

# CITY OF ORANGE, CALIFORNIA

▶ Statement of Qualifications/Proposal

## Energy Conservation, Performance, Contracting, and Power Purchasing Agreements

RFQ #24-25.29

July 31, 2025

### CONTACT

Colton Gorman  
858.951.2195  
[cgorman@willdan.com](mailto:cgorman@willdan.com)



Submitted by:

**Willdan Energy Solutions**

2401 E. Katella Avenue, Suite 300 | Anaheim, CA 92806

714.940.6300 | 800.424.9144 | Fax: 714.940.4920



## COVER LETTER

July 31, 2025

### Wanda Alvarez, Purchasing Manager, City of Orange

The City of Orange's efforts to advance sustainability, energy efficiency, and climate resilience through solar installations at three facilities, LED retrofits for nearly all streetlights and traffic signals, and targeted water utility improvements represent a strong foundation for a strategic energy savings plan. Willdan commends the City's leadership in furthering these efforts by exploring long-term strategies that promote clean energy and cost-effective infrastructure upgrades across municipal facilities in this RFQ/P.

Willdan's proposal is provided in response to the City's **RFQ/P for Energy Conservation, Performance Contracting, And Power Purchasing Agreements**.

The information included in this proposal is accurate.

We hereby acknowledge we meet all of the City's prerequisites for responding, will sign the City's *Standard Agreement for Consultant Services*, and have read and received *Addendums #1 and 2*.

**Primary Contact:** Colton Gorman  
2401 E Katella Ave. Suite 300 | Anaheim, CA 92806  
cgorman@willdan.com | 858.951.2195 [www.willdan.com](http://www.willdan.com)

**With a 42-year history of successful collaboration with the City of Orange and extensive experience in completing 1,000+ projects for all 34 cities in Orange County**, Willdan is excited about the opportunity to develop and implement a comprehensive energy program that aligns with operational, fiscal, and environmental goals. Our approach to energy savings performance contracting (ESPC) extends beyond conventional methods, which focus on short-term, low-cost upgrades. We offer a holistic, strategic framework that begins with a tailored Energy Master Plan – a living document that integrates facility assessments, energy and decarbonization master planning, and long-term capital planning.

Our Energy Master Plan will expand on the City's existing sustainability initiatives, including solar installations, EV charging infrastructure, LED streetlight conversions, and water system upgrades to guide the identification, prioritization, budgeting, and execution of projects that reduce utility costs, lower emissions, modernize infrastructure, and maximize funding opportunities such as federal and state incentives, power purchase agreements, and tax-exempt lease structures. Willdan's key differentiators:

- ▶ **HISTORY WITH THE CITY OF ORANGE-** Willdan has provided professional services to the City of Orange for **42 years**. Our long-standing partnership delivers insights into the City's infrastructure, priorities, and community values. Our experience working with the City enables us to streamline communication and project priorities.
- ▶ **NOT A TRADITIONAL ENERGY SERVICES COMPANY (ESCO)-** With 60 years as an engineering-focused firm, Willdan delivers unbiased, innovative energy solutions. Since starting ESPC projects 15 years ago, we've alleviated ESCO stigmas through full transparency, creative financing, and genuine guarantees. As California's top administrator of utility incentives, we ensure optimal savings for our clients.  
**Importance to the City of Orange:** Our approach enables the City to efficiently achieve sustainable energy goals, cut costs, upgrade infrastructure, avoid conventional model pitfalls, and foster long-term resilience.
- ▶ **DELIVERING SAVINGS AND REVENUE TO THE CITY OF ORANGE-** Willdan's approach to energy and infrastructure upgrades, including expedited Advanced Metering Infrastructure (AMI) water meter installations, positions the City for significant financial benefits. **By accelerating the replacement of the City's remaining ~22,000 water meters to AMI (surpassing the current plan of 1,500 replacements per year), we can enable an annual revenue recovery of \$2.1M through improved metering accuracy and reduced water loss.** This timeline would generate ~\$7M more in savings compared to a 15-year rollout, while saving energy with optimized water distribution and reduced pumping.
- ▶ **NATIONWIDE DECARBONIZATION AND MASTER PLANNING LEADER-** We have been at the forefront of decarbonization and electrification planning since it first gained popularity in the 2000s. Our team has developed 250+ specialized strategic master plans for similar public entities and local government clients, including New York City, to establish its 4,000-building Local Law 97 Decarbonization Master Plan.
- ▶ **PROVEN TRACK RECORD WITH LARGE METROPOLITAN MUNICIPALITIES-** Willdan understands the challenges large urban municipalities face in implementing city-wide efforts, as we are partners to four of the largest cities in California such as Los Angeles (including a \$330M contract with the Department of Water and Power to implement the Commercial Direct Install Program) and San Diego (including various energy efficiency and sustainability projects), with combined contracts valued at \$150M+.

**Headquartered in Anaheim, with 200+ team members located in Orange County** and Southern California, our team is excited to exceed the City's sustainability, deferred maintenance, and funding goals.

Respectfully submitted,



**David Daniel. AIA. LEED AP.** Senior Vice President



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## 2. INTRODUCTION

### Summary Statement

*A summary statement that demonstrates the proposer has a clear understanding of the City's objectives and how it expects to address them.*

The City has expressed interest in developing and implementing energy conservation, energy efficiency, energy generation, and energy-related capital improvement projects that are self-funding and require **no upfront capital investment**. Our approach to meeting the City's objectives includes:

- Conducting a preliminary city-wide Energy Master Plan and Investment Grade Audit (IGA) at no cost
- Implementing cost-effective energy conservation projects with no upfront costs
- Delivering long-term energy cost reductions that extend beyond final payment

The City of Orange has already made substantial progress in improving energy efficiency, reducing costs, and enhancing resiliency through several completed initiatives. These include solar PV installations at three sites; upgrades to 9,500 streetlights, traffic signals, and underpass fixtures; LED conversions for street and traffic lighting; enhancements to City-owned water utility infrastructure; and conversion of 25% of water meters to AMI technology.

Below is a summary of our three primary takeaways from the City's Project Goals (RFP Page 6), along with how Willdan, an ESCO certified by the United States Department of Energy (DOE), the National Association of Energy Service Companies (NAESCO), and the State of California Department of General Services (DGS), will address them.

#### City of Orange Goals At-A-Glance

##### Projects with no capital funding:

- Implement upgrades that are fully paid for with guaranteed utility cost reductions and operational savings

##### Climate Action Plan is being developed; goals include:

- Align with California's statewide target of reducing GHG emissions by 40% by 2030
- Support the City's hybrid approach to its CAP, developed with Chapman University, to achieve long-term Greenhouse Gas (GHG) emission reductions

#### GOAL #1: Reduce Energy and O&M with Turnkey Projects that Replace Obsolete Equipment and Increase Performance

**WILLDAN'S APPROACH:** *Start with a no-cost Energy Master Plan to identify key energy conservation measures and needs. Deliver end-to-end, no-upfront-cost solutions with cutting-edge technologies that upgrade outdated systems beyond like-for-like replacements to improve reliability while meeting California's 40% by 2030 GHG reduction goals.*

Our 42 years of experience with the City of Orange, including professional services for building and safety, sewer master planning, and traffic studies, gives us a holistic view of the City's day-to-day operations and opportunities beyond the low-hanging fruit that traditional ESCO projects focus on. Our team of 856 California-based specialists and 12 licensed Professional Engineers identifies revenue-generating scopes (e.g., AMI water meters, lift stations, Battery Energy Storage System (BESS), transformers) and pairs them with capital investments (e.g., electric vehicle (EV) charging, building and fleet electrification, HVAC) to create self-financing projects without City capital. Experience that guides our work for the City includes:

- \$500M+ in California infrastructure modernization projects, including energy efficiency and renewables, since 2020.
- *City of San Diego* – \$160M identified in LED streetlighting, building lighting, building electrification, HVAC, and roofing needs with significant energy and operational savings over the life of the project (56 buildings in portfolio).
- *City of Chino Hills* — A \$9M project that included transforming the public works building with advanced engineering, re-zoning the HVAC system with Variable Refrigerant Flow (VRF), integrating a BESS with solar for peak demand management, adding smart controls, and installing EV fleet charging infrastructure. This innovative redesign cut energy costs by 40%+ and achieved net-zero readiness.

**IMPACT FOR CITY OF ORANGE:** *Beyond 1-for-1 replacements with cutting-edge solutions and expanded funding options.*

**City Solution Highlight:** We will explore a greater range of energy efficiency measures (e.g., AI-optimized energy management, smart city funding, net-zero energy buildings, green infrastructure retrofits) and individualized funding options (e.g., accelerated water meter AMI conversion to **save ~\$7M more** compared to a 15-year rollout).





**GOAL #2: Improve Occupant Comfort and Safety, Community Enrichment, and Economic Development**

**WILLDAN'S APPROACH:** *Our projects go beyond energy savings. We not only exceed regulatory codes but also find opportunities for safety and comfort improvements. Our dedicated engagement team focuses on the community and economy, including targeted programs such as our Clean Energy Academy for skills development and a business incubator supporting local entrepreneurs in sustainable ventures.*

These projects should excel beyond typical ESCO energy outcomes. Energy upgrades also make public spaces safer and more comfortable environments that enrich communities and stimulate economic activity. Willdan's experience includes:

- Working with 95% of California cities (461 out of 481 incorporated cities and towns) to deliver professional services and/or turnkey projects, giving us insight into the needs cities face with mandates and the local climate.
- Occupant-centric design tools that prioritize measures which improve indoor air quality and thermal comfort, with targeted interventions boosting occupant satisfaction by 60%+.

**IMPACT FOR CITY OF ORANGE:** Prioritized occupant and community benefits in project design, ensuring every initiative contributes to lasting enrichment and growth within our master planning framework.

- *Comfort and Safety:* Integrate occupant-focused measures like smart ventilation systems and community solar programs, funded via economic development grants, to improve safety and align with emerging CAP.
- *Willdan Clean Energy Academy:* Offering a free, comprehensive training and education program to equip individuals with the skills needed for careers in energy efficiency, clean energy, and sustainability (1300+ graduates to-date).
- *Local Business Incubator:* Nurturing emerging clean energy enterprises and talent by offering free, advanced training in energy efficiency, sustainability standards, energy auditing, software tools, certifications, and professional development (e.g., resume building). For the City of Orange, this incubator could impact 200+ community members with workforce training on Energy Conservation Measures (ECMs) like VFDs, smart irrigation, or solar maintenance.

**Goal #3: Minimize Financial and Technical Risk to the City**

**WILLDAN'S APPROACH:** *We use performance guarantees, transparent audits, and diversified financing to address the City's highest priority buildings with no upfront capital cost.*

Willdan uses a dedicated, in-house team of 8 accredited funding specialists and our 50+ partner network (including preferred/local providers) to exhaust all national, state, and local funding sources. Our expertise includes:

- Utilizing extensive experience securing \$3B+ in financing, incentives, and grants, evaluating all options, including PPA escalator risks against TELP's (Tax Exempt Lease Purchase) ownership benefits to shield the City from financial burdens and technical uncertainties.
- In comparable California municipal projects with the goal of no capital expenditures, we can reduce energy consumption by an average of 25-35% and typically craft turnkey projects that address \$30M+ in infrastructure needs at no cost to the City.

**IMPACT FOR CITY OF ORANGE:** Reliable revenue streams, no upfront cost, and reduced O&M costs long term.

Key features of our approach to reducing financial and technical risks to the city include:

- *Financial Risk:* Willdan maintains substantial bonding capacity — exceeding \$500M aggregate through A-rated sureties like Liberty Mutual and Travelers — to cover performance, payment, and construction bonds for projects of this scale.
- *Technical Risk:* Willdan's turnkey process assumes all technical risks, from the no-cost preliminary assessment and IGA to design, construction, commissioning, and ongoing performance monitoring. Our in-house team of licensed engineers (Class A and B in California) and partnerships with vetted subcontractors ensure compliance with codes, seamless integration with existing systems (e.g., solar at the Police Department or VFDs on wells), and minimal disruption.

## Acknowledgement of City's Standard Agreement

*Acknowledge your firm will sign the City's Standard Agreement for Consultant Services (attached).*

Per the City of Orange's request Willdan attests, upon selection as the City's Turnkey Energy Conservation, Performance Contracting, and Power Purchasing Agreement Provider, that it will sign the City's Standard Agreement for Consultant Services.





### 3. COMPANY PROFILE

*The proposer shall provide a general description of the firm, including a brief history and its experience in providing similar services as those requested in the RFQ/Proposal in relation to the City’s facility characteristics and project objectives.*

Willdan has been a trusted advisor to California Cities for 57+ years, and has a deep understanding of the challenges they face. We deliver industry-leading energy and engineering solutions that have transformed government and commerce, with our teams completing \$550M+ of successful projects with state and local governments.

Aspects of the Willdan advantage are detailed throughout our proposal and also summarized below:

- Since our founding in California in the 1960s, we have worked with all 58 counties and 442 of the 483 incorporated cities in the State.
- **We have served the City of Orange for 42 years**, providing financial analysis and engineering services.
- Our revolutionary approach to project development includes reaching 100% design during the IGA, while traditional ESCOs typically utilize a conceptual (30% or less) design to establish pricing. This reduces the City’s project risk by avoiding inherent price inflation needed to cover the ESCO’s risk due to incomplete information.
- We think outside of the box and create master-planning approaches for our projects so that any City investment in energy conservation and efficiency not only saves energy and reduces utility costs in the short term but also contributes to bringing the City’s facilities into compliance with local and state carbon emissions regulations and other requirements.
- We will creatively leverage all of our regional partnerships to create the most cost-effective program for the City, including all utility incentive and grants programs.
- We stamp our own drawings and keep all mechanical, electrical, plumbing, civil, utility, and energy engineering in-house.



**Our team is fully committed to:**

- Engaging local subcontractors and Disadvantaged Business Enterprises (DBEs) to construct projects.
- Working with local school districts and colleges to provide educational opportunities wherever possible.
- Providing project updates and communication to stakeholders and the community, including city council meetings, a groundbreaking ceremony, and other marketing and press-related events.

**Willdan has saved our clients:**

-  7,800+ GWh
-  1,600+ MW of electricity
-  110M therms of natural gas
-  2.6B gallons of water

### Proof Willdan meets Minimum Requirements

As requested by the City, Willdan Group Inc. (“Willdan”) attests that we:

- As mentioned in **Section 2. Introduction**, are accredited by NAESCO and included on the U.S. Department of Energy’s (DOE) Qualified List of Energy Service Companies;
- Have successfully implemented significantly more than five (5) energy performance contracts and power purchasing agreements for public sector clients in the last five (5) years;
- Hold an active Class A – General Engineering and Class C10 – Electrical licenses (held by Willdan Energy Solutions, a wholly-owned subsidiary), and a Class B – General Building (held by Willdan Engineering, an wholly-owned subsidiary) Contractor’s license in the State of California
- Have not filed for bankruptcy under any business name over the past five (5) years.
- Have provided a Bonding Statement, as a separate attachment along with our submittal, from our Surety Company (rated A- or better) attesting to our bonding capacity, and
- Carry all the required licenses in accordance with the City Orange requirements.





## a. ESCO in the State of California

The City will only consider submittals from ESCOs whose proposed team can demonstrate the following background and capabilities:  
A long term, well established ESCO in the State of California;

Willdan Energy Solutions (“Willdan”) is a leading ESCO with California roots and a national reach.

Willdan achieved \$1.1B+ in revenue over the past three years, providing energy audits, engineering services, and project implementation to clients across the country. Our solutions and services include investment-grade audits, incentive applications, energy reporting, and project implementation related to smart lighting, HVAC, solar, wind, battery storage, wastewater treatment facilities, and more for municipalities.

Willdan’s energy expertise goes well beyond traditional performance contracting projects; we provide unique capabilities to ensure the City’s energy program delivers maximum value:

**IGA Approach:** We go beyond just capturing ‘low-hanging fruit’ or addressing immediate needs – instead delivering a comprehensive strategy that incorporates energy opportunities, capital improvement plans, climate action plans, and other community initiatives. We ensure the energy program we deliver advances the City’s goals and maximizes long-term value.

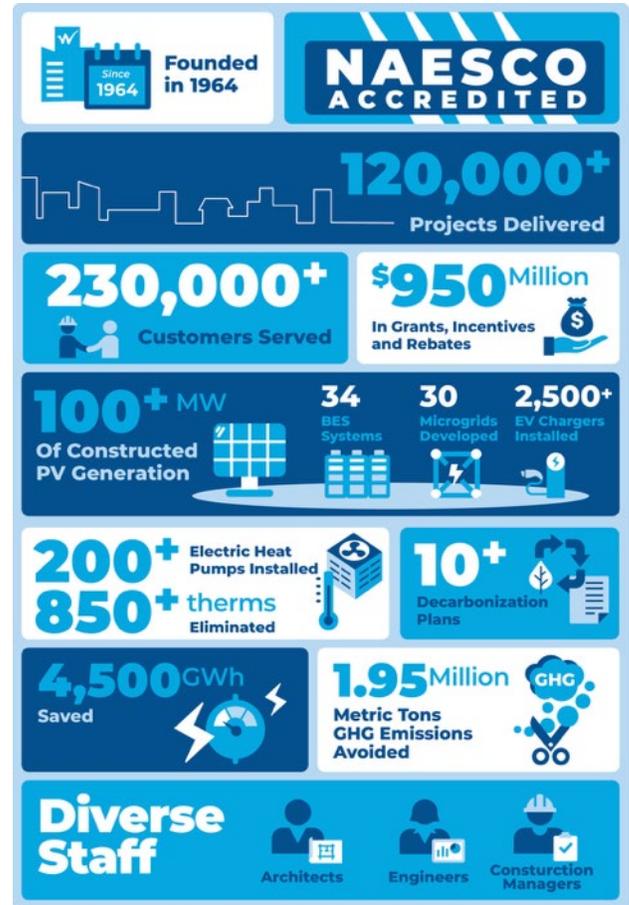
**Enhanced Engineering to Reduce Costs and Risks:** Willdan’s upfront engineering and design go far beyond competitor offerings. Where other ESCOs inflate costs to hedge for unknowns, we dive in to create certainty. Our enhanced project development enables heightened confidence, lower costs, greater savings, and decreased risk.

**Dedicated to Serving CA Public Agencies:** Since our founding in 1964, we’ve focused on providing high-quality services to California’s public agencies. *We have experience serving all 58 California counties, as well as 91% of the incorporated cities*, including 24+ years of service to the City of Orange. Our depth of experience with public agencies is unparalleled and will result in a superior service for the City.

**Utility Incentive Program Implementers:** Willdan is trusted by the largest utilities in the country to create and deliver efficiency and electrification programs to their customers. We bring an unmatched understanding of how to partner with utilities in order to maximize the incentives for the City’s energy projects.

**Fleet Electrification Experts:** Willdan can leverage our experience of crafting fleet electrification and electric vehicle charging infrastructure strategies for 40+ public agencies to ensure the City’s energy program comprehensively addresses vehicle and facility energy use. Our fleet electrification experts will ensure the energy program keeps the City ahead of regulations and on the optimal road to carbon-neutral transportation.

**Carbon Reduction Strategy Pioneers:** Willdan also helps utilities, regulators, policy makers, private companies, and local government agencies make the best strategic decisions possible as they implement new public policies, respond to technological advances, and address shifting stakeholders expectations.





Because Willdan works with clients from all sectors of the electricity industry, we provide a 360-degree understanding of markets, planning, policy, regulation, and environmental factors. Just as important, we are committed to delivering clear, unbiased analyses that help clients make informed decisions.

We have successfully delivered high-quality projects to 442 of the 482 cities in California, providing high performance to our municipal clients for 60+ years. We understand that while the City will promote sustainability with the projects, maximizing energy efficiency will minimize expenses and deliver bottom-line operational cost savings on an annual basis. Headquartered in Anaheim, Willdan has offices strategically located throughout California. Willdan also has more than 80 California-licensed professional engineers and architects in 14 offices across the state, all with proven professional records on simple to complex energy savings projects. While many of our competitors must engage the services of third parties for engineering expertise on an as-needed basis, our approach is built on the belief that there is a direct correlation between the amount of up-front engineering investment and the successful outcome of a project.

- Willdan is the third largest provider of ENERGY STAR Web Services, having benchmarked 15,000+ properties in the last 12 months. We have calculated ENERGY STAR scores for 8,000+ buildings and field verify energy efficiency measures in 500+ projects per year to help customers achieve the ENERGY STAR label.
- Willdan has 50+ LEED-accredited professionals who have evaluated and designed projects using sustainability requirements nationwide.
- We calculate emissions reductions on 800 new construction projects per year using Net Energy Optimizer (NEO), our in-house energy modeling software. This can also be done for existing buildings. In addition, we show potential emissions savings on 20,000+ buildings in our B3 Benchmarking system. With B3, we have incorporated regional emissions factors and can enter area-specific factors to calculate emissions reductions.
- Willdan has successfully implemented 80+ comprehensive energy efficiency projects in the last five years, similar in scope to that envisioned by the City.

## b. Implementation of Comprehensive Projects

*Implementation of comprehensive energy conservation measure on public works projects such as Water/Waste Water Districts, County, and Municipal facilities;*

With over 25 years of experience performing similar services for municipal governments, we have completed more than \$550M of successful projects with California state and local governments. These include the hundreds of cities like South Lake Tahoe, Dublin, Chino Hills, Paramount, Fillmore, Fairview, San Diego; the California DGS; and the California Transportation Agency (CALTRANS).

Per the City’s request, more information on these projects can be found in **Section 5. Prior Related Experience and Competence**.

## c. Utility Company Incentive Experience

*Experience in procuring utility company incentives;*

Willdan is trusted by the largest utilities in the country to create and deliver efficiency and electrification programs to their customers. We bring an unmatched understanding of how to partner with utilities in order to maximize the incentives for the City’s energy projects. Willdan has implemented over 70 utility EE programs and served more than 210,000 customers nationwide, providing **over \$250M in rebates for our municipal customers in CA and \$1.4B total nationwide**.

### Relevance to City of Orange

Willdan’s deep utility partnerships—particularly with Southern California Edison (SCE)—will maximize incentives and rebates for your energy projects, including solar expansions, LED upgrades, and water efficiency measures.





To date, Willdan has secured \$2B+ in project financing for our customers utilizing many financial vehicles as shown below. Willdan Financial Services works closely with our customers to identify the best options to evaluate as part of our detailed Investment Grade Audit.

In California, for example, we have supported utilities, state agencies, and the market operator in developing the infrastructure, programs, and plans that will realize the State’s goal of meeting a 50% renewable portfolio standard by 2030. In New York, we are advising state agencies and regulators about how to implement clean energy policy with an emphasis on customer incentives and markets. In Hawai’i, we are helping the utility achieve the state’s goal of 100% renewable energy in the most reliable, least expensive way.

## d. ESPC Project Experience

*Planning of a minimum of five (5) projects for energy savings performance contracting in the past five (5) years;*

Willdan has successfully implemented over 40 comprehensive energy efficiency projects in the last five years similar in scope to that envisioned by the City. A sampling is shown below; a longer list and subsequent references for three (3) projects are provided in **Section 5. Prior Related Experience and Competence**.

Project Name	City & State	Project Size (\$)	Project Scope/ Measures	Status
City of San Diego	San Diego, CA	\$150M+	Lighting, HVAC, PV, roofing, streetlighting upgrades, BESS, water conservation, EV charging	2027 estimated construction comp.
City of Fillmore	Fillmore, CA	\$5.2M	System-wide AMI upgrade with new ultrasonic meters and Customer Experience Portal	Completed in Q1 2025
City of Dublin	Dublin, CA	\$22M	HVAC, BAS, PV, BESS, microgrids, EV charging, LED lighting	Multiple phases starting 2021
City of Chino Hills	Chino Hills, CA	\$12.5M	PV, BESS, microgrids, EV, HVAC, LED lighting	Phase I Complete; Phase II Ongoing
CA DGS - Elihu Harris	Oakland, CA	\$11.7M	LED lighting, air duct sealing, BAS and access controls, HVAC measures	Project complete 2021

## e. Team of California Licensed Engineers

*Ability to provide a team of California licensed mechanical, electrical, structural, and civil engineers as may be necessary;*

Willdan has more than 80 California-licensed professional engineers and architects in 14 offices in the state, all with proven professional records on simple to complex energy savings projects. While many of our competitors must engage the services of third parties for engineering expertise on an as-needed basis, our approach is built upon the belief that there is a direct correlation between the amount of up-front engineering investment that is made and the successful outcome of a project.

California-licensed engineers on staff include the following:

**Aaron Buys, PE**  
*Mechanical Engineering Lead*  
 License No. 39204  
**Tom Muñoz, PE**  
*Mechanical Engineering Lead*  
 License No. 30635  
**Jeff Lau, PE**  
*Civil and Traffic Engineering*  
 License Nos. 2835 and 83887  
**Eddie Sladek, PE**  
*Mechanical Engineering*  
 License No. 36321

**Shane Maddox, PE**  
*Electrical Engineering Lead*  
 License No. 25108  
**Ben Laboy, PE**  
*Mechanical Engineering*  
 License No. 40619  
**Aaron Etkorn, PE**  
*Mechanical Engineering*  
 License No. 38889  
**Afsheen Mashayekhi, PE**  
*Mechanical Engineering*  
 License No. 34007

**Jeff Lau, PE**  
*Civil Engineering Lead*  
 License No. 83887  
**Jamie Gustafson, PE**  
*Mechanical Engineering*  
 License No. 41641  
**Bryan Rossi, PE**  
*Mechanical Engineering*  
 License No. 40307  
**Raymond Cun, PE**  
*Mechanical Engineering*  
 License No. 41390





## f. Experience Retrofitting Water Entities Infrastructure

*Demonstrated experience in retrofitting water entities infrastructure to reduce energy consumption;*

Willdan’s water system specialists have deep experience retrofitting water and wastewater infrastructure to enhance operational efficiency and reduce energy use across multiple jurisdictions. Our approach blends advanced controls, smart metering technologies, and ESPC to deliver measurable results – while also supporting critical capital improvement projects (CIP) by using ESPC in intelligent, budget-neutral ways. By aligning performance-based savings with infrastructure priorities, we help agencies accelerate urgent upgrades without waiting for traditional funding cycles.

