

**CONSULTING ENGINEERING SERVICES AGREEMENT INTEGRATED WATER
MASTER PLAN (IRCDUS PROJECT ID 00.23.547)**

THIS AGREEMENT for PROFESSIONAL SERVICES ("Agreement"), entered into as of this 24th day of September 2024 by and between Indian River County, a political subdivision of the State of Florida ("County"), and HDR Engineering, Inc., ("Consultant"):

BACKGROUND RECITALS:

A. In accordance with the Consultants' Competitive Negotiations Act, Section 287.055, Florida Statutes, the County solicited, evaluated and developed ranking of firms to develop an Integrated Water Master Plan ("IWMP") for its water, wastewater, and reuse utility systems ("Project"), based on statement of qualifications received in response to Request for Qualifications 2024039.

B. As a result of its response, the County has selected Consultant to provide the professional Services as more fully set forth in the Statement of Work, attached as "Exhibit A" to this Agreement and made a part hereof by reference.

C. The Consultant is willing and able to perform the Services for the County on the terms and conditions set forth below; and

D. The County and the Consultant wish to enter into this Agreement for the Consultant's Services for the Project.

NOW THEREFORE, in recognition and consideration of the above Recitals, which are not merely prefatory, but are incorporated by reference as though fully set forth herein and form part of the consideration, terms and conditions of this Agreement, and in accordance with the mutual covenants herein contained and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties agree as follows:

1. GENERAL.

1.1 The Background Recitals are true and correct and form a material part of this Agreement.

1.2 Professional services provided by the Consultant for the County will include those identified in Exhibit A. The parties agree that the task and/or subtasks provided in Exhibit B are the basis to be used for billing purposes and that method of Consultant's compensation is set forth in section 5. Consultant's services will be performed in a timely, efficient, cost effective manner. In the performance of professional services, the Consultant will use that degree of care and skill ordinarily exercised by other similar professionals in the field under similar conditions in similar localities ("standard of care"). The Consultant will use due care in performing its services and will have due regard for acceptable engineering design standards and principles. Consultant's standard of care shall not be altered by the application, interpretation, or construction of any other provision of this Agreement.

1.3 Additional services which would increase, decrease or which are otherwise outside the scope of Services or level of effort contemplated by the Exhibit(s) shall be Services for which the Consultant must obtain the prior written approval of the County as provided by this Agreement. All terms for the performance of such Services must be agreed upon in a

written document prior to any deviation from the terms of the Agreement, and when properly authorized and executed by both the Consultant and the County shall become an amendment to the Agreement.

2. COUNTY OBLIGATIONS.

2.1 The County will provide the Consultant with a copy of any preliminary data or reports available as required in connection with the services to be performed under this Agreement, together with all available drawings, surveys, right-of-way maps, and other documents in the possession of the County pertinent to the Services and as otherwise provided in Exhibit A. The Consultant is responsible for bringing to the County's attention, for the County's resolution, material inconsistencies or errors in such data that are made known to the Consultant, but Consultant is not responsible for discovering errors, omissions, or inconsistencies in the drawings or data provided.

2.2 The County shall provide all criteria and full information as to the requirements for the Project, attend Project-related meeting, provide interim reviews on an agreed-upon schedule, make decisions on Project alternatives, and participate in the Project to the extent necessary to allow Consultant to perform the services.

2.3 The County shall arrange for access to, and make provisions for the Consultant to enter upon, public and private property (where required) as necessary for the Consultant to perform its Services, upon timely written request of Consultant to County.

2.4 The County shall promptly execute any permit applications necessary to the Project.

2.5 The County shall examine any and all studies, reports, sketches, drawings, specifications, proposals and other documents presented by the Consultant, and render, in writing, decisions pertaining thereto within a reasonable time.

2.6 The County will appoint a Project Manager who shall (a) act as the County's agent with respect to the Services rendered hereunder; (b) transmit instructions to and receive information from the Consultant; (c) communicate the County's policies and decisions to the Consultant regarding the Services; and (d) determine, initially, whether the Consultant is fulfilling its duties, responsibilities, and obligations hereunder.

2.7 The County shall give prompt written notice to the Consultant whenever the County observes or otherwise becomes aware of any development that affects the timing or delivery of the Consultant's Services. If the Consultant has been delayed in completing its Services through no fault or negligence of either the Consultant or any sub-consultant, and, as a result will be unable to perform fully and satisfactorily under the provisions of this Agreement, then the Consultant shall promptly notify the Project Manager. In the County's sole discretion, and upon the submission to the County of evidence of the causes of the delay, the Work Order shall be modified in writing as set forth in this Agreement, at no additional cost to the County, subject to the County's rights to change, terminate, or stop any or all of the Services at any time in accordance with this Agreement.

2.8 The Consultant shall not be considered in default for a failure to perform if such failure arises out of causes reasonably beyond the Consultant's control and through no fault or negligence of the Consultant. The parties acknowledge that performance of Consultant's subconsultants and subcontractors is with Consultant's reasonable control. The parties also acknowledge that adverse weather conditions, acts of God, or other unforeseen circumstances of a similar nature, may necessitate modifications to this Agreement. If such conditions and circumstances do in fact occur, then the County and Consultant shall mutually agree, in writing, to the modifications to be made to this Agreement.

2.9 The County shall be responsible for acquiring all rights-of-way, easements, and other rights in land, as necessary to complete the project.

3. **RESPONSIBILITIES OF THE CONSULTANT.**

3.1 The Consultant agrees to perform all necessary Services as outlined in Exhibit A, in connection with the assigned Project as set forth in this Agreement.

3.2 The Consultant agrees to complete the Project in a timely manner and within a mutually agreed upon schedule, as may be modified from time to time.

3.3 The Consultant will maintain an adequate staff of qualified personnel and assign them to work on the project as necessary to complete the agreed upon scope of services.

3.4 The Consultant will comply with all present and future federal, state, and local laws, rules, regulations, policies, codes, and guidelines applicable to the Services performed under this Agreement.

3.5 The Consultant, as a part of the consideration hereof, does hereby covenant and agree that: (1) in connection with the furnishing of Services to the County hereunder, no person shall be excluded from participation in, denied the benefits of, or otherwise subjected to discrimination in regard to the services to be performed by Consultant under this Agreement on the grounds of such person's race, color, creed, national origin, religion, physical disability, age or sex; and (2) the Consultant shall comply with all existing requirements concerning discrimination imposed by any and all applicable local, state, and federal rules, regulations, or guidelines, as such rules, regulations, or guidelines may be from time to time amended.

3.6 The Consultant shall, during the entire term of this Agreement, procure and keep in full force, effect, and good standing any and all necessary licenses, registrations, certificates, permits, and any and all other authorizations as are required by local, state, or federal law, in order for the Consultant to render its Services as described in this Agreement. The Consultant shall also require all subconsultants to comply by contract with the provisions of this section.

3.7 The Consultant will cooperate fully with the County in order that all phases of the Services may be properly scheduled and coordinated.

3.8 The Consultant will cooperate and coordinate with other County consultants, as

directed by the County.

3.9 The Consultant shall report the status of the Services under this Agreement to the County Project Manager upon request and hold all related work open to the review of the County Project Manager or his authorized agent at any time, upon reasonable request.

3.10 All documents, reports, field books, survey notes and information, and other data developed by the Consultant for the purpose of this Agreement, shall become the property of the County upon payment for the Services. The foregoing items will be created, maintained, updated, and provided in the format specified by the County. When all Services contemplated under this Agreement is complete and payment in full is made, all of the above data shall be delivered to the County Project Manager.

3.11 The Consultant will confer with the County during the project(s) for which the Consultant has provided Services, and the Consultant will make corrections to the Consultant's Work Product due to the fault of Consultant, based on the Scope of Services Defined in Exhibit A, at no additional cost to the County, within thirty (30) calendar days of notice by the County, or upon a determination of the Consultant that corrections are needed, whichever event shall first occur.

3.12 The Consultant agrees to maintain complete and accurate books and records ("Books"), in accordance with sound accounting principles and standards for all Services, costs, and expenditures under this Agreement. The Books shall identify the Services rendered during each month of the Agreement and the date and type of each Project-related expense. The County shall have the right, at any reasonable time during normal business hours upon five (5) business days' notice to Consultant and through any of its designated agents or representatives, to inspect and audit the Books in conformance with generally accepted auditing standards for the purpose of verifying the accuracy of any invoice. The Consultant shall retain the Books, and make them available to the County as specified above, until the later of three (3) years after the date of termination of this Agreement, or such longer time if required by any federal, state, or other governmental law, regulation, or grant requirement.

3.13 The Consultant shall not assign or transfer any work under this Agreement without the prior written consent of the County. However, the Consultant is permitted to retain subconsultants to perform work under this Agreement. When applicable and upon receipt of such consent from the County, the Consultant shall cause the names of the professional subconsultant firms responsible for the major portions of each separate specialty of the work to be inserted on the reports or other data.

3.14 All documents, prepared by the Consultant pursuant to this Agreement are related exclusively to the Services described herein and are not intended or represented to be suitable for reuse by the County or others on any other project. Reuse of any documents prepared by the Consultant is prohibited and shall be at the County's own risk. The Consultant shall not be held liable for any modifications made to the documents by others.

3.15 Consultant is registered with and will use the Department of Homeland Security's E-Verify system (www.e-verify.gov) to confirm the employment eligibility of all newly hired employees for the duration of this agreement, as required by Section 448.095, F.S. Consultant is also responsible for obtaining proof of E-Verify registration and utilization for all subconsultants.

3.16 The Consultant shall not be held liable for any modifications made to the documents by others.

3.17 Where services hereunder include preparation of drawings and other contract documents by Consultant and where, notwithstanding acceptance and approval by the County thereof, in the opinion of the County, drawings and other contract documents so prepared are found during the course of construction to require modification due to the oversight, inadvertence or negligent omissions of, errors by, or lack of detail provided by Consultant, such modifications must be made by Consultant without additional compensation. Where such contract documents are used in letting a contract for construction, Consultant will assume responsibility for any direct or actual damages suffered or incurred by the County, including, but not limited to, any increase in compensation due to a construction contractor, which increase is directly attributable to the required changes in the Drawings or other contract documents to the extent caused by Consultant's negligent acts, omissions, or errors.

3.18 Approval by the County of any of the Consultant's work, including but not limited to drawings, design specifications, written reports, or any work products of any nature whatsoever furnished hereunder, shall not in any way relieve the Consultant of responsibility for the technical accuracy and adequacy of the work. Neither the County's review, approval or acceptance of, or payment for, any of the Services furnished under this Agreement shall be construed to operate as a waiver of any rights under this Agreement or of any cause of action arising out of the performance of this Agreement. The Consultant shall be and remain liable in accordance with all applicable laws for all damages to the County caused by the negligent performance by the Consultant of any of the Services furnished under this Agreement.

4. **TERM; TIME FOR COMPLETION.**

4.1 The term of this agreement is three years, with one renewal available, based on the determination that renewal is in the best interest of the County. The time for completion of the Services shall be defined in Exhibit A.

5. **COMPENSATION.**

5.1 The County shall pay to the Consultant a mutually agreed professional fee, on a deliverable basis, all as set forth in Exhibit A. Invoices shall be submitted to the County Project Manager, in detail sufficient for proper prepayment and post payment audit. Upon submittal of a proper invoice the County Project Manager will determine if the tasks or portions thereof have been satisfactorily completed. Upon a determination of satisfactory completion, the County Project Manager will authorize payment to be made. All payments for services shall be made to the Consultant by the County in accordance with the Florida Prompt Payment Act, as may be amended from time to time (Section 218.70, Florida Statutes, et seq.).

5.1.1 The Consultant acknowledges and agrees that it will not be reimbursed for travel within the State of Florida.

5.1.2 The County shall make direct payment of all permit fees paid to regulatory

agencies for approvals directly attributable to the Services under the Project. These permit fees do not include those permits required for any construction contractor.

