

CLIMATE & WASTE SYSTEMS ADVISORY

SYSTEMS FIRST. ENGINEERED RIGHT.

PROPOSAL

2026 Water and Sewer Rate Study and Integrated Infrastructure Master Plan

Prepared for City of Geneva, Illinois

SOLICITATION NO.	RFQ – 2026 Water and Sewer Rate Study and IIMP
TYPE	RFQ
DUE DATE	July 2, 2026
JURISDICTION	IL
PROPOSED FEE	$298,500
PROPOSAL NO.	26-2235



PRESENTED TO

City of Geneva, Illinois

Alex Voigt, City Administrator

PRESENTED BY

Climate & Waste Systems Advisory

Tammy Taylor-Pena — Authorized Negotiator

Director of Procurement | (817) 330-4414 | tammy@wasteadvisory.com

SBA WOSB CERTIFIED

Version 1 · June 30, 2026

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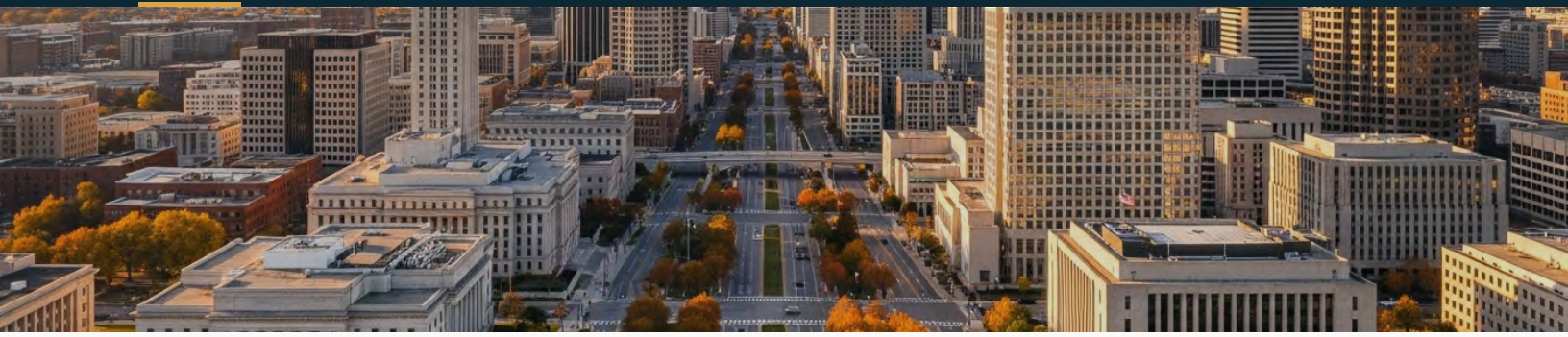
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15+ Years Experience | **100+** Municipal Projects | **Multi-State** Regulatory Expertise

June 30, 2026

Alex Voigt

City Administrator

City of Geneva, Illinois

22 S. First Street

Geneva, IL 60134

Dear Evaluation Committee,

Proposal Submission and Interest

Climate & Waste Systems Advisory (CWSA) is pleased to submit our proposal in response to the City of Geneva's solicitation RFQ – 2026 Water and Sewer Rate Study and Integrated Infrastructure Master Plan. We are genuinely interested in supporting the City of Geneva in this initiative, which aims to enhance resource management and optimize utility services.

Understanding of Geneva's Opportunity

The 2026 Water and Sewer Rate Study and Integrated Infrastructure Master Plan presents a significant opportunity for the City of Geneva to achieve a comprehensive understanding of its current infrastructure and rate structures. This project aligns seamlessly with CWSA's expertise in delivering integrated planning, rate analysis, and infrastructure assessment. Our approach focuses on leveraging advanced GIS and OS-enabled solutions to ensure that the City receives data-driven insights for informed decision-making.

Relevant Experience and Qualifications

CWSA's proven track record includes engagements similar in scope, such as our work with the City of Rockford, Illinois, where we conducted a comprehensive utility rate and cost-of-service study. This experience positions us uniquely to address the City of Geneva's specific objectives, including accurate rate setting and strategic infrastructure planning.

Commitment to Delivery

Our team is committed to delivering a thorough analysis and actionable recommendations within the proposed timeline. We will collaborate closely with the City of Geneva to ensure that our efforts align with your operational goals and community needs.

Closing Statement

We look forward to the opportunity to partner with the City of Geneva on this transformative project.

PROPOSAL REFERENCE

CLIENT
City of Geneva, Illinois

SOLICITATION NO.
RFQ – 2026 Water and Sewer Rate Study and

PROJECT
2026 Water and Sewer Rate Study and

DUE DATE
July 2, 2026

INTERNAL PROPOSAL NO.
26-2235

WHY CWSA IS A FIT

- Integrated system planning across operations &
- Defensible financial and procurement
- Regulatory compliance aligned with mandates

10+	25+	100%
Years Experience	Municipal Projects	Regulatory Expertise

KEY PROJECT UNDERSTANDING

PROJECT SCOPE
2026 Water and Sewer Rate Study and Integrated Infrastructure Master Plan

CLIENT AGENCY
City of Geneva, Illinois

ADVISORY FOCUS
Comprehensive rate study and infrastructure planning

APPROACH
Integrated planning with GIS and OS-enabled solutions

Firm Approach

CWSA certifies that: we will services described in the RFP

- We will comply with all requirements, conditions and specifications
- Acknowledges all issued addenda
- This proposal remains valid for 90 days

Delivery Commitment

If selected, CWSA will serve as a strategic and technical partner to the City of Geneva, Illinois.

- Senior-led advisory engagement
- Implementation-ready deliverables
- Transparent and defensible decision frameworks
- Measurable performance outcomes

Cam Anderson, PMP
Managing Principal
(817) 330-4414 | cam@wasteadvisory.com
Climate & Waste Systems Advisory

Tammy Taylor-Pena
Authorized Negotiator · Director of Procurement
(817) 330-4414 | tammy@wasteadvisory.com
Climate & Waste Systems Advisory



CORE ADVISORY SERVICES

Waste System Architecture
System assessments, infrastructure planning & implementation roadmaps

Financial Rate Structuring
Cost-of-service, rate strategy & carbon credit modeling

Procurement & Contract Governance
RFP architecture, contract governance & vendor accountability

Compliance & Regulatory Strategy
Mandate compliance, methane program design & reporting

Performance & Compliance Intelligence
Vendor oversight, KPI dashboards & performance scorecards

ORGANIZATIONAL STRUCTURE

CLIMATE & WASTE SYSTEMS ADVISORY
SYSTEMS FIRST. ENGINEERED RIGHT.

Leadership



Cam Anderson, PMP, TRUE Advisor
Managing Principal | Senior Waste System Strategist



Tammy Pena
Director of Procurement | Governance Operations



L. Lucas Lopez, P.E.
Senior Data Engineer



Asalah Ali-Higginbotham
Senior ML & Systems Research Lead



Kelly Thompson
Senior Administrative & Municipal Operations Advisor



Grace Espaldon
Business Development Director



Amanda Taylor, CPA
Certified Public Accountant | Financial Advisor



Lois Li, Esq
Attorney at Law | Legal Advisor

OFFICE LOCATIONS



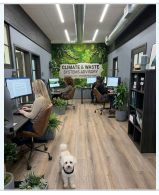
HEADQUARTERS

Weatherford, TX
119 N. Main St., Suite 221
Weatherford, TX 76087
Regional coverage: South Central U.S.



MOUNTAIN WEST

Colorado Springs, CO
2175 N. Academy Cir., Ste. LL8
Colorado Springs, CO 80909
Regional coverage: Mountain West & Central U.S.