PROJECT	PROJECT OVERVIEW
<b>Irvine Ranch Water District, CA Infrastructure Efficiency Upgrades</b>	Willdan supported infrastructure modernization efforts, integrating energy-efficient solutions and smart technologies to optimize water system performance, reduce energy consumption, and extend asset life. Using our proprietary B3 benchmarking and analysis tool, we identified high-impact efficiency measures that aligned with IRWD’s operational priorities and capital planning goals – ensuring targeted investments that maximized both energy savings and system resilience.
<b>City of Fillmore, CA Smart Water AMI Upgrade</b>  <b>City of Camas, WA Wastewater Plant ESPC Project</b>	Willdan deployed a citywide AMI system with integrated real-time dashboards, leak alerts, and hourly consumption data. These enhancements enabled 24/7 oversight, significantly reduced water loss, and supported energy savings by optimizing pumping schedules and operational response.  Willdan implemented controls upgrades and programming on specific VFDs and UV disinfection equipment, which resulted in improved blower control, reliable UV system operation, extended equipment life, as well as energy and maintenance cost savings.
<b>King County, WA West Point WWTP</b>	Willdan performed equipment upgrades & optimization, LED lighting upgrade with advanced controls





## g. Experience with Power Purchasing Agreements (PPAs)

*Experience with Power Purchasing Agreements.*

Willdan brings extensive expertise in structuring and implementing Power Purchasing Agreements (PPAs) to deliver renewable energy solutions that minimize upfront costs and lock in long-term savings for municipalities. Over the last 15 years, we have secured \$3B+ in financing, incentives, and grants for our customers, enabling the deployment of solar and other clean energy projects through innovative third-party arrangements. Our dedicated Willdan Financial Services division, comprised of municipal financing specialists, excels in navigating complex funding landscapes to optimize outcomes for public sector clients like the City of Orange.

For this project, our team will conduct a thorough evaluation of all viable financing options tailored to the City's needs, including PPAs; Tax-Exempt Lease Purchases (TELP); municipal bonds; and a comprehensive pursuit of federal, state, and utility grants and incentives (e.g., through programs like the Inflation Reduction Act and Southern California Edison rebates). This holistic approach ensures the City achieves maximum value—such as predictable, below-market energy rates via PPAs—while aligning with your goals of energy cost reductions, resiliency enhancements, and zero capital outlay. Our track record includes successful PPAs for similar California cities, resulting in millions in annual savings and reduced operational risks, all backed by performance guarantees and transparent measurement protocols.

## h. Experience in Design and Installation of Photovoltaic (PV) Systems

*Demonstrated experience in the design and installation of photovoltaic systems at Municipal facilities to reduce energy consumption;*

Willdan has delivered over 100MW of solar PV projects for municipal clients, including 1.2MW for the City of Dublin, 2.3MW for Paramount USD, and a 1MW ground mount system for the City of Turlock. Systems were sized to maximum utility cost savings, accounting for forecasted baseline decreases from other measures or baseline increases from future EV loads or building expansions.

During the preliminary assessment and Investment Grade Audit (IGA), Willdan analyzes the existing electricity consumption, evaluates opportunities to maximize land use, and develops schematic solar PV layouts that show the location and system size of the arrays.

Willdan's combination of expertise in the analysis, design, procurement and installation of fully integrated solar PV makes us ideally suited to design, procure and construct solar on behalf of the City. Highlights of our past experience with this technology includes:

- 8+ years experience installing and operating solar systems
- Completion of PV system designs for 230+ sites

Willdan provides the full suite of services necessary to successfully identify and deliver renewable generation and projects for the City, including:

- Systems analysis and solution identification
- Interconnection application assistance
- Full in-house design & engineering solutions
- Competitive and transparent procurement of equipment and trade services
- Construction management & field supervision
- Commissioning & Measurement and Verification (M&V)
- Ongoing operations and maintenance support (O&M)





## i. Experience Integrating New PV with Existing Monitoring Systems

*Demonstrated experience in integrating new photovoltaic systems to work with existing monitoring systems at Municipal facilities;*

Willdan regularly integrates solar PV and other monitoring systems such as BESS and microgrid controllers, including for the City of Dublin. For the City of Dublin, Willdan added solar PV to sites with existing solar PV and intentionally kept the new solar PV data acquisition systems separate, so production of new systems could be accurately tracked for our M&V guarantee.

## j. Familiarity with Recent CPUC Rulings

*Familiarity with recent CPUC rulings regarding California's Net Energy Metering (NEM) program and have resources to provide the proper assessment and application submittal before deadlines.*

Willdan is a trusted policy advisor to the CEC and CPUC. For our end-user clients, as part of the master planning analysis our teams will do a rigorous analysis of the existing utility supply tariffs, time-of-use and various other strategies and methods to look at improving utility costs for our clients.

Willdan demonstrates deep familiarity with recent CPUC rulings on California's Net Energy Metering (NEM) program, ensuring compliance and optimization for the City of Orange's solar initiatives. We are well-versed in the transition from NEM 2.0 to the Net Billing Tariff (NBT, commonly referred to as NEM 3.0) established by CPUC Decision D.22-12-056 in December 2022, which took effect for new interconnections on April 15, 2023, reducing export compensation to avoided cost rates while incentivizing paired storage. Subsequent rulings include D.23-11-068 in November 2023, introducing the Virtual Net Billing Tariff (VNBT) and aggregation subtariff effective February 14, 2024, alongside enhanced consumer protections and prevailing wage requirements under AB 2143. We are also closely monitoring the ongoing California Supreme Court case challenging NEM 3.0's legality—oral arguments were heard on June 4, 2025, with a decision pending as of July 2025—which could impact future compensation structures and deployment strategies. Our Willdan Financial Services division, staffed with municipal financing experts, provides dedicated resources for comprehensive assessments, including site-specific solar feasibility studies, export credit projections, and interconnection applications. We handle all submittals to utilities like Southern California Edison before critical deadlines, leveraging our track record of securing \$3B+ in financing, incentives, and grants to maximize rebates under programs like the Inflation Reduction Act while mitigating risks from regulatory shifts.

## k. Commitment Team will Perform Energy Services Contract

*Contractually commit that the team defined in the qualification statement will perform on this energy services contract should it be chosen.*

Willdan is prepared to contractually commit to this team to perform the requested services. Should the City or Willdan request new or replacement team members, any changes would be made with the City's approval.

## l. Financial Capacity of Firm

*Financial capacity of the firm including the disclosure of any bankruptcies, pending litigation, mergers, or office closures which might impede Proposer's ability to complete the contract.*

Willdan's financial health is strong, and as a 60+-year-old publicly traded company our financials are transparent, audited and published quarterly. For the 12 months ending in June 2024 the company has generated \$51M in Adjusted EBITDA and \$48M in cash flow from operations on \$550M of revenue. Our balance sheet is supported by a five-member bank syndication providing \$100M in term loans plus an additional \$50M line of credit under which there were no borrowings and thus was fully available. Our cash balance at quarter end was \$44M. Our integrated financial management systems provide us the tools to manage cash flows and financial performance over more than 2,000 active projects in our system, and many of those projects include multiple thousands of individual





customer installations under a single utility or municipal contract. Willdan has the financial wherewithal to effectively and efficiently handle the volume of projects you expect to produce.

Willdan has no bankruptcies, pending litigation, mergers, or office closures that might impede its ability to complete the contract with the City of Orange.

## m. Capabilities, Experience, and Approach

*Describe your firm's capabilities, experience, and approach to preparing energy assessments and implementing projects for similar agencies. Included shall be a description of at least five (5) design-build energy projects of similar or greater complexity or power purchasing agreements that your firm has completed within the past five (5) years. Include the following information:*

- i. Project description (include types of energy and other conservation measures) and*
- ii. Project size (total implementation cost)*

Willdan has proven experience developing energy assessments and implementing energy for cities, counties and school districts across California.

The City has ambitious energy conservation, efficiency, and generation goals; making them a reality will require:

1. Aligning future investments with a long-term vision
2. Securing all available funding to maximize scope and minimize capital expenditures, and
3. Engaging the services of an experienced and effective partner with creative solutions and a comprehensive approach customized to the City's needs.

To meet your energy and operational reduction goals, the City needs a partner that transcends typical ESCOs and the usual, basic approach to energy assessments, project identification, and implementation.

Willdan was founded as a one-stop shop for our municipal clients and continues to operate as much more than your basic ESCO, combining leading energy services, implementation of utility efficiency and electrification programs, municipal engineering, and the financial services of one of the largest municipal providers in the country under one umbrella.

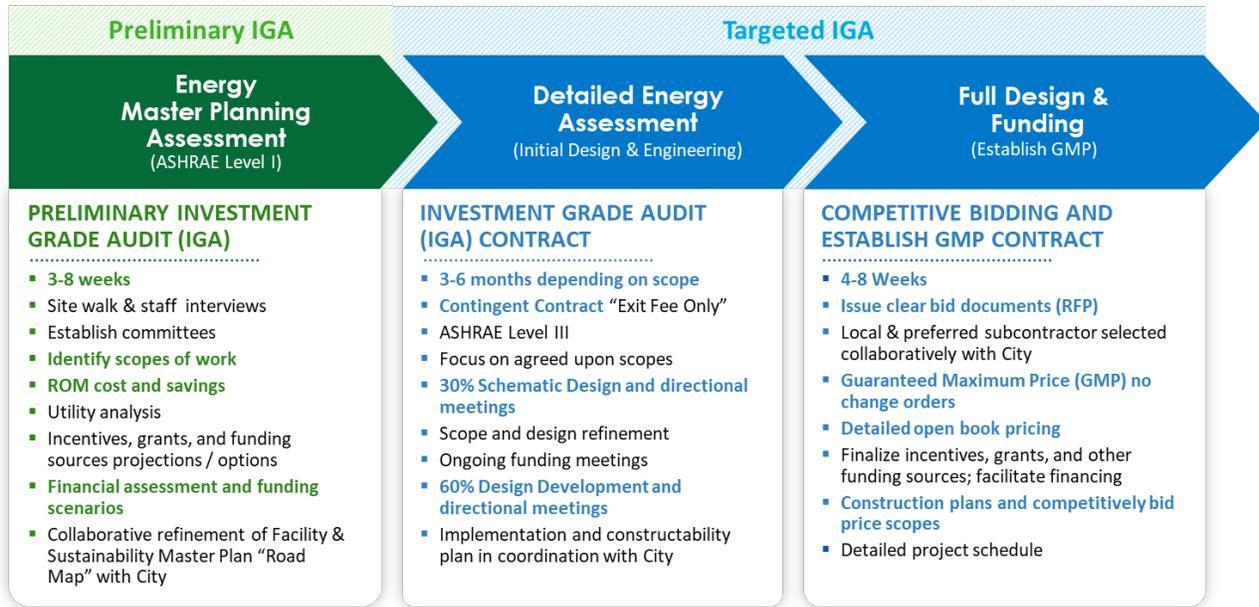
### Capabilities, Experience and Approach to Preparing Energy Assessments

The development of an IGA typically begins with several meetings with the owner to become familiar with their buildings, pain points, facility and financial goals, funding criteria, timing, desired measures, etc. Based on these meetings, we move forward into a preliminary master planning effort (ASHRAE Level II). The comprehensive master plan is our first opportunity to begin identifying, prioritizing and refining the scopes aligning with client goals and other requirements. All financial estimates, cash flows, funding sources and other decision-making metrics are included in this effort. This is the foundational "Road Map" and is the basis for moving forward with a more targeted IGA and design effort. The IGA is directed by input from the individual owner and is considered a "design process;" it is not a comprehensive, a-la-cart option to choose from at the end of the effort. Those tasks and refinements have already happened in the master planning effort; therefore, the IGA is a 30-60-90 design process. Numerous collaborative meetings with the District and full design before competitive bidding are cornerstone to Willdan's IGA process. More detailed design leads to less risk for all parties and lower, more accurate bids from subcontractors.

### Capabilities, Experience, and Approach to Implementing Projects

Willdan's approach to project implementation revolves around diligently managing the scope, schedule, budget, and customer expectations to successfully complete every project. We employ business strategies to manage project delivery: careful and complete documentation of the scope, schedule, and budget; frequent dialog with the customer to manage expectations (and documentation of those conversations); weekly review of progress and prioritization of additional resources if needed; allowing ample time for quality control; and personal presentation of all progress and final submittals.





Site supervision is key to the success of our projects. The allocation of site supervision is dependent on project scope and size. The more complex the scope or larger the project size, the more site supervision is required to maintain project schedule and financial responsibility. All our projects have on-site supervision while construction activities are happening.

As each project approaches closeout, O&M Manuals and commissioning reports are provided to the owner. The manuals include all applicable technical, maintenance, and warranty information for the systems and equipment installed. Key contacts with major subcontractors and equipment suppliers are included, although Willdan is the customer’s first contact for warranty issues. Commissioning reports will reflect the verification of proper system operation, with any system deficiencies noted and documented as punch list items to be resolved prior to project close out. Commissioning reports are then updated with the final corrected system parameters or modifications to prove proper system operation.

Once the Willdan team and preferred existing OUSD commissioning partner have ensured successful commissioning of the installed systems and the project has a Notice of Commencement of Energy Savings Date, M&V commences. The M&V engineer monitors utility usage monthly through construction and the M&V period and provides regular updates to OUSD. If any of the utility data reports an irregularity, the Operations Team connects to the system remotely or comes on site at the project location for closer review. Upon anniversary of the Annual M&V, an M&V report is issued to OUSD. This protocol is maintained throughout the M&V contract duration. Your satisfaction with your energy project investment is our priority.

Further information on our approach to preparing energy assessments and the implementation of those projects can be found in **Section 6. Execution Plan.**





**i. Project Description (Types of Energy and Other Conservation Measures)**  
**ii. Project Size (Total Implementation Cost)**

**Table 1. Willdan’s Recent Relevant Projects**

Customer Name Contract Dates	i. Project Description	ii. Project Size	Relevance to City of Orange
City of San Diego, CA 2023-Present 	<ul style="list-style-type: none"> <li>Multi-phase ESPC project including building and sport lighting, HVAC, roofing, ASHP block heaters, PV+BESS, pool heating electrification, VFD pool pump, onsite chlorination, water conservation upgrades, DHW electrification, kitchen electrification, transformers, plug load controllers, laundry electrification and advanced streetlighting upgrades</li> </ul>	\$150M+	<i>City-wide project to meet EE, water conservation, address deferred maintenance, regulatory, and decarbonization goals</i>
City of Dublin, CA 2019-Present 	<ul style="list-style-type: none"> <li>Multi-phase design-build energy savings project including HVAC, building/ energy management, solar PV, BES systems, microgrids, EV charging, and LEDs with advanced controls</li> </ul>	\$22M	<i>City-wide project to meet EE, regulatory, and decarbonization goals</i>
California DGS 2019-Present 	<ul style="list-style-type: none"> <li>ESPC project across three facilities in Los Angeles, San Diego, and Oakland including HVAC, central plant upgrades, LEDs with advanced controls, plumbing retrofits, microgrids, RCx, and DDC controls</li> </ul>	\$12M	<i>Comprehensive turnkey EPC project delivery for large municipal office buildings</i>
City of Fairfield, CA 2020-Present 	<ul style="list-style-type: none"> <li>Fleet electrification support for <b>250+ light, medium, and heavy-duty municipal fleet vehicles</b>, including vehicle procurement, EV charging infrastructure, and DER integration; secured <b>\$12.4M</b> in FTA funding</li> <li>Project including City administration center central plant upgrade, City Hall RTU overhaul, city-wide solar PV, LED lighting, roofing, and HVAC upgrades</li> </ul>	\$22M	<i>Comprehensive turnkey project delivery for municipal facilities; municipal fleet electrification support</i>
Paramount USD, CA 2024-Present 	<ul style="list-style-type: none"> <li>2.3MW of solar PV and 44 electric vehicle chargers across 11 district sites</li> </ul>	\$17.7M	<i>Districtwide solar PV and EV chargers</i>
Escondido USD, CA 2021-Present 	<ul style="list-style-type: none"> <li>Complex ESPC project scope across 11 facilities with efficiency upgrades combined with solar PV, and EV charging infrastructure</li> </ul>	\$19M	<i>Leveraged project savings with multiple outside funding sources to pay for the project and achieve net positive cashflow</i>





Customer Name Contract Dates	i. Project Description	ii. Project Size	Relevance to City of Orange
Yosemite USD, CA 2022-Present 	<ul style="list-style-type: none"> <li>District-wide energy and facility upgrades include district-wide solar PV, EV charging infrastructure, bus electrification, emergency lighting, and HVAC controls</li> </ul>	\$7.53M	<i>Leveraged project savings with multiple outside funding sources to pay for the project and achieve net positive cashflow</i>
CalTrans District 1, CA 2023-Present 	<ul style="list-style-type: none"> <li>ESPC project. Scope of work includes: full HVAC replacing existing gas-fired boiler plant with air-to-water heat pump; upgrade of building automation system (BAS); complete LED lighting ; replacement of all original windows; installation of new 480-volt, 3-phase electrical; full decarbonization of the facility for regular operations; major electrical infrastructure upgrade to support expansion of EVCS and electrification; replacement of existing single pane windows with double panes; and LED Lighting and lighting controls</li> </ul>	\$11.1M	<i>This project will achieve a net energy savings, even while adding mechanical cooling to the building (where no previous comfort cooling systems existed). Additionally, the project reduces GHG emissions by 89% from the baseline, with plans for Caltrans to offset emissions fully in the future using additional solar PV and/or RECs.</i>





## 4. MANAGEMENT AND STAFFING

List the roles, responsibilities and hourly pay rates of the individuals who will be directly involved with the project, including the Project Manager, that will be the primary contact with City staff and any subcontractors, and provide their individual resumes.

### Roles, Responsibilities, and Hourly Pay Rates

The team proposed for the City of Orange’s Energy Performance Contract (EPC) or Power Purchase Agreement (PPA) is comprised of highly credentialed, experienced, in-house professionals that to deliver all engineering, construction management, commissioning, and M&V services. A table introducing the individuals proposed is provided on the pages immediately following.

All work will be performed from our California offices, with a focus on providing services from our local Anaheim headquarters.

**Table 2. Management and Staffing**

Key Staff	Relevant Experience	Education, Skills, Pay Rate
 <p><b>David Daniel</b> Executive Oversight</p>	<ul style="list-style-type: none"> <li>21 years of experience with energy services and solutions, account management, and project development.</li> <li>Project experience includes the <b>City of San Diego, Clark County School District, State of California Facilities – Statewide, City of Southlake Tahoe and the City of Dublin.</b></li> </ul>	<ul style="list-style-type: none"> <li>BS, Chemical Engineering, Syracuse University, NY</li> <li>MA, Architecture and Environmental Studies, NewSchool of Architecture</li> </ul> <p><b>Hourly Pay Rate: N/A, Overhead</b></p>
 <p><b>Carolyn Kiesner, CEM</b> Program Oversight</p>	<ul style="list-style-type: none"> <li>14 years of experience with successful energy and infrastructure project engineering, implementation, M&amp;V, contracting, and financing.</li> <li>Completed <b>\$275M</b> in energy upgrade projects for <b>22+ California public agencies and districts, including the City of San Diego, City of Chino Hills, City of Fairfield, Paramount USD, Sonoma County and Escondido USD.</b></li> </ul>	<ul style="list-style-type: none"> <li>BS, Mechanical Engineering, Northern Illinois University, DeKalb, IL</li> <li>Certified Energy Manager</li> </ul> <p><b>Hourly Pay Rate: N/A, Overhead</b></p>
 <p><b>Colton Gorman</b> Program Manager</p>	<ul style="list-style-type: none"> <li>14 years of experience with contributions to the implementation of over \$100M in turnkey energy efficiency contracts.</li> <li>Special focus on working with smaller or remote community customers.</li> <li>Project experience includes the <b>City of Paramount, the City of Chino Hills, the City of San Diego, Paramount USD, Escondido USD, and Azusa USD.</b></li> </ul>	<ul style="list-style-type: none"> <li>BS, Mechanical Engineering, University of Hawaii at Manoa</li> <li>Certified Energy Manager (CEM)</li> <li>Certified Building Commissioning Professional (CBPCP)</li> </ul> <p><b>Hourly Pay Rate: N/A, Overhead</b></p>
 <p><b>Thomas Muñoz, PE</b> Project Development Director</p>	<ul style="list-style-type: none"> <li>31 years of experience in energy efficiency and project management, including building energy management and DERs, with a focus on decarbonization and resilience.</li> <li>Project experience includes the <b>Cities of San Diego, South Lake Tahoe, Brisbane, Imperial Beach, and Vallejo.</b></li> </ul>	<ul style="list-style-type: none"> <li>MS, Mechanical Engineering, California State University</li> <li>CA Licensed Professional Engineer (Mechanical)</li> </ul> <p><b>Hourly Pay Rate: \$195</b></p>





Key Staff	Relevant Experience	Education, Skills, Pay Rate
 <p><b>Ben Laboy, PE</b> <i>Lead DER Engineer</i></p>	<ul style="list-style-type: none"> <li>8 years of experience with solar PV and battery storage deployments in the public sector.</li> <li>Project experience includes the development of <b>PV and BESS projects for Dublin and San Fernando, as well as microgrid projects for Culver City, Eureka USD, and the Golden Empire Transit District.</b></li> </ul>	<ul style="list-style-type: none"> <li>MS, Earth Systems, Concentration in Energy Efficiency, Stanford University</li> <li>CA Licensed Professional Engineer (Mechanical)</li> </ul> <p><b>Hourly Pay Rate: \$145</b></p>
 <p><b>Tyrone Peter</b> <i>Civil Engineering Lead</i></p>	<ul style="list-style-type: none"> <li>17 years of experience managing multi-discipline, multi-agency infrastructure projects, ensuring on-time and within budget delivery.</li> <li>Expertise spans highway design, street improvements, light rail, flood control, and water and sewer projects. He has led feasibility studies, project reports, construction documents, and inspections while effectively managing large teams and subconsultants.</li> <li>Project experience includes the <b>City of Lynnwood, CA, Golden State Water – the City of Lakewood, CA, and the City of Elk Grove.</b></li> </ul>	<ul style="list-style-type: none"> <li>BS, Engineering and Civil Engineering, Tamil Nadu College of Engineering</li> <li>Civil Engineering, Murugappa Polytechnic</li> <li>CA Licensed Professional Engineer (Civil): 81888</li> </ul> <p><b>Hourly Pay Rate: \$145</b></p>
 <p><b>Taylor Briglio</b> <i>Clean Mobility Manager</i></p>	<ul style="list-style-type: none"> <li>7 years of experience.</li> <li>Leads Willdan’s EV-related work, including fleet electrification planning and implementation, infrastructure development and construction, and the integration of infrastructure into turnkey energy efficiency and renewable generation projects.</li> <li>Project experience includes the <b>City of Fairfield Transit and Municipal Fleet Electrification projects, the City of Inglewood, Madera County, and the City of Camarillo.</b></li> </ul>	<ul style="list-style-type: none"> <li>MS, Bren School of Environmental Science and Management - UC Santa Barbara</li> <li>BS, Environmental Science, UCLA</li> </ul> <p><b>Hourly Pay Rate: \$145</b></p>
 <p><b>Bryan Rossi</b> <i>Mechanical Design Engineer</i></p>	<ul style="list-style-type: none"> <li>8 years of experience developing energy projects, focusing on both mechanical engineering design and project management.</li> <li>Has worked with educational, institutional, and public and private sector facilities in various capacities, including performing 100 Level II and III energy audits and developing 40+ detailed building energy models.</li> <li>Project experience includes <b>Multiple buildings for Cisco and the California Energy Commission.</b></li> </ul>	<ul style="list-style-type: none"> <li>MS, BS, Mechanical Engineering, Binghamton University</li> <li>CA Licensed Professional Engineer (Mechanical): 40307</li> </ul> <p><b>Hourly Pay Rate: \$145</b></p>
 <p><b>Sripad Kamdada</b> <i>Energy Engineer</i></p>	<ul style="list-style-type: none"> <li>6 years of experience in the development of solar PV, BESS, and EV infrastructure network programs and projects.</li> <li>Additional experience in demand response, sustainability, battery design, and other renewable energy projects.</li> <li>Project experience includes the <b>Cities of Fairfield Transit and Municipal Fleet projects, The Cities of Chino Hills, San Diego &amp; Inglewood, Escondido USD, Evergreen Public Schools, Biddeford-Saco-Old Orchard Beach Transit Office, and Washington State Department of Ecology.</b></li> </ul>	<ul style="list-style-type: none"> <li>MS, Mechanical Engineering (Energy Conversion), University of Southern California</li> <li>BE, Mechanical Engineering, Anna University, India</li> <li>LEED AP, Neighborhood Development (ND)</li> </ul> <p><b>Hourly Pay Rate: \$145</b></p>