5.2 The County may at any time notify the Consultant of requested changes to the Services, and thereupon the County and the Consultant shall execute a mutually agreeable amendment to this Agreement.

5.3 The County shall have the sole right to reduce or eliminate, in whole or in part, any portion of the Services under Exhibit A at any time and for any reason, upon written notice to the Consultant specifying the nature and extent of the reduction. In such event, the Consultant shall be paid for the Services already performed and also for the Services remaining to be done and not reduced or eliminated, upon submission of invoices as set forth in this Agreement.

5.4 The County may, at any time and for any reason, direct the Consultant to suspend Services, in whole or in part under this Agreement. Such direction shall be in writing, and shall specify the period during which Services shall be stopped. The Consultant shall resume its Services upon the date specified, or upon such other date as the County may thereafter specify in writing. Where the County has suspended the services under this Agreement for a period in excess of six (6) months, the compensation of Consultant for such suspended Services may be subject to modification. The period during which the Services are stopped by the County shall be added to the time of performance of this Agreement.

6. **ADDITIONAL WORK.**

6.1 If services in addition to the Services provided hereunder are required or desired by the County in connection with the Project, the County may, at the sole option of the County: separately obtain same outside of this Agreement; or request the Consultant to provide, either directly by the Consultant or by a subconsultant, such additional services by a written amendment to this Agreement.

7. **INSURANCE AND INDEMNIFICATION.**

7.1 The Consultant shall not commence work on this Agreement until it has obtained all insurance required under this Agreement and such insurance has been approved by the County's Risk Manager.

7.2 Consultant's insurance coverage shall be primary.

7.3 All required insurance policies shall be placed with insurers licensed and/or authorized to do business in Florida and with a Best's rating of A VII or better.

7.4 The insurance policies procured shall be occurrence forms, not claims made policies with the exception of professional liability.

7.5 A certificate of insurance shall be provided to the County's Risk Manager for review and approval, ten (10) days prior to commencement of any work under this Agreement. The County shall be named as an additional insured (or such insurance should have a blanket additional insured endorsement) on commercial general liability policy.

7.6 The insurance companies selected shall send written verification to the County Risk Manager that they will provide 30 days prior written notice to the County Risk Manager of its intent to cancel any required policies of insurance.

7.7 Consultant shall furnish separate certificates and endorsements for each subconsultant. All coverages for subconsultants shall be subject to all of the requirements stated herein.

7.8 Consultant agrees that it now carries and will continue to carry during the performance of this Agreement, at its own expense, the applicable insurance policies indicated below, with limits not less than those specified. Any insurance on a "claims made" basis shall be maintained for at least 3 years after completion of the Services.

- A. Worker's Compensation – Statutory
- B. Employer's Liability - \$1,000,000 per occurrence
- C. Commercial General and Contractual Liability – \$1,000,000 per occurrence
- D. Automobile Liability - \$500,000 per occurrence
- E. Umbrella Liability - \$2,000,000 aggregate (in excess of B., C. and D. above)
- F. Professional Liability - \$1,000,000 per claim/aggregate.

7.9 The Consultant shall indemnify and hold harmless the County, and its officers and employees, from liabilities, damages, losses, and costs, including, but not limited to, reasonable attorneys' fees (where recoverable under law), to the extent caused by the negligence, recklessness, or intentionally wrongful conduct of the Consultant and other persons employed or utilized by the Consultant in the performance of this Agreement.

8. **TERMINATION.**

8.1 This Agreement may be terminated: (a) by the County, for any reason, upon thirty (30) days' prior written notice to the Consultant; or (b) by the Consultant, for any reason, upon thirty (30) days' prior written notice to the County; or (c) by the mutual Agreement of the parties; or (d) as may otherwise be provided below. In the event of the termination of this Agreement, any liability of one party to the other arising out of any Services rendered, or for any act or event occurring prior to the termination, shall not be terminated or released.

8.2 In the event of termination by the County, the County shall be obligated to pay the Consultant for those portions of completed work previously authorized under this Agreement. Such payment shall be determined on the basis of the percentage of work performed by the Consultant, up to the time of termination. In the event of such termination, the County may, without penalty or other obligation to the Consultant, elect to employ other persons to perform the same or similar services.

8.3 In addition to the termination rights set forth in 8.1, the obligation to provide services under this Agreement may be terminated by either party upon seven (7) days prior written notice in the event of substantial failure by the other party to perform in accordance with the terms of this Agreement through no fault of the terminating party and the failure of the party to cure or begin an acceptable cure within the seven day period.

8.4 In the event that the Consultant merges with another company, becomes a subsidiary of, or makes any other substantial change in structure, the County reserves the right

to terminate this Agreement in accordance with its terms.

8.5 In the event of termination of this Agreement, the Consultant agrees to surrender any and all documents prepared by the Consultant for the County in connection with this Agreement. Consultant shall have no liability for such documents that are finalized by the County or another third party.

8.6 The County may terminate this Agreement for refusal by the Consultant to allow public access to all documents, papers, letters, or other material subject to the provisions of Chapter 119 Florida Statutes and made or received by the Consultant in conjunction with this Agreement.

8.7 The County may terminate this Agreement in whole or in part if the Consultant submits an intended false invoice to the County.

8.8 TERMINATION IN REGARDS TO F.S. 287.135: Consultant certifies that it and those related entities of Consultant as defined by Florida law are not on the Scrutinized Companies that Boycott Israel List, created pursuant to s. 215.4725 of the Florida Statutes, and are not engaged in a boycott of Israel. In addition, if this agreement is for goods or services of one million dollars or more, Consultant certifies that it and those related entities of Consultant as defined by Florida law are not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to Section 215.473 of the Florida Statutes and are not engaged in business operations in Cuba or Syria.

8.8.1 County may terminate this Contract if Consultant is found to have submitted a false certification as provided under section 287.135(5), Florida Statutes, been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or been engaged in business operations in Cuba or Syria, as defined by section 287.135, Florida Statutes.

8.8.2 County may terminate this Contract if Consultant, including all wholly owned subsidiaries, majority-owned subsidiaries, and parent companies that exist for the purpose of making profit, is found to have been placed on the Scrutinized Companies that Boycott Israel List or is engaged in a boycott of Israel as set forth in section 215.4725, Florida Statutes.

9. **TRUTH-IN-NEGOTIATION CERTIFICATE: CONTINGENCY FEES.**

9.1 Execution of this Agreement by the Consultant shall act as the execution of a truth-in-negotiation certificate certifying that the wage rates and costs used to determine the compensation provided for in this Agreement are accurate, complete and current as of the date of the Agreement. The original contract price and any additions thereto will be adjusted to exclude any significant sums by which the County determines the contract price was increased due to inaccurate, incomplete, or noncurrent wage rates and other factual unit costs. All such contract adjustments must be made within 1 year following the end of the contract. County has the authority and right to audit Consultant's records under this provision. The County does not hereby waive any other right it may have pursuant to Section 287.055, Florida Statutes, as it may be from time- to-time amended.

9.2 Pursuant to the Consultants' Competitive Negotiations Act, F. S. section

287.055, the Consultant warrants that it has not employed or retained any company or person other than a bona fide employee working solely for the Consultant to solicit or secure this Agreement and that it has not paid or agreed to pay any company or person other than a bona fide employee working solely for the Consultant any fee, commission, percentage fee, gifts or any other considerations, contingent upon or resulting from the award or making of this contract. For breach of violation of this provision, the County shall have the right to terminate this Agreement without liability and, at its discretion, to deduct from the contract price, or otherwise recover, the full amount of such fee, commission, percentage, gift, or consideration.

10. **MISCELLANEOUS PROVISIONS.**

10.1 **Independent Contractor.** It is specifically understood and acknowledged by the parties hereto that the Consultant or employees or subconsultants of the Consultant are in no way to be considered employees of the County, but are independent contractors performing solely under the terms of the Agreement and not otherwise.

10.2 **Merger; Modification.** This Agreement incorporates and includes all prior and contemporaneous negotiations, correspondence, conversations, agreements or understandings applicable to the matters contained herein and the parties agree that there are no commitments, agreements, or understandings of any nature whatsoever concerning the subject matter of the Agreement that are not contained in this document. Accordingly, it is agreed that no deviation from the terms hereof shall be predicated upon any prior or contemporaneous representations or agreements, whether oral or written. No alteration, change, or modification of the terms of this Agreement shall be valid unless made in writing and signed by the Consultant and the County.

10.3 **Governing Law; Venue.** This Agreement, including all attachments hereto, shall be construed according to the laws of the State of Florida. Venue for any lawsuit brought by either party against the other party or otherwise arising out of this Agreement shall be in Indian River County, Florida, or, in the event of federal jurisdiction, in the United States District Court for the Southern District of Florida. Notwithstanding any provision of this Agreement to the contrary, in no event shall either party be liable to the other for consequential, incidental, punitive, special, or exemplary damages, including lost revenues, profits, delays, or other economic loss arising from any cause including breach of warranty, breach of contract, tort, strict liability or any other cause whatsoever. To the extent permitted by law, any statutory remedies that are inconsistent with this provision of the Agreement are waived.

10.4 **Remedies; No Waiver.** All remedies provided in this Agreement shall be deemed cumulative and additional, and not in lieu or exclusive of each other or of any other remedy available to either party, at law or in equity. Each right, power and remedy of the parties provided for in this Agreement shall be cumulative and concurrent and shall be in addition to every other right, power or remedy provided for in this Agreement or now or hereafter existing at law or in equity or by statute or otherwise. The failure of either party to insist upon compliance by the other party with any obligation, or exercise any remedy, does not waive the right to so in the event of a continuing or subsequent delinquency or default. A party's waiver of one or more defaults does not constitute a waiver of any other delinquency or default. If any legal action or other proceeding is brought for the enforcement of this Agreement or because of an alleged dispute, breach, default or misrepresentation in connection with any provisions of this Agreement, each party shall bear its own costs.

10.5 Severability. If any term or provision of this Agreement or the application thereof to any person or circumstance shall, to any extent, be held invalid or unenforceable for the remainder of this Agreement, then the application of such term or provision to persons or circumstances other than those as to which it is held invalid or unenforceable shall not be affected, and every other term and provision of this Agreement shall be deemed valid and enforceable to the extent permitted by law.

10.6 Availability of Funds. The obligations of the County under this Agreement are subject to the availability of funds lawfully appropriated for its purpose by the Board of County Commissioners of Indian River County.

10.7 No Pledge of Credit. The Consultant shall not pledge the County's credit or make it a guarantor of payment or surety for any contract, debt, obligation, judgment, lien or any form of indebtedness.

10.8 Public Records. County is a public agency subject to Chapter 119, Florida Statutes. The Consultant shall comply with Florida's Public Records Law. Specifically, the Consultant shall:

10.8.1 Keep and maintain public records required by the County to perform the service.

10.8.2 Upon request from the County's Custodian of Public Records, provide the County with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119 or as otherwise provided by law.

10.8.3 Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of the contract if the Consultant does not transfer the records to the County.

10.8.4 Upon completion of the contract, transfer, at no cost, to the County all public records in possession of the Consultant or keep and maintain public records required by the County to perform the service. If the Consultant transfers all public records to the County upon completion of the contract, the Consultant shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Consultant keeps and maintains public records upon completion of the contract, the Consultant shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the County, upon request from the Custodian of Public Records, in a format that is compatible with the information technology systems of the County.

IF THE CONSULTANT HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONSULTANT'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT, CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT:

(772) 226-1424

publicrecords@indianriver.gov
Indian River County Office of the County Attorney
1801 27th Street
Vero Beach, FL 32960

10.9 Notices: Any notice, request, demand, consent, approval, or other communication required or permitted by this Agreement shall be given or made in writing and shall be served, as elected by the party giving such notice, by any of the following methods: (a) Hand delivery to the other party; (b) Delivery by commercial overnight courier service; or (c) Mailed by registered or certified mail (postage prepaid), return receipt requested at the addresses of the parties shown below:

County: Indian River County Department of Utility Services
1801 27th Street
Vero Beach, Florida 32960
Attention: Howard Richards, Capital Projects Manager
772-226-1821 telephone
hrichards@indinriver.gov

Consultant: HDR Engineering, Inc.
1475 Centrepark Blvd., Suite 230
West Palm Beach, FL 33401
Attention: Chance Lauderdale
(813) 853-1614
Chance.Lauderdale@hdrinc.com

10.10 Survival. Except as otherwise expressly provided herein, each obligation in this Agreement to be performed by Consultant shall survive the termination or expiration of this Agreement.