PACIFIC

Carlsbad, CA
1938 Kellogg Ave., Suite 110
Carlsbad, CA 92008
Regional coverage: West Coast & Pacific States

FIRM CREDENTIALS & COMPLIANCE

Financial Strength

Audited 2025 Financial Statement
Revenue: $3,316,168 | Net Profit: $386,640
Cash at Bank: $1,105,345 | Auditor: AZM

Insurance & Liability Coverage

General Liability: $2,000,000
Professional Liability: $2,000,000
Cyber Coverage: $100,000 | Effective:

SBA WOSB Certified
Women-Owned Small Business

MEMBERSHIPS & EXPERTISE

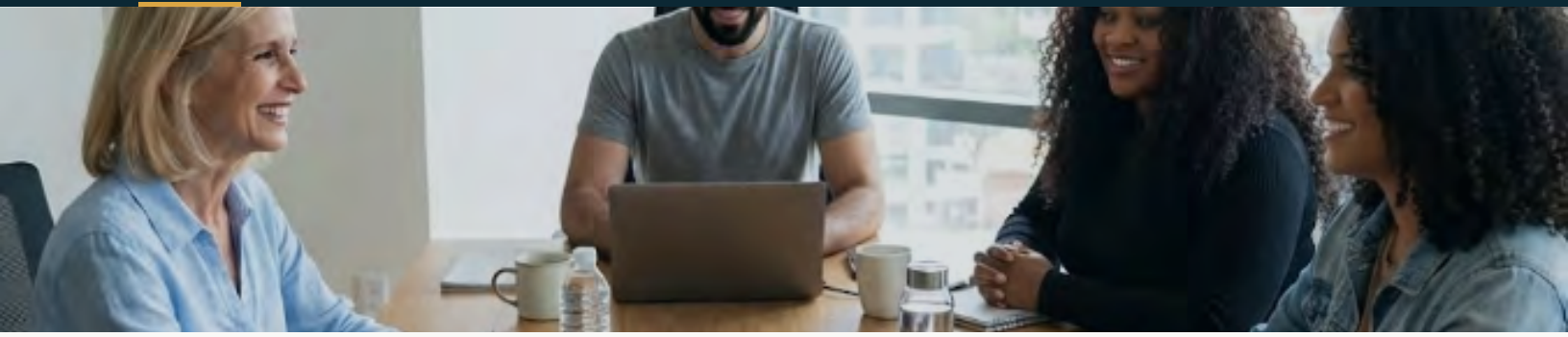
TRUE Advisor

US Composting Council

SWANA

ICMA

APWA



PROJECT TEAM

LEADERSHIP



Cam Anderson
Principal-in-Charge / Municipal Systems Lead
PMP, TRUE Advisor

Provides executive oversight and strategic planning for the City of Geneva's 2026 Water and Sewer Rate Study and Integrated Infrastructure Master Plan, ensuring all project components align with the City's objectives and quality...



Grace Espaldon
Project Manager / Project Controls & Coordination Lead

Manages the day-to-day operations for the City of Geneva project, including schedule control, data request tracking, and maintaining seamless communication between CWSA and city stakeholders.

ADVISORY & TECHNICAL TEAM



Chuck Loy
Senior Utility Rate Lead
CPA

Conducts the water and sewer rate study, focusing on revenue requirements and cost-of-service analyses for the City of Geneva, and develops detailed rate models to support strategic financial planning.



L. Lucas Lopez
Infrastructure / CIP Integration & Pavement Management Lead
P.E.

Leads the integration of the Infrastructure Master Plan with a focus on capital improvement planning and pavement management for Geneva, coordinating lifecycle planning and infrastructure prioritization.



Dr. Asalah M. Ali-Higginbotham
GIS / Esri Story Map Lead
Ph.D., TensorFlow Developer Certificate

Develops Esri-based GIS deliverables for the City of Geneva, organizing GIS assets and ensuring data quality, culminating in a City-hosted Esri handoff package.



Understanding of Geneva's Project

The City of Geneva, Illinois, has outlined a comprehensive initiative through its solicitation RFQ – 2026 Water and Sewer Rate Study and Integrated Infrastructure Master Plan (IIMP). This project transcends a simple rate study, aiming to establish a cohesive decision-making framework that integrates various key components of the city's infrastructure. CWSA recognizes the complexity and ambition embedded in this project, which seeks to harmonize water and sewer rate evaluations with the operational needs of the Reverse Osmosis (RO) plant, Wastewater Treatment Plant (WWTP), water distribution systems, sanitary collection networks, storm sewer improvements, pavement conditions, and both a 10-year and 30-year Capital Improvement Plan (CIP).

Integration of Rate Study and Infrastructure Needs

CWSA understands that the City of Geneva is not merely seeking to adjust water and sewer rates in isolation. Instead, the City aims for a strategic alignment of financial planning with infrastructure demands. This integrated approach will ensure sustainable and equitable rate structures that reflect the true cost of service delivery while supporting necessary infrastructure upgrades.

- Water and Sewer Rate Evaluation: CWSA will conduct a detailed analysis of current rates, targeting the alignment of revenue generation with the financial requirements of infrastructure maintenance and development.
- RO Plant and WWTP Needs: Our team will assess the operational and financial impacts of the RO plant and WWTP, ensuring that rate adjustments are reflective of these critical facilities' costs and efficiency targets.

Comprehensive Infrastructure Master Planning

The IIMP component necessitates a holistic evaluation of Geneva's infrastructure. CWSA's methodology will incorporate:

- Water Distribution and Sanitary Collection Systems: We will review existing conditions and future demands, identifying system deficiencies and optimizing performance through strategic investments.
- Storm Sewer Improvements: CWSA will evaluate stormwater management needs, integrating them with broader infrastructure objectives to enhance resilience and environmental compliance.
- Pavement Condition Assessment: As part of the infrastructure review, pavement conditions will be analyzed to prioritize improvements that support overall system efficiency and public safety.

Capital Improvement Planning

In alignment with the City's long-term vision, CWSA will develop a phased Capital Improvement Plan that addresses immediate and future infrastructure needs:

- 10-Year and 30-Year CIP Development: CWSA will create a roadmap for capital investments, balancing short-term maintenance with long-term growth and sustainability goals. This plan will facilitate informed decision-making, ensuring that Geneva's infrastructure supports community needs and regulatory requirements over time.

Commitment to Reducing City Staff Burden

CWSA is committed to delivering a seamless integration of the water and sewer rate study and IIMP that minimizes the burden on City staff. Through our data-driven and collaborative approach, we will provide clear, actionable insights and recommendations, empowering Geneva's leadership to make informed decisions without overwhelming city resources.

In conclusion, CWSA's approach to Geneva's project is not just about fulfilling the technical requirements but about creating a sustainable, efficient, and resilient infrastructure system that meets the City's current and future needs. We are dedicated to providing a comprehensive framework that supports Geneva's strategic goals and community betterment.

01 Controls & Data	02 Rate Model	03 Infrastructure & PCI	04 IIMP & CIP	05 Esri & Council

5.1 TECHNICAL APPROACH SUMMARY

Climate & Waste Systems Advisory (CWSA) submits this Technical Approach for the City of Geneva 2026 Water and Sewer Rate Study, Pavement Management Plan, and Integrated Infrastructure Master Plan. CWSA will deliver a structured, seven-workstream planning process that connects utility financial planning, infrastructure lifecycle analysis, pavement management, storm sewer priorities, Esri-based visualization, and a 10-year/30-year capital improvement framework - all managed through disciplined project controls and the Municipal Waste Systems OS.