Key Staff	Relevant Experience	Education, Skills, Pay Rate
 <p><b>Jamie Gustafson, PE</b> <i>Mechanical Engineer</i></p>	<ul style="list-style-type: none"> <li>8 years of experience in the development and implementation of energy efficiency, electrification, EV infrastructure, and renewables.</li> <li>Project experience includes <b>Yosemite National Park and the Cities of San Diego, Vallejo, and Dublin</b>, as well as <b>EV charging infrastructure for the Cities of Inglewood and Dinuba</b>.</li> </ul>	<ul style="list-style-type: none"> <li>BS, Mechanical Engineering, Jacobs School of Engineering, UC San Diego</li> <li>CA Licensed Professional Engineer (Mechanical)</li> <li>CEM</li> </ul> <p><b>Hourly Pay Rate: \$125</b></p>
 <p><b>Scott Griffith, LEED GA</b> <i>Water Specialist</i></p>	<ul style="list-style-type: none"> <li>36 years of experience delivering innovative water conservation solutions.</li> <li>Utilizes state-of-the-art data analytics to improve water systems performance, optimizing AMR to AMI transitions, and implementing SMART SCADA and integrating the billing systems.</li> <li>Project experience includes <b>80+ water and wastewater projects</b>, including the <b>City of Paramount, the City of Fillmore, the City of Chino, Dublin San Ramon Service District, Padre Dan Municipal Water District, Elsinore Valley Municipal Water District, and the City of Vallejo</b>.</li> </ul>	<ul style="list-style-type: none"> <li>BA, Architecture, Georgia Institute of Technology</li> <li>BVA, Design &amp; Material Sciences, Georgia State University</li> <li>International Business Studies, University of Hong Kong</li> <li>LEED Green Associate</li> </ul> <p><b>Hourly Pay Rate: \$145</b></p>
 <p><b>Chris Gaddy</b> <i>AMI Developer</i></p>	<ul style="list-style-type: none"> <li>15 years of project development experience and 8 years of AMI experience.</li> <li>Leads project development and manages implementation, commissioning and billing integration for new metering and AMI-specific efforts.</li> <li>Project experience includes the turnkey delivery of \$15M+ in AMI projects and projects with the <b>Cities of Fillmore, Irvine Ranch Water District, Paramount, and Monte Vista</b>.</li> </ul>	<ul style="list-style-type: none"> <li>BS, Texas Christian University</li> <li>AWWA Member</li> <li>ASHRAE Associate Member</li> </ul> <p><b>Hourly Pay Rate: \$145</b></p>
 <p><b>Esam Rostom</b> <i>Director of Construction</i></p>	<ul style="list-style-type: none"> <li>27 years of construction experience in turnkey design-build construction management.</li> <li>Manages construction personnel, constructability, subcontractors, project controls, and quality.</li> <li>Project experience includes the <b>implementation of \$450M in design-build construction projects</b>.</li> </ul>	<ul style="list-style-type: none"> <li>BA, Marketing, California State University Northridge</li> <li>Associate DBIA Professional</li> </ul> <p><b>Hourly Pay Rate: \$195</b></p>
 <p><b>Mark Effinger</b> <i>Director of Commissioning and M&amp;V</i></p>	<ul style="list-style-type: none"> <li>18 years of experience in commissioning and M&amp;V to ensure high-quality project delivery.</li> <li>Project experience includes 100+ commissioning and energy audit projects covering 35M+ square feet of facilities for municipal, healthcare, large office, multifamily, education, retail, and stadiums.</li> </ul>	<ul style="list-style-type: none"> <li>MS, Mechanical Engineering, UC Irvine</li> <li>Bachelor of Mechanical Engineering, UC Irvine</li> <li>CMVP, CEA, and CCP</li> </ul> <p><b>Hourly Pay Rate: \$135</b></p>





Key Staff	Relevant Experience	Education, Skills, Pay Rate
 <p><b>Marcey Crowell</b> Community Engagement Manager – MBE/WBE Liaison</p>	<ul style="list-style-type: none"> <li>16 years of experience supporting diversity, equity, inclusion (DEI), and community engagement on public projects.</li> <li>Project experience includes the <b>Cities of San Diego, Chino Hills, Fillmore, South Lake Tahoe, Fairfield, and Dublin</b>, alongside the development and support of Willdan’s Vendor Diversity program. Also, organized a district-wide STEM outreach event for <b>Clark County School District</b> teachers, featuring hands-on workshops and lesson plans.</li> </ul>	<ul style="list-style-type: none"> <li>Procore certified</li> </ul> <p><b>Hourly Pay Rate: N/A, Overhead</b></p>
 <p><b>Annie Mikkelson</b> Marketing/Entity Contact</p>	<ul style="list-style-type: none"> <li>10 years of experience in the AEC industry.</li> <li>Specializes in the community development, engagement, marketing, and communications functions of client projects.</li> <li>At-Large Board Member and Outreach Committee Chair for Association for Learning Environments (A4LE) Rocky Mountain Chapter, leading efforts to engage K-12 stakeholders, expand membership, and promote the organization’s mission of fostering innovative, student-centered learning environments.</li> <li>Project experience includes the <b>Yosemite USD STEM and Flip the Switch event and the Dreamer’s Camp in Kern County</b>.</li> </ul>	<ul style="list-style-type: none"> <li>BA, Communications, University of Colorado</li> <li>LEED Green Associate</li> </ul> <p><b>Hourly Pay Rate: N/A, Overhead</b></p>
 <p><b>Juliette Brown</b> Client Engagement &amp; Marketing Manager</p>	<ul style="list-style-type: none"> <li>27 years of experience coordinating customer events and community engagement activities, including PR/networking events.</li> <li>Manages the development of proposals, marketing collateral, press releases, and other promotional materials.</li> <li>Project experience includes <b>Kern County STEM Fair, Yosemite USD STEM event and Flip the Switch, Montecito USD Living Lab dedication, Columbia County – John Gumm historical building ribbon cutting, and the Southern California Edison (SCE) 540 MW BESS project</b>.</li> </ul>	<ul style="list-style-type: none"> <li>BA, English, Studio Arts, and German, Western Washington University, Bellingham, WA</li> <li>Six Sigma Green Belt</li> </ul> <p><b>Hourly Pay Rate: N/A, Overhead</b></p>

## Individual Resumes

Per the City’s request, project resumes for the individuals identified in the section above are provided in **Appendix A**.





## 5. PRIOR RELATED EXPERIENCE AND COMPETENCE

*The successful Proposer shall be skilled and regularly engaged in the general class or type of work called for under the Contract and also have no less than five (5) years of experience in the magnitude and character of the work proposed. It is the intention of the City to award a contract to a Proposer who furnishes the satisfactory evidence that they have the requisite experience, ability, sufficient capital, and facilities to enable them to perform the work successfully and properly, and to complete it within the time specified in the Contract. To determine the degree of responsibility to be credited to the Proposer, the City will weigh any evidence that the Proposer has performed satisfactorily on other contracts of like nature, magnitude, and comparable difficulty.*

As introduced in previous sections, Willdan has been providing our municipal clients with work scopes similar in magnitude and character to the work envisioned by the City for over 35 years. We’ve completed hundreds of energy projects with public agencies nationwide and have the experience and capabilities to successfully deliver all the services required for the City’s Energy Conservation, Performance Contracting, and Power Purchasing Agreements program(s).

As an added benefit, Willdan’s strategic partner, E Source, brings additional expertise particularly in Advanced Meter Infrastructure (AMI), including recent deployments of Neptune meters and fixed-based AMI – the exact technology that the Orange water department is currently deploying.

### List of Representative Projects

*Proposer must provide a list of representative projects of similar scope and nature performed within the last five (5) years, particularly projects for other local government agencies. Projects should include both Guaranteed and Shared Savings contracts if available. Include a contact person for each representative project listed.*

In the last five years, Willdan has completed \$550M of turnkey projects with state and local governments in California. Below, we have provided a matrix including scope overviews for local energy projects we feel best demonstrate our experience in line with the City’s request.

The table provided on the pages immediately following provides information on representative projects of similar scope and nature performed for other local government agencies by members of the Willdan Team.





**Table 3. Representative Projects, Willdan Team**

		Utility Program Management	Services			Energy Distribution & Supply
			Design	Install	Maintain	
County of San Mateo	Strategic Energy Master Plan Consulting	✓	✓			✓
Merced County	Consulting Contract to Develop Region-Wide EV Infrastructure Plan	✓	✓			✓
County of Madera	Consulting Contract to Develop Fleet Electrification Plan	✓	✓			✓
Sonoma County Phase I	Turnkey ESPC Projects	✓	✓	✓	✓	✓
Sonoma County Phase II	Turnkey ESPC Projects	✓	✓	✓	✓	✓
King County	Turnkey Biogas DBOOM ESPC Projects	✓	✓	✓	✓	✓
Alameda County	Turnkey ESPC Projects	✓	✓	✓	✓	✓
California DGS, Elihu Harris	IGA, Incentives, and Other Energy Services	✓	✓	✓	✓	
CA DGS, Mission Valley	Heating and Domestic HW Boiler upgrades, and other Energy Services	✓	✓	✓	✓	
City of Dublin	IGA, Incentives, and Other Energy Services, Solar PV, EV Chargers, Microgrid, Public EVCS Infrastructure Master Plan	✓	✓	✓	✓	✓
Escondido USD	HVAC, Central Plant Upgrades, Solar PV, EVCS, and other Energy Services	✓	✓	✓	✓	
Yosemite USD	Incentives, Solar PV, Fleet Electrification and other Energy Services	✓	✓	✓	✓	
City of Inglewood	EV Fleet Electrification and Public EVCS Infrastructure Master Plan	✓	✓			
City of Fairfield	EV Fleet Electrification Master Plan, IGA	✓	✓			
City of Arcadia	IGA, Utility Meter Engineering, Civil, and other Energy Services		✓		✓	✓
City of Bellflower	Energy Grant Application & Reporting, and other Energy Services	✓	✓	✓	✓	
City of San Diego	IGA, Incentives, and Other Energy Services	✓	✓	✓	✓	✓
City of Carson	IGA, Incentives, and other Energy Services	✓	✓	✓	✓	✓
City of Cathedral City	Energy Services & Master Planning		✓	✓	✓	✓
City of Chino Hills	IGA, Civil Engineering, and other Energy Services	✓	✓	✓	✓	
City of Claremont	IGA, Incentives, and other Energy Services	✓	✓	✓	✓	✓
City of Diamond Bar	IGA, Incentives, and other Energy Services	✓	✓	✓	✓	✓
City of El Segundo	IGA, Incentives, and other Energy Services		✓	✓	✓	✓
City of Elk Grove	Energy Services, and LED Streetlighting	✓	✓	✓	✓	✓
City of La Puente	IGA, Incentives, and other Energy Services		✓	✓	✓	✓





		Utility Program Management	Services			Energy Distribution & Supply
		Design	Install	Maintain		
City of Lakewood	IGA, Incentives, and other Energy Services	✓	✓	✓	✓	✓
City of Manhattan Beach	Energy Services, Solar PV, CCA Support	✓	✓	✓	✓	
City of Milpitas	Energy Services	✓	✓			✓
City of Newport Beach	IGA, Incentives, other Energy Services, and LED Streetlighting	✓	✓	✓	✓	✓
City of Norwalk	IGA, Incentives, and other Energy Services	✓	✓	✓	✓	✓
City of Palm Springs	IGA, Incentives, and other Energy Services, and Solar PV	✓	✓	✓	✓	✓
City of Palo Alto	Energy Services		✓			
City of Pico Rivera	Energy Grant Application & Reporting and Energy Services	✓	✓	✓	✓	✓
City of Rancho Cucamonga	IGA, Incentives, Benchmarking, and Solar PV	✓	✓	✓	✓	✓
City of Rosemead	IGA, Incentives, and other Energy Services	✓	✓	✓	✓	✓
City of San Bernardino	Energy Services		✓			✓
City of San Francisco	Energy Services, Solar PV	✓	✓	✓	✓	✓
City of Santa Monica	Energy Services	✓	✓			
City of South Lake Tahoe	Energy Services	✓	✓	✓	✓	✓
City of Stockton	IGA, Incentives, other Energy Services, Design-Build	✓	✓	✓		✓
City of Temple City	IGA, Incentives, and other Energy Services	✓	✓	✓	✓	✓
City of West Covina	IGA, Incentives, and LED Streetlighting	✓	✓			
City of Westminster	IGA, Incentives, and other Energy Services		✓	✓		✓
City of Beverly Hills	Advanced Metering Infrastructure		✓	✓		
City of Palo Alto	Advanced Metering Infrastructure		✓	✓		
City of Roseville	Advanced Metering Infrastructure			✓		
City of San Jose	Advanced Metering Infrastructure		✓	✓		
City of Santa Ana	Advanced Metering Infrastructure		✓	✓		
City of Santa Barbara	Advanced Metering Infrastructure		✓	✓		
City of Vallejo	Advanced Metering Infrastructure		✓	✓		
Crescenta Valley Water District	Advanced Metering Infrastructure		✓	✓		
Long Beach Water Department	Advanced Metering Infrastructure		✓	✓		
Mesa Water District	Advanced Metering Infrastructure		✓	✓		
Riverside Public Utilities	Advanced Metering Infrastructure		✓	✓		





## Minimum of Three (3) City References of Cities

Proposer must also provide a minimum of three (3) references of cities that have received or currently are receiving similar services. The references must include a contact person's name, title, contact information, and brief description of final project executed from Proposer's IGA.

Note: The City is interested in benefitting from an unbiased, value-based program to address its needs through a vendor-neutral ESCO. Therefore the Proposer must also demonstrate its willingness and past experience in providing projects that deploy solutions which incorporate equipment, controls and related products and services independent of its own specific business portfolio.

Per the City's request, references and detailed information for the five projects we feel best represent the scope and features of the City of Orange's project(s) are provided on the pages immediately following.

### References: Willdan

City Name: City of San Diego	Brief Description of Project	Contact Person's Name, Title, and Contact Information
<p><b>Project Size:</b> 54 sites, 50,000 streetlights</p> 	<p><b>Project Description:</b> Willdan was selected by the City of San Diego to develop comprehensive turnkey energy measures, with Phase 1 addressing 54 sites including facilities, parks, and over 50,000 streetlights.</p> <p><i>Measures to be implemented include:</i> Building and sport lighting; HVAC; Roofing; ASHP block heater; PV+BESS; Pool heating electrification; VFD pool pump, and onsite chlorination; Water conservation upgrades; DHW and kitchen electrification; Transformers; Plug load controllers; Laundry electrification; and Advanced streetlighting upgrades.</p> <p>Willdan also provided grant application support for multiple programs.</p>	<p>Lindsey Hawes, Municipal Energy Program Manager Sustainability &amp; Mobility Department</p> <p>City of San Diego 805.705.4732 <a href="mailto:lhawes@sandiego.gov">lhawes@sandiego.gov</a></p>

City Name: City of Chino Hills	Brief Description of Project	Contact Person's Name, Title, and Contact Information
<p><b>Project Size:</b> Citywide \$9 M</p> <p><b>Contract Start/End Dates:</b> Phase I Construction completion 2024; Phase II ongoing</p> 	<p><b>Project Description:</b> Willdan was selected by the City of Chino Hills to develop a comprehensive Energy Efficiency and Renewable Energy/ EVCS project.</p> <p><i>Measures installed include:</i> Microgrid; 1.4 MW DC of solar photovoltaic (PV) systems across 6 City sites; 880 kWh of BESS, including two islanded microgrids; Electrical infrastructure to add full facility to existing generator for resiliency; 16 public EV charging stations for four sites; HVAC upgrade at City Public Works offices; and LED lighting retrofit and new lighting controls including sports field lighting, and interior office lighting scopes.</p> <p>Project is achieving \$510k/year utility savings, and received ~\$3.5M in incentives &amp; tax credits.</p>	<p>Jarrod Manuel, Facilities Supervisor</p> <p>City of Chino Hills <a href="mailto:jmanuel@chinohills.org">jmanuel@chinohills.org</a> <i>(note: client requests email contacts only)</i></p>





City Name: City of Fillmore	Brief Description of Project	Contact Person's Name, Title, and Contact Information
<p><b>Project Size:</b> 4000 Accounts \$5.2 M</p> <p><b>Contract Start/End Dates:</b> 2023-2025</p> 	<p><b>Project Description:</b> The City of Fillmore contracted with Willdan for a meter system assessment, covering meters to billing. Willdan presented assessment findings to City Council, resulting in a contract to provide design and development services in late 2023.</p> <p>As a result, Willdan developed and implemented a \$5.2M water meter and AMI upgrade project. Features of the AMI project include: Zenner ultrasonic meters for sizes 2” and below; Honeywell ultrasonic meters for sized 3” and larger; AmCoBi Aquacell for cellular endpoints; and AquaHawk customer and operational portal, with support for 20 years.</p> <p>The project is expected to save the City \$630,00 annually.</p>	<p>Erika Herrera -Terriquez, <i>City Manager</i></p> <p>City of Fillmore <a href="mailto:eherrera@fillmoreca.gov">eherrera@fillmoreca.gov</a> 805.946.1712</p>

City Name: City of South Lake Tahoe	Brief Description of Project	Contact Person's Name, Title, and Contact Information
<p><b>Project Size:</b> City-wide \$12 M</p> 	<p><b>Project Description:</b> Willdan worked with the City of Lake Tahoe to develop a \$12 M energy and infrastructure upgrade project. The project contributes toward the City’s 59.2% GHG and 50% carbon emissions reductions goals by 2030, and provides significant community engagement opportunities for the City.</p> <p><i>Measures include:</i> Cogeneration microturbine; Solar PV (242 and 173 kW DC canopies); Building automation controls and thermostats; Efficient CO2 ice plant for Ice Arena; Water meters; and Efficient power transformers.</p> <p>Projected Lifetime savings: \$36 M.</p>	<p>Sara Letton, <i>Sustainability Coordinator</i></p> <p>City of South Lake Tahoe <a href="mailto:sletton@cityofslt.us">sletton@cityofslt.us</a> 530.542.6175</p>

*“As stewards of the Lake Tahoe Basin and the natural beauty that it holds, we are proud to have a project that will help us preserve the quality of our mountain air and save taxpayers money in the long-run. This project benefits all of us, and we hope it can be a model for future improvement in our City.”*

– Sara Letton, Sustainability Coordinator for the City of South Lake Tahoe





City Name: City of Fairfield	Brief Description of Project	Contact Person's Name, Title, and Contact Information
<p><b>Project Size:</b> City-wide \$30 M</p> 	<p><b>Project Description:</b> Willdan provided turn-key design-build delivery of \$30M in repairs and upgrades through a self-funding project ESPC project. The project also achieved \$3.9 M in project incentives, extending the benefit further. The project included onsite generation of clean renewable energy (1.9 MW of production annually), and deferred maintenance and other deficiencies at critical facilities, improves health and safety, comfort, reliability, and resiliency, and substantially reduces the City's carbon emissions.</p> <p><i>Measures include:</i> Solar PV; EV Charging; LED Lighting; Civic Center Central Utility Plant; HVAC &amp; Controls; BAS Integration; Retrocommissioning; Roofing; City Hall Acoustical Ceiling Tiles; Irrigation Controls; and Domestic Water Heaters.</p>	<p>Marisa Cumpian, Sr. <i>Management Analyst</i></p> <p>City of Fairfield <a href="mailto:mcumpian@fairfield.ca.gov">mcumpian@fairfield.ca.gov</a> 707.428.7494</p>

*"Willdan was an excellent partner in developing comprehensive energy solutions for our city, and through that implementing a first-phase project to address our critical facility needs as well as produce over \$45M in lifetime project savings. The Willdan team was thorough and very effective in providing both technical solutions and creative funding options, and helped us to leverage a variety of available funding sources to support our project. Their expert guidance, responsiveness, and collaborative approach was key to delivering a project that has broad stakeholder support while providing upgrades to many of our city's facilities."*

– Marisa Cumpian, Sr. Management Analyst, City of Fairfield

**Willdan Partner project references**

City Name: City of Oceanside – Water Utilities	Brief Description of Project	Contact Person's Name, Title, and Contact Information
<p><b>Project Size:</b> 44,000 water accounts</p> <p><b>Contract Start/End Dates:</b> May 2017 – May 2024</p>	<p><b>Project Description:</b> Key members of the Willdan AMI team guided the City of Oceanside through the development and deployment of an AMI project. Their support included an AMI assessment and business case, procurement assistance, and implementation of a full AMI system comprising new meters, a Meter Data Management System (MDMS), and communications infrastructure. The team also provided program management, developed a stakeholder engagement plan, and recommended targeted large meter and valve replacements, including piping modifications to accommodate test ports and bypasses.</p>	<p>Chaz Olloqui <i>Management Analyst - AMI</i></p> <p>City of Oceanside 706.435.5845 <a href="mailto:colloqui@oceansideca.org">colloqui@oceansideca.org</a></p>





## 6. EXECUTION PLAN

### Detailed Work Plan

The plan represents the Proposer's offer of services to the City. The proposed execution plan must include a detailed work plan describing how the Proposer will meet the project objective in the most cost-efficient and timely manner. The plan is to provide a detailed explanation of the Proposer's approach in performing the services described in the RFQ/Proposal Scope of Work section outlined above.

Willdan will use sound engineering, construction, and financial expertise to deliver a program that maximizes energy savings, reduces operational costs, and modernizes the City's portfolio. We have included details on our process below.





The City has ambitious energy conservation and efficiency goals; making them a reality will require:

1. Aligning future investments with a long-term vision
2. Securing all available funding to maximize scope and minimize capital expenditures, and
3. Engaging the services of an experienced and effective partner with creative solutions and a comprehensive approach customized to the City's needs.

In developing an ESPC project for the City, we know from experience that streamlined processes and shortcuts just don't work. That's why we've developed a technical approach that is both systematic and thorough – reducing the risks for our customers and delivering the lowest long-term cost.

*"Willdan's team of expert engineers & architects were able to creatively navigate budget constraints while still meeting the city's expectations and goals. As a premier design-builder, Willdan's team were able to provide incredible long-term solutions in a guaranteed fashion."*

– Gordon M. Public Works Director,  
City of Stockton

## Approach in Performing Services Described

### Planning and Analysis

	Benchmark & Prioritize
<b>Stakeholder Interviews</b>	<ul style="list-style-type: none"> <li>▪ Engage administration and stakeholders in discussion to understand future capital plans and long-term goals</li> <li>▪ Engage site operating personnel in discussion to help identify major issues or potential capital improvements meriting further study</li> </ul>
<b>Utility &amp; Maintenance Analysis</b>	<ul style="list-style-type: none"> <li>▪ Collect 2-3 years of electric, gas and water usage at all City facilities</li> <li>▪ Analyze each building's energy usage in relation to its square footage, benchmarking the results from other buildings of similar size and function</li> <li>▪ Review maintenance expenditures to identify major issues, regardless of energy index</li> </ul>
<b>Site Operation &amp; Schedule</b>	<ul style="list-style-type: none"> <li>▪ Complete site walk-throughs to gather additional specific information on mechanical, electrical, plumbing, lighting, building envelope, and technology systems, and operation</li> <li>▪ Conduct as-built drawing and specification reviews, as needed</li> </ul>
<b>B3 Benchmarking</b>	<ul style="list-style-type: none"> <li>▪ Buildings, Benchmarks, and Beyond (B3) is a custom online tool that quickly and accurately identifies buildings with the greatest potential for energy improvement – and maximum return on investment</li> </ul>
<b>Decision-Making Matrix</b>	<ul style="list-style-type: none"> <li>▪ Evaluate each facility with the following key inputs: opportunities for reduced energy and maintenance expenditures, B3 Benchmarking, capital priorities, and site/infrastructure imminent need</li> </ul>
<b>Building Prioritization</b>	<ul style="list-style-type: none"> <li>▪ Discuss matrix results and develop priorities and future project phasing, in collaboration with Orange stakeholders</li> </ul>

### Design and Final Pricing

	Evaluate & Recommend Solutions
<b>ASHRAE Level 2 Audit</b>	<ul style="list-style-type: none"> <li>▪ Establish existing equipment conditions and facility operations</li> <li>▪ Complete a detailed review of as-built drawings, data logging, and building automation controls trend analysis</li> <li>▪ Conduct additional staff interviews and comprehensive building walkthroughs</li> </ul>
<b>Comprehensive Energy Modeling</b>	<ul style="list-style-type: none"> <li>▪ Detailed building energy simulation based on exact building geometry, construction, and operation, utilizing the enhanced mode of eQuest</li> <li>▪ Energy models are calibrated to existing utility consumption and weather to ensure a highly accurate model</li> </ul>





	Evaluate & Recommend Solutions
<b>Schematic Design</b>	<ul style="list-style-type: none"> <li>▪ Preliminary sizing and layout of concepts</li> <li>▪ Used as the basis for cost estimates and energy savings estimates through energy modeling</li> </ul>
<b>Life-Cycle Costing</b>	<ul style="list-style-type: none"> <li>▪ Evaluate multiple equipment and system options to provide unbiased recommendations for informed decision-making</li> <li>▪ Include details of utility rate impact and the total cost over the system’s lifetime</li> </ul>
<b>Recommend Solutions</b>	<ul style="list-style-type: none"> <li>▪ Orange staff and our design engineers collaborate to refine scope and confirm project intent leading into detailed project design</li> <li>▪ Scope review ensures our intensive engineering process in Phase II focuses on Orange’s highest priorities, while still completing the audit in a timely manner</li> </ul>