Notices shall be effective when received at the address as specified above. Email transmission is acceptable notice effective when received, provided, however, that email transmissions received after 5:00 p.m. or on weekends or holidays, will be deemed received on the next day that is not a weekend day or a holiday. The original of the notice must additionally be mailed. Either party may change its address, for the purposes of this section, by written notice to the other party given in accordance with the provisions of this section.

10.11 Construction. The headings of the sections of this Agreement are for the purpose of convenience only, and shall not be deemed to expand, limit, or modify the provisions contained in such Sections. All pronouns and any variations thereof shall be deemed to refer to the masculine, feminine or neuter, singular or plural, as the identity of the party or parties may require. The parties hereby acknowledge and agree that each was properly represented by counsel and this Agreement was negotiated and drafted at arm's-length so that the judicial rule of construction to the effect that a legal document shall be construed against the draftsperson shall be inapplicable to this Agreement

10.12 Counterparts. This Agreement may be executed in one or more counterparts, each of which shall be deemed to be an original copy and all of which shall constitute but one and the same instrument.

10.13 PURSUANT TO FLA. STAT. § 558.0035, AN INDIVIDUAL EMPLOYEE OR AGENT OF THE CONSULTANT MAY NOT BE HELD INDIVIDUALLY LIABLE FOR NEGLIGENCE. COUNTY agrees that, to the fullest extent permitted by law, Consultant's total liability to County for any and all injuries, claims, losses, expenses, or damages whatsoever arising out of or in any way related to the Project or this Agreement from any causes including, but not limited to, Consultant's negligence, errors, omissions, strict liability, or breach of contract and whether claimed directly or by way of contribution shall not exceed the total compensation received by Consultant under this Agreement.

IN WITNESS WHEREOF the parties hereto have executed this Agreement as of the date first written above.

Consultant
HDR Engineering, Inc.

By Katie E. Duty
Katie E. Duty, Vice President

Indian River County Board of County
Commissioners

By Susan Adams
Susan Adams, Chairman



Attest: Ryan L. Butler, Clerk of Court
and Comptroller

By Randi Wardlaw
Deputy Clerk

Approved:

John A. Titkanich, Jr.
John A. Titkanich, Jr., County Administrator

Approved as to form and legal sufficiency:

Chris Hicks
Asst County Attorney

EXHIBIT A

INDIAN RIVER COUNTY

INTEGRATED WATER MASTER PLAN

SCOPE OF SERVICES

August 30, 2024

Indian River County, Florida (COUNTY) is implementing an Integrated Water Master Plan (IWMP) to prioritize programmatic and capital investments. HDR Engineering, Inc. (CONSULTANT) has been retained to collaborate with the COUNTY in development of the IWMP. The IWMP will align with the framework outlined in the US Environmental Protection Agency's (USEPA) June 2012 Integrated Municipal Stormwater and Wastewater Planning Approach Framework codified within the Federal Clean Water Act in 2019. The goal of the IWMP is to develop an adaptable and affordable long-term plan for addressing the COUNTY's drinking water, wastewater, and reuse needs. The following tasks will be executed to complete this first phase of IWMP development.

Scope of Services

Task 1 Project Management

1.1 Kickoff Meeting

CONSULTANT to facilitate a two-hour in-person Project Kickoff Meeting to discuss the purpose, high-level goals, scope, and schedule of the IWMP. CONSULTANT to develop agenda, presentation, and meeting minutes for the meeting.

1.2 Progress Meetings

CONSULTANT will facilitate twenty (20) monthly one-hour virtual project meetings in addition to those identified in other tasks.

1.3 Schedule Management

CONSULTANT will develop a project schedule in Gantt chart format which includes all proposed deliverables, meetings, and workshops. CONSULTANT will review the schedule during each Progress Meeting with the COUNTY and update, as needed, with the agreement of the COUNTY.

1.4 General Project Management

CONSULTANT will set up, organize, manage, administer, and coordinate CONSULTANT activities for this Project, including:

- Perform Project initiation and Project closeout tasks.
- Organize, manage, and coordinate staff required to accomplish this scope.
- Monitor scope, schedule, and budget throughout the Project.
- Prepare for and submit monthly Progress reports, summarizing completed tasks, next steps, information needs, status update of active work with comparison of planned vs. actual schedules, and action items for

CONSULTANT and COUNTY staff. Progress reports shall accompany the invoices submitted to the COUNTY each month.

Task 1 Assumptions, Workshops, and Deliverables

Assumptions:

- Kickoff Meeting to be attended by up to eight (8) CONSULTANT staff.
- Progress meetings will be attended by up to three (3) CONSULTANT staff.

Meetings/Workshops:

- One (1) two-hour in-person Project Kickoff Meeting.
- Twenty (20) monthly progress meetings with COUNTY to review progress of scope, schedule, and budget.

Deliverables:

- Kickoff agenda and meeting minutes
- Monthly invoices with progress reports

Task 2 Build the Vision

2.1 Initial Data Request and Review

CONSULTANT will collect and review existing utility information, data, and reports that are foundational for the IWMP. Specific tasks will include the following:

2.1.1 Data Request

CONSULTANT will work with the COUNTY to collect and organize existing treatment, collection, distribution, and management data, including operational, asset condition, and performance data. The CONSULTANT will develop a data request to include the following general items:

- Water meter billing data
- Sewer flow monitoring data
- Facility flows, loads, and capacity data (i.e. finished water pumping data, influent & effluent flow and loading data, unit process capacities)
- Pump curves for all major high service pump stations, booster pump stations, wastewater lift stations, and repump stations
- Existing hydraulic models for drinking water and reuse water distribution and wastewater collection
- Drinking water distribution geospatial data, including size and material
- Reuse distribution geospatial data, including size and material
- Wastewater collection geospatial data, including size and material
- Water/Wastewater Treatment Process Models
- Vertical asset inventory
- Condition assessment data (linear and vertical assets)
- Capital and Operations and Maintenance (O&M) historical expenditures and budgets
- Previous master plans for drinking water, wastewater, and reuse systems
- Treatment performance benchmarking data (e.g., process performance, operational goals, finished water targets, system pressures, etc.)

- Regulatory compliance data

2.1.2 Document and Data Review – Overview

CONSULTANT will perform a high-level review of documents and data provided by COUNTY to inform discussions on risks, drivers, compliance efforts, and existing level of service goals. CONSULTANT will report on preliminary findings at the IWMP Chartering and the Strategic Goals and Objectives Follow-Up Workshops.

2.1.3 Condition of Assets – Overview

CONSULTANT will perform a high-level review of asset inventory, condition assessment data, product data sheets, operational data, and other relevant data sources to perform an initial desktop assessment of the condition of the COUNTY's assets. This review will be performed to a level of detail needed to identify key focus areas for future desktop condition assessment efforts and to guide discussions in the IWMP Chartering and the Strategic Goals and Objectives Follow-Up Workshops.

2.1.4 Regulatory/Policy Review

There are several outstanding and upcoming regulatory and water quality drivers at the local, state, and federal levels that will influence the planning, development, implementation, and ultimate success of the IWMP. These issues include EPA drinking water standards, Florida regulations, local water quality goals, collaboration with local Watershed Management Authorities, and consumptive use permitting. CONSULTANT will conduct an initial review to define applicable regulatory drivers based on Safe Drinking Water Act (SDWA) and Clean Water Act (CWA) requirements.

2.1.5 Level of Service Goals

CONSULTANT will review the COUNTY's existing qualitative and quantitative level of service (LOS) goals defined in previous master planning documents, capital planning documents, and operational data. If LOS goals are not readily apparent, CONSULTANT will attempt to infer existing drivers based on COUNTY operations. This review will be performed to a level of detail needed to guide discussions in the IWMP Chartering and the Strategic Goals and Objectives Follow-Up Workshops.

2.2 IWMP Chartering Workshop and Facility Walkthrough

CONSULTANT will lead a four-hour in-person IWMP Chartering Workshop with the COUNTY's management team. CONSULTANT will collaboratively work with the COUNTY to facilitate a visioning process that evaluates goals and objectives of the IWMP, level of service and water quality goals for the COUNTY, and project milestones. Topics for discussion include:

- Regulatory compliance requirements
- Level of service (LOS) goals, including usage of data
- Asset Prioritization
- Asset risk evaluation
- Expected future growth
- Capital planning workflows and desired improvements
- External funding sources
- Resiliency considerations, including Risk and Resiliency Assessment
- Organizational capacity and structure
- Program and large capital project management

CONSULTANT will provide four personnel to perform a two-day walkthrough of major COUNTY drinking water, wastewater, and reuse facilities accompanied by COUNTY management and operations personnel.

CONSULTANT will develop agenda and presentation materials for the workshop and walkthrough and will summarize findings in Draft Module 1: Visioning.

2.3 Strategic Goals and Objectives Follow-Up Workshop (2 hours, in-person)

CONSULTANT will lead a two-hour in-person IWMP Strategic Goals and Objectives Follow-Up Workshop with the COUNTY's management team. The purpose of this workshop will be to review findings from the Document Review (2.1.2), Condition of Assets Review (Task 2.1.3), Regulatory/Policy Review (Task 2.1.4), Level of Service Goals (Task 2.1.5) and IWMP Chartering Workshop (Task 2.2) prior to incorporation into the IWMP. CONSULTANT will develop agenda and presentation materials for the workshop and will summarize findings from the workshop in Draft Module 1 – Visioning.

2.4 Draft IWMP Module 1: Visioning

CONSULTANT will develop a draft version of IWMP Module 1: Visioning based on findings from high-level document reviews and workshop discussions. The purpose of IWMP Module 1 will be to:

- Describe purpose and goals of IWMP.
- Provide background on existing conditions and operations based on findings from preliminary data review.
- Define performance, level of service, and regulatory goals/drivers for future improvements.
- Incorporate summaries of Chartering and Strategic Goals and Objectives Follow Up Workshops.

CONSULTANT will provide Module 1 as a draft only as part of this task. COUNTY review comments will be tracked in an Excel spreadsheet and incorporated into the Pre-Final and Final versions of the IWMP to be compiled in Task 7.4.

2.4.1 Develop IWMP Roadmap

CONSULTANT will develop an implementation roadmap for future efforts on IWMP development. Roadmap will outline tasks and timelines as they relate to the goals outlined in the COUNTY's Invitation to Interview and will be used to update the project plan. Roadmap will include infographics and tables to display information in a digestible format for delivery to the COUNTY Board of Commissioners, the public, and other stakeholders.

Task 2 Assumptions, Workshops, and Deliverables

Assumptions

- CONSULTANT will provide up to four people for drinking water and wastewater treatment facility walkthroughs for two, 8-hour days.

Meetings/Workshops:

- IWMP Chartering Workshop (4 hours, in- person)
- Strategic Goals and Objectives Follow-Up Workshop (2 hours, in-person)

Deliverables:

- Draft IWMP Module 1: Visioning
- IWMP Roadmap

Task 3 Evaluate Existing System Performance

3.1 Detailed Desktop Data Review

3.1.1 Follow-Up Document and Data Request and Review

CONSULTANT will review the status of data and documents requested in Task 2.1.1 and will submit a supplemental data and document request. This request will include information requested but not received in Task 2.1.1, clarification on information received, as well as any new data and documents not previously requested. The purpose of this data request is to collect additional data, reports, and relevant information that CONSULTANT is made aware of during Task 2.

