

**APPLICATIONS FOR RENEWAL OR UPDATE
OF
CONSERVATION SERVICE PROVIDER (CSP) REGISTRATION**

Instructions: One of the following applications may be used by a registered Conservation Service Provider (CSP) to renew or update CSP Registration as follows:

I am renewing my CSP Registration according to the normal two year renewal cycle and have no changes to my prior application – Use the Application for Renewal of CSP Registration – No Changes Incurred to Application of Record. This application should be used when there are NO CHANGES to the CSP Application of record. The filing fee for renewal is \$25.

I am renewing my CSP Registration according to the normal two year renewal cycle and have changes to my prior application – Use the Application for Renewal of CSP Registration – Changes Incurred to Application of Record. This application should be used when there are one or more CHANGES to the CSP Application of record. The Applicant is also required to submit a newly completed CSP Application. The filing fee for renewal is \$25.

I am updating my CSP Registration information prior to my next required renewal – Use the Application to Update CSP Registration. This application should be used by a currently approved, registered CSP in order to update one or more items of the CSP Application of record. The Applicant is also required to submit a newly completed CSP Application. There is no filing fee to update CSP Registration information of record.

In all three cases listed above, the registered CSP is required to conduct a thorough review of the individual items, parts and subparts of the Applicant's CSP Application of record, which may be obtained by searching the Pennsylvania Public Utility Commission (PUC) website at www.puc.pa.gov.

- *Double click "Search Documents" located on the upper right-hand corner of the PUC website.*
- *Type the last seven (7) digits of your PUC Docket No. for "Docket No."*
- *Click button labeled "Search."*

An entity that uses one of the three applications to renew CSP Registration or to update CSP Registration information, shall be held accountable for identifying each and every item that has changed or contains information that has changed relating to the Commission-approved Application currently on file at the Commission.

File a signed and verified original and one copy of the completed application along with any attachments in person or by first class mail, with your check (if applicable) to the following address:

Filing in person:

Secretary
Pennsylvania Public Utility Commission
Commonwealth Keystone Building
400 North Street
Harrisburg, PA 17120

Filing by first-class Mail:

Secretary
Pennsylvania Public Utility Commission
P. O. Box 3265
Harrisburg, PA 17105-3265

**APPLICATION FOR RENEWAL OF CSP REGISTRATION
CHANGES INCURRED TO APPLICATION OF RECORD**

Applicant (Company) Name and Docket No.:
The Cadmus Group LLC

Contact Information (name, address, phone number and email of person filing application):

Cheryl Callinan, 720 SW Washington, suite 400, Portland, OR 97205 213.255.3354

cheryl.callinan@cadmusgroup.com

On behalf of the Applicant I am filing with the Commission this Application for Renewal of CSP Registration. There are one or more CHANGES to Applicant's CSP Application of record on file at the Commission at the Docket Number as indicated herein.

I have reviewed the Applicant's CSP Application of record and the information contained therein has changed. Enclosed are the following items:

- a. Completed CSP Application;
- b. Renewal application fee of \$25;
- c. Affidavit, attesting to the truth and knowledge of these facts; and
- d. Proof of current liability insurance coverage.

Peter Jardine, SVP, Corporate Development
Name and Title of person authorized by Applicant to file this Application

[Handwritten Signature]
Signature

June 23, 2023
Date

The Applicant understands that the making of false statement(s) herein may be grounds for denying the Application for Renewal of Conservation Service Provider Registration, or if later discovered, for revoking any authority granted pursuant to the Application. This Application is subject to 18 Pa. C.S. §§4903 and 4904, relating to perjury and falsification in official matters.

AFFIDAVIT

[Commonwealth/State] of Massachusetts

: SS.

County of Middlesex

Peter Jardine, Affiant, being duly [sworn/affirmed] according to law, deposes and says that:

[He/she is the SVP, Corp Dev (Office of Affiant) of The Cadmus Group LLC (Name of Applicant);]

[That he/she is authorized to and does make this affidavit for said Applicant;]

That the Applicant herein The Cadmus Group LLC has the burden of producing information and supporting documentation demonstrating its technical and financial fitness to be registered as a conservation service provider pursuant to Act 129 of 2008.

That the Applicant herein The Cadmus Group LLC acknowledges that it has answered the questions on the application correctly, truthfully and completely and has provided supporting documentation as required.

That the Applicant herein The Cadmus Group LLC acknowledges that it is under a duty to update information provided in answer to questions on this application and contained in supporting documents.

That the Applicant herein The Cadmus Group LLC acknowledges that it is under a duty to supplement information provided in answer to questions on this application and contained in supporting documents as requested by the Commission.

That the facts above set forth are true and correct to the best of his/her knowledge, information, and belief, and that he/she expects said Applicant to be able to prove the same at hearing.

[Signature]
Signature of Affiant

Sworn and subscribed before me this 22nd day of June, 2023.

[Signature]
Signature of official administrator **CHUDIN O. EKPUNOBI**
Notary Public
Commonwealth of Massachusetts
My Commission Expires
August 26, 2027

My commission expires: _____

**CONSERVATION SERVICE PROVIDER (“CSP”) APPLICATION
FOR REGISTRATION IN THE COMMONWEALTH OF PENNSYLVANIA**

Conservation Service Providers (“CSPs”) have a specific role under Act 129, which requires a covered Electric Distribution Company’s Energy Efficiency and Conservation (EE&C) plan to include one or more CSPs to implement at least a portion of the EE&C Plan. 66 Pa.C.S. § 2806.1(b)(1)(i)(E). CSPs provide information and technical assistance to EDCs on *measures* that enable a person to increase energy efficiency or reduce energy consumption. CSPs must have no direct or indirect ownership, partnership or other affiliated interest with an EDC. 66 Pa.C.S. § 2806.1 (m). Only registered CSPs may advise an EDC and/or provide consultation, design, or administration or management services to an EDC related to the implementation of the EDC’s EE&C Plan. As such, registration of business entities as approved CSPs is required before entering into a contractual agreement with an EDC exclusively for the provision of consultation, design, administration, management or advisory services regarding that EDC’s EE&C plan. This registry is not intended as a resource for business, whose sole purpose is the installation of measures, supplying of equipment or other contracting work for use by the general public and EDC customers. If providing such services, registration as a CSP is not required for entering into an agreement with an EDC.

Any CSP subcontractor with an annual contract cost that equals or exceeds 10% of the CSP annual contract cost and is directly performing services pursuant to a contract with a CSP which has contracted with an EDC after Commission approval should also register as a CSP. This does not include third party contractors which participate in or support an EE&C Plan but are not directly contracted with a CSP which has a direct contractual relationship with the EDC subject to Act 129.

To qualify an applicant must have at least two years of experience in providing program consultation, design, administration, management or advisory services related to energy efficiency and conservation services. CSP registration is not required of entities that limit their services to the installation of energy efficiency measures or the provision of equipment or materials to EDC customers or the public in general.

1. IDENTITY OF THE APPLICANT

- a. Legal Name of Applicant: The Cadmus Group LLC

Attach proof of compliance with appropriate Pennsylvania Department of State filing requirements.¹

¹ A copy of any document from the Pennsylvania Department of State (Pa. Dept. of State) documenting the Applicant’s Pa. Dept. of State entity number is adequate. However, the document must indicate that the Applicant’s Pa. Dept. of State registration is “active.” Certified copies of Pa. Dept. of State documents are not required.