## Project Implementation

	Management During Project Construction
<b>Onsite Construction Management</b>	<ul style="list-style-type: none"> <li>▪ An in-house construction manager is onsite for the entirety of the implementation phase</li> <li>▪ The lead construction manager will coordinate scheduling to minimize disruptions and maximize efficiency across the various trades implementing the project scope</li> </ul>
<b>Project Management Plan (PMP)</b>	<ul style="list-style-type: none"> <li>▪ Finalize requirements and procedures for implementation, safety plan, integration, commissioning, testing procedures, and communications plan</li> <li>▪ Clearly assign responsibility and develop a master schedule to maintain a common set of activities for project elements</li> </ul>
<b>Weekly Coordination</b>	<ul style="list-style-type: none"> <li>▪ Our construction management and installing contractors meet with Orange staff weekly to discuss project progress</li> <li>▪ Meeting agenda includes maintaining critical path scheduling and information flow, reviewing routine quality control inspections, and addressing any issues</li> </ul>
<b>Schedule</b>	<ul style="list-style-type: none"> <li>▪ We specialize in working around building occupancy requirements, completing invasive work around the City’s schedule to avoid disruption</li> <li>▪ We establish accurate construction phasing and scheduling details using detailed design and through collaboration with Orange stakeholders and subcontractors</li> </ul>
<b>Project Coordination</b>	<ul style="list-style-type: none"> <li>▪ We require all trades to provide a three-week advance schedule for each weekly coordination meeting</li> <li>▪ A “look ahead” schedule is used as the basis for planning and communication with local utilities, subcontractors, equipment suppliers, and facility personnel</li> </ul>
<b>Project Schedule</b>	<ul style="list-style-type: none"> <li>▪ Construction management team will facilitate discussions between Orange staff and subcontractor staff to maintain critical path scheduling and information flow, review routine quality control inspections, and address any issues</li> </ul>
<b>Scope Changes</b>	<ul style="list-style-type: none"> <li>▪ We provide a fixed cost, turnkey ESPC</li> <li>▪ If a Willdan omission or error requires a change in scope, Willdan covers the cost of this change</li> </ul>
<b>Iterative Fine-Tuning</b>	<ul style="list-style-type: none"> <li>▪ Our commissioning (Cx) agents help finalize Cx procedures to be used during construction, building upon the critical foundation set in the Technical Audit</li> <li>▪ All post-construction support is managed by Willdan, for full accountability to Orange</li> </ul>





## Performance Maximization

	Ongoing Services Including Measurement and Verification (M&V)
M&V	<ul style="list-style-type: none"> <li>Willdan adheres to the International Performance Measurement and Verification Protocol (IPMVP), prioritizing Option C (Whole Facility) where feasible, to provide transparent, meter-level verification of savings based on actual utility data.</li> <li>Annual M&amp;V reports detail energy and cost savings (e.g., projected 25-35% reductions across facilities), with Willdan reimbursing any shortfalls under our guaranteed savings model to minimize financial risk.</li> </ul>
Ongoing Service and Support	<ul style="list-style-type: none"> <li>Our O&amp;M Guarantee is available as an optional service, covering maintenance, monitoring, and repairs for all installed ECMs (e.g., AMI meters, VFDs, solar systems) throughout the contract term (10-20 years).</li> <li>Dedicated support includes remote monitoring, proactive optimizations, and 24/7 response for critical systems, ensuring long-term performance, resiliency, and reduced peak demands.</li> </ul>
Ongoing Education	<ul style="list-style-type: none"> <li>Through the Willdan Clean Energy Academy (WCEA), we deliver free, customized training for City staff on ECM operation and maintenance (e.g., smart irrigation controls, HVAC systems), with hands-on modules to enhance safety and efficiency.</li> <li>Online and in-person courses prepare participants for certifications, supporting occupant comfort, job creation, and the City's hybrid CAP goals for 80% GHG reductions by 205</li> </ul>
Community Engagement and PR	<ul style="list-style-type: none"> <li>Willdan's Local Business Incubator, partnered with utilities and minority-owned firms, offers free training and mentorship to 100-200 local residents, fostering green jobs in clean energy and stimulating economic development in underserved communities.</li> <li>We will facilitate public workshops, PR campaigns, and success stories (e.g., \$7M savings from AMI rollout) to highlight Orange's sustainability leadership, boosting community pride and positive recognition.</li> </ul>

## Outline of Approach to Preparing the Initial Assessment and Subsequent IGA

*The plan should also include an outline of the approach to preparing the initial assessment and subsequent IGA, as referenced in this RFQ/Proposal. It will outline energy conservation measure descriptions, cost and savings identified for similar projects. The plan should outline how the Proposer will focus on the City's facilities and Request for infrastructure and be broken into separate projects, by site, with approximate energy, water, maintenance and cost savings, as well as costs on a project by project or measure by measure basis. All projects should also be summarized.*

## Energy Conservation Measure Descriptions, Cost and Savings Identified for Similar Projects

We have provided highlights from relevant local energy projects and their associated scopes below.

### Implementation of Energy Conservation Measures in Similar Projects

ECM & Willdan Implementation Experience Highlight	Proposed Application for City of Orange
<p><b>EV Infrastructure</b></p> <p>Developed electric vehicle charging station (EVCS) plans for Cities of Dublin, Inglewood, Dinuba and regional Metropolitan Planning Organizations (MPOs): Southern California Association of Governments (SCAG), Tulare County Association of Governments (TCAG), and Merced County Association of Governments (MCAG), determining long-term Level 2, Level 3, and direct current fast charging (DCFC) for local and state goals.</p> <ul style="list-style-type: none"> <li>Developed preliminary plans for 150+ sites for priority locations to support public, staff, and fleet charging.</li> <li>Implementation of EVs includes Dublin and Paramount, Escondido and Yosemite USDs, and Sonoma County.</li> </ul>	<ul style="list-style-type: none"> <li>Collaborate on long-term public EVCS needs.</li> <li>Align with Orange County EVCS Blueprint.</li> <li>Develop EVCS projects on City-owned sites to meet needs and goals.</li> <li>Ensure proposed solar shade canopies will meet current EV charging code requirements.</li> </ul>





ECM & Willdan Implementation Experience Highlight	Proposed Application for City of Orange
<p><b>Fleet Electrification</b></p> <p>Completed fleet electrification analysis for 13,000+ vehicles across 35+ fleets.</p> <ul style="list-style-type: none"> <li>Fleet plans include a long-term charging strategy, phased implementation plan, preliminary design for first tranche of EVCS, and identify and support applying for funding opportunities.</li> <li>Helped clients obtain 15M+ in federal, state, and local EV-specific funding and we manage utility make-ready program application for fleets to secure funding for the Cities of Fairfield, Inglewood, and Imperial Beach.</li> </ul>	<ul style="list-style-type: none"> <li>Develop long-term plan and charging strategy to convert the City’s fleet vehicles and equipment to zero emissions in compliance with Advanced Clean Fleet (ACF) and Advanced Clean Cars (ACC) II Rules.</li> <li>Leverage SCE’s EV Fleet Program to subsidize EV infrastructure cost for initial EVCS building to support 5+ years of charging needs.</li> <li>Use other funding sources (IRA, Energize, SJVAPCD Carl Moyer) to fill in remaining gaps.</li> </ul>
<p><b>Streetlighting</b></p> <p>Performed a retrofit of streetlights for City of Elk Grove.</p> <ul style="list-style-type: none"> <li>Inventoried 12,000 streetlights and implemented a demonstration project to test features for effectiveness and appearance.</li> <li>Performed PS&amp;E, helped obtain utility incentives, and managed installation of efficient streetlights, saving the City 4.1M kWh annually, and \$400K in annual utility and maintenance costs.</li> </ul> <p>For the City of San Diego, we evaluated 30k+ of streetlighting, generating \$1.5M+ in annual operation savings and \$700K in annual energy savings.</p>	<p>We understand the City upgraded approximately 8,000 city-owned streetlights to LEDs in 2017/2018, providing energy savings and significant operational savings.</p> <ul style="list-style-type: none"> <li>Evaluate what has and has not yet been upgraded and City streetlighting safety and infrastructure concerns.</li> <li>Use GIS mapping to evaluate project opportunity</li> </ul>
<p><b>Lighting - Indoor</b></p> <p>Willdan is implementing a multi-year LED and controls upgrade project for Los Angeles Unified School District, the second-largest K-12 in the U.S. with 1,438 schools and 75M+ sf of facilities. 100%-funded by utility incentives, this program has delivered 22.9M+ kWh in savings to date.</p>	<ul style="list-style-type: none"> <li>Improve safety, illumination + aesthetics and reduce energy consumption + high energy costs.</li> <li>Back up data on energy consumption, expected savings, and comparison with proposed system.</li> </ul>
<p><b>Lighting - Exterior</b></p> <p>For California DGS, Willdan is implementing facility-wide deep building energy and infrastructure improvements across a portfolio of state-owned, fully occupied office buildings.</p> <ul style="list-style-type: none"> <li>Measures include advanced LED interior/ exterior lighting renovations and controls, security/ IT, mechanical, and water with zero upfront expense.</li> <li>A comprehensive O&amp;M package was designed and provided to help DGS staff.</li> </ul>	<ul style="list-style-type: none"> <li>Improve safety, illumination + aesthetics and reduce energy consumption + high energy costs.</li> <li>Back up data on energy consumption, expected savings, and comparison with proposed system.</li> </ul>
<p><b>Solar PV, Battery Storage and Microgrids</b></p> <p>Delivered 300+ MW of DER projects, for 100+ clients nationwide, including 100+ MW of solar PV, 40+ BESS projects, and 20+ microgrids.</p>	<ul style="list-style-type: none"> <li>Evaluate the City of Orange’s diverse facility portfolio—including the Corporation Yard, fire stations, parking structures, reservoirs, parks, and community centers—for additional solar PV feasibility, building on existing installations at four sites (New Fire Station parking lot,</li> </ul>





ECM & Willdan Implementation Experience Highlight	Proposed Application for City of Orange
<ul style="list-style-type: none"> <li>Optimized system size for local utilities net energy metering policies to maximize savings.</li> <li>For the City of Turlock we partnered with Erthos to develop a 1MW earth mounted solar array. By eliminating the structural steel of a traditional ground mount system, we saved the City over 30% in project costs.</li> <li>At the City of Dublin we implemented 3 microgrids at community centers and critical facilities to provide battery back up generation and reduction in demand charges.</li> </ul>	<p>Police Department, Fire Station 4, and Old Towne Parking Structure), while optimizing system sizes under California’s Net Billing Tariff (NEM 3.0) rules by pairing with BESS where appropriate to manage peak demands and enhance resiliency.</p> <ul style="list-style-type: none"> <li>Evaluate microgrid and backup generation needs for critical facilities like public safety buildings and water infrastructure, aligning with available grants and incentives (e.g., through the Inflation Reduction Act and SCE programs) to support the City’s hybrid Climate Action Plan and long-term GHG reduction goals.</li> <li>Maximize land use on City-owned properties, such as reservoirs and parks, by evaluating innovative ground-mounted solar PV systems like Erthos’ earth-flat technology for cost-effective, low-impact deployments under Power Purchase Agreements (PPAs).</li> </ul>
<p><b>HPWH – Space Heating</b></p> <p>For Cisco Systems San Jose Campus Building Q, provided turnkey installation of a Trane AXM030 heat pump and two (2) Raypak H7-1007 condensing boilers, allowing our team to size the heat pump to serve a majority of the heating load.</p> <ul style="list-style-type: none"> <li>New boilers will economically provide peaking capacity and backup for heat pump systems.</li> <li>Significant decarbonization gains were achieved.</li> </ul>	<p>Create a detailed inventory of existing systems and equipment across all buildings.</p> <ul style="list-style-type: none"> <li>Prioritize replacement of end-of-life equipment and systems where electrification makes financial sense.</li> <li>Exhaust all grant, incentive, and other funding opportunities to maximize the upgrades business case.</li> </ul>
<p><b>HPWH – Domestic Water</b></p> <p>For Kaiser Permanente, our team performed turnkey (design, engineering, and construction) installation of HPWHs at 80 sites to replace gas-fired DHW heaters.</p> <ul style="list-style-type: none"> <li>This included \$600K in incentives and a portfolio IRR of 109% first- year therm savings of 112,000.</li> </ul>	<ul style="list-style-type: none"> <li>Confirm potential for grant money in SCE and SoCalGas incentive benefits (e.g., up to \$3,100 per unit via TECH Clean California) for heat pump water heaters (HPWHs) and/or tankless natural gas heaters across the City’s civic and community facilities, such as City Hall, community centers, libraries, and fire stations (based on specific central vs. distributed systems).</li> </ul>
<p><b>Water Meters</b></p> <p>Our water team, along with our strategic partner E Source, brings 90+ years of collective experience in water delivery upgrade projects (e.g., lifts, pump stations, water meters, and waterside infrastructure), directly applicable to the City of Orange’s utility with its 10 wells, 15 reservoirs, 15 pump stations, and ~36,500 service connections.</p> <ul style="list-style-type: none"> <li>For the Cities of Paramount and Fillmore, we developed and implemented a meter replacement/AMI upgrade project for 11,000+ accounts. We completed an initial system assessment to identify water loss and conservation opportunities and develop self-funding performance</li> </ul>	<p>We understand that the City of Orange is exploring AMI upgrades for its municipal water utility, with 25% of its ~36,500 service connections already converted to Neptune meters and the remaining 75% planned over the next 7-10 years.</p> <ul style="list-style-type: none"> <li>Provide a streamlined approach for funding and implementation at scale to dramatically increase the pace of conversion, delivering \$2.1M+ in annual revenue recovery through reduced water loss and enhanced efficiency, all self-funded via guaranteed savings without upfront capital or rate increases.</li> </ul>





ECM & Willdan Implementation Experience Highlight	Proposed Application for City of Orange
<p>contracts that did not require separate capital funds or rate increases.</p> <ul style="list-style-type: none"> <li>All water measures paid for themselves over time, and we propose a similar expedited approach for Orange's remaining ~27,000 meters (75% of total), accelerating beyond the 7-10 year plan to deliver \$2.1M+ in annual revenue recovery through reduced non-revenue water loss and enhanced efficiency.</li> </ul>	<ul style="list-style-type: none"> <li>Utilize experience assisting 6+ California utilities in pursuing WaterSMART grant funding from the Bureau of Reclamation (BOR), along with other incentives (e.g., SCE rebates), to maximize non-City resources for the project.</li> <li>Work closely with E Source to evaluate all lift and pump opportunities across the City's 15 pump stations, 10 wells, and reservoirs, with the goal of upgrading equipment (e.g., adding VFDs and soft starters) and realizing water and energy efficiencies in the system.</li> </ul>
<p><b>Retro-commissioning (RCx)</b></p> <p>Willdan provided comprehensive RCx services for the Metasys BMS system, air distribution systems, hydronic systems, central plant, lighting controls, access controls, and all other dynamic systems within for the Elihu Harris State Building in downtown Oakland (built in 1998, 1.17M sf).</p> <ul style="list-style-type: none"> <li>This resulted in \$168K+ in annual utility savings, improved comfort, and optimizing 20-year-old equipment so it works better than when originally installed and will function until it is replaced in the next decade.</li> </ul>	<p>Perform rigorous RCx to identify equipment and control systems with useful life remaining and only in need of a "tune-up" to optimize operation, efficiency, and indoor environment quality. Provide a suite of services including:</p> <ul style="list-style-type: none"> <li>Cx, RCx, MBCx, and various solutions to ensure optimal long-term systems operations as part of ongoing client support.</li> </ul>
<p><b>HVAC and Controls</b></p> <p>Our in-house team of PEs, CEMs, PMPs, BCxAs, and CMVPs have designed, implemented, and guaranteed the performance of hundreds of turnkey retrofit HVAC and building automation system/controls projects for local governments over the last 30+ years.</p> <ul style="list-style-type: none"> <li>Because we are not tied to any product, vendor, or subcontractor, we develop ideal solutions for our client's facilities.</li> <li>From simple single-zone heat pumps to air-to-water heat pumps, and even complex ground-source VRF systems, our team utilizes a Lifecycle Cost/Total Cost of Ownership approach to work with clients to identify the ideal HVAC and controls solutions that fit their unique goals and requirements.</li> </ul>	<p>We have observed many City of Orange buildings: City Hall, Corporation Yard (including Public Works and Water Division buildings), Police Department, Fire Headquarters (new and original), eight active Fire Stations (plus the former station at 176 S. Grand Street), Old Towne Orange Parking Structure, community centers, public libraries, water wells, reservoirs, and pump stations.</p> <ul style="list-style-type: none"> <li>Leverage our experience with similar buildings from the same vintages (early 20th century to 2020s) and central system types.</li> <li>Retrofit HVAC systems to improve comfort, indoor air quality, electrification, and meet resiliency goals along with standardizing control systems across buildings to improve ease-of-use, optimize operation, and maximize cost savings.</li> </ul>

From this list, Willdan will make sure to prioritize and assess with further any and all measures favored by the City.

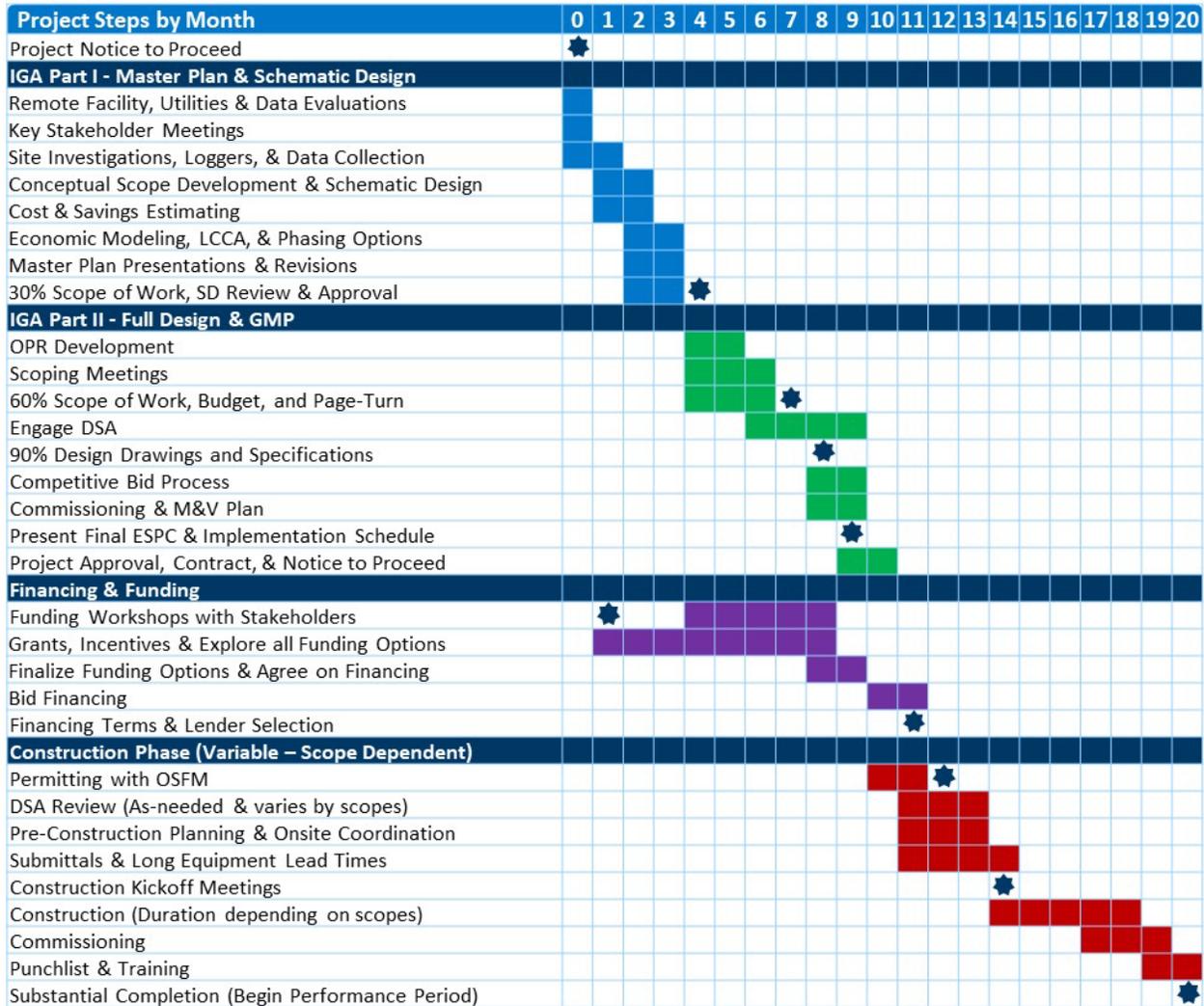




## Project Schedules

Include a project schedule showing start and completion dates for the specific tasks, including milestone dates and processing time for review by the City.

Project Schedule: Full Project



## AMI Acceleration Plan

Willdan proposes a streamlined, concurrent project schedule to accelerate implementation while respecting the City of Orange's distinct funding streams, ensuring no upfront capital outlay and alignment with your operational and fiscal goals. Drawing from our 42-year history serving the City and experience across all Orange County municipalities, we recognize that the AMI water meter project is funded through the enterprise water fund while other Energy Conservation Measures (ECMs)—such as HVAC optimizations, solar expansions, lighting retrofits, and BESS—are typically supported by the general fund. To maximize efficiency and minimize disruptions, we will run two parallel tracks: one dedicated to the expedited AMI rollout for the remaining ~22,000 meters, and another for the broader ECM portfolio. This dual-track approach allows for faster delivery of high-impact savings, like the projected \$2.1M annual revenue recovery from AMI, while enabling flexible phasing across facilities.

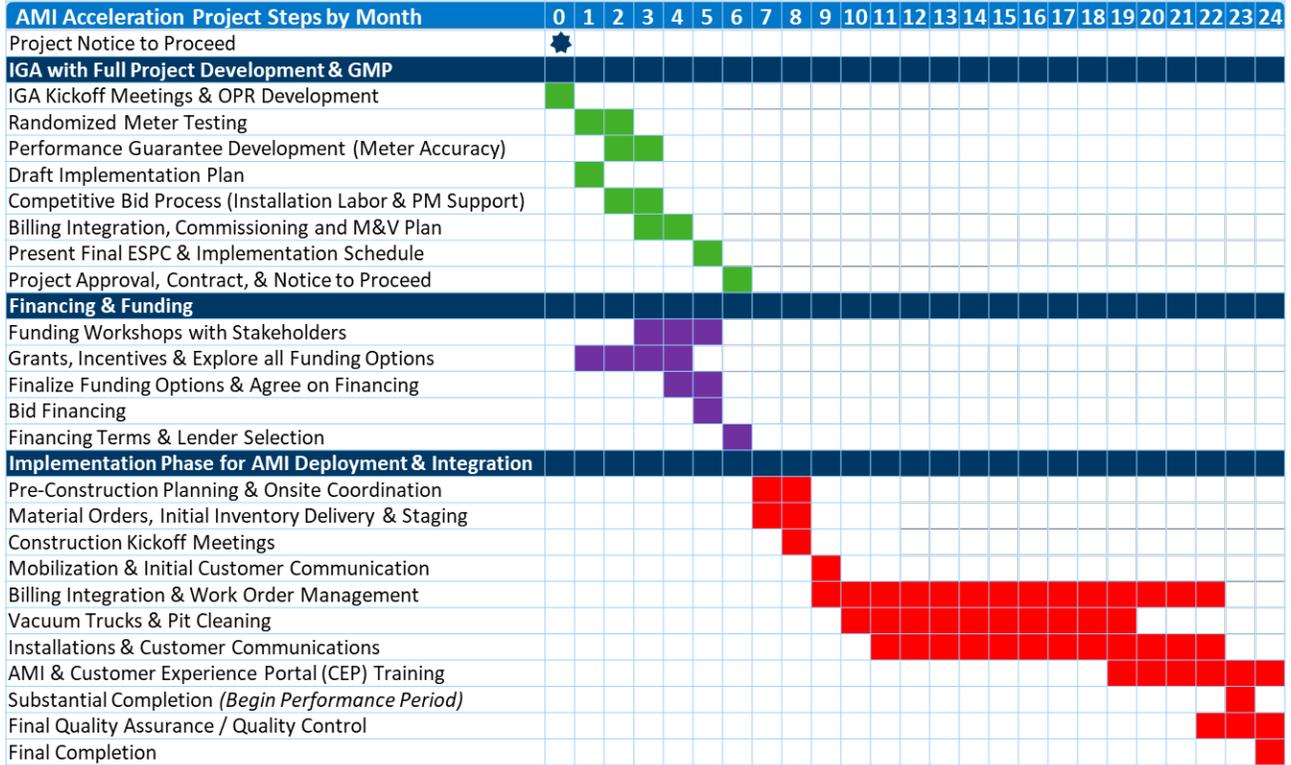
This concurrent schedule compresses the overall timeline to 18-24 months for full implementation, delivering \$7M+ in cumulative savings advantages while minimizing financial/technical risks through our bonding capacity





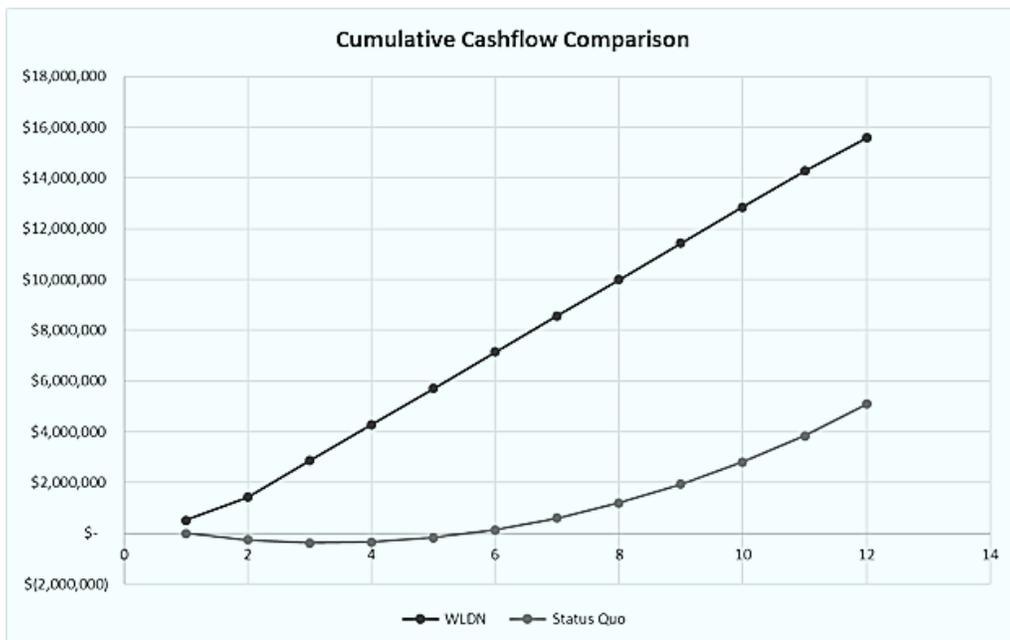
(\$500M+), performance guarantees, and risk assumption. By separating funding streams, we optimize budget allocation, foster economic development via local job creation, and support your hybrid CAP for 40% GHG reductions by 2030.