Why CWSA for Geneva

- ✓ Integrated rate + infrastructure approach, not a stand-alone rate study
- ✓ Staff-light delivery with Grace Espaldon managing data, controls, and comments
- ✓ Chuck Loy, CPA leads rate study, revenue requirements, and Excel model
- ✓ Lucas Lopez, P.E. leads infrastructure/CIP integration and pavement management
- ✓ Asalah Ali-Higginbotham leads Esri story map and GIS handoff

RFQ Key Facts - Geneva

CITY SYSTEM
RO water plant · WWTP · water/sewer/storm/roads

CUSTOMERS
Approx. 8,344 utility customers · population 21,595

WATER NETWORK
156.9 miles of water main · 2 pressure zones

PAVEMENT NEED
Formal PCI dataset to be created through this project

GIS PLATFORM
Esri story map hosted by the City

5.2 SEVEN-WORKSTREAM TECHNICAL PROGRAM

#	WORKSTREAM	TIMING	PRIMARY OUTPUT	OS / EVIDENCE ARTIFACT
1	Kickoff, Data Request & Project Controls - kickoff meeting, communication protocols, data log, project schedule, and City review workflow	**Wks 1-2**	Kickoff memo · data request log · schedule · action tracker	**CWSA-E-001 Project Controls Log**
2	Water/Sewer Rate Study & Financial Model - revenue requirements, cost of service, fund balance, debt/cash funding, connection fees, and rate scenarios	**Wks 3-10**	Excel rate model · preliminary scenarios · customer impact tables	**CWSA-E-002 Rate Model Inputs**
3	Capital Needs & Lifecycle Review - review water, sanitary sewer, WWTP, RO plant, stormwater, and existing plans/studies	**Wks 5-12**	Lifecycle framework · capital needs summary	**CWSA-E-003 Capital Needs Register**
4	Pavement Management Plan & PCI Data Process - PCI approach, pavement prioritization, and lifecycle planning integrated with utility work	**Wks 3-9**	PCI method memo · PMP inputs · pavement priority matrix	**CWSA-E-004 PCI/PMP Evidence File**
5	Storm Sewer & Drainage Capital Integration - incorporate 2021 drainage study priorities and funding options into IIMP/CIP	**Wks 7-13**	Storm sewer CIP inputs · funding and sequencing notes	**CWSA-E-005 Storm/CIP Register**
6	Integrated Infrastructure Master Plan & 10/30-Year CIP - unified plan connecting rate strategy, projects, timing, and funding	**Wks 10-16**	Draft IIMP · 10-year CIP · 30-year framework	**CWSA-E-006 IIMP Decision Matrix**
7	Esri Story Map, Final Report & Council-Ready Deliverables - final report, Esri handoff, and two evening presentations	**Wks 14-20**	Final report · Esri handoff · Committee/Council decks	**CWSA-E-007 Final Archive**

Workstreams may proceed concurrently after City authorization. Total planned duration: 20 weeks from notice to proceed, subject to City data availability and review cadence.

5.3 DATA FRAMEWORK & CITY INTAKE

CWSA will build the technical approach on complete data intake, traceable assumptions, and transparent City review. Each requested item is assigned a responsible party, due-day target, required format, and use case.

#	DATA ITEM - SOURCE DOCUMENT OR DATASET	RESPONSIBLE PARTY	DUE	FORMAT
D-01	Current rate ordinances, customer classes, billing data, usage history, and meter/account records	Finance / Utility Billing	**Day 5**	Excel / PDF
D-02	Audits, budgets, fund balances, debt schedules, existing reserve policies, and cash-funded capital history	Finance	**Day 5**	Excel / PDF
D-03	Prior rate study, Council presentations, connection fee history, and financial policies	Finance / Administration	**Day 5**	PDF / Excel
D-04	Water distribution system inventory, RO plant data, wells, storage, pressure zones, water main replacement plans	Water Division / GIS	**Day 10**	GIS / PDF / Excel
D-05	Sanitary collection system, WWTP data, flow monitoring, CCTV logs, intensification study and surcharge review materials	Wastewater Division	**Day 10**	GIS / PDF / Excel
D-06	Storm sewer assets, 2021 Comprehensive Drainage Study, DSA project status, easements, and cost updates	Public Works / Engineering	**Day 10**	GIS / PDF
D-07	Street improvement history, pavement replacement records, internal PCI materials, road centerline data, and planned work	Public Works / Streets	**Day 10**	GIS / Excel / PDF
D-08	Capital improvement plans, project lists, cost estimates, funding assumptions, grant/loan history, budget cycles, and decision calendar	Administration / Finance	**Day 15**	Excel / PDF
D-09	GIS layers for water, sanitary sewer, storm sewer, pavement, parcels, road segments, and project boundaries	GIS / Public Works	**Day 15**	Esri / Shapefile

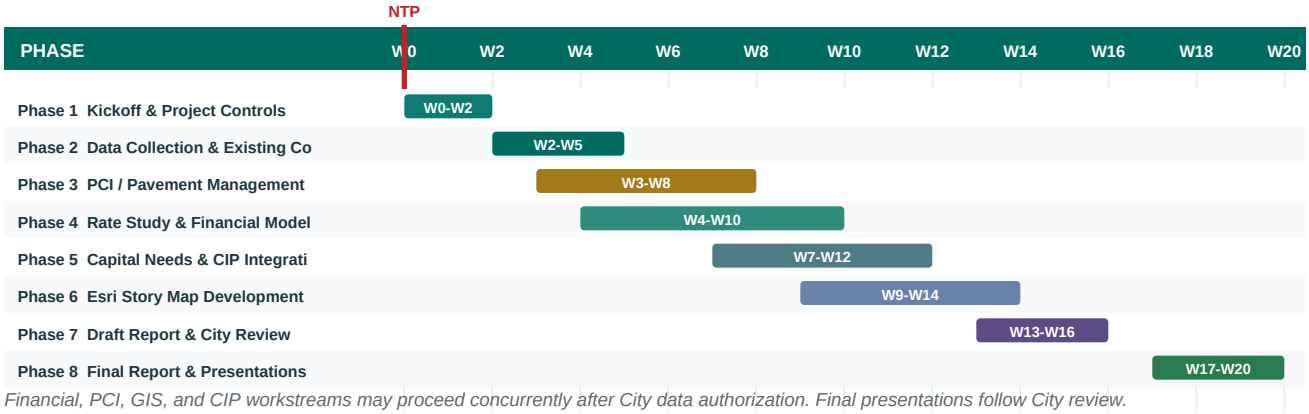
5.4 OS VERIFICATION LAYER - MUNICIPAL SYSTEMS OS

Every major CWSA deliverable will be registered as a project artifact in the Municipal Waste Systems OS with an ID, source chain, version history, status, and exportable file package.

ARTIFACT ID	PHASE SOURCE	ARTIFACT NAME & SCOPE	CONFIDENCE	CITY ACCESS
CWSA-E-001	**Phase 1**	Project Controls Log - schedule, data requests, action items, comments, and decision record	**Seeded**	**Read / Export**
CWSA-E-002	**Phase 2**	Rate Model Input Documentation - all assumptions, customer data, revenue requirements, and scenarios	**Phase 2**	**Read / Export**
CWSA-E-003	**Phase 3**	Capital Needs Register - water, sewer, storm, pavement, and lifecycle project inventory	**Phase 3**	**Read / Export**
CWSA-E-004	**Phase 4**	PCI/PMP Evidence File - pavement assumptions, data source notes, scoring, and prioritization logic	**Phase 4**	**Read / Export**
CWSA-E-005	**Phase 5**	Storm/CIP Register - drainage study integration, cost updates, and sequencing logic	**Phase 5**	**Read / Export**
CWSA-E-006	**Phase 6**	IIMP Decision Matrix - project phasing, funding strategy, rate impact, and timing alignment	**Phase 6**	**Read / Export**
CWSA-E-007	**Final**	Final Evidence Archive - final report, Excel model, Esri handoff, presentations, and source index	**Final**	**Download / Own**

CITY DATA RIGHTS GUARANTEE
Final CWSA project artifacts are transferred to the City in open-format files at engagement close. The Excel rate model, GIS-ready CIP layers, Esri handoff materials, and final report are intended for City ownership and future staff use - no proprietary software lock-in is required for final delivered files.