Attached as Exhibit 1

- b. Trade or Commercial or Fictitious Names Used by Applicant (d/b/a)—List all that apply.
- The Applicant will be using a fictitious name or doing business as (“d/b/a”). Identify names below. If more space is needed, list names on the back of this page or append list to completed application.
 - The Applicant will not be using a fictitious name.
- c. Applicant Address: 410 Totten Pond, Suite 400, Waltham, MA 02451
- d. Applicant Telephone No: 213.255.3354
- e. Applicant Email Address: peter.jardine@cadmusgroup.com
- f. Contact Information for Applicant. PLEASE NOTE: Upon approval of this application, this Contact Information will be listed on the Commission’s CSP Registry.
- Name – Cheryl Callinan
 - Mailing Address – 720 SW Washington St. Suite 400, Portland, OR 97205
 - Telephone - 213.255.3354
 - Email Address – cheryl.callinan@cadmusgroup.com
- g. Predecessor(s) & Other Names used by Applicant for past five (5) years of date of this application. Provide Name(s), Address(es) and Telephone No.(s).
- Check Box if any Predecessor(s) is currently or was previously registered in Pennsylvania as a CSP. If affirmative, please provide Docket No(s). (A-[Year]-[Seven (7) Digits]) and names for all registered CSPs.

A-2009-2106658

h. Parent & Subsidiary Companies & Affiliates:

- Parent Name and Contact Information. Provide name and contact information for parent company. Check Box if any parent company is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If "None," do not check the box and answer "None" below.

CI (Cadmus Holdings, LLC)

None

-
- Subsidiaries and Contact Information. Provide name and contact information for all subsidiary companies. Check Box if any subsidiary is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If "None," do not check the box and answer "None" below.

Wheelhouse Group LLC (Collaboration House LLC)

Cadmus Newco, LLC

Meister Consulting Group, Inc.

Cadmus Concourse JV, LLC

Nathan Associates LLC (Gnarus Advisors, LLC, Nathan Associates London ltd, Nathan Economic Consulting India Private)

Cadmus International Inc. (Cadmus Europe SRL, Cadmus Korea Co Ltd, The Cadmus Group

Germany GMBH, IFOK GmbH)

None

-
- Affiliate(s) and Contact Information. Provide name and contact information for all affiliate companies. Check Box if any affiliate is currently doing business in Pennsylvania as a CSP or Electric Distribution Company (EDC). If "None," do not check the box and answer "None" below.

None

i. Contracts & Business Partnerships:

- Check Box if Applicant intends to or has operated under contract with or has partnered with an EDC within the past five (5) years. If "None," do not check the box and answer "None" below.
- Check Box if Applicant intends to or has operated under contract (subcontractor) with or has partnered with a CSP within the past five (5) years. If "None," do not check the box and answer "None" below.

If any box above is checked, please provide name(s) of EDC(s) and CSP(s) and contact information for each and briefly describe the nature of business services associated with each contract and/or partnership.

PPL Utilities located at : 827 Hausman Road, Allentown PA 18104-9392, Tel: 484.634.3005.

Contact : Tom McAteer, email at tjmcateer@pplweb.com

FirstEnergy Corp., located at 76 South Main Street, Akron, OH 44308

Contact : Tina Largent, email at tlargent@firstenergycorp.com

- j. Identify principal officers (owners, executives, partners and/or directors), as appropriate for Applicant's organizational structure. Provide an organizational chart and the names, titles, business addresses and telephone numbers for each office.

Ian P. Kline, President & CEO, 7700 Old Georgetown Road, Bethesda, MD 20814, (240) 240-6201
Dennis Lauer, Chief Information Officer, 3100 Clarendon Blvd., Suite 400, Arlington, VA 22201, (703) 247-6000
Paul Lynch, Chief Operating Officer, 3100 Clarendon Blvd., Suite 400, Arlington, VA 22201, (703) 247-6000
Cindy Shephard, Chief Financial Officer, 7700 Old Georgetown Road, Bethesda, MD 20814, (240) 204-6228
Peter Jardine, Senior Vice President of Corp. Development, 410 Totten Pond Suite 400, Waltham, MA 02451
Helle Huxley, Chief Marketing Officer, 3100 Clarendon Blvd, Suite 400, Arlington, VA 22201, (703) 247 6070
Kerri Morehart, Chief HR Officer, 3100 Clarendon Blvd, Suite 400, Arlington, VA 22201, (703) 989-0026
Nathan Smith, Senior Vice President, 3100 Clarendon Blvd, Suite 400, Arlington, VA 22201, (703) 247-6175
Ed Miller, Senior Vice President, 3100 Clarendon Blvd, Suite 400, Arlington, VA 22201, (703) 247-6104
Beth McDonald, 3100 Clarendon Blvd, Suite 400, Arlington, VA 22201
Henning Banthien, Senior Vice President, Germany
Dr. Dirk Rompf, Senior Vice President, Germany
Andrea Marr, Senior Vice President, California
Paul Hovespian, Vice President, 410 Totten Pond Suite 400, Waltham, MA 02451

- k. Attach to this Application a brief biography or single page professional resume for all principal officers and management directly responsible for Applicant's operations.

Please see exhibit 2.

Ian P. Kline, President & CEO, 7700 Old Georgetown Road, Bethesda, MD 20814, (240) 240-6201
Paul Lynch, Chief Operating Officer, 3100 Clarendon Blvd., Suite 400, Arlington, VA 22201, (703) 247-6000
Cindy Shephard, Chief Financial Officer, 7700 Old Georgetown Road, Bethesda, MD 20814, (240) 204-6228
Andrea Marr, Senior Vice President of Energy Services, California

- l. Provide Applicant's Employer Identification No. (EIN): 04-2793755

2. **REGISTERED AGENT**

- a. If the Applicant does not maintain a principal office in the Commonwealth, the Applicant is required by the Pennsylvania Department of State to designate an approved Registered Agent as its representative in the Commonwealth. Check one of the Boxes below, as applicable:

YES, the Applicant has registered its business with the Pennsylvania Department of State. Following is the Name and Contact information for the Applicant's Department-Approved Registered Agent.

- Registered Agent's Name
National Corporate Research

- Registered Agent's Mailing Address
661 Spruce Dr, West Chester PA 19382
 - Registered Agent's Telephone
800-221-0102
 - Registered Agent's Email Address
Not available.
- NO, the Applicant has not registered its business with the Pennsylvania Department of State. **STOP**—To avoid denial of your application and forfeiture of your application fee, you should contact the Pennsylvania Department of State Bureau of Corporations to register as a business entity within the Commonwealth PRIOR TO completion and filing of this application with the Pennsylvania Public Utility Commission.

b. Applicant has registered its business with the Pennsylvania Department of State. Please check appropriate registration type for Applicant as designated with the Department.

- Sole proprietor (15 Pa. C.S. §4124)
- Domestic corporation (none)
- Domestic general partnership (15 Pa. C.S. §4124)
- Domestic limited liability company (15 Pa. C.S. §8913)
- Domestic limited liability partnership (15 Pa. C.S. §8201)
- Foreign corporation (15 Pa. C.S. §4124)
- Foreign general or limited partnership (15 Pa. C.S. §4124)
- Foreign limited liability company (15 Pa. C.S. §8981)
- Foreign limited liability general partnership (15 Pa. C.S. §8211)
- Foreign limited liability limited partnership (15 Pa. C.S. §8211)

c. If Applicant is not domiciled in the Commonwealth of Pennsylvania and is registered as a “foreign” entity as identified in Question 2.b., please identify all other states where applicant is registered and name the appropriate state department(s):

Please see Exhibit 3

3. **APPLICANT'S OPERATIONS**

Respond to each of the following four questions relating to Applicant's operations and its technical and financial fitness. Respond to each item and attach any additional information and/or statements to this Application as appropriate.

a. Describe nature of business:

Cadmus' Energy Services Division (ESD) provides expertise in the following areas:

- Evaluation process, Impact, Finance
- Market Characterization & Research
- Marketing & Communication
- Planning & Program Design
- Load Forecasting
- Potential Assessment
- Carbon Consulting
- Codes & Standards
- Renewable Energy
- Smart Grid
- Electric Vehicles

b. Current status of business (check one):

- Applicant is presently doing business in Pennsylvania
- Applicant is presently not doing business in Pennsylvania

c. The Applicant proposes to provide the following information and technical services to an EDC. Check all services that apply and identify all EDCs with whom Applicant intends to conduct business.