**Project Schedule: AMI Acceleration Plan**



By electing to implement the AMI Acceleration Project Plan above, the City will benefit from the following positive cash flows:

**Materials Only Comparison of Cumulative Cashflows**





## 7. LITIGATION DISCLOSURE

*Describe any involvement as a party in any formal litigation, arbitration or mediation associated with savings performance on an energy savings contract, power purchasing agreement, or specifically related to an Investment Grade Audit (IGA) agreement in the last five years under any previous or current firm names, along with a description of the nature and outcome of such litigation.*

### Formal Litigation, Arbitration or Mediation

Willdan Energy Solutions is not a party to any formal litigation, arbitration or mediation associated with savings performance on an energy savings contract or related to an IGA agreement in the last five years.

## 8. FINANCIAL STABILITY

*Proposer will provide proof of financial stability including income statements, balance sheets, and statements of changes for the three (3) most recently completed fiscal years. If audited financial statements are not available, provide evidence of the level of third party review of the financial statements. Proposer shall also provide documentation regarding levels of financing available from a financial institution.*

### Proof of Financial Stability

Willdan's financial health is strong, with our financials transparent, audited, and published quarterly. Per the City's request, truncated audited financial statements (including income statements, balance sheets, and statements of changes) covering the three (3) most recently completed fiscal years are provided as **Appendix B**.

A complete copy of Willdan's latest Annual Report can be found here:

[Willdan 10-K Annual Report YE 12-2024](#)

With full copies of reports for the last several years available here:

[EDGAR Entity Landing Page - Willdan Inc.](#)

### Documentation of Financing Available

Willdan has a \$200M financing facility with a consortium of five banks that includes a \$50M line of credit, which is currently unused. As a NASDAQ-listed company, we have access to public equity and debt markets to fund capital needs for growth. Willdan has been in operation for over 60 years and has tracked revenue related to EE since 2009.

A letter from Willdan's bank (BMO) has been provided as **Appendix C**, which demonstrates our levels of financing available.





## 9. COMPENSATION/FEE SCHEDULE

*All SOQ/Proposals shall include a detailed breakdown of the compensation proposed, for work as outlined in Scope of Work section. The SOQ/Proposals should include a breakdown of all costs including hourly rates and reimbursement schedule.*

### Detailed Breakdown of Compensation Proposed

#### Compensation/Fee Schedule

All SOQ/Proposals shall include a detailed breakdown of the compensation proposed for work as outlined in the Scope of Work section. Rather than offering a \$0 IGA fee like other ESCOs may attempt to do, Willdan proposes an IGA fee structure that follows a no-cost preliminary Energy Master Plan of the entirety of the City's buildings and infrastructure. This allows our development team to best understand your needs—so a transparent, negotiable contingency IGA fee can be established.

Our typical Municipality IGA fee is based on scale and complexity and is exclusively an “Exit Fee,” meaning it is ONLY due if the City elects NOT to move forward with any turnkey project into construction at the end of the IGA process. As outlined in section 7, our team delivers a more robust IGA with more upfront design, analysis, and risk mitigation.

As mentioned in the Project Approach, Willdan completes IGAs in two steps:

#### 1. Preliminary Energy Master Planning Audit

No upfront costs or exit fees to the City; allows the team to frame the project (rough order of magnitude savings, cost, and GHG impact) and decide what to proceed on within the more rigorous second step of the IGA.

- No-fee structure allows us to offer a competitive first step to other ESCOs’ “\$0 IGA.”
- Allows development team to best understand your needs—so a transparent, negotiable contingency IGA fee can be established on only the scope and buildings the City truly wants to spend time on.

#### 2. Investment Grade Audit (IGA)

Our typical Municipality IGA fee (\$0.14/square foot) is exclusively an “Exit Fee,” meaning it is ONLY due if the City elects NOT to move forward with any turnkey project into construction at the end of the IGA process. As outlined in our Project Approach, our team delivers a more robust IGA with more upfront design, analysis, and risk mitigation.

#### Willdan’s pricing would be estimated at:

**Cost Proposal = \$0.14/square foot \* 500,000 square feet = \$70,000 (Exit Fee only).**

This fee encompasses a detailed breakdown of all costs for the IGA work, including labor (based on the hourly rates outlined in the Management and Staffing section of this proposal, such as Project Manager at \$195/hour, Energy Engineer at \$145/hour, and others), materials, and any necessary subcontractors. The total compensation for the IGA is fully included within the \$0.14/square foot rate, ensuring no additional charges unless the City proceeds to construction.



# Appendix:

**Appendix A: Project Resumes**

**Appendix B: Audited Financials**

**Appendix C: Bank Letter**

**Appendix D: Required Forms**



# Appendix A: Project Resumes





## David Daniel, AIA, LEED AP

### Executive Oversight

David Daniel will be responsible for overseeing this project and contract with the City of Orange. David has led our team to the implementation of 100+ turnkey energy efficiency and design-build contracts totaling over \$500M. David is responsible for developing actionable strategies for achieving our Vision goal of forming partnerships on each of projects that engage communities to challenge limits and go beyond to create built environments that promote opportunity, wellbeing and sustainability. David's expertise is centered in understanding the client needs and working with the Willdan team to shape an offering which meets clients' goals. David is a southern California native, engaged with the local community and is a highly sought after speaker for local and national organizations including Department of Energy, NAESCO & AIA.

#### Education

*BS, Structural Engineering, University of California San Diego  
MA, Architecture & Environmental Studies, New School of Architecture*

#### Registrations & Certifications

*Licensed Architect, CA  
Licensed Architect, CO  
LEED Green Associate Accreditation*

#### 21 Years of Experience

### Recent Project Experience

**City of San Diego.** David is providing Executive Oversight and Program Management for this 400+ facility turnkey energy efficiency and decarbonization project, to be executed in phases. Phase 1 scope includes 50+ sites and citywide streetlight conversions totaling over \$150M in construction costs. David has helped this client, with significant capital constraints (no upfront costs) with aggressive decarbonization and zero net energy goals, craft a project that will not impact the general fund and provide the City with millions of dollars in savings. Key measures included balancing energy efficiency and decarbonization with major deferred maintenance needs, including new roofing, civil & ADA upgrades and building envelope improvements.

**State of California Facilities– Statewide, California.** David led the development of three facilities in San Diego, Los Angeles, and Oakland, resulting in over \$12M in turnkey construction with over \$900k in guaranteed annual energy savings. The projects also included over \$6M in utility on-bill financing. Project scopes include central plant upgrades, building management system replacement, lighting and controls retrofits, and extensive retro-commissioning.

**County of San Luis Obispo.** David led the development of a ~\$5M energy savings performance contract addressing HVAC, controls, retrocommissioning, lighting, indoor air quality improvements, water and extensive deferred maintenance. The project includes two detention centers and a juvenile facility with poor indoor air quality that will be addressed.

**City of Dublin.** David led the development of a comprehensive \$21M+ energy service performance contract that aligns with the City's Climate Action Plan and long-term goals. This master planned approach focused on HVAC, controls, lighting, street lighting, ballfield & park lighting, resiliency, microgrids, solar PV, battery storage, EV stations, and building envelope work. This project also includes O&M contracts for key scopes of work. Willdan Financial Services was able to provide 100% funding for the project to avoid use of the general fund.



## Carolyn Kiesner, CEM

Program Director, Business Development Manager

Carolyn Kiesner will be responsible for providing support and relationship management expertise on the ESPC project and contract with the City of Orange. Carolyn is an accomplished project director with 14 years of successful energy & infrastructure project engineering, implementation, M&V, contracting and project financing experience. She has completed site-wide energy upgrade projects valued at \$275M for over 22+ California public agencies & districts.

### Education

*BS, Mechanical  
Engineering, Northern  
Illinois University,  
DeKalb, IL*

### Certifications

*Certified Energy  
Manager, License #  
21384*

**14 Years of Experience**

### Project Experience

**City of Chino Hills.** Project Director. Oversaw contracting, project funding and development team. Project includes solar, lighting, HVAC and controls. Project funding included City capital improvement project contribution.

**City of San Diego:** Account Manager. Developed a comprehensive Citywide energy masterplan to achieve City's decarbonization and climate action goals. Scope includes 56+ sites, building electrification, solar, battery storage, lighting, LED streetlighting, HVAC, controls and transformer upgrades.

**City of Fairfield:** Program Director. Oversaw the project contracting, funding and development team. Scope included significant upgrades to City Hall administration campus which included a central plant upgrade and RTU overhaul; in addition to transit center fleet transition and EV charging infrastructure; and citywide LED lighting, solar, roofing and HVAC upgrades. Project funding included a combination of City capital improvement project funds, incentives, grants and low-interest tax-exempt lease financing.

**Paramount USD:** Program Director. Oversaw the project development and contracting. Scope included 2.3MW of solar PV and 44 electric vehicle chargers across 11 district sites. Project funding included District bond dollars.

**Escondido USD:** Program Manager. Oversaw the contracting, funding and project development of complex ESPC project scope across 11 facilities with efficiency upgrades combined with solar PV, and EV charging infrastructure. Project funding included incentives and a low-interest tax-exempt lease.

**El Dorado Union Highschool District.** Account Manager. Managed and developed 3.2MW of solar PV across 3 sites, interior lighting and a microgrid and battery back-up at 2 sites. Project funding included utility incentives and low-interest tax-exempt lease financing.

**City of Madera, Madera, CA.** Program Director. Led and developed citywide upgrades for 1.2 MW of solar canopies at the city hall, library, airport, fire station #6, public works, city parks, PD, and community centers; solar streetlights; interior and exterior lighting; HVAC and controls; 3.24 MW ground mount of NEM and RESBCT at WWTP; EV chargers; and electrical switchgear replacements. The funding mechanism included a low-interest tax-exempt lease financing.



## Colton Gorman, CEM, CBCP

### Program Manager

Colton Gorman will be responsible for relationship management expertise on the ESPC project and contract with the City of Orange. Colton has been actively involved in operations and project development since 2011, successfully contributing to the implementation of numerous turnkey energy efficiency contracts, amounting to over \$100M in total project value. With a diverse range of projects valued between \$1M and \$25M, Colton has gained valuable experience working with municipal and local government customers. His involvement in energy performance contracts and operational savings projects demonstrates his expertise and commitment to the field.

His responsibilities include: driving the company's growth by identifying, developing, and closing new business opportunities in the energy efficiency, renewable energy, and energy management sectors; building and nurturing long-term relationships with clients, partners, and key stakeholders to strengthen the company's market position and reputation; addressing client needs by collaboratively developing tailored, competitive proposals with the technical, sales, and operations teams; tackling challenges in securing contracts and agreements through strategic negotiation and creative problem-solving skills; and ensuring the company's long-term success by aligning business development activities with the organization's overall growth strategy and objectives.

#### Education

*BS, Mechanical Engineering, University of Hawaii at Manoa*

#### Registrations & Certifications

*Certified Energy Manager (CEM)  
Certified Building Commissioning Professional (CBCP)*

#### 14 Years of Experience

### Recent Project Experience

**Paramount Unified School District, Project Manager.** Successfully generated leads and developed comprehensive project scopes for a large-scale, \$19.7M solar installation initiative across 11 sites, delivering 2.2MW of clean energy capacity. The project focused on district-wide solar installations to enhance energy efficiency and sustainability across the district's facilities. By securing necessary funding through bonds and leveraging available incentives and rebates, the team ensured timely implementation of the project's key components, including the integration of advanced solar technology. The results translated into long-term energy savings, reduced operational costs, and a more sustainable learning environment for the district.

**City of Chino Hills, Chino Hills, CA, Program Manager.** Assisted the Willdan team in successfully launching and managing a \$9M energy efficiency project for the City of Chino Hills. The project involved city-wide solar installations, battery energy storage systems, fleet electrification, HVAC VRF retrofits, rezoning efforts, and LED retrofits across the city's facilities. Despite any challenges that arose, the team was able to incorporate industry best practices and innovative solutions, ensuring the timely completion and long-lasting impact of the project on the city's energy efficiency and sustainability.

**Escondido Unified School District, Project Manager.** Successfully generated leads and developed comprehensive project scopes for a large-scale, \$18M energy savings initiative. The project focused on HVAC replacement and solar installations across the district's facilities. By securing necessary funding and leveraging available incentives and rebates, the team ensured timely implementation of the project's key components, including the modernization of HVAC systems and integration of solar technology. The results translated into long-term energy savings, reduced operational costs, and a more sustainable learning environment for the district.



## Thomas Muñoz, PE

### Regional Engineering Manager

Thomas Muñoz will be responsible for overseeing the engineering tasks on this project and contract for the City of Orange. Thomas is an experienced leader specializing in energy efficiency engineering and project management. He has overseen portfolio building energy management and distributed energy resources, with a focus on decarbonization and resilience. Previously, Thomas managed design-build projects and served as a Sr. Project Development Engineer at a mechanical firm and ESCO, focusing on performance contracting for various sectors. With expertise in mechanical design, project management, and energy efficiency, Thomas brings valuable skills to drive innovation and sustainability in the industry.

#### Education

*Bachelor of Science in  
Mechanical  
Engineering, California  
State Polytechnical  
University*

*Master of Science in  
Mechanical  
Engineering, California  
State University*

#### Registrations & Certifications

*Registered Professional  
Engineer with the State  
of California*

**32 Years of Experience**

#### Recent Project Experience:

**City of San Diego, *Engineering Manager*.** Currently providing engineering leadership for a multi-phase energy savings performance contracting project including building and sport lighting, HVAC, roofing, ASHP block heaters, PV+BESS, pool heating electrification, VFD pool pump, onsite chlorination, water conservation upgrades, DHW electrification, kitchen electrification, transformers, plug load controllers, laundry electrification and advanced streetlighting upgrades.

**City of South Lake Tahoe, *Engineering Manager*.** Provided engineering oversight for the City of Lake Tahoe on a \$12 M energy and infrastructure upgrade project. Measures included: cogeneration microturbines, Solar PV (242 and 173 kW DC canopies), building automation controls and thermostats, efficient CO2 ice plant for ice arena, water meters, and efficient power transformers.

#### Previous Project Experience:

**California Department of Corrections and Rehabilitation (CDCR), *Owner's Representative*.** Acted as Owner's Representative for energy conservation projects at 7 prisons. The scope of work included engineering design and calculation review, equipment submittal review, incentive administration, commissioning process oversight, building automation scope review, guidance on project feasibility, constructability, and code compliance, and guidance on contractor change orders and construction administration for lighting upgrades, mechanical upgrades, and controls.

**LA County Metropolitan Transportation Authority (LA Metro) – Energy and Climate Services, *Lead Developer*.** Provided engineering design and oversight services as Owner's Representative to LA Metro on various energy and climate initiatives. Project scope included: LED Tunnel Lighting Design, BAS Pilot Program, Master Planning Support, ISO 50001 Certification, EV Charging Stations, and Solar PV and BEES Systems.



## Benjamin R. Laboy, PE

### Renewable Energy and Microgrid Lead

Benjamin Laboy will be responsible for providing renewable energy expertise on the ESPC/PPA project and contract with the City of Orange. Ben leads development and analysis of renewable energy projects for Willdan Performance Engineering. He develops turnkey solar PV, battery storage, and microgrid projects for forward-thinking public and private-sector customers seeking to maximize electricity bill savings, lower carbon footprint, and increase resiliency. Mr. Laboy manages an internal team of design and project development engineers, acts as point of contact for customers throughout project process, and collaborates with other Willdan operating groups on DER-related efforts. Mr. Laboy draws from a strong background in interdisciplinary problem-solving to tackle complicated technical projects and provide reliable results.

#### Education

*MS Earth Systems,  
Concentration in Energy  
Efficiency, Stanford  
University, CA*

*BS Science, Technology  
and Society, Stanford  
University, CA*

#### Registrations & Certifications

*Registered Professional  
Engineer (Mechanical),  
California*

#### 9 Years of Experience

### Recent Project Experience

**Biddeford-Saco-Old Orchard Beach (BSOOB) Transit Office.** Lead DER Engineer providing Transit Facility Microgrid Feasibility Assessment and Design services for a microgrid incorporating EV charging infrastructure, solar PV, a battery energy storage system, backup generator, and microgrid controller at BSOOB's transit yard. Tasks include preliminary microgrid site plan design, financial analysis, and implementation planning.

**City of Dublin.** Lead Engineer for development of \$7M of DER turnkey project scope at 8 different facilities, including solar PV, Battery Energy Storage, EV charging and traditional diesel generators to help the City reduce costs, improve resiliency, and reduce carbon. Developed initial project feasibility and obtained customer buy-in of final project scope. Currently supporting construction of projects to ensure successful completion.

**City of Elk Grove.** Supported City of Elk Grove in their efforts to evaluate feasibility and procurement of solar PV across three meters at their newly constructed District56 site, which includes an Aquatic Center, a Community/Senior Center, and park spaces. Led engineering analysis efforts to project site load profiles and annual usage totals for the new facilities. Identified optimal solar PV system sizing and preliminary layouts, and evaluated potential economic benefit of battery energy storage systems. Assessed multiple financing options, including loan and PPA options. Developed RFP to procure a design-build or PPA project to construct the solar PV system, supported contract negotiation with selected vendor and finalized contract for 740 kW ground mount system.

**Culver City.** Provided engineering analysis for solar PV and battery storage technology as part of a microgrid feasibility study for the Culver City Senior Center and Parks and Recreation facilities. Identified ~750 kW potential solar PV capacity along with battery storage solution to couple with energy efficiency projects to form a truly resilient microgrid solution for the site.

**Escondido Union School District.** Supported Escondido Union SD in their efforts to evaluate feasibility and procure solar PV totaling ~2.77 MW in carport and shade structures across 13 sites. Finalized PPA agreements and provided contract negotiation and construction support to the District. Currently supporting \$19M in comprehensive energy project scopes, including 1.8MW solar PV and 46 Level 2 EV chargers (including chargers serving the District's maintenance fleet).



## Tyrone Peter, PE

### Civil Engineering Lead

Tyrone Peter will be responsible for providing civil design engineering expertise on the ESPC project and contract with the City of Orange. An accomplished civil engineer, Tyrone excels in managing multi-discipline, multi-agency infrastructure projects, ensuring delivery on time and within budget. With extensive experience in public works, he oversees entire projects and key civil engineering tasks. His expertise spans highway design, street improvements, light rail, flood control, and water and sewer projects. He has led feasibility studies, project reports, construction documents, and inspections while effectively managing large teams and subconsultants.

#### Education

*BS, Engineering and  
Civil Engineering, Tamil  
Nadu College of  
Engineering*

*Civil Engineering,  
Murugappa Polytechnic*

#### Registrations & Certifications

*Civil Engineer,  
California, No. 81888*

#### 17 Years of Experience

### Project Experience

**Sanitary Sewer Management Plan, City of Lynwood, CA. Project Manager.** Responsible for overall project management and oversight required for the sanitary sewer management plan. Willdan assisted the City in accomplishing compliance with SDWR Order No. 2006-0003-DWQ for Statewide General Waste Discharge Requirements for Sanitary Sewer Systems. Compliance required each sewerage entity to develop and implement a Sewer System Management Plan. The process involved reviewing and evaluating all sewer system-related codes, policies, practices, mapping, reporting, financing, and public information dissemination. The SSMP development process also involved preparing an expansion of the City's GIS mapping and database, providing a hydraulic analysis of the sewer system, and presenting recommendations to facilitate compliance with various elements of the Order.

**Golden State Water Distribution Network Acquisition and Integration Feasibility Analysis, City of Lakewood, California.** Project Manager responsible for overall project management and oversight of services required to perform a feasibility and financial impact analysis to acquire and integrate the existing Golden State Water (GSW) distribution network within the city. Willdan evaluated the existing network to determine whether the network within city limits could be disconnected from the existing network. To determine the feasibility, the existing GSW network was evaluated for its ability to function as a stand-alone network after the removal of the distribution lines within city limits. Willdan evaluated and compared the detached GSW network with the existing distribution network to identify the best solutions for the City to provide service to the detached GSW network. This included evaluating the existing well capacity and/or a service connection from the City's distribution network to facilitate the additional network demand. Willdan conducted a preliminary evaluation of the infrastructure acquisition cost. Based upon the findings, Willdan analyzed the financial aspects and impacts of the water system acquisition. Willdan provided a technical memorandum detailing the study's findings.

**Design Services, City of Elk Grove, California.** Served as Senior Design Engineer responsible for the preparation of construction plans, specifications, and estimate for the Sound Wall renovation project on East Stockton Boulevard. The sound wall was constructed along a city artery paralleled to CA-99 in the City of Elk Grove. As a part of outreach and selection of design alternatives, Willdan staff met and consulted with local residents and the City Art Advisory Council prior to finalizing the design.



### Education

*Master of  
Environmental Science  
and Management,  
Bren School of  
Environmental Science  
& Management - UC  
Santa Barbara,  
Santa Barbara, CA*

*BS Environmental  
Science,  
UCLA,  
Los Angeles, CA*

### 8 Years of Experience

## Taylor Briglio

### Clean Mobility Manager

Taylor Briglio will be responsible for providing EVSE Expertise on the ESPC project and contract with the City of Orange. Taylor evaluates opportunities to incorporate EV charging stations (EVCS) for public, staff, and fleet use cases as part of our clients' overall turnkey projects. Taylor leads Willdan's electric vehicle-related work, including fleet electrification planning and implementation, electric vehicle (EV) infrastructure development and construction, and the integration of EV infrastructure into turnkey energy efficiency and renewable generation projects.

### Previous Project Experience

**City of Fairfield, CA.** Supported both consulting and turnkey efforts with the City. Currently supporting the City's Transportation Electrification Master Plan by developing a roadmap for converting over 300 City vehicles including their transit and public works fleet to electric vehicles (EV). Tasks include feasibility analysis; corporation yard improvement needs assessment and project management services. Supporting and coordinating route modeling, operational analysis of available BEB options and vehicle chargers, a fleet replacement plan, DER integration feasibility, a facilities assessment, and a financial analysis of transitioning to and operating an all-electric fleet. Successfully acquired over \$13M in funding to implement EV projects. Also supported incorporating 5 publicly accessible Level 2 EVCS as part of 1.23MWdc of solar PV Willdan implemented in our turnkey project.

**City of Chino Hills.** Developed EVCS scopes as part of a comprehensive turnkey energy project. Secured \$160K in SCE rebates for public Level 2 EVCS at four sites. Developing a fleet electrification scope to install 17 Level 2 EVCS and two DC Fast Chargers (DCFCs) with supporting infrastructure to support an additional 8 DCFCs and 35 Level 2 EVCS, which can support a fully electric public works fleet.

**City of Inglewood, CA.** Lead development of the City's EV Fleet and Charging Infrastructure Master Plan. Tasks include development of a Zero-Emission Vehicle (ZEV) Fleet Conversion Plan for the City's fleet of 360 vehicles, a Public EV Service Equipment (EVSE) Plan to develop a network of publicly available EV chargers on publicly owned property throughout the City, funding and financial assistance for recommended EV-related expenditures, and the development of a City Vision and Mission Statement for a Transportation Electrification and Energy Modernization Program.

**City of Camarillo, CA.** Led the development of the City's Zero-Emission Transit Fleet Electrification Plan for the City's transit fleet, which consisted of 18 vehicles serving two routes as well as demand response paratransit operations. Tasks included energy modeling, site suitability analysis for EVSE including conceptual layouts and construction cost estimates, financial analysis, and the development of workforce training recommendations.

**County of Madera, CA.** Led the development of the County's Transit Innovative Clean Transit Rollout Plan. Tasks included the preparation of a zero-emission transit fleet electrification plan for the County's transit fleet consisting of 13 vehicles that serve 4 routes and demand response paratransit operations, energy modeling, development of a charging strategy, and recommended suitable electric transit buses and chargers to meet operational requirements. Also provided workforce training recommendations and an overview of funding opportunities to reduce upfront and ongoing costs for fleet electrification.



## Bryan Rossi, PE

### Mechanical Design Engineer

Bryan Rossi will be responsible for identifying and designing measures on the ESPC project with the City of Orange. Bryan's experience developing energy projects includes both mechanical engineering design and project management, combining knowledge in all aspects of project development from inception to implementation. He has worked with educational, institutional, and public and private sector clients in varying capacities including developing 100 Level II and III energy audits and over 40 detailed building energy models.