CONSULTANT will perform a detailed review of operational data, monitoring data, asset inventory, previous master plans, CIPs, and other available data to inform workshop discussions. CONSULTANT will compile findings as a section in Draft IWMP Module 2: Existing System Performance.

3.1.2 Regulatory Review – Detailed

As regulatory drivers evolve over the course of the development and implementation of the IWMP, it will be necessary to analyze and interpret existing and new data to prioritize water quality issues and better understand long-term planning needs. CONSULTANT will evaluate data compiled during the project with respect to regulatory drivers and provide analyses relevant to planning and implementation of the IWMP (e.g., relative water quality impacts, timing, relative magnitude of fiscal impacts, etc.). Regulations identified will include relevant new (e.g., PFAS rule) and emerging (e.g., M/DBP rule) regulations which may impact drinking water, wastewater, and reuse.

CONSULTANT will develop a regulatory timeline to visualize identified regulatory milestones, deadlines, and other triggers over a 20-year planning horizon. Timeline will be delivered to COUNTY and incorporated into the IP Framework document.

Working with the COUNTY and their counsel, the CONSULTANT will engage the Florida Department of Environmental Protection (FDEP) to coordinate endorsement of the IWMP. This coordination will likely involve a series of meetings with FDEP to gain buy-in and discuss IWMP elements.

3.2 Vertical Asset Capacity Assessment

CONSULTANT will perform desktop capacity assessments of treatment infrastructure and develop alternative improvement strategies for identified infrastructure or capacity deficiencies. CONSULTANT will utilize the 2045 horizon for determining needed infrastructure upgrades for mechanical and electrical equipment. CONSULTANT will utilize the 2075 horizon as needed to assess new basin capacities and facilities. CONSULTANT will develop an Excel workbook to record COUNTY's existing treatment capacities as well as industry standard capacities for comparison. CONSULTANT will use projections developed in Task 5.2 to define the expected demands and flows of the 2045 and 2075 planning horizons.

3.3 System Modeling / Linear Asset Capacity Assessment

3.3.1 Model Coordination Workshop (4 hours, in-person)

CONSULTANT will facilitate a four-hour in-person coordination meeting with the COUNTY's existing hydraulic modeling consultant in order to discuss existing model infrastructure, data sources, calibration efforts and workflows, data and calibration needs, and other topics prior to model review and calibration.

3.3.2 Model Review and Existing Conditions Updates

CONSULTANT will update COUNTY's most current hydraulic models (three total; one for distribution system, one for wastewater collection system, and one for reuse system) to assess current and future system performance.

CONSULTANT will leverage COUNTY's current Geographic Information Systems (GIS) attributes for updating the existing conditions hydraulic models. CONSULTANT will run the existing conditions models with average flow and pressure conditions to check the reasonableness of the resulting modeled system pressures for distribution, collection, and reuse systems. Scope assumes that GIS is up-to-date and no updates to GIS are included.

3.3.3 Existing Conditions Model Validation

CONSULTANT will work with the COUNTY to identify two conditions at which to run each of the three models. For the collection system model, these will be a typical dry weather condition and a wet weather condition. For the potable and reuse distribution system models, these conditions will represent a period of baseline demand and a period of high demand. CONSULTANT will utilize readily available data from representative periods for each system to run initial model scenarios for the COUNTY's three hydraulic models. This includes comparing results from the three hydraulic models to actual and typical system performance criteria including minimum and maximum pressure, velocity, fire flow (for potable water system), and headloss. Models will be considered valid if 90% of the model results are within 10% of actual flow data, within 10% of actual or expected pressure/level data, or within 5 feet of actual or expected water column as applicable and aligned with actual SSOs (for collection).

CONSULTANT will present the six model outcomes to the COUNTY and discuss the path forward for each model to perform boundary level calibration with additional available data as part of Task 3.3.3 below, or to perform field data collection and full calibration as part of Task 3.3.4 below.

3.3.4 Boundary Level Calibration

CONSULTANT will calibrate models as needed to known boundary level field conditions (i.e. known system pressures, pump station discharge pressures, pressure zone HGLs, measured flows). The boundary level calibration will be considered complete when 90% of the model results are within 10% for the flow data and 5 feet of water column of the field data. All exceptions will be justified and documented. Time series data validation will be considered compared when the model is able to replicate the observed trends and minimum and maximum points. Individual time points in time series will not be compared. CONSULTANT will meet with COUNTY operations staff to review model results and prepare for field calibration efforts if further model calibration is warranted.

3.3.5 Field Data Collection for Full Calibration

3.3.5.1 POTABLE DISTRIBUTION SYSTEM

CONSULTANT will perform a series of hydrant flow tests to refine roughness coefficients (C factors) for model calibration. CONSULTANT will develop a calibration plan that identifies hydrants to perform flow tests on and will collect hydrant flow test data at these hydrants. This field data will be used to calibrate the model to simulate losses across the distribution system. CONSULTANT will adjust model parameters to balance the model to meet the calibration goals as indicated in the AWWA M32 "Computer Modeling Water Distribution Systems" Manual. All exceptions will be justified and documented. CONSULTANT will provide statistics for model calibration results. If SCADA data is available, the hydraulic model will be calibrated to a 7-day (168 hour) Extended Period Simulation (EPS). Time series data validation will be considered compared when the model is able to replicate the observed trends and minimum and maximum points. Individual time points in time series will not be compared. The following assumptions apply:

- COUNTY is responsible for conducting all hydrant tests with COUNTY equipment and following all COUNTY protocols.
- CONSULTANT will hold one (1) virtual review meeting to present the final model and calibration results.
- Hydrant flow test data to be collected and interpreted by CONSULTANT with operation of valves and systems provided by the COUNTY. CONSULTANT will provide one staff member to observe hydrant flow testing. CONSULTANT will not conduct hydrant flow tests.
- One calibration meeting is assumed to be on-site at COUNTY offices in duration of 4 hours.
- The COUNTY will collect pressure data as needed for main calibration.
- A total of 40 hydrant flow tests are assumed. Schedule assumes 2 hours of CONSULTANT time per hydrant test and 8-hour workdays, totaling 10 field days. Final locations will be determined based on existing COUNTY flow test data, final goals and objectives of the model, and areas that are not within the boundary calibration range.
- COUNTY will be responsible for setup, cleanup, traffic control, access, and customer notification ahead of testing, as needed.

3.3.5.2 WASTEWATER COLLECTION SYSTEM

CONSULTANT will develop a calibration plan to identify needed flow, velocity, pressure, and level criteria for field data collection during a 12-month period to capture daily fluctuations in the COUNTY's wastewater collection system. Potential data collection includes:

- Up to 3 insertion flow, velocity, and depth meters in the COUNTY's gravity flow collection system. The COUNTY will install the insertion meters and collect the data on a monthly basis.
- Up to 20 strap-on flow meters with data recording in the COUNTY's low-pressure vacuum station discharge points and/or repump station discharge points. The COUNTY will install the flow meters and collect the data on a monthly basis.

CONSULTANT will compile the data monthly and share it back with the COUNTY for review. CONSULTANT will present findings from this data during up to four progress meetings.

CONSULTANT will disaggregate base sanitary flows, dry weather flows, and wet weather flows to estimate inflow and infiltration quantities upstream of each data collection point. CONSULTANT will calibrate the model to a 7-day EPS for both dry and wet weather time periods. CONSULTANT will adjust model parameters to balance the model and meet the goals of the UK's Chartered Institution of Water and Environmental Management's (CIWEM's) Wastewater Planning Users Group (WaPUG) Code of Practice for the Hydraulic Modeling of Sewer Systems. All exceptions will be justified and documented. CONSULTANT will provide statistics for model calibration results.

3.3.5.3 REUSE DISTRIBUTION SYSTEM

CONSULTANT will develop a calibration plan to identify needed flow and pressure criteria for field data collection over a 1-month period. Potential data collection includes up to 6 strap-on flow meters with data recording on exposed system mains. If mains are not exposed, the COUNTY will expose and protect the target pipe. COUNTY will be responsible for setup, cleanup, traffic control, access, and customer notification ahead of testing, as needed. The COUNTY will install the flow meters and collect the data on a monthly basis.

CONSULTANT will review the data collected and present findings from this data during one progress meeting. CONSULTANT will adjust model parameters to balance the model to meet the calibration goals as indicated in the AWWA M32 "Computer Modeling Water Distribution Systems" Manual. All exceptions will be justified and documented. CONSULTANT will provide statistics for model calibration results. If SCADA data is available, the hydraulic model will be calibrated to a 7-day (168 hour) Extended Period Simulation (EPS). Time series data validation will be considered compared when the model is able to replicate the observed trends and minimum and maximum points. Individual time points in time series will not be compared.

3.4 Asset Management and Condition Assessment

3.4.1 Asset Management Review and Workshop (4 hours, in-person)

CONSULTANT will review COUNTY's existing asset inventory, vertical asset hierarchy, and management systems and platforms to assess workflows and needs for asset management. CONSULTANT will review data and coordinate with the COUNTY to complete the asset inventory templated by Arcadis in 2018. CONSULTANT will provide the draft asset hierarchy to the COUNTY.

CONSULTANT will facilitate a four-hour, in-person workshop to discuss the criteria, scoring, and weighting developed by Arcadis, as well as the asset inventory, and make changes, as needed, prior to further condition assessment efforts.

CONSULTANT will compile the hierarchy and inventory into Draft IWMP Module 2: Existing System Performance.

3.4.2 Desktop Condition and Risk Assessments

CONSULTANT will perform unit process/network level desktop condition assessments of the COUNTY's vertical and linear assets through reviews of the COUNTY's asset inventory in terms of age, typical useful life, and completed work orders. CONSULTANT will also incorporate findings from previous condition assessment data and reports. CONSULTANT will compile condition ratings into a draft vertical asset hierarchy proposed in Task 3.4.1.

For linear assets, CONSULTANT will develop estimates of remaining useful life (RUL), likelihood of failure (LOF), consequence of failure (COF), and overall risk using desktop data only from the COUNTY and available external data sources.

CONSULTANT will discuss findings and conclusions with the COUNTY at the Asset Management and Condition Assessment Workshop and will compile them into Draft IWMP Module 2: Existing System Performance.

3.4.3 Physical Condition Assessment Preparation Workshop (2 hours, in-person)

CONSULTANT will facilitate a two-hour, in-person workshop with management and operations to develop a prioritized list of lift stations for CONSULTANT to visit during physical condition assessment. CONSULTANT will not visit all lift stations but will develop a template with which the COUNTY can assess remaining lift stations in the future.

3.4.4 Physical Condition Assessment – Vertical Assets

CONSULTANT will perform a visual only, multi-discipline (process, mechanical, structural, electrical, instrumentation) condition assessment of existing conditions at the following facilities:

- Oslo Water Treatment Plant
- Hobart Water Treatment Plant
- Central Wastewater Treatment Facility
- South Wastewater Treatment Facility
- West Wastewater Treatment Facility
- Blue Cypress Wastewater Treatment Facility
- Biosolids Facility
- Up to forty (40) vertical repump facilities

CONSULTANT assumes that major process equipment, HVAC equipment, electrical equipment, structures, and controls equipment will be assessed. CONSULTANT will perform site visits in a single trip to occur over five consecutive days to complete the visual assessment. CONSULTANT will develop a field data collection application to be used to record photographs and observations. CONSULTANT will use the Asset Inventory developed in Task 3.4.1 to build the field data collection tool. CONSULTANT will record observations for Level 6 Assets as defined in the COUNTY's existing asset hierarchy. CONSULTANT will coordinate with the COUNTY to review the 2018 Arcadis "Condition and Risk Assessment Guidelines: Vertical Assets" document and any changes that the COUNTY would like to make to the condition assessment criteria, scoring, and weighting defined therein. CONSULTANT will compile condition observations, performance input from COUNTY staff, and desktop data reviewed in Task 3.4.2 to assign a remaining useful life (RUL) to all defined assets.