- | | |
|--|-------------------------------|
| <input type="checkbox"/> Consultation | EDCs: |
| <input checked="" type="checkbox"/> Design | <u>PPL Electric Utilities</u> |
| <input type="checkbox"/> Administration | _____ |
| <input type="checkbox"/> Management | _____ |
| <input type="checkbox"/> Advisory | _____ |

d. Attach to this Application a copy of any certification(s) or similar documentation that would demonstrate the technical fitness of Applicant, such as membership in trade associations, professional licenses, technical certifications, and/or names of current or past clients with a description of dates and types of services provided by Applicant.

Please see Exhibit 4

e. Attach to this Application proof of current liability insurance coverage.

Please see Exhibit 5

4. **COMPLIANCE**

Respond to each of the following Questions. Provide a statement as to the resolution or present status of any such proceedings, if applicable.

- a. In the past three years has the Applicant, the parent company, an affiliate or predecessor or partner (contractor/subcontractor business relationship) of the Applicant, or any person identified by the Applicant in this Application, been investigated or convicted of a crime involving fraud, theft, larceny, deceit, violation of consumer protection law, violation of deceptive trade law or similar activity, whether before an administrative body or in a judicial forum, in which the Applicant, an affiliate, a predecessor of either, or a person identified herein has been a defendant or a respondent?

- No
- Yes. Provide explanation:

- b. Is the Applicant, the parent company, an affiliate, or a predecessor of either, currently delinquent with any state or federal taxing authority?

- No
- Yes. Provide explanation:

- c. Identify all bankruptcy or liquidation proceedings for the prior three years. If none, state "None" below.

None

- d. Identify all customer complaints filed with a regulatory or prosecutor agency for the prior three years of the date of this application. In none, state "None" below.

None

5. **FALSIFICATION**

The Applicant understands that the making of false statement(s) herein may be grounds for denying the Application, or if later discovered, for revoking any authority granted pursuant to the Application. This Application is subject to 18 Pa. C.S. §§4903 and 4904, relating to perjury and falsification in official matters.

Signature of Principal Official:  _____

Official's Name & Title (Please Print) : Peter Jardine, SVP Corporate Development

Date : June 22, 2023

APPENDIX A - AFFIDAVIT

[Commonwealth/State] of Massachusetts :

: ss.

County of Middlesex :

Peter Jardine, Affiant, being duly [sworn/affirmed] according to law, deposes and says that:

[He/she is the SVP, Corp Dev (Office of Affiant) of The Cadmus Group LLC (Name of Applicant);]

[That he/she is authorized to and does make this affidavit for said Applicant;]

That the Applicant herein The Cadmus Group has the burden of producing information and supporting documentation demonstrating its technical and financial fitness to be registered as a conservation service provider pursuant to Act 129 of 2008.

That the Applicant herein The Cadmus Group acknowledges that it has answered the questions on the application correctly, truthfully and completely and has provided supporting documentation as required.

That the Applicant herein The Cadmus Group acknowledges that it is under a duty to update information provided in answer to questions on this application and contained in supporting documents.

That the Applicant herein The Cadmus Group acknowledges that it is under a duty to supplement information provided in answer to questions on this application and contained in supporting documents as requested by the Commission.

That the facts above set forth are true and correct to the best of his/her knowledge, information, and belief, and that he/she expects said Applicant to be able to prove the same at hearing.

Signature of Affiant

Sworn and subscribed before me this 22nd day of June, 2023.

Signature of official administering oath



CHUDI C. EKPUNOBI
Notary Public
Commonwealth of Massachusetts
My Commission Expires
August 26, 2027

My commission expires: 8/26/2027

Exhibit 1

Proof of compliance with appropriate Pennsylvania Department of State filing requirement.



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Trademark

CROP

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Business Search

As of 06/21/2023 we have processed all business filings received in our office through 06/13/2023.

Business Search Info:



Cadmus Group



Advanced

Results: 1

Filing Information	Initial Filing Date	Status	Entity Type	Formed In	Address
THE CADMUS GROUP, LLC (2000361)	01/28/1991	Active	Foreign Limited Liability Company	DELAWARE	Cogency Global Inc.



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Exhibit 2

- Org. chart
- Resumes for Ian P Kline, Andrea Marr
- Biographies for Cindy Shephard, Paul Lynch

Executive Team



Chief Operations Officer **Cindy Shephard** has more than 25 years of experience in financial management, operations, and accounting in the government contracting industry. At Cadmus, she is responsible for ensuring that we continuously improve the ways in which we do business. It is her job to guarantee our staff management, workload allocation, and project management are the best in the industry and benefit not only our clients but our employee-owners as well. Ms. Shephard is also responsible for ensuring that our administrative systems and performance data are structured to enable our executive team, division and team leaders, and project managers to make the best decisions possible. She also oversees the implementation of critical operational initiatives throughout the company.

Ms. Shephard combines her financial training and experience with operations expertise, having served as a corporate chief financial officer, controller, vice president of operations, and a chief of staff. She has extensive experience in corporate policy development, financial management, quality assurance, and acquisition integration, for firms ranging in size from \$50 million to \$1.5 billion.

Prior to joining Cadmus, Ms. Shephard served as vice president and group controller at SRA International, and as the chief financial officer and vice president of administration for the Marasco Newton Group. She has a bachelor's degree in accounting and is a certified public accountant. She serves on the advisory board of [The Nature Generation](#).

Chief Operations Officer, **Paul Lynch** is a creative and collaborative general manager with over 20 years of experience leading progressively larger organizations with particular concentrations on digital transformation and public health. Forward-thinking and data-driven, Paul oversees Cadmus' organizational execution, program delivery, continuous improvement process, quality management system, operational due diligence and acquisition integration, and corporate services. He also collaborates with other members of the executive team on strategy development and execution and on growth planning.

Prior to joining Cadmus, Paul led operations for ICF's public sector operating group. He holds an M.B.A. from the University of Maryland, University College.

Andrea Marr, Senior Vice President

Andrea Marr leads Cadmus' energy services division. She has effectively led energy-focused business units and practices and headed engagements for planning and delivering energy efficiency programs across the Commercial and Industrial sectors. Andrea's diverse background spans multiple sectors of the clean energy economy and she has worked with utilities, commercial, and industrial clients on issues relating to decarbonization and the future of the electric grid.

Before joining Cadmus, Andrea was the vice president of industrial energy at Willdan Energy Solutions, growing the business and developing a new strategic roadmap to make inroads into new markets. At Willdan, she also served as the principal in charge of more than \$500 million of work for electric and gas utilities and as a project manager for sustainability, smart cities, renewables, and energy efficiency projects. Andrea previously founded her own sustainability consulting firm, Wedge Consulting, where she provided energy audits, assessments, and strategic planning for five universities in Southern California and oversaw energy efficiency construction projects. Following Wedge's acquisition by Regatta Solutions, Andrea served as Regatta's vice president of energy services with a focus on energy efficiency and renewable energy projects and launched a new consultative sustainability practice.

Andrea holds a doctorate in leadership with a focus on organizational management from the University of San Diego and a master's degree in engineering management from Old Dominion University. She earned a bachelor's in aerospace engineering from the U.S. Naval Academy and spent five years in the U.S. Navy as a Surface Warfare Officer (Nuclear). In 2013, Andrea received the Champion of Change Award from the White House for her work in energy as a veteran. She is active with Team Red, White & Blue, a veterans' organization that creates camaraderie for veterans and their families through physical activity.

Relevant Experience

- **Cadmus. Senior Vice President (2023–present).** Dr. Marr leads Cadmus' Energy Services sector from the company's Santa Monica, California, office. The 120-plus member sector specializes in delivering twenty-first century grid economic and policy analysis; program planning, design, and development; and program evaluation.
- **Willdan. Vice President (2017-20223).** Dr. Marr led more than \$500 million of energy efficiency implementation work for electric and gas utilities and served as a project manager for sustainability, smart cities, renewables, and energy efficiency projects for clients like South Coast Air Quality Management District (SCAQMD) and the US Trade and Development Agency (USTDA). At SCAQMD, she tested emerging technologies in HVAC and lighting including circadian and occupancy based controls as well as advanced refrigerants.
- **Regatta Solutions. Vice President (2015-2017).** Dr. Marr developed energy projects from concept to installation including securing financing, delivering engineered designs and all customer coordination. This included managing solar and cogeneration projects during development and construction, evaluating solar and battery storage suppliers and service providers and researching new technologies in the energy sector.

