on the Jetline, a pipeline owned by Buckeye Pipeline, that ships fuel from New Haven harbor, up to its terminus at Westover ARB. The company also owns and manages a terminal in Springfield, MA, with storage capacity of 40,000 barrels, and distributes diesel fuel, dyed diesel fuel, heating oils, as well as kerosene, premium and winter blends of all products. It operates its own truck fleet with a combined 15 trucks, and 30 drivers (between the two entities).

The company maintains supply relationships with most major suppliers, and has a multitude of supply deals in place that include index deals, rack deals, spot purchases, and fixed forward contracts. Roberts Energy maintains its own commodities account with R.J. O'Brien for the specific purpose of hedging inventory that is in tank or in transit, and securing fixed-price forward contracts for its customers. The account is active and in good standing, and trading occurs on a daily basis.

From a financial standpoint, the company has very little debt. There is no senior term debt on the business, and the assets were purchased with a combination of equity from the principal and subordinated debt from the principal and other members of the Roberts Family. The company also secured, for a 3-year term, an asset-based line of credit with People's United Business Capital for \$5,000,000, and a \$500,000 line of credit for capital expenditures. The purpose of the credit line is to finance the working capital and inventory required to run a commodity-based business of its size, and People's United was selected as the lender for the experience and expertise in financing similar businesses.

While no full year results are available, the wholesale division within F.L. Roberts earned approximately \$2,000,000 of EBITDA in 2015 and 2016, and the company expects to continue those results in 2017. The company employs 40 people, and anticipates selling 75 million gallons in 2017.

A handwritten signature in black ink, appearing to be 'FR' or 'F.R.', located at the bottom right of the document.




Diesel Fuel  
Invitation for Bids  
Dated April 24, 2017  
Addendum 1  
May 5, 2017

1. Page 7, section A, Contract, ¶ 3, Fuel Specifications: Winter Requirements: Cloud Point should read 15°F
2. Page 8, ¶ 5 Spillage: add the following, "Spillage caused by the actions or omissions of the Customer or its agents are the responsibility of the Customer."
3. Page 9, ¶ 9 Determination of Pricing: a. Option 1. The words ULSD Premium shall be replaced with ULS Diesel. (NOTE that this changes the posting in the oil price daily that we will use in this bid so this will change your margins.)

**Please sign the acknowledgment form below.  
Enclose it with your bid submission.**

I acknowledge the receipt of Addendum 1 to the LPVEC Diesel Fuel bid:

Signature  Date: 5/10/17 Frank Roberts  
Name (Please Print)  
Company Roberts Energy, LLC

**LOWER PIONEER VALLEY EDUCATIONAL COLLABORATIVE**  
174 BRUSH HILL AVENUE, WEST SPRINGFIELD, MA 01089 PHONE 413-735-2200 FAX 413-735-2280

SERVING AGAWAM•EAST LONGMEADOW•HAMPDEN•WILBRAHAM•LONGMEADOW•LUDLOW•SOUTHWICK•TOLLAND•GRANVILLE•WEST SPRINGFIELD



Cashier's Check

Reference \_\_\_\_\_ Date 05/10/2017

8771387  
46109-A136AJ8

\$\*\*\*\*\*1,000.00\*\*\*\*\*

~~PAY~~ ONE THOUSAND DOLLARS AND ZERO CENTS

\*LOWER PIONEER VALLEY EDUCATION COLLABORATIVE\*

To the  
Order of \_\_\_\_\_

CASHIER'S CHECK

*Michelle Chase*  
Authorized Signature

Notice to Customers: The purchase of an indemnity bond may be required before this check will be replaced or refunded in the event it is lost, misplaced or stolen.

Member FDIC CR-002

⑈8771387⑈ ⑆221172186⑆ ⑆17000295⑈