#### Education

*MS, Mechanical Engineering*  
*BS, Mechanical Engineering,*  
*Binghamton University,*  
*Binghamton, NY*

#### Certifications

*Professional Mechanical Engineer,*  
*License # M 40307*

*OSHA Certification*  
*(30-hour)*

**8 Years of Experience**

#### Previous Project Experience

**Cisco San Jose Building Q - "Electrification of Water heating systems" (2023)** Mechanical Engineer. Provide design & construction management services for new central heating and domestic hot water heating systems. The new air to water heat pump and new redundancy focused heating boilers to serve the hydronic heating system at a new lower distribution temperature. Targeting low operating cost water heating electrification solutions. The new domestic hot water heat pumps will electrify the domestic hot water generation without the need for additional structural upgrades or undue tenant impact.

**Cisco San Jose Building P - Phase 2 "Cisco Electrification of Water heating systems" (2022)** Mechanical Engineer. Provide design & construction management services for new central heating and heat recovery systems. New heat recovery chiller and new redundancy focused heating boilers to serve the hydronic heating system while making chilled water to augment the existing chilled water load. Targeting low operating cost water heating electrification solutions.

**Cisco San Jose Building P - Phase 1 "Domestic hot water electrification and mechanical improvements" (2022)** Mechanical Engineer. Provide design & construction management services for new heat pump water heater installation and grooved pipe coupling replacements on heating hot water pipe. Pipe coupling replacements targeted to prevent leaking at lower heating hot water distribution temperatures. Targeting low operating cost water heating electrification solutions.

**Cisco San Jose campus Electrification Feasibility Study for Buildings Q, P,3, 5, 10, 14, & 17 (2021)** Mechanical Engineer. Provide Engineering analysis and schematic design for proposed electrification efforts to seven building on the San Jose Campus. In depth assessments of mechanical, electrical, and plumbing loads for sizing future electricity powered water heating systems.

**California Energy Commission SCAQMD BEETS for California, CA.** Project Engineer. This project demonstrates three replicable scalable and innovative bundles of pre commercial technologies in commercial buildings. **Optimized all variable-speed chilled water** (CHW) plants utilizing alternative refrigerant chillers; LED fixtures with integrated advanced controls advanced building management system (BMS) to integrate all HVAC zones integrate wirelessly with plug load controls; and provided a comprehensive platform capable of demand response (DR) and off grid exterior parking lot LED lighting.



## Sripad Kamdadaï, EIT, LEED AP ND

### Energy Engineer

Sripad Kamdadaï will be responsible for identifying and designing renewable energy measures on the ESPC project with the City of Orange. Sripad is responsible for contributing to the development of solar PV, battery energy storage (BESS) and electric vehicle (EV) infrastructure network programs and projects. Mr. Kamdadaï also has experience in demand response, sustainability, and battery design.

#### Education

*Master of Science in Mechanical Engineering (Energy Conversion), University of Southern California, Los Angeles, California*  
*BE, Mechanical Engineering, Anna University, Chennai, Tamil Nadu, India*

#### Registrations & Certifications

*LEED AP Neighborhood Development (ND)*  
*Engineer-in-Training (EIT)*

#### 6 Years of Experience

### Previous Project Experience

**City of Fairfield, CA.** Currently supporting the City's Transportation Electrification Master Plan by developing a roadmap for converting over 300 City vehicles including transit and public works fleet to electric vehicles (EV). Tasks include feasibility analysis; corporation yard improvement needs assessment and project management services. Supporting and coordinating route modeling, operational analysis of available BEB options and vehicle chargers, a fleet replacement plan, DER integration feasibility, a facilities assessment, and a financial analysis of transitioning to and operating an all-electric fleet.

**City of Chino Hills, CA.** Lead engineer responsible for the design and development of a fleet electrification scope at the City's Public Works Fleet Yard to install 17 Level 2 EVCS and two DC Fast Chargers (DCFCs) with supporting infrastructure for an additional 8 DCFCs and 35 Level 2 EVCS which can fully support a 100% electric public works fleet. Currently supporting the development of a DER-integrated scope of work which includes solar PV and BESS as it transitioned from a comprehensive turnkey energy project into procurement and construction phases. Additional tasks include utility coordination, savings and financial evaluation for solar PV, BESS and EVCS scopes of work.

**City of San Diego, CA.** Currently supporting the development of comprehensive turnkey energy and decarbonization measures across city facilities. Supporting the design and development of 2MW solar PV and 2.5MW BESS scopes of work at 19 different facilities. Tasks include solar PV and BESS design feasibility, modeling solar and energy storage systems for energy savings and financial evaluation.

**City of Inglewood, CA.** Currently supporting the development of the City's Electric Vehicle Fleet and Charging Infrastructure Master Plan. Tasks include the development of a Zero-Emission Vehicle (ZEV) Fleet Conversion Plan for the City's fleet of 360 vehicles, a Public EV Service Equipment (EVSE) Plan to develop a network of publicly available EV chargers on publicly owned property throughout the City, funding and financial assistance for recommended EV-related expenditures, and the development of a City Vision and Mission Statement for a Transportation Electrification and Energy Modernization Program.

**Escondido Union School District, CA.** Responsible for all technical aspects of this 3 MW solar PV and BESS project as it transitioned from a feasibility study into procurement and construction phases. Ensured favorable terms were negotiated for the client as PPA contract documents were created and agreed upon by all parties. Assured appropriate tracking with the changes in technical details and understanding the financial impact from each change.



## Jamie Gustafson | PE, CEM

### Energy Engineering Lead

#### Education

*BS Mechanical Engineering, Jacobs School of Engineering, UC San Diego*

#### Registrations & Certifications

*Mechanical PE, CA (License # 41641)*

*Certified Energy Manager (CEM)*

#### 8 Years of Experience

Jamie Gustafson will be responsible for identifying and designing measures on the ESPC project with the City of Orange. Jamie provides key engineering services in support of the development of building energy efficiency, decarbonization goals, and distributed energy resource (DER) projects, including electric vehicle (EV) infrastructure, solar photovoltaic (PV) systems, and battery energy storage systems (BESS). Through her time supporting utility programs and direct-to-customer contracts, Jamie is an expert at identifying energy and cost saving opportunities at various facility types (city/county, schools, offices, biotech, retail, hotels, hospitals, and multifamily properties).

#### Previous Project Experience

**City of San Diego, CA.** Currently supporting the development of comprehensive turnkey energy and decarbonization measures across 56 city facilities, and upgrades for over 50,000 streetlights. Measures include building and sport lighting, HVAC electrification/upgrades, generator block heaters, PV+BESS, onsite pool chlorination, water conservation measures, water heater electrification, kitchen appliance electrification, transformer upgrades, plug load controllers, laundry electrification and advanced streetlighting upgrades.

**City of Inglewood, CA.** Supported the development of the City's Electric Vehicle Fleet and Charging Infrastructure Master Plan. Tasks include the development of a Zero-Emission Vehicle (ZEV) Fleet Conversion Plan for the City's fleet of 360 vehicles, a Public EV Service Equipment (EVSE) Plan to develop a network of publicly available EV chargers on publicly owned property throughout the City, funding and financial assistance for recommended EV-related expenditures, and the development of a City Vision and Mission Statement for a Transportation Electrification and Energy Modernization Program.

**Merced County Association of Governments (MCAG), CA.** Supported the development of MCAG's Electric Vehicle Readiness Plan to prepare the region for growing EV adoption, determine local and regional EV infrastructure needs, and identify priority locations for EVCS. Tasks included quantifying air quality benefits from regional EV adoption, identifying potential charging station sites, and providing an overview of funding opportunities.

**City of Dublin, CA.** Supported the development of an EV infrastructure plan for public electric vehicle charger deployment. Tasks included identifying optimal locations and determining appropriate mix of chargers. Also supported the development and installation of 10 EV chargers as part of larger turnkey energy services performance contract.

**City of Dinuba EV Infrastructure Study, CA.** Supported the development of a public EV charging station implementation plan for the City of Dinuba. Location evaluation, site planning and engagement, cost/benefit analysis, presentation of findings and ranking matrix, summarize best practices, outreach for future implementation interest.

**City of Bell, City Transit Electrification, CA.** Developed options for City of Bell paratransit electrification. Feasibility study components include: evaluating EV transit models on current market for practical applications (two set bus routes with dial-a-ride option), state of charge analysis throughout bus route, recharging scenario optimization, location evaluation and site planning, cost/benefit analysis.



## Patrick M. Wills

### Senior Construction Manager

Patrick Wills will be managing implementation and construction of measures on the ESPC project with the City of Orange. Patrick has 40 years of experience in construction with a focus on design-build projects. As a project manager, Mr. Wills applies his vision of creating cohesive teams to deliver high-quality, low-cost building upgrades to clients on an efficient timeline. Mr. Wills has managed teams from planning to completion on new construction and existing building commissioning projects for municipal and K-12 institutions, and he takes great pride in the major improvements he has brought to school districts throughout California.

#### Education

*Associate of Science,  
Business  
Administration, Mesa  
College, 1989*  
*Associate of Science,  
Construction  
Management, Mesa  
College, 1989*  
*Sheet Metal  
Journeyman Local 206,  
1990*

#### Registrations & Certifications

*EM-385-1-1 40-hr  
Safety Training, 2010*  
*Asbestos Awareness  
CPR and First Aid*  
*Coursework: Direct  
Digital Controls -  
University of California  
at San Diego*  
*Coursework: HVAC  
Design - University of  
California at San Diego*

#### 40 Years of Experience

#### Project Experience

**County of San Luis Obispo, General Services Department, UESC, Energy Conservation Measures Implementation, San Luis Obispo, CA, *Project Manager:*** Design/build contract with Pacific Gas & Electric, designed, permitted and installed over \$6 million in HVAC improvements demand management, domestic water conservation, energy management system upgrades and lighting. (Design-Build)

**Huntington Beach Union High School District, Energy Savings Projects, Huntington Beach, California, *Project Manager:*** Design-build master energy services agreement, implemented a new district 125HP Compressed Natural Gas generating station at the districts' transportation facility, weather-based irrigation control and modifications/replacement of AHU's at district offices. (Design-Build)

**Beaumont Unified School District, Energy Savings Projects, Beaumont, California, *Project Manager:*** Design-build master energy services agreement, implemented energy conservation measures. This program consisted of a new 125HP fast fill and time fill CNG station and generating equipment, energy-efficient lighting, occupancy sensors, new ground mount canopy 633Kv DC solar photovoltaic generation structures, variable frequency drives, energy management system upgrades, and peak load demand response. Developed, designed, and implemented over \$8 million in energy savings projects. (Design-Build)



## Scott Griffith, LEED GA

### Water Specialist

#### Education

*BA, Architecture  
Georgia Institute of  
Technology;  
BVA – Design & Material  
Sciences, Georgia State  
University;  
Portfolio Completion,  
Parsons School of  
Design, NYC;*

#### Registrations & Certifications

*LEED Green Associate  
Accreditation, U.S.  
Green Building Council*

#### 35 Years of Experience

Scott Griffith will be supporting the City of Orange in its efforts to modernize its water system for energy savings and to enhance utility revenue through AMI integration and billing optimization. Scott brings experience in over 100+ water utility projects, delivering innovative water conservation and smart utility solutions to municipalities across the western U.S., with a focus on California's regulatory and infrastructure environment. Scott has supported system optimization and AMI deployments for numerous California agencies including Chino, Dublin San Ramon Services District, Elsinore Valley MWD, and Padre Dam MWD – integrating SCADA, AMI, GIS, and billing platforms to enhance performance and revenue - and has delivered large-scale ESPC and AMI programs in Roswell, NM and Silver City, NM resulting in millions in non-revenue water recovery and operational savings across ~30,000 accounts. Scott is currently consulting with the UC Santa Barbara Bren School on California's groundwater – energy nexus and has been recognized for his expertise in data-driven water conservation, utility analytics, and smart infrastructure integration.

#### Project Experience

##### City of Fillmore, CA.

Scott supported the development and implementation of a citywide Advanced Metering Infrastructure (AMI) project for Fillmore's 4,000+ water accounts, resulting in \$5M in turnkey construction and over \$575K in annual savings and revenue recovery. He played a key role in designing the funding strategy, which allowed the City to deliver the project with no upfront capital contribution by leveraging TELP financing. The project modernized Fillmore's water system with ultrasonic meters, real-time data, and a Customer Experience Portal (CEP), supporting enhanced billing accuracy and long-term water conservation.

##### City of Chino Hills, CA.

Scott served as a subject matter expert supporting Chino Hills with planning and strategy for water system modernization, including AMI, SCADA, and data integration efforts. Drawing on his extensive experience with neighboring Chino, he advised the City on how to achieve operational visibility, non-revenue water reduction, and improved customer service through smart infrastructure investment. His role focused on ensuring system interoperability and aligning future upgrades with statewide water conservation and electrification policies.

##### City of Chino, CA.

Scott served as the project development consultant for a full water system optimization initiative, integrating SCADA, AMI, GIS, hydraulic modeling, and CMMS into one unified smart water platform. The Chino project focused on improving operational efficiency, reducing non-revenue water, and lowering energy consumption through advanced pump and distribution optimization. The platform empowered the City to extract greater value from its existing technologies, enabling real-time decision-making and measurable cost reductions across its utility operations.



## Chris Gaddy

AMI Developer

Chris Gaddy will be responsible for development of any Advanced Metering Infrastructure (AMI) and water metering scope for the City of Orange. Chris has been involved in the development and turnkey implementation of over \$17M in AMI projects. Chris has audited 30+ water metering systems and working with over 10 unique billing systems, including the billing system currently in place at the City of Orange. Chris develops budgets, solutions, and implementation plans, ensuring that the client's needs and objectives fully inform the delivery of solutions.

### Education

B.S., Texas Christian University

### Registrations & Certifications

AWWA Member  
ASHRAE Associate Member

15 Years of Experience

### Relevant Experience

**City of Fillmore, Advanced Metering Infrastructure (AMI).** Chris provided account management and led the development and community engagement efforts for this project, resulting in \$5M in turnkey construction with over \$575K in annual savings and revenue recovery. Chris helped this client to fund the project without capital contributions, relying solely on project benefits. The project updated the entire 4,000+ account water system from old meters being visually read to new ultrasonic meters with real-time reading capability and a Customer Experience Portal (CEP). Chris facilitated financial discussions culminating in the Cities use of Tax Exempt Lease Purchase (TELP) financing to provide an alternative to the CIP for funding of the project, allowing the City to re-direct critical funds to other immediate infrastructure needs.

**City of Paramount, Advanced Metering Infrastructure (AMI).** Chris led project development for the City's AMI and water metering initiative, delivering an \$11M turnkey AMI infrastructure modernization project without requiring any rate increases. Chris led development, technical scoping, and implementation planning for the AMI scope, aligning technology upgrades with customer service and conservation goals. The project upgraded Paramount's entire water system with real-time meter reading, automated billing, and a Customer Experience Portal (CEP), resulting in over \$230K in annual O&M savings and \$860K in recovered water revenue. Chris facilitated a funding strategy that enabled 100% project delivery using existing utility revenues, freeing up capital for other City priorities.

**City of Monte Vista, Advanced Metering Infrastructure (AMI) project.** Chris served as Account Manager and Lead Project Developer for this AMI deployment, which is projected to save over \$75,000 annually in O&M costs and recover \$156,140 in additional revenue from improved meter accuracy. Chris designed the technical solution, managed the competitive procurement process, and coordinated a multi-agency grant strategy to fully fund the project. Chris helped the City secure a Department of Local Affairs (DOLA) grant as a match to a Bureau of Reclamation grant application.



## Esam Rostom, Assoc. DBIA

California Construction Director

### Education

*BS Marketing,  
California State  
University, Northridge,  
CA*

### Registrations & Certifications

*Associate DBIA  
Professional  
OSHA 30 Hour*

**27 Years of Experience**

Esam Rostom will be responsible for overseeing construction and implementation of measures on the ESPC project with the City of Orange. Esam has 27 years of experience in construction with a focus on design-build projects. As a project manager, Mr. Rostom applies his vision of creating cohesive teams to deliver high-quality, low-cost building upgrades to clients on an efficient timeline. Mr. Rostom has managed teams from planning to completion on new construction and existing building commissioning projects for municipal and K-12 institutions, and he takes great pride in the major improvements he has brought to school districts throughout California.

### Project Experience

**City of San Fernando, CA - San Fernando Police Department HVAC Upgrade.** Served as Senior Construction Manager and managed team by tracking materials, scope of work, and timelines. Led HVAC redesign and replacement, including installation and integration of new dedicated outdoor air system (DOAS) unit; new variable refrigerant flow (VRF) heat recovery system, including heat recovery units (HRUs), fan coil units (FCUs), and mode control units (MCUs); gravity relief ventilators; localized exhaust fans; rooftop units; and BAS controls.

**Escondido Union School District, Escondido, CA - Solar, EV Charging, HE Transformers Lighting Controls Plug Load Controllers and HVAC System Design & Improvements.** Served as Senior Construction Manager and managed construction team in designing and building solar PV, EV charging stations, transformers, lighting controls, plug load controllers, and HVAC improvements on multiple District sites. Provides turn-key installation of solar PV canopy system, including carport installation. Conducts system training, turnover, and electrical interconnection. Leads full design and implementation of EV charging stations, obtaining approvals, permits, and coordinating utility meter installation. Tests and commissions EVCS, provides system operation demonstration and training, and leads installation of EVCS cloud platform for performance monitoring and remote access.

**Compton Unified School District, Compton, CA - Compton High School, New Construction Project.** Served as Senior Project Manager and managed staff and performed subcontracting and site setup. Construction included a new academic building, new gymnasium building, new aquaticus center with CIF pool and bleachers, new performing arts center with 903 seating capacity, new football stadium, track field with night lighting, bleachers, press box, visitors' restroom, and concessions. The site required reconstruction from the ground up, including site prep, demolition, earthwork, site infrastructure and utilities, lunch shelters, parking areas, basketball and tennis courts, hardscape, and a California native and adaptive landscape.

**Downey Unified School District Downey, CA - Sussman Middle School, New Construction and Modernization Project.** Served as Senior Project Manager. Led a project for a 107,000-sq.ft. two-story classroom/science building and new 14,000-sq.ft. gymnasium building, both built within an occupied campus. In addition to the new construction the campus undertook a phased 64,000 sq.ft. major modernization to all existing classroom wings.



## Mark Effinger, PE, CMVP, CEA, CCP

Commissioning Director, M&V Director

Mark Effinger will be responsible for leading commissioning on the ESPC project with the City of Orange. Mark leads Willdan's commissioning team, ensuring delivery of high-quality projects for our clients. His background includes hands-on experience delivering Continuous Commissioning® services while previously employed by the Energy Systems Laboratory at Texas A&M University.

Mark has also worked in the design and implementation of utility-based energy efficiency programs and has authored several papers and guidelines related to the measurement and verification of energy savings and building performance tracking strategies. He was a contributing author of *Guidelines for Verifying Savings from Commissioning Existing Buildings* and a research paper which is cited in ASHRAE 14. He has also supported the technical requirements of green building certification programs such as LEED and Green Globes. Additionally, Mark is a qualified Tune-Up Specialist under the City of Seattle Building Tune-Up program requirements.

### Project Experience

**City of Dublin Distributed Energy Resource Design-Build Project, Dublin, CA, M&V Lead.** Developed the M&V plan for energy efficiency, infrastructure, resiliency, and smart-city upgrades project at 20 sites in the City of Dublin. Measurement and verification includes both IPMVP Options A and C. Coordinated with a subcontractor to complete Option A field measurements. The Option C performance period will begin shortly.

**Elihu Harris Comprehensive Upgrades, Oakland, CA, M&V Lead.**

Led M&V (IPMVP Option C) for a large lighting and HVAC controls project at a 22-story California state office building. Project resulted in a reduction of whole building energy consumption by nearly 40%.

**Martin Army Community Hospital:** Continuous Commissioning® services while working for Texas A&M Energy Systems Laboratory. Resulted in verified energy savings totaling 18%.

**Citi Field: Home of the NY Mets.** Retro-Commissioning and ASHRAE Level II Energy Audit to comply with NYC Local Law 87.

**Oregon Senate Bill 1149: New Construction Commissioning** services for a high school and middle school to help the districts comply with the energy retrofit bond requirements.

**Oregon Convention Center:** Ongoing Commissioning conducted over 5 years. Included integrating with the facility operators to modify existing preventative maintenance procedures to include performance-based tasks.

**Hawaii Convention Center:** Existing Building Commissioning and ASHRAE Level I energy audit for LEED compliance.

**Austin Independent School District:** Continuous Commissioning® services for an elementary school, middle school, and multipurpose events center.

### Education

M.S. in Mechanical Engineering, University of California, Irvine

B.S. in Mechanical Engineering, University of California, Irvine

### Specialized Expertise

Licensed Professional Engineer (PE), 3 states  
Certified Measurement and Verification Professional (CMVP)

Certified Energy Auditor (CEA)

Certified Commissioning Professional (CCP)

18 years of experience



## Marcey Crowell

Community Engagement Manager – MBE/WBE Liaison

Marcey Crowell will be responsible for community engagement and MBE/WBE tasks on the project and contract with the City of Orange. Marcey leads Willdan's community engagement and DEI initiatives on public sector projects, with a focus on educational impact, equity, and authentic community partnerships. With over 13 years of prior experience working in local government, she brings a unique understanding of public agency operations and the needs of school districts and municipalities. Her expertise includes stakeholder outreach, educational programming, and inclusive strategy development, with a strong emphasis on building bridges between public projects and K-12 communities.

### Education

*Procure Certified*

### Relevant Skills & Focus Areas

*Community Engagement & Stakeholder Relations*

*Public Sector & Local Government Collaboration*

*Vendor Outreach & Supplier Inclusion*

*STEM Event Coordination for Students & Teachers*

*K-12 Educational Programming & Partnerships*

**16 Years of Experience**

### Recent Project Experience

#### City of San Diego, CA – Community Engagement Lead

Coordinated and mobilized a network of local subcontractors for site visits across the county, ensuring geographic coverage and logistical efficiency while aligning with Willdan's commitment to community engagement. By prioritizing locally owned, minority-, women-, and veteran-owned businesses, this initiative strengthened community trust, improved project responsiveness, and directly supported DEI goals by expanding economic opportunities in underserved communities.

#### City of Dublin, Dublin, CA – Community Engagement Lead

Supported Dublin Unified School District's STEM education by organizing a student and teacher tour of Willdan's innovative project sites. Worked in close partnership with both the school district and the City of Dublin to coordinate all logistics and outreach. Facilitated an enriching learning experience that aligned with classroom instruction and community education goals.

#### Vendor Diversity Program, Willdan Corporate – Nationwide

Currently supporting the development and ongoing implementation of Willdan's vendor management system in partnership with Willdan Corporate Accounting. Helping define system requirements, assisting with testing and updates, and coordinating with internal teams to maintain accurate vendor records. The system helps streamline vendor and subcontractor onboarding, track certifications, and support more inclusive procurement practices across projects and programs.

#### Clark County School District (CCSD), Las Vegas, NV – Community Engagement Lead

Planned and executed a STEM-focused educational event for CCSD teachers, aligned with continuing education requirements and district goals. Partnered with Envirolution to deliver hands-on STEM training and curriculum resources for educators. Collaborated with school administrators to align the program with classroom standards and promote long-term learning outcomes. Coordinated and led a Las Vegas SPHERE site tour for students and teachers in partnership with Signify, providing real-world exposure to energy and lighting solutions and inspiring future careers in sustainability and engineering.



## Annie Mikkelson

### Campus and Student Organization Liaison

Annie Mikkelson will be responsible for supporting STEM education and community events on the ESPC project for the City of Orange. Annie is a collaborative leader with a strong background in advancing sustainability, education, and community engagement initiatives, having led outreach efforts, developed impactful programming, and coordinated events that bring together stakeholders across the education and building industries. Her work spans board leadership, public-private partnerships, and strategic communications, always with a focus on creating healthier, more engaging, and future-ready environments.

#### Education

*BA, Communications,  
University of Colorado*

#### Certifications

*LEED Green Associate  
TRUE Advisor*

#### 11 Years of Experience

### Relevant Experience

#### **Association for Learning Environments (A4LE), At-Large Board Member and Outreach Committee Chair**

Annie serves as an At-Large Board Member and Chair of the Outreach Committee for the Association for Learning Environments (A4LE) Rocky Mountain Chapter, leading efforts to engage K-12 stakeholders, expand membership, and promote the organization's mission of fostering innovative, student-centered learning environments. She coordinates outreach initiatives, partnerships, and more to connect educators, district administrators, school board members, operations and maintenance staff, designers, and industry professionals across the region.

#### **Yosemite Unified School District, STEM Education and "Flip the Switch" Ceremony**

Led coordination and marketing efforts for a district-wide solar dedication event at Yosemite Unified School District, celebrating the launch of new solar PV systems. Supported hands-on STEM activities for K-12 students, facilitated community engagement, and helped organize a public ceremony featuring elected officials and district leadership, highlighting the District's commitment to sustainability and clean energy education.

#### **U.S. Green Building Council, Green Schools Summit (2018-2022), Lead Event and Program Manager**

This annual summit, which hosts more than 250 industry professionals, focuses on sharing best practices, innovative strategies, and resources for creating healthy, energy-efficient, and environmentally friendly K-12 schools. Participants include educators, administrators, architects, engineers, and policymakers who are committed to promoting sustainability in educational settings. The event aims to inspire and empower attendees to transform schools into healthier, more sustainable learning environments. Annie oversaw this event's program and execution between 2018 and 2022.