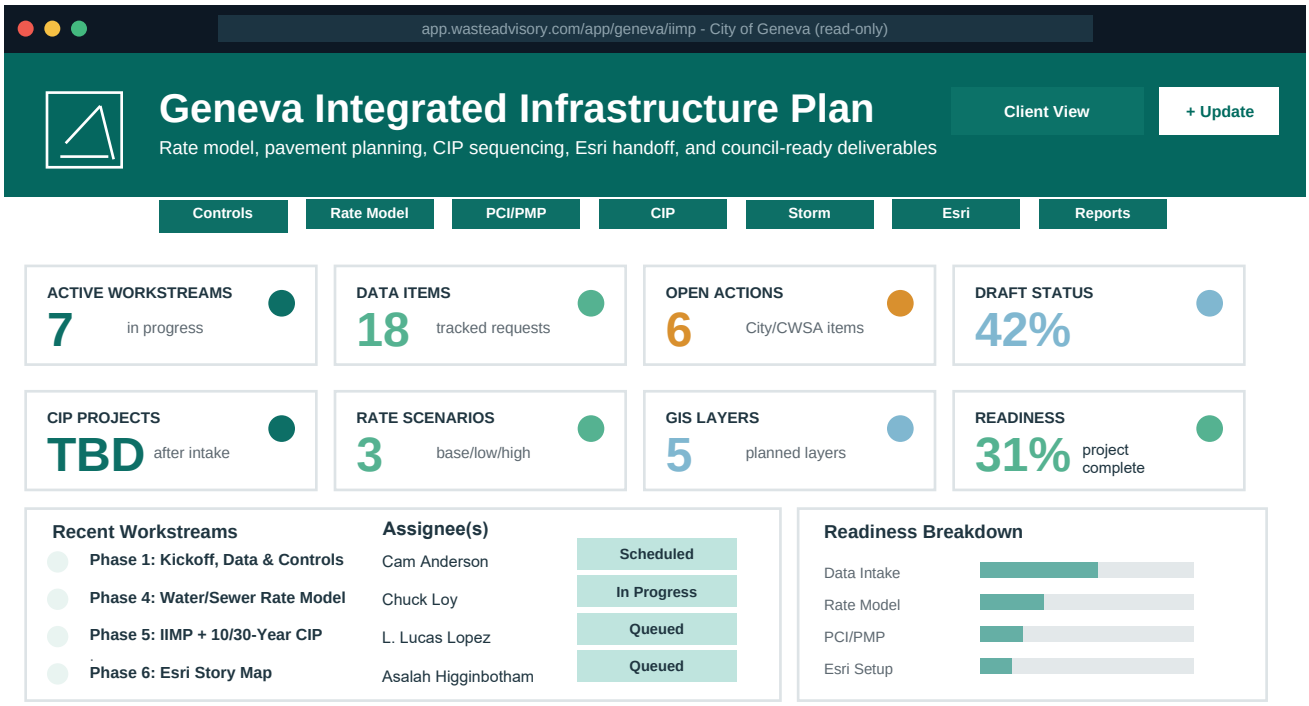
5.5 PROJECT SCHEDULE - 20-WEEK WORK PLAN



Financial, PCI, GIS, and CIP workstreams may proceed concurrently after City data authorization. Final presentations follow City review.

5.6 CWSA OS PLATFORM - CITY ENGAGEMENT DASHBOARD

The City of Geneva may receive read-only project dashboard access during the engagement. The dashboard is used for phase status, open actions, data requests, artifact tracking, risk items, draft deliverables, and final export packages. The dashboard supports staff coordination while final deliverables remain available in open-format files.



PROJECT SCHEDULE & DELIVERABLES

City of Geneva, Illinois — 2026 Water and Sewer Rate Study and Integrated Infrastructure Master Plan

PROJECT SCHEDULE

1 Phase 1 — Project Kickoff, Data Request, and Project Controls — Weeks 1–2

- Conduct a kickoff meeting with City of Geneva staff to confirm project objectives and establish communication protocols
- Outline the project schedule, data request needs, and decision points
- Implement project controls and document management structures

2 Phase 2 — Data Collection and Existing Conditions Review — Weeks 2–5

- Review existing financial statements, budgets, audits, rate ordinances, and related data
- Assess customer billing data, debt schedules, capital plans, GIS information, and infrastructure records

3 Phase 3 — PCI and Pavement Management Workstream — Weeks 3–8

- Develop a methodology for pavement condition data collection and coordinate assessments
- Analyze pavement prioritization criteria and evaluate lifecycle and budget needs

4 Phase 4 — Water and Sewer Rate Study and Financial Model — Weeks 4–10

- Establish revenue requirements and review fund balances, operating costs, and capital needs
- Develop customer impact analysis and multiple rate scenarios

5 Phase 5 — Capital Needs, Lifecycle Review, and CIP Integration — Weeks 7–12

- Integrate all capital needs into a comprehensive planning framework
- Align infrastructure replacement schedules with stormwater and roadway priorities

6 Phase 6 — GIS / Esri Story Map Development — Weeks 9–14

- Organize capital planning data for GIS and develop Esri story map structures
- Coordinate with City staff on hosting requirements and future maintainability

7 Phase 7 — Draft Report and City Review — Weeks 13–16

- Prepare a draft report encompassing all study findings and recommendations
- Facilitate a review meeting with City staff to incorporate feedback

8 Phase 8 — Final Report, Esri Handoff, and Presentations — Weeks 17–20

- Finalize all project deliverables, incorporating City feedback
- Deliver presentations to the Committee of the Whole and City Council

KEY DELIVERABLES

Project Schedule and Controls Package

A comprehensive package including the master project schedule, data request log, action item tracker, meeting summaries, and deliverable status tracker. Delivered at project kickoff.

Existing Conditions and Data Gap Summary

A detailed summary of available financial, infrastructure, and planning data, highlighting key limitations and assumptions. Delivered by the end of Phase 2.

Water and Sewer Rate Study

Complete analysis of revenue requirements, cost-of-service, customer class allocations, rate structure reviews, and impact analysis. Delivered by Phase 4 completion.

Excel Rate Model

A digital model enabling the City to review assumptions and evaluate future rate scenarios. Delivered with the rate study.

Pavement Management Plan Inputs

Framework and methodology for pavement data collection and prioritization. Delivered by the end of Phase 3.

Integrated Infrastructure Master Plan

A unified planning document connecting all study components, including lifecycle planning and funding strategy. Delivered in draft form by Phase 7.

10-Year Capital Improvement Program

A prioritized CIP with project descriptions, cost considerations, and sequencing rationale. Delivered with the final report.

30-Year Capital Planning Framework

Long-term planning horizon identifying major capital categories and future decision points. Delivered with the final report.

Esri GIS / Story Map Handoff

GIS-ready planning layers and story map structure, including visualization materials. Delivered in Phase 8.

Final Report

Comprehensive final report in PDF format, incorporating all City comments and recommendations. Delivered in Phase 8.

Presentation Materials

Presentation decks for the Committee of the Whole and City Council, summarizing findings and recommendations. Delivered in Phase 8.