CONSULTANT will provide up to six (6) persons for each one-week condition assessment mobilization. COUNTY will make available operations and maintenance staff familiar with condition and maintenance of pumping facilities. During the field work, no tanks will be drained, and no CONSULTANT personnel will enter Occupational Safety and Health Administration (OSHA) defined confined spaces. No non-visual assessment, such as amperage draw or temperature draw, will be performed.

Schedule and cost assumes four (4) weeks of condition assessment.

3.4.5 Asset Management and Condition Assessment Workshop (4 hours, in-person)

CONSULTANT will facilitate a 4-hour, in-person workshop with the COUNTY to discuss the following:

- Asset management review findings
- Asset hierarchy
- Proposed asset management platform and workflows
- Desktop condition assessment and asset risk findings
- Visual vertical condition assessment findings

CONSULTANT will incorporate the workshop summary into Draft IWMP Module 2: Existing System Performance.

3.5 Resilience Coordination Workshop (2 hours, in-person)

CONSULTANT will facilitate a 2-hour, in-person workshop with the COUNTY's Risk and Resiliency Assessment (RRA) consultant to discuss findings from the RRA and items for future coordination throughout IWMP development. CONSULTANT will incorporate the workshop summary into Draft IWMP Module 2: Existing System Performance.

3.6 Staffing Capacity Assessment Workshop (2 hours, in-person)

CONSULTANT will facilitate a two-hour, in-person workshop to discuss existing staff capacity and needs. Discussion will also include investigation into various methods of meeting current and future staffing needs, such as:

- Employee retention strategies
- Staff augmentation
- Staff capacity planning tools

CONSULTANT will incorporate the workshop summary into Draft IWMP Module 2: Existing System Performance.

3.7 Existing System Performance Summary

3.7.1 Existing System Performance Workshop (4 hours, in-person)

CONSULTANT will facilitate a 4-hour, in-person workshop to discuss overall performance of the COUNTY's existing drinking water, wastewater, and reuse systems. Topics for discussion will include:

- Findings from desktop reviews
- Comparison of existing system performance to LOS goals established in Task 1: Visioning
- Recommendations for system improvements and detailed condition assessment
- Recommendations for asset management and staffing

CONSULTANT will incorporate the workshop summary into Draft IWMP Module 2: Existing System Performance.

3.7.2 Draft IWMP Module 2: Existing System Performance

CONSULTANT will develop a draft version of IWMP Module 2: Existing System Performance based on findings from detailed document reviews and workshop discussions. The purpose of IWMP Module 2 will be to:

- Summarize existing system performance and capacity for both vertical and linear assets.
- Review findings from desktop condition assessments.
- Highlight priority areas for focused condition assessment, capacity enhancements, rehabilitation, and replacement.
- Discuss strengths and vulnerabilities regarding resilience.
- Review existing staffing capacity and guide planning for future staffing expansion.

CONSULTANT will provide Module 2 as a draft only as part of this task. COUNTY review comments will be tracked in an Excel spreadsheet and incorporated into the Pre-Final and Final versions of the IWMP to be compiled in Task 7.4.

Task 3 Assumptions, Workshops, and Deliverables

Assumptions:

- COUNTY will provide all necessary personnel to accompany CONSULTANT during four-week vertical condition assessment.
- COUNTY personnel will provide input regarding asset performance during five-day vertical condition assessment.
- Vertical condition assessment will consist of visual and auditory observations only. CONSULTANT will not use any instrumentation as part of condition assessment.
- Development of RUL, LOF, COF, and risk estimates for linear infrastructure will be based purely on desktop assessment.
- Level of CONSULTANT effort assumes that COUNTY GIS is up to date. No updates to GIS are included.
- Hydrant flow tests for model calibration will be performed by COUNTY with CONSULTANT personnel observing only. COUNTY is responsible for setup, cleanup, traffic control, access, and customer notification ahead of hydrant testing, as needed.
- COUNTY will install all temporary flow meters and instruments for calibration and will collect data on a monthly basis for collection system and reuse system calibration.
- Regulatory meetings and negotiations needs will be identified and addressed through IWMP development.
- Regulatory agency coordination will remain active throughout the duration of the project (i.e., meetings will be reserved for as-needed coordination with FDEP throughout the development of the IP framework).

Meetings/Workshops:

- Up to three (3) meetings with FDEP
- Asset Management & Condition Assessment Workshop (4 hours, in-person)
- Resilience Workshop (2 hours, in-person)
- Staffing Workshop (2 hours, in-person)
- Existing System Performance Workshop (4 hours, in-person)

Deliverables:

- Regulatory compliance timeline (Excel)
- Vertical capacity assessment workbook (Excel)
- Updated hydraulic models
- Draft IWMP Module 2: Existing System Performance

Task 4 Engage Community Stakeholders

4.1 Review of Communication Efforts and Tools

CONSULTANT will conduct an in-depth review of COUNTY's communication efforts to-date and existing communication tools to understand brand standards, communication channels, roles and responsibilities, and audience perceptions.

CONSULTANT will submit a data request for existing branding standards, communications plans, materials, workflows, and other documents and perform an initial review of these documents.

CONSULTANT will then conduct a two-hour in-person Communications Review Workshop to discuss findings, ask remaining questions, and collect anecdotal information from COUNTY communications personnel. Topics to be covered will include:

- Overview of stakeholder relationships and levels of trust
- Existing communication channels and relative success
- Communication workflows
- Roles and responsibilities for communications
- Public response to COUNTY decisions and projects
- Customer satisfaction monitoring
- Branding standards

CONSULTANT will develop an agenda and presentation in preparation for the Workshop. The agenda and a Communications Review Workshop Summary will be provided as deliverables to COUNTY.

4.2 Develop Community Analytics Profile

CONSULTANT will conduct stakeholder/project-area analyses to understand community needs and identify population characteristics across Indian River COUNTY.

CONSULTANT will evaluate a variety of socioeconomic, demographic, business, and market potential reports within the project area, providing "snapshot" summaries for any combination of variables, such as income, age, education, ethnicity, vulnerability, and technology use.

These reports, displayed through tables, infographics, and mapping, provide granular insight into the community's behaviors, lifestyles, trends, and communication needs. This dynamic approach will allow the project team to better understand the community, communicate more effectively, and inform strategy from project inception by providing a comprehensive visual and statistical understanding on the project community.

CONSULTANT will develop a 3- to 5-page PDF report with infographics to display the results of the community analytics assessment and will provide as a deliverable to COUNTY.

4.3 Conduct Communications Goal Setting and Stakeholder Identification Workshop

CONSULTANT will conduct a four-hour in-person Communications Goal Setting and Stakeholder Identification Workshop with COUNTY management and communications personnel. Topics to be covered will include:

- Identification of internal and external stakeholders
- Goals for stakeholder engagement
- Desired future meetings and deliverables
- Review of milestones within the IWMP development process and identification of decision-making and stakeholder involvement needs
- Best practices for messaging, format, and delivery of outreach materials

CONSULTANT will develop an agenda and presentation in preparation for the Workshop. The agenda and a Communications Audit Workshop Summary will be provided to COUNTY.

4.4 Public Involvement Events

4.4.1 Community Meetings

CONSULTANT will develop and support implementation of a series of two (2) community meetings and one (1) supplementary online meeting option to incorporate public input into the master plan development process, specifically related to a multi-criteria decision analysis. These meetings could serve as an opportunity to educate the public about the project, field questions, and elicit initial feedback. This scope of work will include:

- Outreach materials development
- Event Plan
- Facilitation Guide
- Logistic coordination support
- Development and design of meeting materials

Meeting summaries to be included in IWMP Module 3: Stakeholder Engagement.

4.4.2 Small-Group Stakeholder Meetings

CONSULTANT will facilitate up to five (5), 2-hour, in-person small group meetings to engage key stakeholders and partners, such as community organizations, elected officials, and local county agencies to educate about, elicit feedback on, and garner support of the master planning process. CONSULTANT will provide agendas for each meeting. Meeting summaries to be included in IWMP Module 3: Stakeholder Engagement.

4.5 Draft IWMP Module 3 – Stakeholder Engagement

CONSULTANT will compile findings from the communications data review, Community Analytics Profile, Communications Audit, and workshops to develop a draft of the One Water Integrated Plan's Module 3 – Stakeholder Engagement.

CONSULTANT will provide Module 3 as a draft only as part of this task. COUNTY review comments will be tracked in an Excel spreadsheet and incorporated into the Pre-Final and Final versions of the IWMP to be compiled in Task 7.4.

4.6 Collateral Development

As part of this scope of work, CONSULTANT will develop content and provide graphic design for a variety of deliverables to support internal and external communications during master plan development. In developing these materials, CONSULTANT will take into consideration COUNTY's varied audiences and channels of delivery to provide clean, branded materials that makes technical subjects easier to understand.

Deliverables will follow COUNTY's existing brand guidelines and include items such as:

- Branded templates
- Bill inserts
- Brochures
- Door hangers and notices
- Emails and e-blasts
- Flyers, handouts & mailers
- Internal and external newsletters
- Online content and graphics
- Presentations
- Press releases/media advisories
- Print ads
- PSAs
- Social media posts and graphics
- Talking points
- Video/podcast scripts, graphics, & production

4.7 Project Website Development and Maintenance

If IRC desires, CONSULTANT can develop a standalone website containing up to five (5) pages of content on the master planning process for internal audiences, the public, visitors, and other stakeholders. The proposed content would feature/include much of the collateral items to allow for extended reach and consistent messaging. The website development process would include:

- Up to three website coordination calls
- One website site map
- One website content document
- Up to two draft and final website content documents
- One website wireframe populated with approved content and based on the site map
- One interactive website design mockup based on wireframe
- One staging website prototype
- One final website with a custom URL and hosting for one year
- One web survey to gather public input for weighting decision criteria used within Task 6 investment prioritization.
- Up to 12 visitor analytics reports

Task 4 Assumptions, Workshops, and Deliverables

Assumptions

- COUNTY will provide key talking points and technical information to CONSULTANT as needed to develop requested deliverables.
- The extent of deliverable development will align with labor assumptions within cost estimate.
- Scope does not include costs for outreach implementation, such as printing or postage.

- Event plan and facilitation guide will be provided to the client electronically.
- COUNTY will provide knowledgeable, informed personnel to help staff meetings.
- CONSULTANT will provide up to five (5) staff to attend each Public Involvement Meeting.
- Community meetings will provide attendees the opportunity to provide written or verbal formal comments.
- Website coordination calls will be virtual with up to two CONSULTANT participants.
- Scope assumes one round of review on each interim deliverable and up to two rounds of review on the final website. CONSULTANT assumes that each review period will not exceed two weeks.
- COUNTY agrees the site map and wireframe will act as frameworks for the website. Significant changes or additions requested after the approval of the site map and wireframe may be considered out of scope.
- The website content document will be produced in MS Word.
- COUNTY will provide images, photography, logo files, color palettes, branding standards, and other material as available to support the development of collateral and website. This scope does not include photography capture or a budget for stock photography.
- CONSULTANT will utilize the free version of the Gtranslate auto-translation tool if website content translation is required.
- Website will be developed with HTML, CSS, and JavaScript, and will not be developed as a content management system (CMS). Website changes and updates will be managed and launched by the consultant's developers.
- Website will support Edge, Chrome (desktop and mobile), Firefox, and Safari (desktop and mobile).
- CONSULTANT will purchase and manage domains and will provide website hosting for this contract. Domains associated with this contract will be purchased through Hover and will be subject to Hover's Terms of Service. The website files and databases will be hosted on the CONSULTANT's VPS through Veerotech Systems, LLC. Website files and associated databases will be subject to Veerotech's Terms of Service. CONSULTANT assumes the website will be hosted on CONSULTANT's VPS for the duration of the website's live-time. If COUNTY requests a migration of the website to another server, a contract amendment will be required if not initially accounted for the scope and budget.
- CONSULTANT will follow WCAG 2.1 Level AA guidelines. CONSULTANT uses Site improve Accessibility Checker to identify and mitigate critical errors where feasible.