#### **Colorado Real Estate Journal, Green Building Summit, May 2024, Program Lead**

Annie developed the education program for CREJ's May 2024 Green Building Summit. She connected the event organizer with subject matter experts and ideated the session topics, including: the business case for net zero buildings, reducing carbon during design and construction, building materials waste reduction and "de-construction", as well as sessions on the state of Colorado and the City of Denver's latest decarbonization regulations for commercial buildings.



## Juliette Brown

### Client Engagement and Marketing Manager

Juliette Brown will be responsible for the oversight and planning of community engagement, education, and PR opportunities for and with the City of Orange. With 27 years of experience in marketing, event coordination, and project proposal development for the Architectural, Engineering, Construction and Energy industries, Juliette supports all customer-facing phases of complex energy efficiency and infrastructure programs.

As a Marketing and Proposal Manager for Willdan, Juliette manages and coordinates production of marketing collateral and materials and leads customer events and PR opportunities, representing Willdan across industry, community, and volunteer events. Juliette collaborates with business development, project management, and design teams to ensure all submittals are compliant and uphold high standards and supports Willdan customers with PR functions and events such as press releases, ribbon-cutting and groundbreaking ceremonies, community engagement initiatives, and award submissions.

#### Education

*BA, English and Studio  
Arts, Western  
Washington University*

*General Coursework,  
Seattle School of Visual  
Concepts*

#### Registrations & Certifications

*Six Sigma Greenbelt*

#### 27 Years of Experience

### Previous and Recent Project Experience

#### **Kern County Career and STEM Expo 2025, Bakersfield, CA**

Coordinated and staffed Willdan participation at a STEM educational event co-sponsored by the Kern High School District and the Kern Economic Development Foundation. Developed and led solar power technology activity for high school students.

#### **Yosemite USD STEM event, Oakhurst, CA**

Coordinated and managed joint STEM educational event at Yosemite High School. Event included students from grades 6-12, and involved a rota of activities including a solar power technology activity/craft, relay race, and hands-on instruction on solar fundamentals.

#### **Yosemite USD Flip the Switch Dedication, Oakhurst, CA**

Coordinated and managed dedication ceremony/ Flip the Switch event at Yosemite High School. Provided refreshments and logistics for ceremony celebrating and dedicating the District's solar PV systems, attended by District staff, members of the community, representatives from California State Government officials, and local news.

#### **Montecito Union School District, Montecito, CA**

Prepared and edited press releases, collateral, and event documents for the dedication ceremony of the District's Nature Lab "Collaboratory" and solar array.

#### **Columbia County–John Gumm Building Remodel, St. Helens, OR**

Acted as liaison between corporate marketing and the client, coordinating press events, including invitations and various onsite features such as signage.

#### **Undisclosed Fortune 50 Tech Client, Mountain View, CA**

Managed formal proposal coordination and editing for multiple solar PV installations, including preparation of customer presentations.

#### **Southern California Edison (SCE) 540 MW BESS, Los Angeles, CA**

Coordinated and edited formal proposals and provided ongoing administrative and contract support for this large utility-scale Battery Energy Storage (BESS) project.



Account Executive

## Todd Barlow

### Executive Consultant

Todd is an Executive Consultant with more than 35 years of experience guiding clients through the development and delivery of complex infrastructure and IT projects in the utilities industry. His expertise includes strategic planning, feasibility studies, project definition, procurement planning, vendor selection, and executive oversight for quality assurance during project implementation. Todd combines application knowledge with a practical understanding of commercial transactions involving multiple stakeholders for a complete end-to-end project delivery. He spends time engaging customers, partners, and vendors to ensure that contract delivery fully supports the technical and business objectives for the project.

Todd's efforts won multiple industry awards related to innovation in planning and implementation of projects. While winning and delivering more than 50 successful client engagements, Todd was actively engaged in nearly every project.

### Education & Certifications

- BS, Petroleum Engineering | Louisiana State University
- Numerous professional development courses related to utility automation, project management, and public procurement

### Specializations

- Strategic Planning
- Conceptual Project Development & Business Case
- Procurement & Delivery Strategy
- Vendor Evaluation, Selection, and Contract Negotiation

### Previous Experience

- Environmental Technical Sales, Inc. | Project Developer for Water Systems
- TYCO International | Applications Engineer

### Years of Experience

- Total: 35+ | w/ E Source: 20

### Professional Strengths

- Providing strategic planning for electric, gas, and water utilities through conceptual project development and associated business case
- Overseeing utility assessment, procurement, and implementation projects and supporting program management efforts
- Guiding utilities through vision and strategy initiatives to determine future courses of action for technology investments, funding, and delivery strategy
- Specializing in advanced metering, grid modernization, and ancillary systems and services procurement, including RFP development, vendor evaluation and selection, and contract negotiations

### Representative Utility Clients

- Newport News Waterworks and Chesterfield County Utilities, VA
- Greensboro Water Resources, NC
- Regional Municipality of Halton, ON
- Halifax Water, NS
- Birmingham Water Works Board and Huntsville Utilities, AL
- Cities of Garland, Greenville, Houston & San Marcos and Brownsville PUB, TX
- City of Norman, OK
- Cities of Monroe, Opelousas, Ruston & Shreveport, LA
- Cities of Casselberry & Clearwater and JEA, FL
- Orangeburg Dept. of Public Utilities, SC

### Value Todd brings to your project

*Todd has an extensive and impressive history in AMI strategic planning, client guidance, and system implementation success. He co-founded UtiliWorks Consulting and was also Executive Consultant of Exergy Corporation—two of the industry leading AMI consulting firms, and both of which were acquired by E Source. Clients comment on the quality, approach, and thoroughness of his guidance.*



**Water Operations SME**

## Don Rankin

### Water Operations and AMI Subject Matter Expert

Don brings 30+ years of utility experience, including 19 years as a utility director leading water, wastewater, and stormwater utility O&M, capital programs, asset management, and customer service operations. He is an innovative, big picture thinker with strong analytical reporting skills and has developed utility business plans for reduced costs and improved services. As director of a municipal utility, Don developed strategic replacement of assets based on analysis of spatial real-time data integrated to GIS from work order and financial systems. His expertise helps utilities align all the pieces together, including social disruption and replacement costs to enable data-driven decisions to strategically manage utility assets.

#### Education & Certifications

- BS, Electrical & Computer Engineering | Kansas State University

#### Specializations

- Planning & Executing Utility Technology Programs
- Metering Systems
- Utility Analytics
- Water System O&M
- Water, WW & Stormwater Policy
- Strategic Asset Management
- Utility Billing System Analysis

#### Previous Experience

- Utilities Director | City of Topeka, Kansas
- Hardware & Software Design/ Manufacturing Engineer | McDonnell Douglas Corp.
- Electronics Technician | US Navy Submarine Service

#### Years of Experience

- Total: 33 | w/ E Source: 11

#### Professional Strengths

- Assessing and aligning meter, endpoint, sensor, and network capabilities to utility goals and objectives and advanced reporting capabilities for water, electric, and gas utilities
- Conducting large meter capability and configuration evaluations and recommendations as well as meter testing program best practices
- Developing and evaluating responses to RFPs and technology procurement efforts
- Producing utility billing system data visualization reporting tools to facilitate on-demand charts and graphs of utility customer billing information; creating utility billing data discovery and audit tools to enhance utility revenue
- Performing water system, loss, and utilization assessments; meter survey and staffing analyses; SCADA assessments, and billing issue resolution
- Establishing tools for complex, multi-discipline, multi-project tracking

#### Representative Utility Clients

- Cities of Palo Alto, Vallejo, Roseville, Shasta Lake, and Oceanside, CA
- Orangeburg DPU, SC & WaterOne, KS
- Long Beach Water & Oil & Gas, CA
- Alameda County Water & Alameda Municipal Power, CA
- Cities of Johnson City & Washington, NC
- Albemarle County, VA
- Cities of Tampa & Port St. Lucie, JEA, Toho Water, Fauquier County, & Wellington, FL
- Brownsville PUB, TX

#### Value Don brings to your project

*As a former Water Utility Director, Don understands utility operations at a granular level. He has supported more than 25 water AMI projects, helping our utility clients expertly plan for and realize the benefits of AMI. He knows the technology, people, and process changes required for a successful AMI project.*

# Appendix B: Audited Financials



**UNITED STATES  
SECURITIES AND EXCHANGE COMMISSION**  
Washington, D.C. 20549  
**FORM 10-K**

(Mark One)

**ANNUAL REPORT PURSUANT TO SECTION 13 OR 15(d) OF THE SECURITIES EXCHANGE ACT OF 1934**

For the Fiscal Year Ended December 27, 2024.

Or

**TRANSITION REPORT PURSUANT TO SECTION 13 OR 15(d) OF THE SECURITIES EXCHANGE ACT OF 1934**

For the Transition Period from \_\_\_\_\_ to \_\_\_\_\_

Commission File Number 001-33076

**WILLDAN GROUP, INC.**

(Exact name of registrant as specified in its charter)

**Delaware**  
(State or other jurisdiction of  
incorporation or organization)

**14-1951112**  
(I.R.S. Employer  
Identification No.)

**2401 East Katella Avenue, Suite 300, Anaheim, California 92806**

(Address of principal executive offices) (Zip Code)

**(800) 424-9144**

(Registrant's telephone number, including area code)

Securities registered pursuant to Section 12(b) of the Act:

Title of each class	Trading Symbol(s)	Name of Exchange
Common Stock, par value \$0.01 per share	WLDN	The Nasdaq Stock Market LLC (Nasdaq Global Market)

Securities registered pursuant to Section 12(g) of the Act: **None**

Indicate by check mark if the registrant is a well-known seasoned issuer, as defined in Rule 405 of the Securities Act. Yes  No

Indicate by check mark if the registrant is not required to file reports pursuant to Section 13 or 15(d) of the Securities Exchange Act of 1934. Yes  No

Indicate by check mark whether the registrant: (1) has filed all reports required to be filed by Section 13 or 15(d) of the Securities Exchange Act of 1934 during the preceding 12 months (or for such shorter period that the registrant was required to file such reports), and (2) has been subject to such filing requirements for the past 90 days. Yes  No

Indicate by check mark whether the registrant has submitted electronically every Interactive Data File required to be submitted pursuant to Rule 405 of Regulation S-T (§ 232.405 of this chapter) during the preceding 12 months (or for such shorter period that the registrant was required to submit such files). Yes  No

Indicate by check mark whether the registrant is a large accelerated filer, an accelerated filer, a non-accelerated filer, a smaller reporting company, or an emerging growth company. See definitions of "large accelerated filer," "accelerated filer," "smaller reporting company," and "emerging growth company" in Rule 12b-2 of the Exchange Act.

Large accelerated filer  Accelerated filer  Non-accelerated filer  Smaller reporting company  Emerging growth company

If an emerging growth company, indicate by check mark if the Registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act.

Indicate by check mark whether the registrant has filed a report on and attestation to its management's assessment of the effectiveness of its internal control over financial reporting under Section 404(b) of the Sarbanes-Oxley Act (15 U.S.C. 7262(b)) by the registered public accounting firm that prepared or issued its audit report.

If securities are registered pursuant to Section 12(b) of the Act, indicate by check mark whether the financial statements of the registrant included in the filing reflect the correction of an error to previously issued financial statements.

Indicate by check mark whether any of those error corrections are restatements that required a recovery analysis of incentive-based compensation received by any of the registrant's executive officers during the relevant recovery period pursuant to § 240.10D-1(b).

Indicate by check mark whether the registrant is a shell company (as defined in Rule 12b-2 of the Exchange Act). Yes  No

The aggregate market value of the voting and non-voting common equity held by non-affiliates computed by reference to the price at which the common equity was last sold, as reported on the Nasdaq Global Market, as of the last business day of the registrant's most recently completed second fiscal quarter was \$285.3 million.

On March 5, 2025 there were 14,407,642 shares of the registrant's common stock issued and outstanding.

**DOCUMENTS INCORPORATED BY REFERENCE**

Designated portions of the Proxy Statement relating to registrant's 2025 Annual Meeting of Stockholders, which will be filed with the Securities and Exchange Commission within 120 days after the end of fiscal year 2024, are incorporated by reference into Part III of this Report.

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**ITEM 8. FINANCIAL STATEMENTS AND SUPPLEMENTARY DATA**

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**WILLDAN GROUP, INC. AND SUBSIDIARIES**  
**CONSOLIDATED BALANCE SHEETS**  
(in thousands, except par value)

	December 27, 2024	December 29, 2023
<b>Assets</b>		
Current assets:		
Cash and cash equivalents	\$ 74,158	\$ 23,397
Restricted cash	—	—
Accounts receivable, net of allowance for doubtful accounts of \$1,313 and \$866 at December 27, 2024 and December 29, 2023, respectively	65,557	69,677
Contract assets	88,528	93,885
Other receivables	2,302	1,169
Prepaid expenses and other current assets	4,979	3,888
Total current assets	235,524	192,016
Equipment and leasehold improvements, net	29,534	27,097
Goodwill	140,991	131,144
Right-of-use assets	14,035	12,465
Other intangible assets, net	29,414	31,956
Other assets	2,019	4,949
Deferred income taxes, net	13,346	15,961
Total assets	\$ 464,863	\$ 415,588
<b>Liabilities and Stockholders' Equity</b>		
Current liabilities:		
Accounts payable	\$ 33,766	\$ 33,193
Accrued liabilities	62,776	54,129
Contingent consideration payable	2,500	—
Contract liabilities	21,556	13,183
Notes payable	10,137	8,452
Finance lease obligations	1,138	1,186
Lease liability	5,804	4,537
Total current liabilities	137,677	114,680
Contingent consideration payable	1,713	—
Notes payable, less current portion	79,350	88,979
Finance lease obligations, less current portion	1,379	1,184
Lease liability, less current portion	9,939	9,758
Other noncurrent liabilities	462	1,142
Total liabilities	230,520	215,743
Commitments and contingencies		
Stockholders' equity:		
Preferred stock, \$0.01 par value, 10,000 shares authorized, no shares issued and outstanding	—	—
Common stock, \$0.01 par value, 40,000 shares authorized; 14,169 and 13,682 shares issued and outstanding at December 27, 2024 and December 29, 2023, respectively	142	137
Additional paid-in capital	197,368	185,795
Accumulated other comprehensive income (loss)	(314)	(664)
Retained earnings	37,147	14,577
Total stockholders' equity	234,343	199,845
Total liabilities and stockholders' equity	\$ 464,863	\$ 415,588

See accompanying notes to consolidated financial statements.

**WILLDAN GROUP, INC. AND SUBSIDIARIES**  
**CONSOLIDATED STATEMENTS OF COMPREHENSIVE INCOME (LOSS)**  
(in thousands, except per share amounts)

	Fiscal Year		
	2024	2023	2022
Contract revenue	\$ 565,798	\$ 510,095	\$ 429,138
Direct costs of contract revenue (inclusive of directly related depreciation and amortization):			
Salaries and wages	93,543	89,915	82,972
Subcontractor services and other direct costs	269,473	240,413	202,587
Total direct costs of contract revenue	363,016	330,328	285,559
Gross profit	202,782	179,767	143,579
General and administrative expenses:			
Salaries and wages, payroll taxes and employee benefits	105,373	95,556	81,801
Facilities and facility related	9,718	9,565	9,287
Stock-based compensation	7,388	5,323	8,373
Depreciation and amortization	14,745	16,431	17,489
Other	34,205	30,818	33,692
Total general and administrative expenses	171,429	157,693	150,642
Income (Loss) from operations	31,353	22,074	(7,063)
Other income (expense):			
Interest expense, net	(7,801)	(9,413)	(5,328)
Other, net	3,127	1,930	939
Total other expense, net	(4,674)	(7,483)	(4,389)
Income (Loss) before income taxes	26,679	14,591	(11,452)
Income tax (benefit) expense	4,109	3,665	(3,004)
Net income (loss)	22,570	10,926	(8,448)
Other comprehensive income (loss):			
Unrealized gain (loss) on derivative contracts, net of tax	350	(664)	38
Comprehensive income (loss)	\$ 22,920	\$ 10,262	\$ (8,410)
Earnings (Loss) per share:			
Basic	\$ 1.63	\$ 0.82	\$ (0.65)
Diluted	\$ 1.58	\$ 0.80	\$ (0.65)
Weighted-average shares outstanding:			
Basic	13,818	13,394	13,013
Diluted	14,245	13,606	13,013

See accompanying notes to consolidated financial statements.

**WILLDAN GROUP, INC. AND SUBSIDIARIES**  
**CONSOLIDATED STATEMENTS OF STOCKHOLDERS' EQUITY**  
(in thousands)

	<u>Common Stock</u>		<u>Additional</u>	<u>Accumulated</u>	<u>Retained</u>	<u>Total</u>
	<u>Shares</u>	<u>Amount</u>	<u>Paid-in</u>	<u>Other</u>	<u>Earnings</u>	
			<u>Capital</u>	<u>Income (Loss)</u>		
<b>Balance at December 31, 2021</b>	12,804	\$ 128	\$167,032	\$ (38)	\$ 12,099	\$ 179,221
Shares of common stock issued in connection with employee stock purchase plan	115	1	3,035	—	—	3,036
Shares of common stock issued in connection with incentive stock plan	34	—	274	—	—	274
Shares used to pay taxes on stock grants	(34)	—	(992)	—	—	(992)
Issuance of restricted stock award and units	377	4	(4)	—	—	—
Stock-based compensation expense	—	—	8,373	—	—	8,373
Net income (loss)	—	—	—	—	(8,448)	(8,448)
Net unrealized gain (loss) on derivative contracts	—	—	—	38	—	38
<b>Balance at December 30, 2022</b>	<u>13,296</u>	<u>\$ 133</u>	<u>\$177,718</u>	<u>\$ (0)</u>	<u>\$ 3,651</u>	<u>\$ 181,502</u>
Shares of common stock issued in connection with employee stock purchase plan	182	2	2,779	—	—	2,781
Shares of common stock issued in connection with incentive stock plan	19	—	182	—	—	182
Shares used to pay taxes on stock grants	(11)	—	(205)	—	—	(205)
Issuance of restricted stock award and units	196	2	(2)	—	—	—
Stock-based compensation expense	—	—	5,323	—	—	5,323
Net income (loss)	—	—	—	—	10,926	10,926
Net unrealized gain (loss) on derivative contracts	—	—	—	(664)	—	(664)
<b>Balance at December 29, 2023</b>	<u>13,682</u>	<u>\$ 137</u>	<u>\$185,795</u>	<u>\$ (664)</u>	<u>\$ 14,577</u>	<u>\$ 199,845</u>
Shares of common stock issued in connection with employee stock purchase plan	164	2	2,836	—	—	2,838
Shares of common stock issued in connection with incentive stock plan	222	2	2,757	—	—	2,759
Shares used to pay taxes on stock grants	(48)	(1)	(1,406)	—	—	(1,407)
Issuance of restricted stock award and units	149	2	(2)	—	—	—
Stock-based compensation expense	—	—	7,388	—	—	7,388
Net income (loss)	—	—	—	—	22,570	22,570
Net unrealized gain (loss) on derivative contracts	—	—	—	350	—	350
<b>Balance at December 27, 2024</b>	<u>14,169</u>	<u>\$ 142</u>	<u>\$197,368</u>	<u>\$ (314)</u>	<u>\$ 37,147</u>	<u>\$ 234,343</u>

See accompanying notes to consolidated financial statements.

**WILLDAN GROUP, INC. AND SUBSIDIARIES**  
**CONSOLIDATED STATEMENTS OF CASH FLOWS**  
(in thousands)

	Fiscal Year		
	2024	2023	2022
Cash flows from operating activities:			
Net income (loss)	\$ 22,570	\$ 10,926	\$ (8,448)
Adjustments to reconcile net income (loss) to net cash provided by (used in) operating activities:			
Depreciation and amortization	14,745	16,431	17,489
Other non-cash items	(73)	1,445	—
Deferred income taxes, net	2,615	2,582	(1,694)
(Gain) loss on sale/disposal of equipment	(15)	(63)	(64)
Provision for doubtful accounts	740	825	243
Stock-based compensation	7,388	5,323	8,373
Accretion and fair value adjustments of contingent consideration	153	—	3,168
Changes in operating assets and liabilities, net of effects from business acquisitions:			
Accounts receivable	5,316	(10,300)	6,766
Contract assets	5,778	(10,825)	(23,772)
Other receivables	(1,133)	3,604	1,494
Prepaid expenses and other current assets	(1,091)	2,566	(1,230)
Other assets	2,953	5,717	3,223
Accounts payable	(831)	4,360	(7,839)
Accrued liabilities	4,707	5,030	12,970
Contract liabilities	8,373	598	(914)
Right-of-use assets	(122)	995	(332)
Net cash (used in) provided by operating activities	<u>72,073</u>	<u>39,214</u>	<u>9,433</u>
Cash flows from investing activities:			
Purchase of equipment, software, and leasehold improvements	(8,413)	(9,925)	(9,602)
Proceeds from sale of equipment	34	68	75
Cash paid for acquisitions, net of cash acquired	(7,364)	(1,600)	—
Net cash (used in) provided by investing activities	<u>(15,743)</u>	<u>(11,457)</u>	<u>(9,527)</u>
Cash flows from financing activities:			
Payments on contingent consideration	—	(4,000)	(10,206)
Receipt of restricted cash	—	—	10,679
Payment on restricted cash	—	(10,679)	—
Payments on notes payable	(190)	(1,631)	(1,920)
Payments on debt issuance costs	—	(1,114)	(177)
Proceeds from notes payable	—	—	1,718
Borrowings under term loan facility and line of credit	—	105,000	20,000
Repayments under term loan facility and line of credit	(8,125)	(112,875)	(13,000)
Principal payments on finance leases	(1,444)	(1,304)	(1,054)
Proceeds from stock option exercise	2,759	182	274
Proceeds from sales of common stock under employee stock purchase plan	2,838	2,781	3,036
Cash used to pay taxes on stock grants	(1,407)	(205)	(992)
Net cash (used in) provided by financing activities	<u>(5,569)</u>	<u>(23,845)</u>	<u>8,358</u>
Net increase (decrease) in cash, cash equivalents and restricted cash	50,761	3,912	8,264
Cash, cash equivalents and restricted cash at beginning of period	23,397	19,485	11,221
Cash, cash equivalents and restricted cash at end of period	<u>\$ 74,158</u>	<u>\$ 23,397</u>	<u>\$ 19,485</u>
Supplemental disclosures of cash flow information:			
Cash paid (received) during the period for:			
Interest	\$ 7,520	\$ 10,193	\$ 5,066
Income taxes	1,316	(3,072)	(1,120)
Supplemental disclosures of noncash investing and financing activities:			
Contingent consideration related to business acquisitions	\$ 4,060	\$ —	\$ —
Equipment acquired under finance leases	1,605	961	2,451

See accompanying notes to consolidated financial statements.

## SECTION 302 CERTIFICATION OF CHIEF EXECUTIVE OFFICER

I, Michael A. Bieber, certify that:

1. I have reviewed this annual report on Form 10-K of Willdan Group, Inc.;
2. Based on my knowledge, this report does not contain any untrue statement of a material fact or omit to state a material fact necessary to make the statements made, in light of the circumstances under which such statements were made, not misleading with respect to the period covered by this report;
3. Based on my knowledge, the financial statements, and other financial information included in this report, fairly present in all material respects the financial condition, results of operations and cash flows of the registrant as of, and for, the periods presented in this report;
4. The registrant's other certifying officer(s) and I are responsible for establishing and maintaining disclosure controls and procedures (as defined in Exchange Act Rules 13a-15(e) and 15d-15(e)) and internal control over financial reporting (as defined in Exchange Act Rules 13a-15(f) and 15d-15(f)) for the registrant and have:
  - a) Designed such disclosure controls and procedures, or caused such disclosure controls and procedures to be designed under our supervision, to ensure that material information relating to the registrant, including its consolidated subsidiaries, is made known to us by others within those entities, particularly during the period in which this report is being prepared;
  - b) Designed such internal control over financial reporting, or caused such internal control over financial reporting to be designed under our supervision, to provide reasonable assurance regarding the reliability of financial reporting and the preparation of financial statements for external purposes in accordance with generally accepted accounting principles;
  - c) Evaluated the effectiveness of the registrant's disclosure controls and procedures and presented in this report our conclusions about the effectiveness of the disclosure controls and procedures, as of the end of the period covered by this report based on such evaluation; and
  - d) Disclosed in this report any change in the registrant's internal control over financial reporting that occurred during the registrant's most recent fiscal quarter (the registrant's fourth fiscal quarter in the case of an annual report) that has materially affected, or is reasonably likely to materially affect, the registrant's internal control over financial reporting; and
5. The registrant's other certifying officer(s) and I have disclosed, based on our most recent evaluation of internal control over financial reporting, to the registrant's auditors and the audit committee of the registrant's board of directors (or persons performing the equivalent functions):
  - a) All significant deficiencies and material weaknesses in the design or operation of internal control over financial reporting which are reasonably likely to adversely affect the registrant's ability to record, process, summarize and report financial information; and
  - b) Any fraud, whether or not material, that involves management or other employees who have a significant role in the registrant's internal control over financial reporting.