TOTAL DELIVERABLES
All deliverables aligned to RFP requirements

11



RELEVANT CASE STUDIES

City of Naples

UTILITY RATE STUDY & WASTE DIVERSION LAB — 2024 – 2025

KEY SERVICES PROVIDED

- Utility cost-of-service rate study and Waste Diversion Lab design and facilitation: full direct and indirect cost allocation methodology
- revenue sufficiency analysis
- rate structure development benchmarked against Southwest Florida peers

RELEVANCE full cost-of-service methodology, rate structure development, and community engagement

Town of Hanover

UTILITY COST-OF-SERVICE AND RATE STUDY & WASTE DIVERSION LAB — 2024

KEY SERVICES PROVIDED

- Comprehensive utility cost-of-service and rate study for solid waste and recycling services
- including Waste Diversion Lab design and facilitation
- full cost allocation methodology

RELEVANCE Provides insights into designing financially viable waste management initiatives, informing program structuring, and aligning with waste diversion education enhancements

City of Waterbury

UTILITY COST OF SERVICES STUDY — 2023 – 2024

KEY SERVICES PROVIDED

- Full utility cost-of-service study for solid waste
- recycling
- and environmental services enterprise funds: revenue sufficiency analysis

RELEVANCE enterprise fund analysis, revenue adequacy, and rate tier benchmarking

City of Seabrook

MUNICIPAL WASTE & ENVIRONMENTAL SERVICES

Mar 2024 – Dec 2024

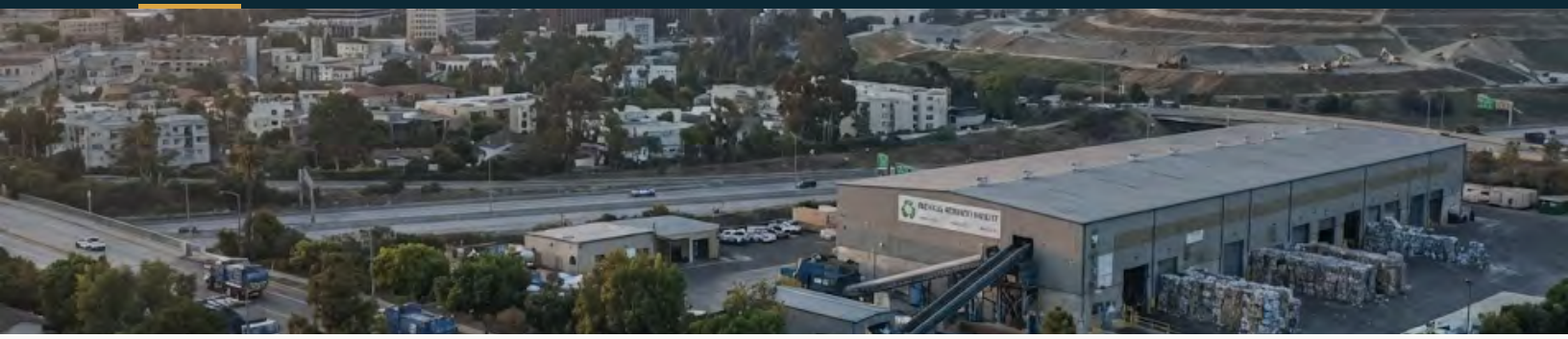
KEY SERVICES PROVIDED

- Waste services procurement support
- contract evaluation
- franchise agreement analysis

RELEVANCE franchise agreement evaluation, service benchmarking, and compliance framework design

FORMAL REFERENCES — ATTACHMENT F

AGENCY	CONTACT	PHONE / EMAIL	DATES	ADDRESS
City of Seabrook	Brian Adkins	(281) 968-3427 brian@seabrooktx.gov	Mar 2024 – Dec 2024	1700 First St, Seabrook TX 77586
Town of Hanover	James Collins	(603) 643-0742 publicworks@hanovernh.org	2024	41 South Main St, Hanover, NH 03755
City of Waterbury	Kevin Bieluch	(203) 574-6851 kbieluch@waterburyct.org	2023 – 2024	235 Grand St, Waterbury, CT 06702
City of Naples	Thomas Green	(239) 370-5878 tgreen@naplesgov.com	2024 – 2025	735 8th St S, Naples, FL 34102



FEE SUMMARY

TOTAL PROPOSED FEE	PRICING BASIS	VALIDITY
$298,500	Time & Materials NTE	90 Days
NUMBER OF TASKS	**TOTAL HOURS**	**DELIVERABLES**
8	840	8 Tasks

PHASED FEE BREAKDOWN

PHASE 1 — Project Kickoff, Data Request, and Project Controls

52 Hours — **$12,700**

● Lead: **Cam Anderson**

ROLE	HOURS	RATE	COST
Cam Anderson LEAD	8	$300/hr	**$2,400**
Grace Espaldon	18	$250/hr	**$4,500**
Chuck Loy, CPA	8	$300/hr	**$2,400**
L. Lucas Lopez, P.E.	8	$230/hr	**$1,840**
Dr. Asalah M. Ali-Higginbotham	4	$150/hr	**$600**
CWSA OS / Analytics Support	6	$160/hr	**$960**
		Subtotal	**$12,700**

PHASE 2 — Data Collection and Existing Conditions Review

86 Hours — **$20,820**

● Lead: **Cam Anderson**

ROLE	HOURS	RATE	COST
Cam Anderson LEAD	8	$300/hr	**$2,400**
Grace Espaldon	22	$250/hr	**$5,500**
Chuck Loy, CPA	20	$300/hr	**$6,000**
L. Lucas Lopez, P.E.	18	$230/hr	**$4,140**
Dr. Asalah M. Ali-Higginbotham	10	$150/hr	**$1,500**
CWSA OS / Analytics Support	8	$160/hr	**$1,280**
		Subtotal	**$20,820**

PHASE 3 — PCI / Pavement Management Workstream

120 Hours — **$27,000**

● Lead: **Cam Anderson**

ROLE	HOURS	RATE	COST
Cam Anderson LEAD	6	$300/hr	**$1,800**
Grace Espaldon	18	$250/hr	**$4,500**
Chuck Loy, CPA	4	$300/hr	**$1,200**
L. Lucas Lopez, P.E.	70	$230/hr	**$16,100**
Dr. Asalah M. Ali-Higginbotham	12	$150/hr	**$1,800**
CWSA OS / Analytics Support	10	$160/hr	**$1,600**
		Subtotal	**$27,000**

PHASE 4 — Water and Sewer Rate Study and Financial Model

142 Hours — $38,860

Lead: **Cam Anderson**

ROLE	HOURS	RATE	COST
Cam Anderson LEAD	10	$300/hr	$3,000
Grace Espaldon	18	$250/hr	$4,500
Chuck Loy, CPA	90	$300/hr	$27,000
L. Lucas Lopez, P.E.	8	$230/hr	$1,840
Dr. Asalah M. Ali-Higginbotham	4	$150/hr	$600
CWSA OS / Analytics Support	12	$160/hr	$1,920
	Subtotal		**$38,860**

PHASE 5 — Capital Needs, Lifecycle Review, and CIP Integration

158 Hours — $37,020

Lead: **Cam Anderson**

ROLE	HOURS	RATE	COST
Cam Anderson LEAD	14	$300/hr	$4,200
Grace Espaldon	16	$250/hr	$4,000
Chuck Loy, CPA	30	$300/hr	$9,000
L. Lucas Lopez, P.E.	62	$230/hr	$14,260
Dr. Asalah M. Ali-Higginbotham	20	$150/hr	$3,000
CWSA OS / Analytics Support	16	$160/hr	$2,560
	Subtotal		**$37,020**

PHASE 6 — GIS / Esri Story Map Development

128 Hours — $23,480

Lead: **Cam Anderson**

ROLE	HOURS	RATE	COST
Cam Anderson LEAD	6	$300/hr	$1,800
Grace Espaldon	10	$250/hr	$2,500
Chuck Loy, CPA	4	$300/hr	$1,200
L. Lucas Lopez, P.E.	20	$230/hr	$4,600
Dr. Asalah M. Ali-Higginbotham	70	$150/hr	$10,500
CWSA OS / Analytics Support	18	$160/hr	$2,880
	Subtotal		**$23,480**