Education and Certifications

Doctor of Philosophy, Leadership Studies, University of San Diego

Masters of Science, Engineering Management, Old Dominion University

Bachelors of Science, Aerospace Engineering, United States Naval Academy

Professional Engineering License – WA 49392

Ian Kline, President and Chief Executive Officer

Summary of Professional Experience

Ian Kline, Cadmus president and chief executive officer, has led the firm for nearly 20 years. Mr. Kline designed the strategic vision through which the firm has continually expanded its practice areas and services so its clients can address today's complex, critical environmental challenges. He was responsible for the acquisition of the firm's energy practice and has led its growth to meet the evolving needs of the utility market. He oversees multiyear, multimillion-dollar programs—including the U.S. Environmental Protection Agency's ENERGY STAR® Program, work assignments, and task orders for government and commercial programs. Mr. Kline joined Cadmus in 1995 as an associate, was named a principal in 1999, and became a vice president in 2000. He became president in 2005 and CEO in 2007.

Relevant Experience

Environmental Policy Planning

1996 Safe Drinking Water Act (SDWA) Amendments. Mr. Kline managed Cadmus' part in implementing requirements in the 1996 Safe Drinking Water Act (SDWA) Amendments related to improving the capabilities of drinking water utilities (particularly small drinking water systems) including offering new programs employing innovative, nonregulatory approaches. He helped the U.S. Environmental Protection Agency develop and implement the national Capacity Development program; designed innovative tools for evaluating and improving the technical, managerial, and financial capabilities of proposed and existing public water systems; and developed easy-to-read and use tools for states and systems on issues such as regulation implementation, compliance options, water pricing, and acquiring and maintaining technical, managerial, and financial capacity.

Drinking Water State Revolving Fund (SRF). Mr. Kline managed and provided technical leadership to Cadmus' support of EPA's implementation of the Drinking Water SRF, through which the EPA provides capitalization grants to States, which establish revolving funds that provide low-or no-interest loans to water systems for infrastructure improvements.

Arsenic in Drinking Water Rule. Mr. Kline oversaw all response to comment efforts required by the re-examination of the Arsenic in Drinking Water Rule. This effort included development and implementation of a workflow plan for over 25 staff and 60,000 comments, database (Access/SQL) development, comment categorization, support in response development, coordination with a large team of EPA staff, and creation of the Response to Comment document.

Environmental Program Assessment

USEPA Superfund Program Workload Assessment. Mr. Kline directed a multimillion dollar workload assessment of the EPA Superfund program that involved working directly with the 10 EPA Regional offices to develop consensus-based estimates of workload for individual elements of the Superfund cleanup program. Responsibilities included leading and overseeing the development of models that determine future Superfund workload and comparing these levels to current staffing; leading and facilitating a series of facilitated discussions with headquarters and regional EPA personnel where consensus was reached on work tasks, the outputs from these tasks, and resource requirements for these outputs; and acting as the senior advisor and point-of-contact for decision-makers at EPA Headquarters and in the Regional offices.

Facilitation Support

Mr. Kline served as facilitator for a wide range of NDWAC working groups and other stakeholder groups charged with making recommendations on policy issues related to implementation of the SDWA Amendments of 1996 and the Clean Water Act (CWA).

Project and Program Management

Water Conservation Guidelines Preparation and Subcommittee Support. Mr. Kline managed Cadmus' support to EPA in publishing guidelines for water conservation plans as required under Section 1455 of SDWA.

State Water Quality Management Resource Analysis. Mr. Kline managed and provided technical leadership to Cadmus' analysis of state water quality management resource requirements and expenditures in support of EPA's Office of Wastewater Management (OWM). This project involved development of a detailed workload model covering 14 water quality management program areas (e.g., permitting, enforcement, standards development and implementation, wetlands). Mr. Kline led design and implementation of the process used to develop the workload model and led the data collection effort.

Technical Support for a Revision to EPA Clean Water Act Section 106 Grant Allocation Formula. Mr. Kline managed Cadmus technical effort in support of a complete revision to the Section 106 grant allocation formula. He supported the State/EPA Section 106 Allocation Formula work group by facilitating meetings, identifying potential categories of variables meeting the goals of the program, extensively researching available data sources for variables chosen by the workgroup, and writing options papers discussing key policy issues to be decided by the work group.

Quality Management Implementation Support to EPA Clean Water Act Section 106 Tribal Formula Workgroup. Mr. Kline managed the effort supporting Region 10, as Lead Region for the Water and Tribal programs, to evaluate whether the Office of Water should make modest revisions to the CWA Section 106 Tribal allocation formation. Facilitated \$106 Tribal Formula Workgroup meetings.

Point-of-Use and Point-of-Entry Devices Cost Analysis and Implementation. Mr. Kline managed Cadmus efforts to update the cost evaluation of point-of-use and point-of-entry devices as small system compliance options and the cost evaluation of waste disposal costs for point-of-use and point-of-entry treatment strategies. He also managed Cadmus' support of the development of Guidance for Implementing a Point-of-Use or Point-of-Entry Treatment Strategy for Compliance.

Education and Certifications

PMD, Comprehensive General Management Program, Harvard Business School
MPP Environmental Policy and Management, University of Southern California
AB, Social and Environmental Studies (College Scholar), Cornell University