Meetings/Workshops:

- One 2-hour in-person Communication Review Meeting
- One 4-hour in-person Communications Goal Setting and Stakeholder Identification Workshop
- Three website planning meetings
- 2, 2-hour in-person Public Involvement Events
- 90-minute virtual Public Involvement Event
- Up to 5, 2-hour in-person Small-Group Stakeholder Meetings

Deliverables:

- Communications data request and review
- Draft and final summary report of findings and workshop discussions
- Community Analytics Profile
- IWMP Module 3 – Stakeholder Engagement with Community Meeting and Small-Group Stakeholder meeting summaries
- Community meeting and Small-Group Stakeholder meeting agendas and materials
- 5-page master planning project website
- Implementation of three (2 in-person, 1 virtual) Public Outreach Events
- Implementation of up to five small-group stakeholder meetings

Task 5 Evaluate Alternative Solutions

5.1 Growth Projections

CONSULTANT will assess the proposed population and growth projections for District based on published growth trends, historical usage, and flows and information gathered in Tasks 3 and 4 above. CONSULTANT will develop 20-year and 50-year growth projections and the associated water needs for COUNTY service area. The following data sources will be accessed for population/growth projections:

- Local, National, and Statewide growth trends
 - COUNTY Historic Growth
 - Bureau of Economic and Business Research (BEBR)
 - SJRWMD Southern Region Water Supply Plan
 - US Census Data – Indian River COUNTY
- COUNTY and Governmental Comprehensive Planning Documents
- Current and future planned developments, as information is available

CONSULTANT will develop water demand projections and wastewater flow projections for 2045 and 2075 based on the population/growth projections, including a probabilistic analysis for key projection inputs. CONSULTANT will:

- Coordinate with COUNTY to assess system-wide average demands; diurnal and seasonal demand patterns utilizing billing, production, and SCADA records; and planned developments and system expansions.
- Evaluate the amount of non-revenue water (hydrant flushing/water loss) and production losses.
- Assess major users and associated future demands to be identified as point demands.
- Coordinate with COUNTY to develop the range of uncertainty for key projection inputs.

CONSULTANT will also use projections developed to evaluate and validate or update the COUNTY's existing assumptions regarding equivalent residential units (ERUs) and gallons per capita per day (gpcd) consumption/production and incorporate these into Task 5.2 Level of Service Updates. CONSULTANT will incorporate the Population and Demand Projections as sections in Draft IWMP Modules 4, 5, 6, and 7 as applicable.

5.2 Level of Service Updates

Based on information review, discussions with COUNTY, and findings from Tasks 2.1.5 and 5.2, CONSULTANT will develop quantitative and qualitative level of service (LOS) goals for the COUNTY'S drinking water, wastewater, and reuse treatment, distribution, and collection systems. This will include updated assumptions for ERUs and per capita consumption/production. The COUNTY's Draft LOS goals will be discussed at related Task 5 workshops and incorporated into respective Draft Modules 4 through 8.

5.3 Drinking Water Supply and Treatment Alternatives Development

5.3.1 Drinking Water Supply and Treatment Alternatives Development

CONSULTANT will investigate alternatives for drinking water supply augmentation and drinking water storage. Proposed drinking water supply alternatives include the following:

- Surface water diversion and treatment
- Surficial aquifer wells and membrane treatment
- Brackish water via Floridan Aquifer wells and membrane treatment
- Reuse (one indirect potable reuse option and one direct potable reuse option)
- Seawater desalination

Proposed raw water storage alternatives include the following:

- Reservoirs
- Aquifer Storage and Recovery (ASR)
- Aquifer Recharge

For each alternative presented, CONSULTANT will develop concepts that consider the following:

- Siting and permitting
- Raw water conveyance and storage
- Treatment system
- Residuals management (including concentrate)

CONSULTANT will size basins and major process equipment for the appropriate growth horizon (20-year for process equipment; 50-year for basins, tanks, and buildings). CONSULTANT will develop high-level project descriptions, site layouts, Class V cost estimates, and life cycle cost analyses for each alternative.

5.3.2 Drinking Water Supply and Treatment Alternatives Workshop (4 hours, in-person)

CONSULTANT will facilitate a four-hour in-person workshop to discuss review findings and alternatives developed for drinking water supply and treatment. CONSULTANT and COUNTY will review the high-level alternative descriptions, layouts, and cost estimates developed by the CONSULTANT. Workshop will include a collaborative multi-criteria decision analysis (MCDA) exercise in which the CONSULTANT and the COUNTY will develop evaluation criteria, weight evaluation criteria, use these criteria to determine the most favorable alternative to be further developed.

5.3.3 Draft IWMP Module 4: Drinking Water Supply and Treatment Alternatives

CONSULTANT will compile review findings, alternatives suggested, and a workshop summary into Draft Module 4: Drinking Water Supply and Treatment Alternatives. This module will contain:

- Descriptions of alternatives presented with pros and cons of each.
- Comparison of costs, operations and maintenance demands, and layouts for each alternative.
- A review of the MCDA exercise and the selected alternative.

CONSULTANT will provide Module 4 as a draft only as part of this task. COUNTY review comments will be tracked in an Excel spreadsheet and incorporated into the Pre-Final and Final versions of the IWMP to be compiled in Task 7.4.

5.4 Drinking Water Distribution Alternatives Development

5.4.1 Drinking Water Distribution Alternatives Development

CONSULTANT will investigate alternatives for improvements to the COUNTY's potable water distribution system with regards to the following:

- Asset risk
- Hydraulics and system pressures
- Expansion and capacity improvements
- Water age and maintenance of water quality

CONSULTANT will evaluate alternatives for areas with potential for improvements based on the results of the potable water hydraulic model (Task 3.3) and interviews with COUNTY staff.

CONSULTANT will size piping, pumping, and storage alternatives based on the 50-year growth horizon as well as any areas where future expansion is planned. CONSULTANT will develop high-level project descriptions, site layouts, Class V cost estimates, and life cycle cost analyses for each alternative.

5.4.2 Drinking Water Distribution Alternatives Workshop (4 hours, in-person)

CONSULTANT will facilitate a four-hour in-person workshop to discuss review findings and alternatives developed for drinking water distribution. CONSULTANT and COUNTY will review the high-level alternative descriptions, layouts, and cost estimates developed by the CONSULTANT. Workshop will include a collaborative MCDA exercise in which the CONSULTANT and the COUNTY will develop evaluation criteria, weight evaluation criteria, use these criteria to determine the most favorable alternative to be further developed.

5.4.3 Draft IWMP Module 5: Drinking Water Distribution Alternatives

CONSULTANT will compile review findings, alternatives suggested, and a workshop summary into Draft Module 5: Drinking Water Distribution Alternatives. This module will contain:

- Descriptions of alternatives presented with pros and cons of each.
- Comparison of costs, operations and maintenance demands, and layouts for each alternative.
- A review of the MCDA exercise and the selected alternative.

CONSULTANT will provide Module 5 as a draft only as part of this task. COUNTY review comments will be tracked in an Excel spreadsheet and incorporated into the Pre-Final and Final versions of the IWMP to be compiled in Task 7.4.

5.5 Septic to Sewer Conversion Planning

CONSULTANT will review the existing collection system service area, network, assets, and capacity as well as any existing septic to sewer planning documents.

CONSULTANT will develop a preliminary plan for septic to sewer conversion through the following evaluation steps:

- Group areas currently on septic into cohorts based on location, environmental sensitivity, disadvantaged status, and other relevant factors.
- Develop a prioritization of cohorts for septic to sewer conversion.
- Approximate additional wastewater treatment capacity needed for each cohort.
- Develop preliminary sizing and locations for conveyance piping, lift stations, and storage.

Septic to Sewer Plan to be discussed at Collection System Alternatives Workshop and incorporated into IWMP Module 6: Collection System Alternatives.

5.6 Collection System Alternatives Development

5.6.1 Collection System Improvements Alternatives Development

CONSULTANT will investigate alternatives for collection system improvements by first pulling in findings from growth projections (Task 5.2) and septic to sewer planning (Task 5.5)

Proposed collection system improvements including the following:

- Asset risk
- Conveyance improvements
 - Gravity
 - Vacuum
 - Step
 - Grinder
- Aboveground storage in up to 2 locations
- Transfer pumping between up to 2 sewersheds

CONSULTANT will size piping and process equipment for the appropriate growth horizon (20-year for process equipment; 50-year for piping, tanks, and buildings). CONSULTANT will develop high-level project descriptions, site layouts, Class V cost estimates, and life cycle cost analyses for each alternative.

5.6.2 Collection System Alternatives Workshop (4 hours, in-person)

CONSULTANT will facilitate a four-hour in-person workshop to discuss review findings and alternatives developed for collection system alternatives. CONSULTANT and COUNTY will review the high-level alternative descriptions, layouts, and Class V cost estimates developed by the CONSULTANT. Workshop will include a collaborative MCDA exercise in which the CONSULTANT and the COUNTY will develop evaluation criteria, weight evaluation criteria, use these criteria to determine the most favorable alternative to be further developed.

5.6.3 Draft IWMP Module 6: Collection System Alternatives

CONSULTANT will compile review findings, alternatives suggested, and a workshop summary into Draft Module 6: Collection System Alternatives. This module will contain:

- Descriptions of alternatives presented with pros and cons of each.
- Comparison of costs, operations and maintenance demands, and layouts for each alternative.
- A review of the MCDA exercise and the selected alternative.

CONSULTANT will provide Module 6 as a draft only as part of this task. COUNTY review comments will be tracked in an Excel spreadsheet and incorporated into the Pre-Final and Final versions of the IWMP to be compiled in Task 7.4.

5.7 Wastewater Treatment and Effluent Management Alternatives Development

5.7.1 Wastewater Treatment & Effluent Management Alternatives Development

CONSULTANT will investigate alternatives for wastewater treatment and effluent management. CONSULTANT will develop up to three process improvements at each plant to achieve AWT compliance. Supplemental modeling in Biowin, CONSULTANT's VisualSpace software, and Visual Hydraulics will be performed as needed to support alternative development.

CONSULTANT will investigate alternatives for effluent management including the following:

- Non-potable reuse system expansion
- Natural treatment solutions
- Underground injection expansion

CONSULTANT will also investigate alternatives for improvements to biosolids treatment and management, including consideration of centrate treatment.

CONSULTANT will size basins and major process equipment for the appropriate growth horizon (20-year for process equipment; 50-year for basins, tanks, and buildings). CONSULTANT will develop high-level project descriptions, site layouts, Class V cost estimates, and life cycle cost analyses for each alternative.

5.7.2 Wastewater Treatment & Effluent Management Alternatives Workshop (4 hours, in-person)

CONSULTANT will facilitate a four-hour in-person workshop to discuss review findings and alternatives developed for wastewater treatment and effluent management alternatives. CONSULTANT and COUNTY will review the high-level alternative descriptions, layouts, and Class V cost estimates developed by the CONSULTANT. Workshop will include a collaborative MCDA exercise in which the CONSULTANT and the COUNTY will develop evaluation criteria, weight evaluation criteria, use these criteria to determine the most favorable alternative to be further developed.

5.7.3 Draft IWMP Module 7: Wastewater Treatment & Effluent Management Alternatives

CONSULTANT will compile review findings, alternatives suggested, and a workshop summary into Draft Module 7: Wastewater Treatment and Effluent Management. This module will contain:

- Descriptions of alternatives presented with pros and cons of each.
- Comparison of costs, operations and maintenance demands, and layouts for each alternative.
- A review of the MCDA exercise and the selected alternative.

CONSULTANT will provide Module 7 as a draft only as part of this task. COUNTY review comments will be tracked in an Excel spreadsheet and incorporated into the Pre-Final and Final versions of the IWMP to be compiled in Task 7.4.