PHASE 7 — Draft Report, City Review, and Comment Resolution

93 Hours — $21,510

Lead: **Cam Anderson**

ROLE	HOURS	RATE	COST
Cam Anderson LEAD	10	$300/hr	$3,000
Grace Espaldon	10	$250/hr	$2,500
Chuck Loy, CPA	18	$300/hr	$5,400
L. Lucas Lopez, P.E.	28	$230/hr	$6,440
Dr. Asalah M. Ali-Higginbotham	15	$150/hr	$2,250
CWSA OS / Analytics Support	12	$160/hr	$1,920
	Subtotal		**$21,510**

PHASE 8 — Final Report, Esri Handoff, and Two Evening Presentations 61 Hours **$14,160**

● Lead: **Cam Anderson**

ROLE	HOURS	RATE	COST
Cam Anderson LEAD	8	$300/hr	$2,400
Grace Espaldon	8	$250/hr	$2,000
Chuck Loy, CPA	11	$300/hr	$3,300
L. Lucas Lopez, P.E.	16	$230/hr	$3,680
Dr. Asalah M. Ali-Higginbotham	10	$150/hr	$1,500
CWSA OS / Analytics Support	8	$160/hr	$1,280
	Subtotal		**$14,160**

TOTAL PROJECT COST

8 Phases · 840 Hours

Professional Labor $195,550 · Direct Cost Allowance $102,950

$298,500

LABOR RATE SCHEDULE

#	LABOR CATEGORY	TYPICAL POSITION TITLE(S)	HOURLY RATE
1	**Principal in Charge**	Managing Director / Principal Advisor	**$300/hr**
2	**Senior Project Manager**	Senior Waste Systems Advisor / Senior Environmental	**$250/hr**
3	**Financial Modeling Lead**	Financial Analyst / Rate & Cost Modeling Lead / Budget	**$220/hr**
4	**Project Manager**	Waste Systems Project Manager / Advisory Project	**$200/hr**
5	**Senior Engineering / Environmental Professional**	Senior Solid Waste Engineer (P.E.) / Senior Civil	**$210/hr**
6	**Engineering / Environmental Professional**	Solid Waste Engineer / Environmental Scientist /	**$170/hr**
7	**Senior Technical Specialist**	Environmental Compliance Specialist / Regulatory	**$170/hr**
8	**Technical Specialist**	Waste Systems Analyst / Research Analyst / Policy	**$150/hr**
9	**Information Technology Specialist**	Data Systems Specialist / Reporting & Platform Analyst	**$160/hr**
10	**GIS Specialist**	GIS Analyst / Spatial Data Specialist / Mapping Analyst	**$150/hr**
11	**Instructor / Educator**	Municipal Waste Training Specialist / Workshop	**$145/hr**
12	**Marketing & Outreach Specialist**	Outreach & Communications Specialist / Engagement	**$135/hr**
13	**Graphic & Visual Communications Professional**	Visual Communications Specialist / Media & Design	**$130/hr**
14	**Administrative / Technical Editor**	Administrative Coordinator / Technical Editor / Project	**$110/hr**

ASSUMPTIONS

- Remote delivery unless otherwise arranged
- Travel billed at cost, pre-approved
- Standard business hours

EXCLUSIONS

- Third-party testing or laboratory services
- Permit application fees
- Legal representation



Appendices

This section provides essential supplementary documentation to support CWSA's proposal in response to the City of Geneva's RFQ for the 2026 Water and Sewer Rate Study and Integrated Infrastructure Master Plan. The appendices include resumes of key personnel, professional registration documentation, an insurance coverage summary, and a capability statement, all tailored to the specific requirements set forth by the City of Geneva.

Appendix A — Resumes

The resumes included in this appendix highlight the expertise and qualifications of the CWSA project team members who will be directly involved in the City of Geneva's rate study and infrastructure planning project:

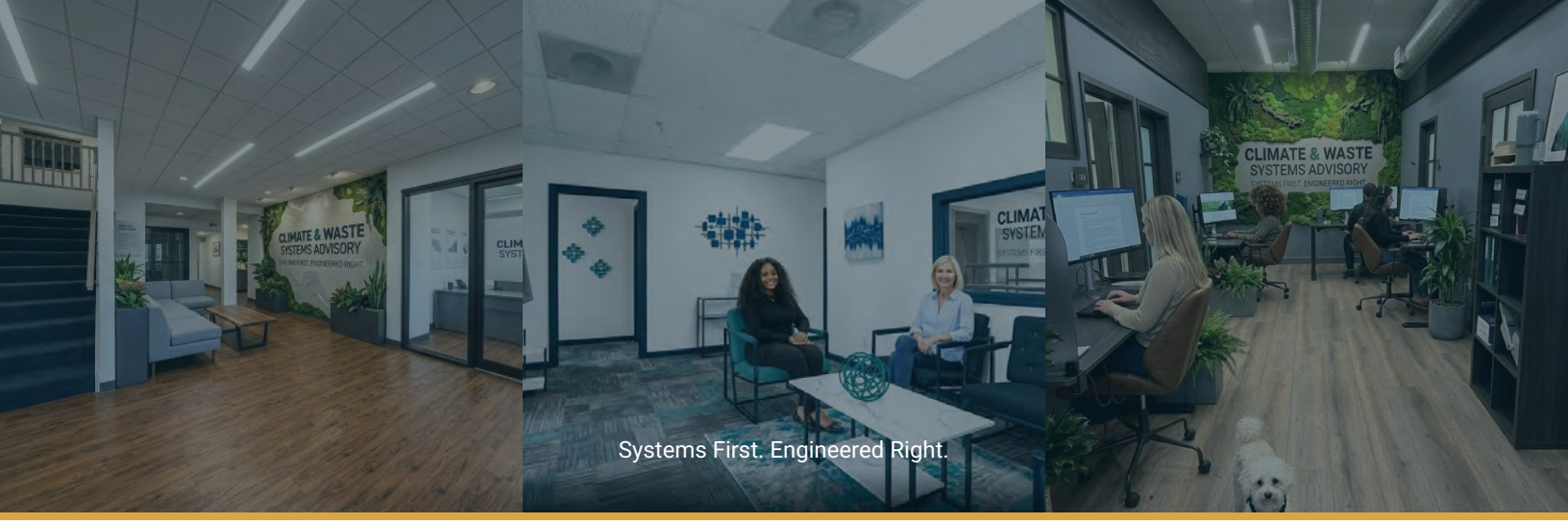
- Cam Anderson, PMP, TRUE Advisor — Principal-in-Charge / Municipal Systems Lead: Cam will oversee the project execution and ensure alignment with Geneva's strategic objectives.
- Grace Espaldon — Project Manager / Project Controls & Coordination Lead: Grace will manage project timelines and coordination, ensuring effective communication and delivery.
- Chuck Loy, CPA — Senior Utility Rate Lead: Chuck will lead the rate study component, leveraging his financial expertise to develop sustainable rate structures.
- L. Lucas Lopez, P.E. — Infrastructure / CIP Integration & Pavement Management Lead: Lucas will manage infrastructure integration, ensuring compliance and alignment with Geneva's infrastructure goals.
- Dr. Asalah M. Ali-Higginbotham, Ph.D. — GIS / Esri Story Map Lead: Asalah will provide GIS expertise, supporting data visualization and spatial analysis.

Appendix B — Insurance Coverage Summary

CWSA maintains comprehensive insurance coverage to support our municipal advisory and technical consulting engagements, including:

- General Liability: Coverage applicable to all engagements.
- Professional Liability / Errors & Omissions: Coverage to protect against professional service errors.
- Cyber Liability: Applicable where digital data handling is involved.
- Workers' Compensation: Coverage to protect our team and ensure compliance.

Certificates of Insurance are available upon request or will be provided during contract negotiations.



WHY CWSA

A Partner Built for Municipal Systems

Climate & Waste Systems Advisory partners with cities, counties, and waste authorities to design resilient, compliant, and financially sustainable municipal waste systems. Our team brings infrastructure expertise, regulatory insight, and data-driven analysis to every engagement.