Exhibit 3

- Entity List



Entity Information Report for Group:
THE CADMUS GROUP LLC

Entity Name	Jurisdiction of Formation or Qualification (domestic state listed first)	Domestic/ Foreign	File Date	Jurisdiction ID# (if any; not all states issue a #)	Jurisdiction Status	Status As Of	Status Comment
CADMUS HOLDING COMPANY, INC.	Massachusetts	Domestic	07/28/17	001284416	Active	6/19/2023	Upcoming Compliance Events: • Annual Report - 07/15/2023
CADMUS HOLDING COMPANY, INC.	North Carolina	Foreign	03/25/19	1822398	Active	6/17/2023	Upcoming Compliance Events: • Annual Report - 08/15/2023
CADMUS NEWCO, LLC	Delaware	Domestic	12/22/22	7204325	Good Standing	6/25/2023	Upcoming Compliance Events: • Annual Franchise Tax Payment - 06/01/2024
MEISTER CONSULTANTS GROUP, INC.	Delaware	Domestic	06/02/08	4555343	Good Standing	6/25/2023	Upcoming Compliance Events: • Annual Report and Franchise Tax Payment - 03/01/2024
MEISTER CONSULTANTS GROUP, INC.	California	Foreign	09/13/17	4063463	Forfeited	5/31/2023	Upcoming Compliance Events: • Statement of Information - 09/30/2023
MEISTER CONSULTANTS GROUP, INC.	Colorado	Foreign	05/22/13	20131301168	Good Standing	6/23/2023	Upcoming Compliance Events: • Business Renewal (Periodic Report) - 12/31/2023
MEISTER CONSULTANTS GROUP, INC.	Idaho	Foreign	09/13/17	632552	Revoked	6/2/2023	Upcoming Compliance Events: • Annual Report - 09/30/2023
MEISTER CONSULTANTS GROUP, INC.	Massachusetts	Foreign	08/14/08	000984254	Active	6/19/2023	Upcoming Compliance Events: • Annual Report - 03/15/2024
NATHAN ASSOCIATES INC.	Delaware	Domestic	12/22/22	7204319	Good Standing	2/12/2023	Upcoming Compliance Events: • Annual Report and Franchise Tax Payment - 03/01/2024
NATHAN ASSOCIATES LLC	Delaware	Domestic	02/16/23	410718	Good Standing	6/25/2023	Upcoming Compliance Events: • Annual Franchise Tax Payment - 06/01/2024
NATHAN ASSOCIATES LLC OBSIDIAN ANALYSIS, LLC	Virginia Delaware	Foreign Domestic	05/05/23 03/01/10	11537311 4794064	Active NA	6/24/2023 NA	Upcoming Compliance Events: • Annual Registration Fee Assessment Notice - 05/31/2024
OBSIDIAN ANALYSIS, LLC	Virginia	Foreign	08/29/17	T0713828	Active	6/24/2023	Upcoming Compliance Events: • Annual Registration Fee Assessment Notice - 08/31/2023
THE CADMUS GROUP LLC	Delaware	Domestic	08/10/17	6507198	Good Standing	6/25/2023	Upcoming Compliance Events: • Annual Franchise Tax Payment - 06/01/2024
THE CADMUS GROUP LLC	New Mexico	Domestic	12/20/17	5581877	Active	6/6/2023	
THE CADMUS GROUP LLC	Alabama	Foreign	10/26/18	000 - 941 - 246	Active	5/31/2023	
THE CADMUS GROUP LLC	Alaska	Foreign	04/10/20	10130255	Good Standing	6/17/2023	Upcoming Compliance Events: • Biennial - 01/02/2024
THE CADMUS GROUP LLC	Arkansas	Foreign	11/07/18	811184394	Good Standing	6/26/2023	Upcoming Compliance Events: • Annual LLC Franchise Tax Report - 05/01/2024
THE CADMUS GROUP LLC	California	Foreign	10/02/17	201727910251	Active	5/31/2023	Upcoming Compliance Events: • Biennial Statement of Information - 10/31/2023
THE CADMUS GROUP LLC	Colorado	Foreign	02/04/08	20081073669	Good Standing	6/23/2023	Upcoming Compliance Events: • Business Renewal (Periodic Report) - 04/30/2024
THE CADMUS GROUP LLC	District of Columbia	Foreign	04/25/18	L00005975782	Active	5/10/2023	Upcoming Compliance Events: • Bi-Annual Report - 04/01/2024
THE CADMUS GROUP LLC	Florida	Foreign	10/26/18	M18000009716	Active	4/6/2023	Upcoming Compliance Events: • Annual Report - 05/01/2024
THE CADMUS GROUP LLC	Georgia	Foreign	02/10/22	22038645	Active	5/31/2023	Upcoming Compliance Events: • Annual Registration - 04/01/2024
THE CADMUS GROUP LLC	Hawaii	Foreign	03/20/18	191299C6	Active	6/19/2023	Upcoming Compliance Events: • Annual Report - 03/31/2024
THE CADMUS GROUP LLC	Idaho	Foreign	10/03/17	572265	Active	6/2/2023	Upcoming Compliance Events: • Annual Report - 10/31/2023
THE CADMUS GROUP LLC	Illinois	Foreign	05/20/19	07595433	Good Standing	6/23/2023	Upcoming Compliance Events: • Annual Report - 04/30/2024
THE CADMUS GROUP LLC	Iowa	Foreign	10/26/18	585786	Active	6/2/2023	Upcoming Compliance Events: • Biennial Report - 04/01/2025
THE CADMUS GROUP LLC	Maine	Foreign	07/13/07	20180328FC	Good Standing	5/31/2023	Upcoming Compliance Events: • Annual Report - 06/01/2024
THE CADMUS GROUP LLC	Maryland	Foreign	10/04/17	Z18310243	NA	NA	NA
THE CADMUS GROUP LLC	Massachusetts	Foreign	08/25/17	001288180	Active	6/19/2023	Upcoming Compliance Events: • Annual Report - 08/25/2023
THE CADMUS GROUP LLC	Michigan	Foreign	10/10/17	802116874	Active	6/20/2023	Upcoming Compliance Events: • Annual Statement - 02/15/2024
THE CADMUS GROUP LLC	Minnesota	Foreign	04/13/18	1012489700027	Active	5/31/2023	Upcoming Compliance Events: • Domestic and Foreign Limited Liability Company Annual Renewal - 12/31/2023
THE CADMUS GROUP LLC	Montana	Foreign	04/13/22	E1280773	Active	6/1/2023	Upcoming Compliance Events: • Annual Report - 04/15/2024
THE CADMUS GROUP LLC	New Hampshire	Foreign	08/10/17	152164	Good Standing	6/20/2023	Upcoming Compliance Events: • Annual Report - 04/01/2024
THE CADMUS GROUP LLC	New Jersey	Foreign	11/16/18	0450324327	Active	6/6/2023	Upcoming Compliance Events: • Corporate Annual Report - 11/30/2023
THE CADMUS GROUP LLC	New York	Foreign	10/30/18	5434433	Active	12/29/2022	Upcoming Compliance Events: • Biennial Statement - 10/31/2024
THE CADMUS GROUP LLC	North Carolina	Foreign	11/09/18	1770748	Active	6/17/2023	Upcoming Compliance Events: • Annual Report - 04/15/2024
THE CADMUS GROUP LLC	Oregon	Foreign	10/03/17	1366378-99	Active	6/20/2023	Upcoming Compliance Events: • Annual Report - 10/03/2023
THE CADMUS GROUP LLC	Pennsylvania	Foreign	10/26/18	2000361	Active	6/24/2023	Upcoming Compliance Events: • Decennial Report Of Association Continued Existence - 12/31/2031
THE CADMUS GROUP LLC	Rhode Island	Foreign	07/12/11	001681576	Active	6/5/2023	Upcoming Compliance Events: • Limited Liability Company Annual Report - 05/01/2024
THE CADMUS GROUP LLC	South Carolina	Foreign	12/07/09	705299	Good Standing	6/5/2023	
THE CADMUS GROUP LLC	Tennessee	Foreign	05/06/19	001027317	Active	6/25/2023	Upcoming Compliance Events: • Annual Report - 08/01/2023
THE CADMUS GROUP LLC	Texas	Foreign	01/12/21	0803899535	NA	NA	NA
THE CADMUS GROUP LLC	Utah	Foreign	03/24/10	7630645-0161	Active	4/29/2023	Upcoming Compliance Events: • Annual Report / Renewal Form - 03/31/2024
THE CADMUS GROUP LLC	Vermont	Foreign	10/23/18	0349169	Active	6/23/2023	Upcoming Compliance Events: • Annual Report - 07/30/2023
THE CADMUS GROUP LLC	Virginia	Foreign	08/29/17	T0713810	Active	6/24/2023	Upcoming Compliance Events: • Annual Registration Fee Assessment Notice - 08/31/2023
THE CADMUS GROUP LLC	Washington	Foreign	06/23/11	601834678	Active	6/12/2023	Upcoming Compliance Events: • Limited Liability Company License Renewal & Annual Report - 06/30/2023
THE CADMUS GROUP LLC	Wisconsin	Foreign	10/16/18	T078539	Good Standing	6/13/2023	Upcoming Compliance Events: • Annual Report - 03/31/2024
THE CADMUS GROUP, INC.	Massachusetts	Domestic	05/26/83	042793755	NA	NA	NA
THE CADMUS GROUP, INC.	Alabama	Foreign	02/26/09	000 - 941 - 246	NA	NA	NA
THE CADMUS GROUP, INC.	Alaska	Foreign	04/23/10	128008	NA	NA	NA
THE CADMUS GROUP, INC.	Arkansas	Foreign	08/27/10	800184161	NA	NA	NA
THE CADMUS GROUP, INC.	California	Foreign	04/01/93	1856215	NA	NA	NA
THE CADMUS GROUP, INC.	Colorado	Foreign	02/04/08	20081073669	NA	NA	NA
THE CADMUS GROUP, INC.	Florida	Foreign	08/03/06	F06000005129	NA	NA	NA
THE CADMUS GROUP, INC.	Hawaii	Foreign	09/15/09	40981F1	NA	NA	NA
THE CADMUS GROUP, INC.	Idaho	Foreign	08/10/15	C206807	NA	NA	NA
THE CADMUS GROUP, INC.	Iowa	Foreign	06/04/03	280424	NA	NA	NA
THE CADMUS GROUP, INC.	Maine	Foreign	07/13/07	20080038 F	NA	NA	NA
THE CADMUS GROUP, INC.	Maryland	Foreign	07/18/94	F03929593	NA	NA	NA
THE CADMUS GROUP, INC.	Michigan	Foreign	11/23/15	60833X	NA	NA	NA
THE CADMUS GROUP, INC.	Minnesota	Foreign	09/23/14	784457400028	NA	NA	NA
THE CADMUS GROUP, INC.	Montana	Foreign	12/31/02	F040588	NA	NA	NA
THE CADMUS GROUP, INC.	Nebraska	Foreign	07/26/07	10100640	NA	NA	NA