5.8 One Water Integrated Alternatives Development

5.8.1 One Water Integrated Alternatives Development

CONSULTANT will review the COUNTY's existing experience with beneficial reuse solutions such as:

- Reuse water
- Indirect and direct potable reuse (IPR/DPR)
- ASR
- Nature-based solutions

CONSULTANT will also review capital improvement plans for other departments (e.g., stormwater, public works, etc.) to evaluate synergies. CONSULTANT will use findings from these reviews to develop suitable alternatives which will integrate water use across multiple disciplines.

CONSULTANT will size basins and major process equipment for the appropriate growth horizon (20-year for process equipment; 50-year for basins, tanks, and buildings). CONSULTANT will develop high-level project descriptions, site layouts, Class V cost estimates, and life cycle cost analyses for each alternative.

5.8.2 One Water Integrated Alternatives Workshop (4 hours, in-person)

CONSULTANT will facilitate a four-hour in-person workshop to discuss review findings and alternatives developed for One Water integrated alternatives. CONSULTANT and COUNTY will review the high-level alternative descriptions, layouts, and Class V cost estimates developed by the CONSULTANT. Workshop will include a MCDA exercise in which the CONSULTANT and the COUNTY will develop evaluation criteria, weight evaluation criteria, use these criteria to determine the most favorable alternative to be further developed.

5.8.3 Draft IWMP Module 8: One Water Integrated Alternatives

CONSULTANT will compile review findings, alternatives suggested, and a workshop summary into Draft Module 8: One Water Integrated Alternatives. This module will contain:

- Descriptions of alternatives presented with pros and cons of each.
- Comparison of costs, operations and maintenance demands, and layouts for each alternative.
- A review of the MCDA exercise and the selected alternative.

CONSULTANT will provide Module 8 as a draft only as part of this task. COUNTY review comments will be tracked in an Excel spreadsheet and incorporated into the Pre-Final and Final versions of the IWMP to be compiled in Task 7.4.

Task 5 Assumptions, Workshops, and Deliverables

Assumptions:

- COUNTY to ensure that all necessary personnel are invited to participate in MCDA exercises.

Meetings/Workshops:

- Drinking Water Supply Workshop (2 hours, in-person)
- Drinking Water Treatment, & Concentrate Management Workshop (2 hours, in-person)
- Collection System Workshop (2 hours, in-person)
- Wastewater Treatment, and Effluent Management Workshop (2 hours, in-person)
- One Water Integrated Alternatives Workshop (2 hours, in-person)

Deliverables:

- Draft Module 4: Drinking Water Supply Alternatives
- Draft Module 5: Drinking Water Treatment & Concentrate Alternatives
- Draft Module 6: Collection System Alternatives
- Draft Module 7: Wastewater Treatment & Effluent Management Alternatives
- Draft Module 8: One Water Integrated Alternatives

Task 6 Develop Solutions and Schedule

6.1 Prioritization

6.1.1 Prioritization Review

CONSULTANT will review decision criteria defined in previous master plans as well as priorities and drivers defined in Task 2 and criteria defined in Task 5 MCDA exercises. CONSULTANT will use this information to develop draft evaluation criteria and weights which can be applied across all water disciplines evaluated and applied to individual projects which will be broken out in future Task 6.2.1. Life cycle cost evaluations will be included as a prioritization criterion.

6.1.2 Prioritization Workshop (2-hour workshops, in-person)

CONSULTANT will facilitate the initial two-hour in-person workshop to develop prioritization criteria (subcriteria if needed) and weights. Workshop will include a collaborative MCDA exercise in which the CONSULTANT and the COUNTY will develop organizational evaluation criteria, define criteria, and weight evaluation criteria. CONSULTANT will also discuss plan and/or results from public input on evaluation criteria and weighting.

CONSULTANT will facilitate the second two-hour in-person workshop to develop score projects for prioritization criteria or subcriteria. Workshop will include a collaborative

MCDA exercise in which the CONSULTANT and the COUNTY will score projects carried forward from Task 5.

6.2 Capital Planning

6.2.1 Capital Planning Review

CONSULTANT will break out manageable capital improvement projects, studies, programmatic improvements, and other project types from the alternatives selected in Task 5. CONSULTANT will review these projects against the COUNTY'S past and current CIPs for any crossover between existing projects and proposed projects. CONSULTANT will develop capital project descriptions and cost estimates in the COUNTY's preferred format(s) and will populate CONSULTANT's EconH2O tool with proposed projects, costs, and draft scheduling. CONSULTANT will perform life cycle cost analyses (LCCA) for all major capital projects proposed.

6.2.2 Financial Capability Assessment (FCA)

CONSULTANT and COUNTY will evaluate impact of proposed capital improvement projects on user rates. CONSULTANT will provide the additional capital and annual operational costs of the potential projects to the COUNTY for input into existing rate models. Up to four alternative implementation schedules for proposed projects will be provided to assess potential rate impacts. The COUNTY will then provide future rate projections for use within the FCA.

CONSULTANT will build a FCA spreadsheet tool that integrates baseline demographic, financial, cost, and funding data to forecast socioeconomic impacts of the potential projects. As part of this task, the CONSULTANT will work with the COUNTY to identify important metrics and approaches that will be used to guide the FCA evaluation.

6.2.3 Capital Planning Workshop (2 hours, in-person)

CONSULTANT will facilitate a two-hour, in-person workshop to review proposed capital improvement project descriptions, cost, and timing; walk through and update EconH2O model; and review rate impacts from FCA. A workshop summary will be incorporated into Draft IWMP Module 9: Solutions and Schedule.

6.3 Alternative Funding

6.3.1 Alternative Funding Review

CONSULTANT will populate CONSULTANT's Funding Alignment tool with proposed capital improvement projects to evaluate eligible grant and loan funding opportunities for proposed projects. This task does not include any formal grant/loan application assistance or a comprehensive eligibility review in terms of scheduling, budgeting, financing, project delivery method, etc.

6.3.2 Alternative Funding Workshop (2 hours, in-person)

CONSULTANT will facilitate a two-hour, in-person workshop to review available funding programs, eligibility, and timeline; walk through Alignment Tool outputs; and adjust, as needed. A workshop summary will be incorporated into Draft IWMP Module 9: Solutions and Schedule.

6.4 Draft IWMP Module 9: Solutions and Schedule

CONSULTANT will compile the following items into Draft IWMP Module 9: Solutions and Schedule:

- Review of prioritization criteria and benefit scoring.
- Description of cost estimate sources and level of detail.
- List of proposed capital improvement projects with timeline and descriptions.
- Explanation of projected rate increases and socioeconomic impacts of proposed improvements from FCA tool.
- Overview of available funding programs and eligibility.
- Summary of project and funding source matches for further investigation.

CONSULTANT will provide Module 9 as a draft only as part of this task. COUNTY review comments will be tracked in an Excel spreadsheet and incorporated into the Pre-Final and Final versions of the IWMP to be compiled in Task 7.4. Project descriptions, EconH2O, FCA, and Alignment Tool to be provided as separate deliverables.

Task 6 Assumptions, Workshops, and Deliverables

Assumptions:

- CONSULTANT will use COUNTY's existing rate model for FCA analysis.
- CONSULTANT will not provide grant/loan application assistance as part of this scope.

Meetings/Workshops:

- Prioritization Workshop (2 hours, in-person)
- Capital Planning Workshop (2 hours, in-person)
- Alternative Funding Workshop (2 hours, in-person)

Deliverables:

- Draft Module 9: Solutions and Schedule
- Funding Alignment Tool (Excel)
- EconH2O Capital Planning Tool (Excel)
- FCA tool (Excel)
- Capital project descriptions

Task 7 Implement and Measure Success

7.1 Internal Digital IWMP Platform Development

7.1.1 Digital Platform Framework Requirements

CONSULTANT will work with the COUNTY to develop digital platform specifications to meet COUNTY goals and objectives. CONSULTANT and COUNTY will define work and data flow processes, including connections with existing COUNTY platforms. CONSULTANT will develop a digital platform framework requirements document.

7.1.2 Digital Platform Framework Requirements Meeting (1 hour, in-person)

CONSULTANT will facilitate meeting with COUNTY IT, management, and operations to discuss:

- Goals and objectives for the Digital IWMP Platform
- Existing COUNTY platforms to connect with the Digital IWMP Platform
- Data output formats from COUNTY platforms

- Internal and external communication needs
- Platform housing preferences

7.1.3 Digital Platform Selection (1 hour, in-person)

CONSULTANT will develop and evaluate the advantages and disadvantages and costs for up to three (3) digital platform solutions. CONSULTANT and COUNTY will select digital platform and housing site.

7.1.4 Digital Platform Framework Selection Meeting (1 hour, in-person)

CONSULTANT will facilitate a meeting with COUNTY IT, management, and operations to discuss:

- Platform advantages and disadvantages
- Platform costs
- Implementation requirements

7.1.5 Document Storage Development

CONSULTANT will work with the COUNTY to develop a document storage system within the selected digital platform that allows for document sharing and collaboration between the CONSULTANT and COUNTY. CONSULTANT will develop a document sharing location and filing system and share with the COUNTY for approval.

7.1.6 Data Visualization Development

CONSULTANT will work with the COUNTY to develop an internal data visualization tool to track progress on IWMP implementation and key data that inform project sequencing and scheduling. CONSULTANT and COUNTY will coordinate regarding metrics to be tracked on dashboards, where/how the data visualizations will be hosted, and how data will be formatted and updated in the visualizations. Possible metrics to track include:

- Project delivery
- Asset condition and renewal
- Septic to sewer conversions
- Public engagement with website, social media profiles, and other channels
- Utility rates and CIP investments
- Developer service requests
- System flows and demands
- Community benefits

7.1.7 Data Visualization Coordination Meetings (1 hour each, virtual)

CONSULTANT will facilitate up to three (3) coordination meetings with COUNTY IT, management, and operations to discuss:

- Goals and metrics for display
- Access, hosting, and/or transitioning of dashboard to COUNTY
- Data connections to existing COUNTY platforms and tools
- Review of data visualization structures and preferences

7.2 Customer Satisfaction Web Survey

7.2.1 Web Survey Development

CONSULTANT will work with the COUNTY to develop a web survey to collect information on customer satisfaction, concerns, and priorities. CONSULTANT and

COUNTY will coordinate regarding questions to be included on survey, review and replay of survey results, and how survey data will be monitored and incorporated into decision-making.

7.2.2 Web Survey Coordination Meetings (1 hour each, virtual)

CONSULTANT will facilitate up to three (3) coordination meetings with COUNTY IT, management, and public relations staff to discuss:

- Survey content
- Review process, customer verification process, display of results
- How survey will be used to improve utility accountability
- Cybersecurity considerations
- Incentives for customer participation
- Other survey delivery methods, if needed
- Non-English survey options

7.3 Draft IWMP Module 10: Implement and Measure Success

CONSULTANT will develop a Draft IWMP Module 10: Implement and Measure Success which will include the following topics:

- Description of metrics selected by COUNTY for internal monitoring.
- Explanation of how to use and troubleshoot internal and external data visualizations and external customer survey.
- Suggestions for updates to digital platform, data visualizations, and survey.
- Suggestions of other methods for measuring success.
- Development of an adaptive management process (rolling CIP).

CONSULTANT will provide Module 10 as a draft only as part of this task. COUNTY review comments will be tracked in an Excel spreadsheet and incorporated into the Pre-Final and Final versions of the IWMP to be compiled in Task 7.4

7.4 Compile and Deliver IWMP

7.4.1 Deliver Pre-Final IWMP

CONSULTANT will develop comment tracking log to track COUNTY comments on draft deliverables and resolutions. CONSULTANT will review and address COUNTY comments on draft modules in a Pre-Final version of the IWMP and record resolutions in the comment tracking log.

7.4.2 Pre-Final IWMP Review Meeting (2 hours, in-person)

Following the COUNTY's review of the Pre-Final IWMP, CONSULTANT will facilitate a 2-hour in-person meeting to walk through comment resolutions and discuss any remaining questions or concerns prior to delivery of the Final IWMP. CONSULTANT and COUNTY will discuss the preferred method of delivering the IWMP to the COUNTY and handing over full access and updating rights to the COUNTY.