15+	100+	8	3
Years of SW Advisory	Municipal Engagements	Certified Professionals	Regional Offices

CONTACT

Tammy Taylor-Pena
Authorized Negotiator · Director of Procurement
(817) 330-4414 | tammy@wasteadvisory.com

FIRM

Climate & Waste Systems Advisory
www.wasteadvisory.com | gov@wasteadvisory.com
Municipal Waste Systems Strategy & Advisory

ATTACHMENT

APPENDIX A

PERSONNEL RESUMES

5 Professional Profiles — Climate & Waste Systems Advisory

- Cam Anderson, PMP, CSM
- L. Lucas Lopez, P.E.
- Grace Espaldon, CSM, CAPM
- Asalah Ali-Higginbotham, Ph.D.
- Chuck Loy, CPA



CONTACT

Email: cam@wasteadvisory.com
Phone: (817) 330-4414
wasteadvisory.com

EDUCATION

PMP, CSM Certified — 20+ Years Systems Experience
Project Management Institute · Scrum Alliance

CERTIFICATIONS & CREDENTIALS

· PMP — Project Management Professional (PMI)
· CSM — Certified ScrumMaster (Scrum Alliance)
· AZ-500 — Azure Security Engineer (Microsoft)
· TRUE Advisor — Total Resource Use & Efficiency (GBCI)
· NIGP Member — Institute for Public Procurement

KEY EXPERTISE

· Waste Systems Assessment & Design
· Procurement & Contract Governance
· Regulatory & Compliance Alignment

CLIMATE & WASTE SYSTEMS ADVISORY

Cam **ANDERSON**, PMP, CSM

MANAGING PRINCIPAL

Climate & Waste Systems Advisory

Cam brings deep domain expertise in municipal waste systems — from collection operations to diversion policy to regulatory compliance. The systems-level thinking that makes assessments credible and recommendations implementable comes from years of understanding how waste programs actually function in the real world of politics, procurement, and staffing constraints.

Every engagement runs through Cam's judgment before a deliverable leaves the platform. Cam provides the strategic assessment that cities need: what will actually work, what won't survive implementation, and where the political risks are hiding.

RELEVANT EXPERIENCE

Waste Systems Assessment & Design

· End-to-end systems mapping: collection, transfer, processing, disposal, and diversion
· Waste characterization analysis and material flow modeling
· Service level assessment and operational gap analysis
· Benchmarking against comparable jurisdictions

Procurement & Contract Governance

· RFP scope of work development and evaluation criteria design
· Contract risk assessment and franchise agreement evaluation
· Vendor accountability framework development
· Negotiation strategy and council decision support

Regulatory & Compliance Alignment

· State-level mandate interpretation (SB 1383, Act 101, HB 1071)
· Enforcement architecture design and workflow development
· Compliance gap assessments against regulatory requirements
· Permitting pathway analysis (TCEQ, EPD, DEQ, and others)

REPRESENTATIVE PROJECT EXPERIENCE

Engagements provided to municipal clients include:

· Solid waste contract advisory and procurement support
· Transfer station needs assessment and feasibility studies
· Zero waste and diversion strategy development
· Organics mandate readiness assessments
· Rate studies and financial sustainability modeling
· Hauler performance evaluation and contract compliance review

CLIENTS SERVED

La Marque, Valdosta, GA, Franklin, TN, Seabrook, TX, Brattleboro, Walker Co., Houston, TX, Greenburgh,



CONTACT

Email: lucas@wasteadvisory.com
Phone: (817) 330-4414
wasteadvisory.com

EDUCATION

Engineering
Yale University

CERTIFICATIONS & CREDENTIALS

· P.E. — Professional Engineer (State Licensing Board)
· AWS-SAA — AWS Solutions Architect – Associate (Amazon Web Services)
· Yale University Engineering Graduate

KEY EXPERTISE

· Platform Architecture & Development
· Data Security & Audit Infrastructure

L. Lucas **LOPEZ**, P.E.

SENIOR DATA ENGINEER

Climate & Waste Systems Advisory

Lucas leads the engineering and product execution behind CWSA's proprietary Municipal Waste Systems platform. From structured intake workflows to the deliverable generation engine, every piece of the platform is built to produce reliable, repeatable outputs that cities can trust.

The platform is the infrastructure that makes consistent, auditable, board-ready deliverables possible across every engagement — integrating data analysis, AI-assisted drafting, and performance reporting.

RELEVANT EXPERIENCE

Platform Architecture & Development

· Full-stack application design (React, TypeScript, Node.js, PostgreSQL)
· Real-time data pipeline architecture for project management workflows
· Multi-tenant system design with role-based access control
· Performance optimization for data-intensive municipal analytics

Data Security & Audit Infrastructure

· Session-based authentication with role-based authorization
· Comprehensive audit logging for regulatory compliance
· Data integrity verification and tamper detection
· Secure API design with input validation

REPRESENTATIVE PROJECT EXPERIENCE

Engagements provided to municipal clients include:

· Municipal Waste Systems OS platform architecture
· Deliverable generation engine design and implementation
· Data pipeline and reporting dashboard development
· Performance metrics systems and KPI infrastructure
· GIS analytics and systems integration

CLIENTS SERVED

La Marque, · Valdosta, GA · Franklin, TN · Seabrook, TX · Brattleboro, · Walker Co., · Houston, TX · Greenburgh,



CONTACT

Email: grace@wasteadvisory.com
Phone: (817) 330-4414
wasteadvisory.com

EDUCATION

8+ Years Program Delivery & Execution Management
Project Management Institute (PMI)

CERTIFICATIONS & CREDENTIALS

· CSM — Certified ScrumMaster (Scrum Alliance)
· CAPM — Certified Associate in Project Management (PMI)

KEY EXPERTISE

· Proposal Preparation & Coordination
· Municipal Market Development

Grace **ESPALDON**, CSM, CAPM

BUSINESS DEVELOPMENT DIRECTOR

Climate & Waste Systems Advisory

Grace Espaldon leads market development, strategic partnerships, and advisory opportunity growth at Climate & Waste Systems Advisory. She identifies emerging municipal needs, coordinates proposal development, and connects CWSA's advisory services to the public-sector clients that align with the firm's mission.

Her background spans program delivery and execution management — giving her both the project discipline to coordinate complex proposals and the relationship skills to expand the firm's reach across municipal markets.

RELEVANT EXPERIENCE

Proposal Preparation & Coordination

· Proposal strategy and response coordination for RFP/RFQ submissions
· Key personnel documentation and qualification matrix preparation
· Compliance matrix review against solicitation requirements
· Proposal schedule management from release through submission

Municipal Market Development

· Identification of emerging municipal advisory needs
· Market intelligence tracking for procurement opportunities
· Relationship development with municipal associations and networks
· Industry association engagement (SWANA, APWA, ICMA, NIGP)

REPRESENTATIVE PROJECT EXPERIENCE

Engagements provided to municipal clients include:

· RFP/RFQ proposal coordination and submission management
· Municipal market development and opportunity identification
· Strategic partnership development and teaming coordination
· Industry association engagement and relationship management
· Stakeholder engagement and public involvement programs

CLIENTS SERVED

La Marque, · Valdosta, GA · Franklin, TN · Seabrook, TX · Brattleboro, · Walker Co., · Houston, TX · Greenburgh,



CONTACT

Email: asalah@wasteadvisory.com
Phone: (817) 330-4414
wasteadvisory.com

EDUCATION

Ph.D. — Doctor of Philosophy
Texas A&M University

CERTIFICATIONS & CREDENTIALS

· Ph.D. — Doctor of Philosophy, Texas A&M University
· TensorFlow Developer Certificate (Google)
· 10+ Years Applied ML/AI Research Experience

KEY EXPERTISE

· AI for Municipal Decision Infrastructure
· Ethical AI & Research Methodology

CLIMATE & WASTE SYSTEMS ADVISORY

Dr. Asalah **HIGGINBOTHAM**, Ph.D.