THE CADMUS GROUP, INC.	Nevada	Foreign	08/25/10	E0414122010-0	NA	NA	NA
THE CADMUS GROUP, INC.	New Hampshire	Foreign	10/26/90	152164	NA	NA	NA
THE CADMUS GROUP, INC.	New York	Foreign	12/15/15	4864110	NA	NA	NA
THE CADMUS GROUP, INC.	North Carolina	Foreign	08/13/91	0292011	NA	NA	NA
THE CADMUS GROUP, INC.	Oklahoma	Foreign	05/12/14	2312454790	Active	5/26/2023	Upcoming Compliance Events:
THE CADMUS GROUP, INC.	Oregon	Foreign	02/08/08	496483-97	NA	NA	• Franchise Tax - 07/01/2023
THE CADMUS GROUP, INC.	Pennsylvania	Foreign	01/28/91	2000361	NA	NA	NA
THE CADMUS GROUP, INC.	Rhode Island	Foreign	07/12/11	000690312	NA	NA	NA
THE CADMUS GROUP, INC.	South Carolina	Foreign	12/07/09	705299	NA	NA	NA
THE CADMUS GROUP, INC.	Utah	Foreign	03/24/10	7630645-0143	NA	NA	NA
THE CADMUS GROUP, INC.	Vermont	Foreign	04/04/05	0080350	NA	NA	NA
THE CADMUS GROUP, INC.	Virginia	Foreign	10/02/87	F0555468	NA	NA	NA
THE CADMUS GROUP, INC.	Washington	Foreign	06/23/11	601834678	NA	NA	NA
THE CADMUS GROUP, INC.	Wisconsin	Foreign	04/27/10	T050909	NA	NA	NA

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State required disclaimer language is included in your entity's specific jurisdiction status information screen. Please view these specific disclaimers about Status Dates using the link below. Status data is for informational purposes only and should not be relied upon as, or considered, an official or certified record.

[Link to State Disclaimers](#)



Name History and Alternate Name Report for Group: THE CADMUS GROUP LLC

Entity Name	Entity Name History (lists name changes in domestic state, if any)	Entity Name History Effective Date
CADMUS HOLDING COMPANY, INC.	CADMUS HOLDING COMPANY, INC.	07/28/17
CADMUS NEWCO, LLC	CADMUS NEWCO, LLC	12/28/22
MEISTER CONSULTANTS GROUP, INC.	MEISTER CONSULTANTS GROUP, INC.	06/02/08
NATHAN ASSOCIATES INC.	CADMUS MERGER SUB, INC.	12/28/22
NATHAN ASSOCIATES INC.	NATHAN ASSOCIATES INC.	02/16/23
NATHAN ASSOCIATES LLC	NATHAN ASSOCIATES LLC	02/21/23
OBSIDIAN ANALYSIS, LLC	OBSIDIAN ANALYSIS, LLC	03/01/10
THE CADMUS GROUP LLC	THE CADMUS GROUP LLC	12/20/17
THE CADMUS GROUP LLC	THE CADMUS GROUP LLC	08/10/17
THE CADMUS GROUP, INC.	THE CADMUS GROUP, INC.	

Entity Name	Alternate Name	Alternate Name Jurisdiction	Name Type
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State required disclaimer language is included in your entity's specific jurisdiction status information screen. Please view these specific disclaimers about Status Dates using the link below. Status data is for informational purposes only and should not be relied upon as, or considered, an official or certified record.

[Link to State Disclaimers](#)