7.4.3 Deliver Final IWMP

Following the Pre-Final IWMP Review Meeting and resolution of any outstanding comments, CONSULTANT will deliver the full IWMP and comment tracking log to the COUNTY. If desired, CONSULTANT will provide the full IWMP in PDF format for record keeping purposes. The Final IWMP will be delivered along with all additional deliverables.

Task 7 Assumptions, Workshops, and Deliverables

Assumptions:

- COUNTY to host web survey on its own website and provide CONSULTANT with any access rights needed to develop the survey.
- Project schedule is based on as assumed two-week review period of the Pre-Final IWMP by the COUNTY.

Meetings/Workshops:

- Internal dashboard coordination meetings (up to 3) (1 hour each, virtual)
- External webpage coordination meetings (up to 3) (1 hour each, virtual)
- Pre-Final IWMP Review Meeting (2 hours, in-person)

Deliverables:

- Draft Module 10: Implement and Measure Success
- IWMP progress dashboard (up to 6 dashboards will be developed)
- Customer satisfaction web survey
- Pre-Final IWMP with comment tracking log
- Final IWMP

Schedule

For a full task-level schedule, see Appendix A.

Assumptions

- Incremental IWMP Modules will be individually submitted in Draft versions only. COUNTY comments on individual modules will be incorporated into Pre-Final IWMP.
- Two weeks are assumed for COUNTY review of deliverables.
- Two weeks are assumed for CONSULTANT revisions and quality control reviews of COUNTY-reviewed deliverables.
- Schedule is contingent upon timely delivery of data, workshop scheduling, and deliverable review by COUNTY.
- The CONSULTANT shall perform no services contemplated to merit compensation beyond that provided for in this scope unless such services shall be provided for by appropriate written authorization via an amendment to the task order. Such change orders will be issued by the Board of County Commissioners' Purchasing Department.

Compensation

The COUNTY shall compensate the CONSULTANT a lump sum amount totaling \$2,475,840. An additional allowance of \$742,750 (30% of lump sum value) will be made available to the CONSULTANT upon request and approval by the COUNTY. The total contract value, including optional allowance, is \$3,218,590.

Professional services will be invoiced monthly in accordance with the CONSULTANT's estimated percent complete by task. A progress report summarizing work completed by task will be submitted with each invoice. See Exhibit B for fee breakdown.

Project Team

CONSULTANT's key team members include the following:

- Principal-in-Charge – Brenda Van Ravenswaay
- Project Manager – Chance Lauderdale
- Deputy Project Manager – Logan Whitehouse
- Integrated Planning Consultant – Trent Stober
- Strategic Communications Consultant – Beth Frady
- Strategic Communications Consultant – Meagan Morvant
- Resiliency/Vulnerability Assessment Consultant – Sharon Wright
- Coastal Resilience Consultant – Angela Schedel
- Alternative Delivery Consultant – David O'Connor
- Project Engineer III – Ryan Messer
- Project Engineer III – Wesley Oehmig
- Project Engineer I – Carlee Fullenkamp

APPENDIX A – SCHEDULE

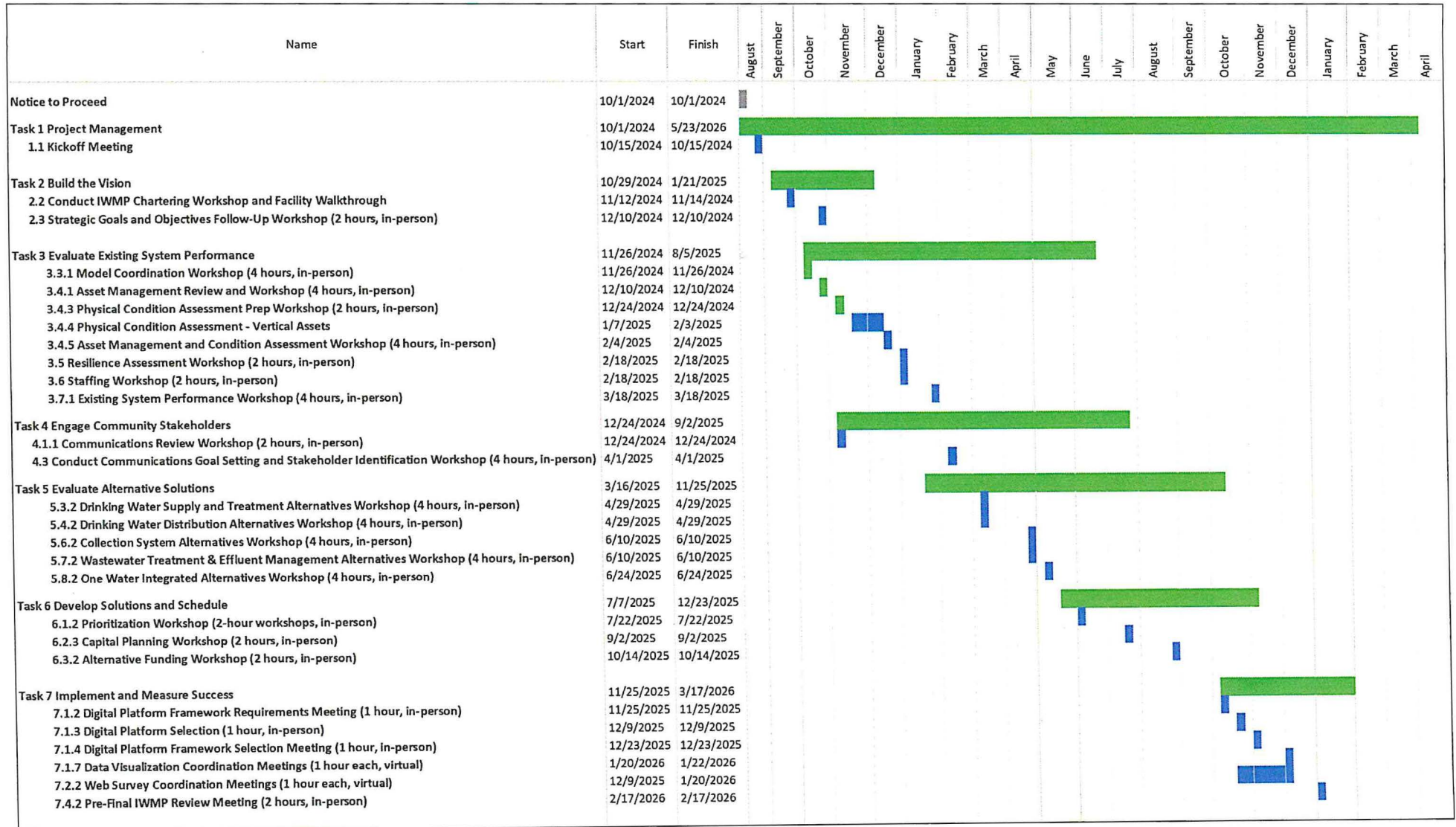


Exhibit B
Fee Breakdown

No.	Description	Total Labor	Labor Costs	Direct Costs (Travel, Materials)	Total Costs	Total with 30% Owner's Allowance
1	Project Management					
1.1	Kickoff Meeting (2 hours, in-person)	110	\$22,880	\$4,140	\$27,020	
1.2	Progress Meetings (20, 1 hour each, virtual)	74	\$20,800	\$0	\$20,800	
1.3	Schedule Management	166	\$37,700	\$0	\$37,700	
1.4	General Project Management	526	\$105,900	\$0	\$105,900	
	Subtotal 1 Project Management	876	\$187,280	\$4,140	\$191,420	
2	Build the Vision					
2.1	Initial Data Request and Review	152	\$32,880	\$0	\$32,880	
2.2	Conduct IWMP Chartering Workshop and Facility Walkthrough	134	\$33,180	\$6,480	\$39,660	
2.3	Strategic Goals And Objectives Follow-up Workshop (2 hours, in-person)	76	\$20,120	\$5,520	\$25,640	
2.4	Draft IWMP Module 1: Visioning	121	\$23,830	\$8,360	\$32,190	
	Subtotal 2 Build the Vision	483	\$110,010	\$20,360	\$130,370	
3	Evaluate Existing System Performance					
3.1	Detailed Desktop Data Review	79	\$16,560	\$0	\$16,560	
3.2	Vertical Asset Capacity Assessment	68	\$13,800	\$0	\$13,800	
3.3	System Modeling / Linear Asset Capacity Assessment	1,692	\$308,400	\$35,300	\$343,700	
3.4	Asset Management and Condition Assessment	2,774	\$576,880	\$60,590	\$637,470	
3.5	Resilience Coordination Workshop (2 hours, in-person)	108	\$23,680	\$2,360	\$26,040	
3.6	Staffing Capacity Assessment Workshop (2 hours, in-person)	104	\$28,600	\$2,770	\$31,370	
3.7	Existing System Performance Summary	289	\$67,750	\$4,570	\$72,320	
	Subtotal 3 Evaluate Existing System Performance	5,114	\$1,035,670	\$105,590	\$1,141,260	
4	Engage Community Stakeholders					
4.1	Review of Communication Efforts and Tools	78	\$14,420	\$2,840	\$17,260	
4.2	Develop Community Analytics Profile	38	\$7,100	\$0	\$7,100	
4.3	Conduct Communications Goal Setting and Stakeholder Identification Workshop (2 hours, in-person)	104	\$21,320	\$4,000	\$25,320	
4.4	Public Involvement Meetings	352	\$62,330	\$19,430	\$81,760	
4.5	Draft IWMP Module 3 – Stakeholder Engagement	91	\$18,290	\$0	\$18,290	
4.6	Collateral Development	448	\$77,920	\$0	\$77,920	
4.7	Project Website Development and Maintenance	300	\$56,960	\$0	\$56,960	
	Subtotal 4 Engage Community Stakeholders	1,411	\$258,340	\$26,270	\$284,610	
5	Evaluate Alternative Solutions					
5.1	Growth Projections	128	\$24,800	\$0	\$24,800	
5.2	Level of Service Updates	68	\$13,800	\$0	\$13,800	
5.3	Drinking Water Supply and Treatment Alternatives Development	319	\$62,810	\$2,230	\$65,040	
5.4	Drinking Water Treatment & Concentrate Alternatives Development	319	\$62,810	\$2,230	\$65,040	
5.5	Septic-to-Sewer Conversion Planning	90	\$17,500	\$0	\$17,500	
5.6	Collection System Alternatives Development	307	\$58,610	\$2,320	\$60,930	
5.7	Wastewater Treatment & Effluent Management Alternatives Development	389	\$77,310	\$3,000	\$80,310	
5.8	One Water Integrated Alternatives Development	331	\$67,010	\$3,990	\$71,000	
	Subtotal 5 Evaluate Alternative Solutions	1,951	\$384,650	\$13,770	\$398,420	
6	Develop Solutions and Schedule					
6.1	Prioritization	130	\$27,220	\$3,710	\$30,930	
6.2	Capital Planning	236	\$60,440	\$4,900	\$65,340	
6.3	Alternative Funding	124	\$28,100	\$5,490	\$33,590	
6.4	Draft IWMP Module 9: Solutions and Schedule	117	\$22,850	\$0	\$22,850	
	Subtotal 6 Develop Solutions and Schedule	607	\$138,610	\$14,100	\$152,710	
7	Implement & Measure Success					
7.1	Internal Digital IWMP Platform Development	364	\$88,830	\$12,250	\$101,080	
7.2	Customer Satisfaction Web Survey	71	\$15,500	\$0	\$15,500	
7.3	Draft IWMP Module 10: Implement and Measure Success	113	\$21,170	\$0	\$21,170	
7.4	Compile and Deliver IWMP	168	\$35,160	\$4,140	\$39,300	
	Subtotal 7 Implement and Measure Success	716	\$160,660	\$16,390	\$177,050	
TOTAL, hours		11,158				
TOTAL, dollars			\$2,275,220	\$200,620	\$2,475,840	\$3,218,590