Date: March 6, 2025

By: /s/ MICHAEL A. BIEBER

Michael A. Bieber

*President, Chief Executive Officer and Director*

*(Principal Executive Officer)*

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## SECTION 302 CERTIFICATION OF CHIEF FINANCIAL OFFICER

I, Creighton K. Early, certify that:

1. I have reviewed this annual report on Form 10-K of Willdan Group, Inc.;
2. Based on my knowledge, this report does not contain any untrue statement of a material fact or omit to state a material fact necessary to make the statements made, in light of the circumstances under which such statements were made, not misleading with respect to the period covered by this report;
3. Based on my knowledge, the financial statements, and other financial information included in this report, fairly present in all material respects the financial condition, results of operations and cash flows of the registrant as of, and for, the periods presented in this report;
4. The registrant's other certifying officer(s) and I are responsible for establishing and maintaining disclosure controls and procedures (as defined in Exchange Act Rules 13a-15(e) and 15d-15(e)) and internal control over financial reporting (as defined in Exchange Act Rules 13a-15(f) and 15d-15(f)) for the registrant and have:
  - a) Designed such disclosure controls and procedures, or caused such disclosure controls and procedures to be designed under our supervision, to ensure that material information relating to the registrant, including its consolidated subsidiaries, is made known to us by others within those entities, particularly during the period in which this report is being prepared;
  - b) Designed such internal control over financial reporting, or caused such internal control over financial reporting to be designed under our supervision, to provide reasonable assurance regarding the reliability of financial reporting and the preparation of financial statements for external purposes in accordance with generally accepted accounting principles;
  - c) Evaluated the effectiveness of the registrant's disclosure controls and procedures and presented in this report our conclusions about the effectiveness of the disclosure controls and procedures, as of the end of the period covered by this report based on such evaluation; and
  - d) Disclosed in this report any change in the registrant's internal control over financial reporting that occurred during the registrant's most recent fiscal quarter (the registrant's fourth fiscal quarter in the case of an annual report) that has materially affected, or is reasonably likely to materially affect, the registrant's internal control over financial reporting; and
5. The registrant's other certifying officer(s) and I have disclosed, based on our most recent evaluation of internal control over financial reporting, to the registrant's auditors and the audit committee of the registrant's board of directors (or persons performing the equivalent functions):
  - a) All significant deficiencies and material weaknesses in the design or operation of internal control over financial reporting which are reasonably likely to adversely affect the registrant's ability to record, process, summarize and report financial information; and
  - b) Any fraud, whether or not material, that involves management or other employees who have a significant role in the registrant's internal control over financial reporting.

Date: March 6, 2025

By: /s/ CREIGHTON K. EARLY

Creighton K. Early

*Chief Financial Officer and Executive Vice President*

*(Principal Financial Officer)*

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**Certification of Chief Executive Officer and Chief Financial Officer Pursuant to 18 U.S.C. 1350,  
as Adopted Pursuant to § 906 of the Sarbanes-Oxley Act of 2002**

In connection with the Annual Report on Form 10-K of Willdan Group, Inc. (the "Company") for the fiscal year ended December 27, 2024, as filed with the Securities and Exchange Commission on the date hereof (the "Report"), Michael A. Bieber, as President and Chief Executive Officer of the Company, and Creighton K. Early, as Chief Financial Officer and Executive Vice President of the Company, each hereby certifies, pursuant to 18 U.S.C. § 1350, as adopted pursuant to § 906 of the Sarbanes-Oxley Act of 2002, that, to the best of his or her knowledge:

- (1) The Report fully complies with the requirements of Section 13(a) or 15(d) of the Securities Exchange Act of 1934; and
- (2) The information contained in the Report fairly presents, in all material respects, the financial condition and results of operations of the Company.

By: /s/ MICHAEL A. BIEBER

Michael A. Bieber

*President and Chief Executive Officer*

*(Principal Executive Officer)*

March 6, 2025

By: /s/ CREIGHTON K. EARLY

Creighton K. Early

*Chief Financial Officer and Executive Vice President*

*(Principal Financial Officer)*

March 6, 2025

This certification accompanies the Report pursuant to § 906 of the Sarbanes-Oxley Act of 2002 and shall not, except to the extent required by the Sarbanes-Oxley Act of 2002, be deemed filed by the Company for purposes of § 18 of the Securities Exchange Act of 1934, as amended. A signed original of this written statement required by § 906 has been provided to the Company and will be retained by the Company and furnished to the Securities and Exchange Commission or its staff upon request.

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**UNITED STATES  
SECURITIES AND EXCHANGE COMMISSION**  
Washington, D.C. 20549  
**FORM 10-K**

(Mark One)

**ANNUAL REPORT PURSUANT TO SECTION 13 OR 15(d) OF THE SECURITIES EXCHANGE ACT OF 1934**

For the Fiscal Year Ended December 29, 2023.

Or

**TRANSITION REPORT PURSUANT TO SECTION 13 OR 15(d) OF THE SECURITIES EXCHANGE ACT OF 1934**

For the Transition Period from \_\_\_\_\_ to \_\_\_\_\_

Commission File Number 001-33076

**WILLDAN GROUP, INC.**

(Exact name of registrant as specified in its charter)

**Delaware**  
(State or other jurisdiction of  
incorporation or organization)

**14-195112**  
(I.R.S. Employer  
Identification No.)

**2401 East Katella Avenue, Suite 300, Anaheim, California 92806**

(Address of principal executive offices) (Zip Code)

**(800) 424-9144**

(Registrant's telephone number, including area code)

Securities registered pursuant to Section 12(b) of the Act:

Title of each class	Trading Symbol(s)	Name of Exchange
Common Stock, par value \$0.01 per share	WLDN	The Nasdaq Stock Market LLC (Nasdaq Global Market)

Securities registered pursuant to Section 12(g) of the Act: **None**

Indicate by check mark if the registrant is a well-known seasoned issuer, as defined in Rule 405 of the Securities Act. Yes  No

Indicate by check mark if the registrant is not required to file reports pursuant to Section 13 or 15(d) of the Securities Exchange Act of 1934. Yes  No

Indicate by check mark whether the registrant: (1) has filed all reports required to be filed by Section 13 or 15(d) of the Securities Exchange Act of 1934 during the preceding 12 months (or for such shorter period that the registrant was required to file such reports), and (2) has been subject to such filing requirements for the past 90 days. Yes  No

Indicate by check mark whether the registrant has submitted electronically every Interactive Data File required to be submitted pursuant to Rule 405 of Regulation S-T (§ 232.405 of this chapter) during the preceding 12 months (or for such shorter period that the registrant was required to submit such files). Yes  No

Indicate by check mark whether the registrant is a large accelerated filer, an accelerated filer, a non-accelerated filer, a smaller reporting company, or an emerging growth company. See definitions of "large accelerated filer," "accelerated filer," "smaller reporting company," and "emerging growth company" in Rule 12b-2 of the Exchange Act.

Large accelerated filer  Accelerated filer  Non-accelerated filer  Smaller reporting company  Emerging growth company

If an emerging growth company, indicate by check mark if the Registrant has elected not to use the extended transition period for complying with any new or revised financial accounting standards provided pursuant to Section 13(a) of the Exchange Act.

Indicate by check mark whether the registrant has filed a report on and attestation to its management's assessment of the effectiveness of its internal control over financial reporting under Section 404(b) of the Sarbanes-Oxley Act (15 U.S.C. 7262(b)) by the registered public accounting firm that prepared or issued its audit report.

If securities are registered pursuant to Section 12(b) of the Act, indicate by check mark whether the financial statements of the registrant included in the filing reflect the correction of an error to previously issued financial statements.

Indicate by check mark whether any of those error corrections are restatements that required a recovery analysis of incentive-based compensation received by any of the registrant's executive officers during the relevant recovery period pursuant to § 240.10D-1(b).

Indicate by check mark whether the registrant is a shell company (as defined in Rule 12b-2 of the Exchange Act). Yes  No

The aggregate market value of the voting and non-voting common equity held by non-affiliates computed by reference to the price at which the common equity was last sold, as reported on the Nasdaq Global Market, as of the last business day of the registrant's most recently completed second fiscal quarter was \$173.7 million.

On March 6, 2024 there were 13,770,106 shares of the registrant's common stock issued and outstanding.

**DOCUMENTS INCORPORATED BY REFERENCE**

None.

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**ITEM 8. FINANCIAL STATEMENTS AND SUPPLEMENTARY DATA**

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**WILLDAN GROUP, INC. AND SUBSIDIARIES**  
**CONSOLIDATED BALANCE SHEETS**  
(in thousands, except par value)

	December 29, 2023	December 30, 2022
<b>Assets</b>		
Current assets:		
Cash and cash equivalents	\$ 23,397	\$ 8,806
Restricted cash	—	10,679
Accounts receivable, net of allowance for doubtful accounts of \$866 and \$640 at December 29, 2023 and December 30, 2022, respectively	69,677	60,202
Contract assets	93,885	83,060
Other receivables	1,169	4,773
Prepaid expenses and other current assets	3,888	6,454
Total current assets	192,016	173,974
Equipment and leasehold improvements, net	27,097	22,537
Goodwill	131,144	130,124
Right-of-use assets	12,465	12,390
Other intangible assets, net	31,956	41,486
Other assets	4,949	10,620
Deferred income taxes, net	15,961	18,543
Total assets	\$ 415,588	\$ 409,674
<b>Liabilities and Stockholders' Equity</b>		
Current liabilities:		
Accounts payable	\$ 33,193	\$ 28,833
Accrued liabilities	54,129	59,110
Contingent consideration payable	—	4,000
Contract liabilities	13,183	12,585
Notes payable	8,452	16,903
Finance lease obligations	1,186	1,113
Lease liability	4,537	4,625
Total current liabilities	114,680	127,169
Notes payable	88,979	90,544
Finance lease obligations, less current portion	1,184	1,601
Lease liability, less current portion	9,758	8,599
Other noncurrent liabilities	1,142	259
Total liabilities	215,743	228,172
Commitments and contingencies		
Stockholders' equity:		
Preferred stock, \$0.01 par value, 10,000 shares authorized, no shares issued and outstanding	—	—
Common stock, \$0.01 par value, 40,000 shares authorized; 13,682 and 13,296 shares issued and outstanding at December 29, 2023 and December 30, 2022, respectively	137	133
Additional paid-in capital	185,795	177,718
Accumulated other comprehensive loss	(664)	—
Retained earnings	14,577	3,651
Total stockholders' equity	199,845	181,502
Total liabilities and stockholders' equity	\$ 415,588	\$ 409,674

See accompanying notes to consolidated financial statements.

**WILLDAN GROUP, INC. AND SUBSIDIARIES**  
**CONSOLIDATED STATEMENTS OF COMPREHENSIVE INCOME (LOSS)**  
(in thousands, except per share amounts)

	Fiscal Year		
	2023	2022	2021
Contract revenue	\$ 510,095	\$ 429,138	\$ 353,755
Direct costs of contract revenue (inclusive of directly related depreciation and amortization):			
Salaries and wages	89,915	82,972	65,648
Subcontractor services and other direct costs	240,413	202,587	152,233
Total direct costs of contract revenue	330,328	285,559	217,881
Gross profit	179,767	143,579	135,874
General and administrative expenses:			
Salaries and wages, payroll taxes and employee benefits	95,556	81,801	73,812
Facilities and facility related	9,565	9,287	9,896
Stock-based compensation	5,323	8,373	16,563
Depreciation and amortization	16,431	17,489	17,146
Other	30,818	33,692	27,148
Total general and administrative expenses	157,693	150,642	144,565
Income (Loss) from operations	22,074	(7,063)	(8,691)
Other income (expense):			
Interest expense, net	(9,413)	(5,328)	(3,869)
Other, net	1,930	939	156
Total other expense, net	(7,483)	(4,389)	(3,713)
Income (Loss) before income taxes	14,591	(11,452)	(12,404)
Income tax (benefit) expense	3,665	(3,004)	(3,987)
Net income (loss)	10,926	(8,448)	(8,417)
Other comprehensive income (loss):			
Unrealized gain (loss) on derivative contracts, net of tax	(664)	38	450
Comprehensive income (loss)	\$ 10,262	\$ (8,410)	\$ (7,967)
Earnings (Loss) per share:			
Basic	\$ 0.82	\$ (0.65)	\$ (0.68)
Diluted	\$ 0.80	\$ (0.65)	\$ (0.68)
Weighted-average shares outstanding:			
Basic	13,394	13,013	12,458
Diluted	13,606	13,013	12,458

See accompanying notes to consolidated financial statements.

**WILLDAN GROUP, INC. AND SUBSIDIARIES**  
**CONSOLIDATED STATEMENTS OF STOCKHOLDERS' EQUITY**  
(in thousands)

	<u>Common Stock</u>		<u>Additional</u>	<u>Accumulated</u>	<u>Retained</u>	<u>Total</u>
	<u>Shares</u>	<u>Amount</u>	<u>Paid-in</u>	<u>Other</u>	<u>Earnings</u>	
			<u>Capital</u>	<u>Income (Loss)</u>		
<b>Balance at January 1, 2021</b>	12,160	\$ 122	\$ 149,014	\$ (488)	\$ 20,516	\$ 169,164
Shares of common stock issued in connection with employee stock purchase plan	106	2	2,653	—	—	2,655
Shares of common stock issued in connection with incentive stock plan	150	1	1,923	—	—	1,924
Shares used to pay taxes on stock grants	(79)	(1)	(3,116)	—	—	(3,117)
Issuance of restricted stock award and units	467	4	(5)	—	—	(1)
Stock-based compensation expense	—	—	16,563	—	—	16,563
Net income (loss)	—	—	—	—	(8,417)	(8,417)
Net unrealized gain (loss) on derivative contracts	—	—	—	450	—	450
<b>Balance at December 31, 2021</b>	<u>12,804</u>	<u>\$ 128</u>	<u>\$ 167,032</u>	<u>\$ (38)</u>	<u>\$ 12,099</u>	<u>\$ 179,221</u>
Shares of common stock issued in connection with employee stock purchase plan	115	1	3,035	—	—	3,036
Shares of common stock issued in connection with incentive stock plan	34	—	274	—	—	274
Shares used to pay taxes on stock grants	(34)	—	(992)	—	—	(992)
Issuance of restricted stock award and units	377	4	(4)	—	—	—
Stock-based compensation expense	—	—	8,373	—	—	8,373
Net income (loss)	—	—	—	—	(8,448)	(8,448)
Net unrealized gain (loss) on derivative contracts	—	—	—	38	—	38
<b>Balance at December 30, 2022</b>	<u>13,296</u>	<u>\$ 133</u>	<u>\$ 177,718</u>	<u>\$ (0)</u>	<u>\$ 3,651</u>	<u>\$ 181,502</u>
Shares of common stock issued in connection with employee stock purchase plan	182	2	2,779	—	—	2,781
Shares of common stock issued in connection with incentive stock plan	19	—	182	—	—	182
Shares used to pay taxes on stock grants	(11)	—	(205)	—	—	(205)
Issuance of restricted stock award and units	196	2	(2)	—	—	—
Stock-based compensation expense	—	—	5,323	—	—	5,323
Net income (loss)	—	—	—	—	10,926	10,926
Net unrealized gain (loss) on derivative contracts	—	—	—	(664)	—	(664)
<b>Balance at December 29, 2023</b>	<u>13,682</u>	<u>\$ 137</u>	<u>\$ 185,795</u>	<u>\$ (664)</u>	<u>\$ 14,577</u>	<u>\$ 199,845</u>

See accompanying notes to consolidated financial statements.

**WILLDAN GROUP, INC. AND SUBSIDIARIES**  
**CONSOLIDATED STATEMENTS OF CASH FLOWS**  
(in thousands)

	Fiscal Year		
	2023	2022	2021
<b>Cash flows from operating activities:</b>			
Net income (loss)	\$ 10,926	\$ (8,448)	\$ (8,417)
Adjustments to reconcile net income to net cash provided by (used in) operating activities:			
Depreciation and amortization	16,431	17,489	17,146
Deferred income taxes, net	2,582	(1,694)	(2,738)
(Gain) loss on sale/disposal of equipment	(63)	(64)	(24)
Provision for doubtful accounts	825	243	102
Stock-based compensation	5,323	8,373	16,563
Accretion and fair value adjustments of contingent consideration	—	3,168	2,333
Changes in operating assets and liabilities, net of effects from business acquisitions:			
Accounts receivable	(10,300)	6,766	(14,209)
Contract assets	(10,825)	(23,772)	3,138
Other receivables	3,604	1,494	138
Prepaid expenses and other current assets	3,170	(1,230)	828
Other assets	5,671	3,223	(7,849)
Accounts payable	4,360	(7,839)	(4,700)
Accrued liabilities	5,917	12,970	1,625
Contract liabilities	598	(914)	6,065
Right-of-use assets	995	(332)	(197)
Net cash provided by operating activities	<u>39,214</u>	<u>9,433</u>	<u>9,804</u>
<b>Cash flows from investing activities:</b>			
Purchase of equipment and leasehold improvements	(9,925)	(9,602)	(8,500)
Proceeds from sale of equipment	68	75	46
Cash paid for acquisitions, net of cash acquired	(1,600)	—	—
Net cash used in investing activities	<u>(11,457)</u>	<u>(9,527)</u>	<u>(8,454)</u>
<b>Cash flows from financing activities:</b>			
Payments on contingent consideration	(4,000)	(10,206)	(6,615)
Receipt of restricted cash	—	10,679	—
Payment on restricted cash	(10,679)	—	—
Payments on notes payable	(1,631)	(1,920)	(1,909)
Payments on debt issuance costs	(1,114)	(177)	—
Proceeds from notes payable	—	1,718	2,074
Borrowings under term loan facility and line of credit	105,000	20,000	—
Repayments under term loan facility and line of credit	(112,875)	(13,000)	(13,000)
Principal payments on finance leases	(1,304)	(1,054)	(545)
Proceeds from stock option exercise	182	274	1,924
Proceeds from sales of common stock under employee stock purchase plan	2,781	3,036	2,655
Cash used to pay taxes on stock grants	(205)	(992)	(3,117)
Restricted Stock Award and Units	—	—	(1)
Net cash provided by (used in) financing activities	<u>(23,845)</u>	<u>8,358</u>	<u>(18,534)</u>
Net increase (decrease) in cash, cash equivalents and restricted cash	3,912	8,264	(17,184)
Cash, cash equivalents and restricted cash at beginning of period	19,485	11,221	28,405
Cash, cash equivalents and restricted cash at end of period	<u>\$ 23,397</u>	<u>\$ 19,485</u>	<u>\$ 11,221</u>
<b>Supplemental disclosures of cash flow information:</b>			
Cash paid (received) during the period for:			
Interest	\$ 10,193	\$ 5,066	\$ 3,545
Income taxes	(3,072)	(1,120)	(1,616)
<b>Supplemental disclosures of noncash investing and financing activities:</b>			
Equipment acquired under finance leases	961	2,451	1,376

See accompanying notes to consolidated financial statements.

# Appendix C: Bank Letter





**National Industries Group**  
320 S. Canal Street  
15<sup>th</sup> Floor  
Chicago, IL 60606

RE: Willdan Energy Solutions Inc.

To Whom It May Concern:

BMO Bank, NA has enjoyed a depository and lending relationship with Willdan Group, Inc. and its wholly owned subsidiary, Willdan Energy Solutions Inc. (collectively "Willdan") since 2014. All obligations and deposit accounts have been handled honorably to date and Willdan is a client in excellent standing with BMO Bank, NA.

Currently, Willdan has a \$50 million revolving line of credit, with more than \$48 million remaining available, and deposits averaging in the medium eight figures. BMO is pleased to extend our recommendation for their services.

Sincerely,

A handwritten signature in cursive script that reads "Giulia F. Naccarato".

Giulia F. Naccarato  
Assistant VicePresident  
BMO Bank N.A.  
National Industries Team  
312-339-3195

# Appendix D: Required Forms

Exhibit A Certificate of Non-Collusion

Addendum 1 Acknowledgment Form

Addendum 2 Acknowledgment Form



**Exhibit A**

**CERTIFICATE OF NON-COLLUSION**

**[Note: This form must be completed and signed by an authorized representative of each bidder.]**

Be it known that Aaron Etzkorn (name), being first duly sworn, deposes and testifies that he/she is the President (relationship with bidding firm), of Willdan Energy Solutions, Inc. (legal name of bidding firm), making the foregoing bid:

1. The bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation.
2. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid.
3. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or to refrain from bidding.
4. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder.
5. All statements contained in the bid are true.
6. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.
7. Any person executing this declaration on behalf of a bidder that is a corporation, partnership, joint venture, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder.
8. I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on 7/29/2025 [date], at Anaheim [city], California [state].

That all the above statements are true to the best of my knowledge.

Signed \_\_\_\_\_  




# CITY OF ORANGE

PURCHASING DIVISION

FAX: 714/744-2275

## Addendum No. 1

Date: June 24, 2025  
To: All Bidders  
Subject: **RFQ/P 24-25.29 - Energy Conservation and Performance Contracting**

This Addendum is issued to provide updates and changes to the Request for Proposal (RFP) 24-25.29 for Energy Conservations and Performance Contracting. Please note the following revisions:

	Original dates	Updated Dates
Section V – Administration, Part 1, page 10		
All questions are due:	June 25, 2025 Before 4:00 p.m. PST	<b>July 3, 2025</b> <b>Before 4:00 p.m. PST</b>
Section II – Tentative Schedule of Events, page 3		
Addendum Issued – <a href="#">Answers to Questions:</a>	July 3, 2025	<b>Tuesday, July 15, 2025</b>
Proposals/ SOQ's Due:	July 17, 2025 Before 11:00 a.m. PST	<b>July 31, 2025</b> <b>Before 11:00 a.m. PST</b>
Interviews at the City's discretion:	Week of July 28, 2025	<b>Week of August 11, 2025</b>
Tentative Council Meeting for award:	August 12, 2025 6:00 p.m. PST	<b>August 26, 2025</b> <b>6:00 p.m. PST</b>

All other terms and conditions of the RFP remain unchanged.

Please note all previously posted questions and answers have been included in this addendum. Bidder shall signify the receipt of this addendum with a **signature on the last page this Addendum No. 1**. Please contact Wanda Alvarez for any questions regarding this addendum at [walvarez@cityoforange.org](mailto:walvarez@cityoforange.org) or call (714) 744-2266.

\_\_\_\_\_  
Wanda Alvarez  
Purchasing Officer

## Acknowledgment Form

I Colton Gorman, authorized representative for company Willdan, hereby  
acknowledge the receipt of **RFP 24-25.29 - Energy Conservation and Performance Contracting -  
Addendum No. 1** documents from your agency, City of Orange, dated *June 24, 2025*.

Willdan

Company Name



Signature of Authorized Company Representative

6/26/25

Date

858-951-2195

Phone number

cgorman@willdan.com

Email address

We appreciate your cooperation and promptness regarding the documentation procedure.



# CITY OF ORANGE

PURCHASING DIVISION

FAX: 714/744-2275

## Addendum No. 2

Date: July 15, 2025  
To: All Bidders  
Subject: **RFQ/P 24-25.29 - Energy Conservation and Performance Contracting – Answers to Questions, and Language Update**

The following are answers to questions submitted for the project referenced above.

Questions:	Answers:
On Page 19, there is an optional or reserved clause for liquidated damages. Will be included as part of the agreement? If so, can the City provide the dollar amount?	An amount will be determined through the negotiation process.
The following question is related to RFQ No 24-25.29, page 13, Section VI Proposal Format and Content, item 1. Presentation: SOQ/Proposals shall be typed, no more than 25 pages. Charts and schedules may also be included but no more than 15 pages in total. Can you confirm that the proposal submission is limited to a response of 25 pages, with an Appendix (that does not contribute to the 25 page limit) not to exceed 15 pages of charts and schedules?	Correct, an appendix that includes charts and tables does not contribute to the 25-page limit but should be limited to 15 pages.
On page 9, section c. Minimum Requirements. The second requirement says, ... 5 energy performance contracts and power purchasing agreements... however on page 10. Section 3. The second box or prerequisite says, ... 5 energy performance contracts or power	Question A (Re: Past history) – Both references will read “5 energy performance contracts or power purchasing agreements”.

<p>purchasing agreements – It seems these are similar requirements/prerequisites.</p> <p>A. Would the City please issue an addendum to have both requirements/prerequisites read: ...5 energy performance contracts or power purchasing agreements...?</p> <p>B. On page 14, Management and Staffing. Would the City please exempt the individual resumes from the 25 page count and 15 page charts and schedules?</p> <p>C. Would the City please provide the approximate age of the existing solar systems and if these systems are currently under a PPA arrangement?</p>	<p>Question B (Re: Page limits) – Yes, individual resumes are exempt from the 25-page limit and 15-page limit for charts and schedules.</p> <p>Question C (Age of solar):</p> <ul style="list-style-type: none"> <li>c. New Fire Station Admin. Parking lot, - installed and activated in 2022</li>   <li>b. Orange Police Department, Fire Station 4 – installed in 2024 and activation is pending due to Southern California Edison delay.</li>   <li>c. Old Towne Orange Parking Structure - installed end of 2018/activated in early 2019.</li> </ul>
--	---

All other terms and conditions of the RFP remain unchanged.

Please note all previously posted questions and answers have been included in this addendum. Bidder shall signify the receipt of this addendum with a **signature on the last page of this Addendum No. 2.** Please contact Wanda Alvarez for any questions regarding this addendum at [walvarez@cityoforange.org](mailto:walvarez@cityoforange.org) or call (714) 744-2266.

---

Wanda Alvarez  
Purchasing Officer

# Acknowledgment Form

I Colton Gorman, authorized representative for company Willdan, hereby acknowledge the receipt of **RFP 24-25.29 - Energy Conservation and Performance Contracting - Addendum No. 2** documents from your agency, City of Orange, dated *July 15, 2025*.

Willdan  
Company Name

  
Signature of Authorized Company Representative

7/29/25  
Date

858-951-2195  
Phone number

cgorman@willdan.com  
Email address

We appreciate your cooperation and promptness regarding the documentation procedure.



**Submitted by:**

**Willdan Energy Solutions**

2401 E. Katella Avenue, Suite 300 | Anaheim, CA 92806

714.940.6300 | 800.424.9144 | Fax: 714.940.4920