Cogency Global Services Report for Group:
THE CADMUS GROUP LLC

Entity Name	Jurisdiction	Domestic/ Foreign	File Date	Jurisdiction ID # (if any; not all states issue a #)	Cogency Global Service Provided	Cogency Global Appointment Date	Renewal Month
CADMUS HOLDING COMPANY, INC.	Massachusetts	Domestic	07/28/17	001284416	Statutory Representation	07/28/17	November
CADMUS HOLDING COMPANY, INC.	North Carolina	Foreign	03/25/19	1822398	Statutory Representation	03/25/19	November
CADMUS NEWCO, LLC	Delaware	Domestic	12/22/22	7204325	Statutory Representation	12/22/22	December
MEISTER CONSULTANTS GROUP, INC.	Delaware	Domestic	06/02/08	4555343	Statutory Representation	10/07/21	October
MEISTER CONSULTANTS GROUP, INC.	California	Foreign	09/13/17	4063463	Statutory Representation	10/11/18	October
MEISTER CONSULTANTS GROUP, INC.	Colorado	Foreign	05/22/13	20131301168	Statutory Representation	10/11/18	October
MEISTER CONSULTANTS GROUP, INC.	Idaho	Foreign	09/13/17	632552	Statutory Representation	10/23/18	October
MEISTER CONSULTANTS GROUP, INC.	Massachusetts	Foreign	08/14/08	000984254	Statutory Representation	10/18/18	October
NATHAN ASSOCIATES INC.	Delaware	Domestic	12/22/22	7204319	Statutory Representation	12/22/22	December
NATHAN ASSOCIATES LLC	Delaware	Domestic	02/16/23	410718	Statutory Representation	02/16/23	February
NATHAN ASSOCIATES LLC	Virginia	Foreign	05/05/23	11537311	Statutory Representation	05/05/23	February
OBSDIAN ANALYSIS, LLC	Delaware	Domestic	03/01/10	4794064	Statutory Representation	06/04/19	August
OBSDIAN ANALYSIS, LLC	Virginia	Foreign	08/29/17	T0713828	Statutory Representation	08/29/17	August
THE CADMUS GROUP LLC	Delaware	Domestic	08/10/17	6507198	Statutory Representation	04/06/18	November
THE CADMUS GROUP LLC	New Mexico	Domestic	12/20/17	5581877	Statutory Representation	12/20/17	November
THE CADMUS GROUP LLC	Alabama	Foreign	10/26/18	000 - 941 - 246	Statutory Representation	10/26/18	November
THE CADMUS GROUP LLC	Alaska	Foreign	04/10/20	10130255	Statutory Representation	04/10/20	November
THE CADMUS GROUP LLC	Arkansas	Foreign	11/07/18	811184394	Statutory Representation	11/07/18	November
THE CADMUS GROUP LLC	California	Foreign	10/02/17	201727910251	Statutory Representation	10/02/17	November
THE CADMUS GROUP LLC	Colorado	Foreign	02/04/08	20081073669	Statutory Representation	10/03/17	November
THE CADMUS GROUP LLC	District of Columbia	Foreign	04/25/18	L00005975782	Statutory Representation	04/25/18	November
THE CADMUS GROUP LLC	Florida	Foreign	10/26/18	M1800009716	Statutory Representation	10/26/18	November
THE CADMUS GROUP LLC	Georgia	Foreign	02/10/22	22038645	Statutory Representation	02/10/22	November
THE CADMUS GROUP LLC	Hawaii	Foreign	03/20/18	191299C6	Statutory Representation	03/20/18	November
THE CADMUS GROUP LLC	Idaho	Foreign	10/03/17	572265	Statutory Representation	10/03/17	November
THE CADMUS GROUP LLC	Illinois	Foreign	05/20/19	07595433	Statutory Representation	05/20/19	November
THE CADMUS GROUP LLC	Iowa	Foreign	10/26/18	585786	Statutory Representation	10/26/18	November
THE CADMUS GROUP LLC	Maine	Foreign	07/13/07	20180328FC	Statutory Representation	09/29/10	November
THE CADMUS GROUP LLC	Maryland	Foreign	10/04/17	Z18310243	Statutory Representation	10/04/17	November
THE CADMUS GROUP LLC	Massachusetts	Foreign	08/25/17	001288180	Statutory Representation	08/25/17	November
THE CADMUS GROUP LLC	Michigan	Foreign	10/10/17	802116874	Statutory Representation	10/10/17	November
THE CADMUS GROUP LLC	Minnesota	Foreign	04/13/18	1012489700027	Statutory Representation	04/13/18	November
THE CADMUS GROUP LLC	Montana	Foreign	04/13/22	E1280773	Statutory Representation	04/13/22	November
THE CADMUS GROUP LLC	New Hampshire	Foreign	08/10/17	152164	Statutory Representation	01/09/20	November
THE CADMUS GROUP LLC	New Jersey	Foreign	11/16/18	0450324327	Statutory Representation	11/16/18	November
THE CADMUS GROUP LLC	New York	Foreign	10/30/18	5434433	Statutory Representation	10/30/18	November
THE CADMUS GROUP LLC	North Carolina	Foreign	11/09/18	1770748	Statutory Representation	11/09/18	November
THE CADMUS GROUP LLC	Oregon	Foreign	10/03/17	1366378-99	Statutory Representation	10/03/17	November
THE CADMUS GROUP LLC	Pennsylvania	Foreign	10/26/18	2000361	Statutory Representation	01/28/91	November
THE CADMUS GROUP LLC	Rhode Island	Foreign	07/12/11	001681576	Statutory Representation	02/16/18	November
THE CADMUS GROUP LLC	South Carolina	Foreign	12/07/09	705299	Statutory Representation	10/26/18	November
THE CADMUS GROUP LLC	Tennessee	Foreign	05/06/19	001027317	Statutory Representation	05/06/19	November
THE CADMUS GROUP LLC	Texas	Foreign	01/12/21	0803899535	Statutory Representation	01/12/21	November
THE CADMUS GROUP LLC	Utah	Foreign	03/24/10	7630645-0161	Statutory Representation	10/23/18	November
THE CADMUS GROUP LLC	Vermont	Foreign	10/23/18	0349169	Statutory Representation	10/23/18	November
THE CADMUS GROUP LLC	Virginia	Foreign	08/29/17	T0713810	Statutory Representation	08/29/17	November
THE CADMUS GROUP LLC	Washington	Foreign	06/23/11	601834678	Statutory Representation	04/27/18	November
THE CADMUS GROUP LLC	Wisconsin	Foreign	10/16/18	T078539	Statutory Representation	10/16/18	November
THE CADMUS GROUP, INC.	Massachusetts	Domestic	05/26/83	042793755	Statutory Representation	09/28/10	November
THE CADMUS GROUP, INC.	Alabama	Foreign	02/26/09	000 - 941 - 246	Statutory Representation	09/29/10	November
THE CADMUS GROUP, INC.	Alaska	Foreign	04/23/10	128008	Statutory Representation	01/31/11	November
THE CADMUS GROUP, INC.	Arkansas	Foreign	08/27/10	800184161	Statutory Representation	08/27/10	November
THE CADMUS GROUP, INC.	California	Foreign	04/01/93	1856215	Statutory Representation	08/30/13	November
THE CADMUS GROUP, INC.	Colorado	Foreign	02/04/08	20081073669	Statutory Representation	10/25/10	November
THE CADMUS GROUP, INC.	Florida	Foreign	08/03/06	F06000005129	Statutory Representation	09/28/10	November
THE CADMUS GROUP, INC.	Hawaii	Foreign	09/15/09	40981F1	Statutory Representation	09/28/10	November
THE CADMUS GROUP, INC.	Idaho	Foreign	08/10/15	C206807	Statutory Representation	08/10/15	November
THE CADMUS GROUP, INC.	Iowa	Foreign	06/04/03	280424	Statutory Representation	09/28/10	November
THE CADMUS GROUP, INC.	Maine	Foreign	07/13/07	20080038 F	Statutory Representation	09/29/10	November
THE CADMUS GROUP, INC.	Maryland	Foreign	07/18/94	F03929593	Statutory Representation	09/29/10	November
THE CADMUS GROUP, INC.	Michigan	Foreign	11/23/15	60833X	Statutory Representation	11/23/15	November
THE CADMUS GROUP, INC.	Minnesota	Foreign	09/23/14	784457400028	Statutory Representation	09/23/14	November
THE CADMUS GROUP, INC.	Montana	Foreign	12/31/02	F040588	Statutory Representation	09/28/10	November
THE CADMUS GROUP, INC.	Nebraska	Foreign	07/26/07	10100640	Statutory Representation	02/02/11	November
THE CADMUS GROUP, INC.	Nevada	Foreign	08/25/10	E0414122010-0	Statutory Representation	08/25/10	November
THE CADMUS GROUP, INC.	New Hampshire	Foreign	10/26/90	152164	Statutory Representation	01/18/12	November
THE CADMUS GROUP, INC.	New York	Foreign	12/15/15	4864110	Statutory Representation	07/23/18	November
THE CADMUS GROUP, INC.	North Carolina	Foreign	08/13/91	0292011	Statutory Representation	12/16/10	November
THE CADMUS GROUP, INC.	Oklahoma	Foreign	05/12/14	2312454790	Statutory Representation	05/12/14	November
THE CADMUS GROUP, INC.	Oregon	Foreign	02/08/08	496483-97	Statutory Representation	09/28/10	November
THE CADMUS GROUP, INC.	Pennsylvania	Foreign	01/28/91	2000361	Statutory Representation	07/05/17	November
THE CADMUS GROUP, INC.	Rhode Island	Foreign	07/12/11	000690312	Statutory Representation	07/12/11	November
THE CADMUS GROUP, INC.	South Carolina	Foreign	12/07/09	705299	Statutory Representation	09/28/10	November
THE CADMUS GROUP, INC.	Utah	Foreign	03/24/10	7630645-0143	Statutory Representation	12/16/10	November
THE CADMUS GROUP, INC.	Vermont	Foreign	04/04/05	0080350	Statutory Representation	12/16/10	November
THE CADMUS GROUP, INC.	Virginia	Foreign	10/02/87	F0555468	Statutory Representation	12/15/10	November
THE CADMUS GROUP, INC.	Washington	Foreign	06/23/11	601834678	Statutory Representation	06/23/11	November
THE CADMUS GROUP, INC.	Wisconsin	Foreign	04/27/10	T050909	Statutory Representation	02/21/17	November

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Exhibit 4

- Membership to associations
- List of current/past clients with a description of dates and types of services.