SENIOR ML & SYSTEMS RESEARCH LEAD

Climate & Waste Systems Advisory

Dr. Asalah Mahmoud Ali-Higginbotham is a senior machine learning researcher specializing in applied AI systems, algorithmic governance, and ethical AI deployment in high-impact public-sector environments. She holds a Ph.D. from Texas A&M University and brings over 10 years of experience.

At Climate & Waste Systems Advisory, she leads the development of intelligent decision-support systems that enhance municipal waste diversion planning, operational readiness analysis, risk modeling, and data-informed climate strategy.

RELEVANT EXPERIENCE

AI for Municipal Decision Infrastructure

· Structured AI pipelines for intake completeness detection
· Risk scoring and operational readiness modeling engines
· Narrative synthesis models for executive briefings
· Decision-support systems for municipal waste operations

Ethical AI & Research Methodology

· AI ethics and compliance frameworks for public-sector deployments
· Governance controls for AI-assisted deliverables
· Human-in-the-loop approval workflows
· Audit logging and traceability for model-assisted outputs

REPRESENTATIVE PROJECT EXPERIENCE

Engagements provided to municipal clients include:

· AI pipeline design for waste program intake and risk scoring
· Ethical AI governance frameworks for municipal tools
· Predictive modeling for diversion planning
· Research-backed program evaluation methodologies
· Data-informed climate and GHG strategy development

CLIENTS SERVED

La Marque, Valdosta, GA, Franklin, TN, Seabrook, TX, Brattleboro, Walker Co., Houston, TX, Greenburgh,



Chuck Loy, CPA

Senior Utility Rate Lead · Provident Utility Advisors | Climate & Waste Systems Advisory (subconsultant)

CPA

PROFESSIONAL SUMMARY

Chuck Loy, CPA, is a senior utility rates and regulatory consultant with more than 30 years of experience in utility revenue requirements, cost-of-service studies, rate design, wholesale rate studies, regulatory accounting, lead-lag studies, conservation rate design, and rate filing support. His experience spans water, wastewater, sewer, gas, and electric utility matters for investor-owned utilities, municipal utilities, non-profit utilities, utility districts, large users, and cooperatives.

AREAS OF EXPERTISE

Utility Rate Studies & Revenue Requirements

- Water and wastewater revenue requirement analysis
- Customer class cost-of-service studies
- Retail and wholesale rate design
- Rate model development, review, and quality control

Specialized Rate & Regulatory Design

- Conservation rate design for water and wastewater programs
- Purchased water pass-through mechanisms
- Lead-lag and cash working capital studies
- Wholesale rate studies and contract negotiations

Financial Review & Council-Ready Analysis

- Regulatory accounting and multi-utility financial review
- Utility acquisition and financial review support
- Written reports, presentations, and expert testimony
- Council-ready rate alternative explanations and customer impact analysis

REPRESENTATIVE PROJECT TYPES

- City of Page, AZ — Retail water/wastewater rate model and Council presentation
- Ector County MUD, TX — Water rate study and wholesale pass-through mechanism
- City of Alexandria, LA — Water/sewer/gas financial review and allocated cost-of-service
- Hays County WCID Nos. 1 & 2, TX — Retail rate models and board presentations
- City of Austin, TX — Cost-of-service review for multi-family customer classes

CERTIFICATIONS & LICENSES

CPA — Certified Public Accountant
State Board of Accountancy · Active

EDUCATION

Bachelor of Business Administration, Accounting
The University of Texas at Austin, Red McCombs School of Business

BACKGROUND

- 30+ Years Utility Rate & Regulatory Consulting Experience
- Expert in municipal, investor-owned, and non-profit utility rate matters
- Extensive rate filing and expert testimony experience before state and municipal authorities

FOCUS AREAS

Water and wastewater rate studies · Revenue requirement analysis · Customer class cost-of-service · Retail and wholesale rate design · Conservation rate design · Lead-lag and cash working capital studies

STRATEGIC VALUE

- Defensible water and sewer revenue requirements backed by 30+ years of rate experience
- Transparent cost-of-service methodology reviewable by City staff and Council
- Practical retail rate recommendations that survive public and council scrutiny
- Independent quality control of Excel financial models
- Reduces risk of black-box or unsupported rate recommendations
- Council-ready explanation of rate alternatives and customer impacts

CONTACT

Provident Utility Advisors
Austin TX
chuck.loy@providentutilityadvisors.com
www.providentutilityadvisors.com

ATTACHMENT

APPENDIX B

INSURANCE

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY): 02/26/2026

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 have ADDITIONAL INSURED provisions or 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).

PRODUCER
Verifly Insurance Services, LLC DBA Thimble Insurance Services
174 West 4th Street, Suite 204
New York, NY 10014
https://support.thimble.com/

CONTACT NAME: THIMBLE https://support.thimble.com/
PHONE (A/C, No, Ext):
FAX (A/C, No):
E-MAIL ADDRESS: support@thimble.com

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : National Specialty Insurance Company	22608
INSURER B :	
INSURER C :	
INSURER D :	
INSURER E :	
INSURER F : https://www.thimble.com/check-policy-status/	

INSURED
Climate & Waste Systems Advisory
119 N Main St, Weatherford, TX, 76086
cam@wasteadvisory.com

COVERAGES **CERTIFICATE NUMBER:** **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 INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: X POLICY PRO-JECT LOC OTHER:	N	N	IBL-PKZF24CBYJ	02/26/2026 11:15 AM CST	02/26/2027 11:15 AM CST	EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	$ 2,000,000 $ 100,000 $ 5,000 $ 2,000,000 $ 2,000,000 $ 2,000,000
	AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY SCHEDULED AUTOS HIRED AUTOS ONLY NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	$ $ $ $
	UMBRELLA LIAB OCCUR EXCESS LIAB CLAIMS-MADE DED RETENTION $						EACH OCCURRENCE AGGREGATE	$ $
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N / A					PER STATUTE OTH-ER E.L. EACH ACCIDENT E.L. DISEASE - EA EMPLOYEE E.L. DISEASE - POLICY LIMIT	 $ $ $
A	Professional Liability - Occurrence	N	N	IBL-PKZF24CBYJ	02/26/2026 11:15 AM CST	02/26/2027 11:15 AM CST	EACH OCCURRENCE AGGREGATE	$ 2,000,000 $ 2,000,000
A	Cyber Insurance - Claims-Made	N	N	IBL-PKZF24CBYJ	02/26/2026 11:15 AM CST	02/26/2027 11:15 AM CST	EACH CLAIM AGGREGATE	$ 100,000 $ 100,000

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

(con't on form Acord 101)

CERTIFICATE HOLDER
Cam Anderson
Climate & Waste Systems Advisory

CANCELLATION
SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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AGENCY CUSTOMER ID: cam@wasteadvisory.com

LOC #: 1

ADDITIONAL REMARKS SCHEDULE

AGENCY Verifly Insurance Services, LLC DBA Thimble Insurance Services	**NAMED INSURED** Climate & Waste Systems Advisory 119 N Main St, Weatherford, TX, 76086 cam@wasteadvisory.com
POLICY NUMBER IBL-PKZF24CBYJ	
CARRIER National Specialty Insurance Company / **NAIC CODE** 22608	**EFFECTIVE DATE:** 02/26/2026 11:15 AM CST

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,

FORM NUMBER: Acord 25 **FORM TITLE:** Certificate of Liability Insurance

Description of Operations (con't)

Episodic Coverage (THSN CG 02 04 02 21) for policy number IBL-PKZF24CBYJ until 02/26/2028 11:15 AM CST

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