Membership in Trade Associations

Division	Organization
GS/HS	American Water Works Association
GS/HS	The National Academics of Science Engineering Medicine
GS/HS	Washington Technology
GS/HS	Professional Services Council (PSC)
GS/HS	Northern VA Technology Council (NVTC)
GS/HS	ACT-IAC
GS/HS	G2xChange FedCiv and G2XChange Health
GS/HS	Association for Corporate Growth (ACG)
GS/HS	RISE Consortium
GS/HS	Alliance for Digital Innovation
ES	ACEEE-American Council for an Energy-Efficient Economy
ES	AEE- Association of Energy Engineers
ES	AESP
ES	ASHRAE- American Society of Heating and Air-Conditioning Engineers
ES	BCA - Building Commissioning Association
ES	CEDMC- California Efficiency + Demand Management Council
ES	E2Tech
ES	GRI GOLD Community Member
ES	MEEA- Midwest Energy Efficiency Alliance
ES	NASEO- National Association of State Energy Officials
ES	NEEC- Northwest Energy Efficiency Council
ES	NEEP Ally Membership
ES	Public Utilities Fortnightly Site Membership
ES	Solar Energy Bus Assoc. of New England (SEBANE)
ES	USGBC National
ES	Smart Grid Today
ES	Energy Central Conference Watch
ES	Utility Dive
ES	Energy Business Review
ES	NASA Climate Change
ES	E&E News
ES	DOE EERE News
ES	SECC Above the Fold
ES	POWERGRID International

Client	Program	Period of Performance
AES Corporation	Dayton Power & Light's Residential and Commercial Portfolio Evaluation	2009-2017
	Indiana's Residential and Commercial Portfolio and Demand Response Program Evaluation	2012-present
	Managed EV Charging Pilot Evaluation	2022-present
	Water Heater Residential Demand Response Pilot Evaluation	2022-present
Alliant Energy	Transportation Electrification Plan Development	2018-2019
	Sense Home Energy Monitoring Pilot	2017-present
Ameren	Pay as You Save Feasibility Study	2018
Avista	Impact and Process Portfolio Evaluation	2017-2022
BC Hydro	Measurement and Verification of Conservation and Energy Management New Construction Projects	2017-2019
Bonneville Power Administration (BPA)	Council Supply Curve Review and Support Development of the 2021 Power Plan	2020-2021
	Demand Response and Energy Efficiency Potential Assessment	2020-2021
California Investor-Owned Utilities	Vehicle Electrification Standard Review Pilot Evaluations	2021-present
	Evaluation of Transportation Electrification Priority Review Projects	2019-2021
CenterPoint Energy	Direct Load Control Program Evaluation	2012-present
	Smart Thermostats Program Evaluation	2016-present
	Residential and Nonresidential Portfolio and Demand Response Program Evaluation	2010-2022
Central Hudson Gas & Electric Corporation	Commercial and Industrial Program Evaluations	2016-present
	Electric and Natural Gas Energy Efficiency Potential Study	2020
Colorado Springs Utilities	Integrated Resource Plan (IRP), Potential Study, Gap Analysis, and Program Design	2019-2020
Consolidated Edison	M&V of Commercial and Industrial Energy Efficiency and Demand Management	2015-present
Consumers Energy	Smart Thermostat Evaluation	2017-present
	Residential Portfolio Evaluation	2009-present
	Customer and Market Research	2013-present
Dominion Energy Virginia	Long-Term Planning	2020-present
Energy Trust of Oregon	Evaluation of Manufactured Homes Heat Pump Pilot	2016-2018
	Air Conditioner Cost Effectiveness Research	2017-2018
	Ductless Heat Pump Market Progress Evaluation	2016-2019
	Large/Complex New Buildings Impact Evaluation	2017-2021
	Large/Complex Industrial Production Efficiency	2019-2021
Eversource Services, Inc	Residential Battery Energy Storage Pilot	2022-present
	Electric Vehicle Charging Pilot	2022-present
Hawaiian Electric Company	Demand Response Grid Service Portfolio	2018-present
Independent Electricity System Operator	Residential Portfolio Evaluation	2017-present
LG&E and KU Energy	Demand-Side Management (DSM) Program Planning	2013-2016
Minnesota Department of Commerce	Cold-Climate Air Source Heat Pump Market Characterization	2019

Client	Program	Period of Performance
Northwest Energy Efficiency Alliance	Luminaire Level Lighting Controls Market Progress Evaluation	2020-present
	Residential Building Stock Assessment	2017-2018
NYSERDA	Statewide Energy Efficiency and Electrification Potential Study	2021-present
PacifiCorp	Residential and Nonresidential Program Evaluations	2020 – 2022
Portland General Electric	Flex Pricing Pilot Evaluations	2015-2022
	Smart Thermostat Demand Response	2015-2022
	Smart Grid Test Bed Project	2019-2022
	System Peak Load Weather Sensitivity Analysis	2020-2021
PPL Electric Utilities	Comprehensive Energy Efficiency Portfolio Evaluation and Program Planning	2009–present
Puget Sound Energy	Non Energy Benefits and Behavioral Program Evaluation	2016-2018
	Assessment of DSM Potential and IRP Support	2006-2015, 2017-2022, 2022-2023
	Low-Income Needs Assessment	2020-present
	Dealer Channel Program Evaluation	2017
Rocky Mountain Power	Soleil Wattsmart Batteries Pilot Evaluation	2021
Southern California Edison	Virtual Power Plant Pilot	2020-present
Seattle City Light	Potential Assessment/End-Use Forecast	2016-present
Sacramento Municipal Utility District	Green Pricing Product Demand and Design,	2020-2021
	New Technology Evaluation Services	2016-present
Vermont Public Service Department	Climate Action Plan	2021-present
Public Service Commission of Wisconsin	Focus on Energy Residential, and Commercial Portfolio Evaluations	2011-present
	Energy Efficiency and Solar Potential Studies	2021

Exhibit 5

- Proof of insurance



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
10/27/2022

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

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

PRODUCER Willis Towers Watson Northeast, Inc. c/o 26 Century Blvd P.O. Box 305191 Nashville, TN 372305191 USA	CONTACT Willis Towers Watson Certificate Center NAME: PHONE (A/C, No, Ext): 1-877-945-7378 FAX (A/C, No): 1-888-467-2378 E-MAIL ADDRESS: certificates@willis.com	
	INSURER(S) AFFORDING COVERAGE	
INSURED Cadmus Group 410 Totten Rd #400 Waltham, MA 02451	INSURER A: Hartford Insurance Company of the Midwest	37478
	INSURER B: Trumbull Insurance Company	27120
	INSURER C: Hartford Casualty Insurance Company	29424
	INSURER D: Hartford Accident and Indemnity Company	22357
	INSURER E: Beazley Insurance Company Inc	37540
	INSURER F: Crum & Forster Specialty Insurance Company	44520

COVERAGES

CERTIFICATE NUMBER: W26477220

REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GENL AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		Y	10 UUN DI6836	10/31/2022	10/31/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
B	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			10 UEN DI7034	10/31/2022	10/31/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
C	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			10 RHU DI6488	10/31/2022	10/31/2023	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	10 WB AN7M5L	10/31/2022	10/31/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
E	Cyber Tech/E&O			V33AB6220101	10/31/2022	10/31/2023	Limit \$5,000,000

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

SEE ATTACHED

CERTIFICATE HOLDER

CANCELLATION

PPL Electric Utilities Corporation
 Two North Ninth Street
 Allentown, PA 18101

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

AUTHORIZED REPRESENTATIVE



ADDITIONAL REMARKS SCHEDULE

AGENCY Willis Towers Watson Northeast, Inc.		NAMED INSURED Cadmus Group 410 Totten Rd #400 Waltham, MA 02451	
POLICY NUMBER See Page 1		NAIC CODE See Page 1	
CARRIER See Page 1		EFFECTIVE DATE: See Page 1	

ADDITIONAL REMARKS

THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,
 FORM NUMBER: 25 FORM TITLE: Certificate of Liability Insurance

PPL Electric Utilities Corporation is included as an Additional Insured as respects to General Liability.

INSURER AFFORDING COVERAGE: Crum & Forster Specialty Insurance Company NAIC#: 44520
 POLICY NUMBER: EOL-238387 EFF DATE: 10/31/2022 EXP DATE: 10/31/2023

TYPE OF INSURANCE:	LIMIT DESCRIPTION:	LIMIT AMOUNT:
Excess Cyber Tech/E&O	Limit	\$5,000,000

INSURER AFFORDING COVERAGE: Hartford Fire Insurance Company NAIC#: 19682
 POLICY NUMBER: 10 UUN DI6836 EFF DATE: 10/31/2022 EXP DATE: 10/31/2023

TYPE OF INSURANCE:	LIMIT DESCRIPTION:	LIMIT AMOUNT:
Business Pers Prop	Blanket Limit	\$14,804,000