

DETAILED SCOPE OF SERVICES

The following outlines the Scope of Work for the 2020 Water Resources Team Proposal.

TASK 1.0 UWMP PROGRAM CONTROLS

1.1 Program Controls

- Provide oversight, manage communication, assign resources, and coordinate work efforts to align with the District priorities.
- Compile and monitor budget, cost, and cash flow information for the Project.
- Monitor scope, including tracking approved out of scope work.
- Administer subcontracts.
- Prepare monthly invoices and progress reports to the District.
- Assumptions: The Cost Proposal is based on an assumed project phase duration of 14 months. Based on completion of Tasks 2-4. It is anticipated that additional technical efforts and program controls to support the CDP will be managed on a time and materials basis not to exceed the Cost Proposal for Task 5. It is likely that the efforts necessary to obtain the CDP will extend beyond the work anticipated by this scope.

1.2 Program Schedule

- Develop, maintain, and monitor the master program schedule. Create a baseline program schedule and produce updated schedules as required.

DELIVERABLE(S): An overall project schedule shall be developed, reviewed, revised, and updated as needed.

TASK 2.0 UWMP INITIAL SCOPE OF SERVICES

2.1 Review of Documents and Data: Analysis and Evaluation

- Review and develop familiarity with the following documents to identify, clarify and/or define critical issues that overlap the CDP and the 2020 UWMP:
 - (1) District's 2015 UWMP
 - (2) District Master Water Plan
 - (3) Title 4 of the District's Municipal Code
 - (4) 2013 Water Use Efficiency Plan
 - (5) Water licenses and prior CDPs
 - (6) Historical pumping data, including recharge of percolated wastewater adjacent to San Simeon creek
 - (7) Agreements with other parties related to agricultural or riparian pumping

- (8) Reports in the 2017 SEIR regarding the AWTP's source of supply, operations, injection of treated water, restrictions, permits and other relevant data
- (9) Other plans, programs, and reports included in the attached bibliography of the RFP for this project
- Kickoff & Background Data Review Meeting
 - (1) Plan, organize, and conduct one kick-off meeting to:
 - (2) Discuss project parameters
 - (3) Review scheduling constraints
 - (4) Establish roles and responsibilities
 - (5) Review scope, schedule, and deliverables
 - (6) Review historical water production graphically illustrated by month by creek since 2000, wastewater discharges to San Simeon Creek watershed, net production from San Simeon Creek watershed, and provisions of the District's water rights licenses and CDPs.
 - (7) Review inconsistencies, if any, and differing assumptions between documents supporting the 2015 UWMP and those supporting the SEIR and CDP application.

DELIVERABLE(S): Electronic copies of agenda and meeting materials at least two (2) working days prior to the meeting. Summary of action items within five (5) working days following the meeting.

2.2 Water Demand Projections

- Develop water demand projections based on the following data and scenarios:
 - (1) Demographic data (e.g., population, housing unit, and employment projections, etc.) from General Plans and Local Coastal Plans of the County of San Luis Obispo and other appropriate sources
 - (2) Historical and current water production data and consumption data by user class (single-family residential, multifamily residential, commercial, institutional, dedicated irrigation, fire, etc.). Trends in water use reduction at the District since 2000 should be analyzed and factored into the demand projection update
 - (3) Historical and projected water savings estimates from on-going District efficiency programs assumed to be provided by the District
 - (4) Potential changes in demographics that may result from changes in residential occupancy rates and impacts of ADUs assumed to be provided by the District
 - (5) Any other relevant information that WSC feels is necessary or beneficial for this task. The District will provide requested and relevant information in a timely manner.

- (a) It is assumed any future water use efficiency savings will be developed by the District's conservation consultant. WSC will work with the District and its conservation consultant in the initial phase of the Project to scope additional technical analysis needed by the District's conservation consultant for the most applicable methodology and assumptions to use based on available data and preliminary analysis.
- (6) Demand scenarios
 - (a) Existing development
 - (b) Development that is allowable pursuant to the District's Water Code Section 350 declaration of water shortage emergency assumed to be provided by the District
 - (c) Land use and development based on build-out included in the Local Coastal Plan adopted by the County of San Luis Obispo assumed to be provided by the District
- Water Demand Projections Staff Conference Call
 - (1) Facilitate a conference call with District staff to establish demand projection methodologies and assumptions in preparation for WSC and the District's participation in one Coastal Commission conference call and for District staff's participation in additional meetings with the Coastal Commission and the District Board of Directors
- Water Demand Projections Coastal Commission Conference Call
 - (1) Facilitate a conference call with District staff and Coastal Commission staff to establish demand projection methodologies and assumptions

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2.3 Water Shortage Contingency Plan Update Evaluation

- Develop Water Shortage Contingency Plan recommendations as follows:
 - (1) Initial suggestions to the District on how the existing plan might be modified to be consistent with guidelines established by DWR.
 - (2) Options for modifying the existing Water Shortage Contingency Plan to meet the District's Board of Directors' goal to utilize the AWTP in a manner that will avoid community impacts associated with Stage 3 drought emergencies.
 - (3) It is assumed that WSC will adapt existing information to DWR's new requirements to the extent possible with information provided by the District. Any additional analysis or information needed to meet DWR's requirements is not included within the Cost Proposal for this task.
- District Staff Water Shortage Contingency Plan Recommendations Meeting
 - (1) Facilitate one conference call with District staff to discuss results of Water Shortage Contingency Plan recommendations development in preparation for WSC and the District's

participation in one Coastal Commission conference call and for District staff's participation in additional meetings with the Coastal Commission and the District Board of Directors

- District Staff and Coastal Commission Water Shortage Contingency Plan Recommendations Conference Call

- (1) Facilitate one conference call with District staff to discuss results of Water Shortage Contingency Plan recommendations development

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TASK 3.0 FINAL PREPARATION OF THE 2020 UWMP

3.1 Plan Preparation

- Describe the purpose and background of the UWMP, coordination with other agencies and public outreach efforts, and plan adoption and submittal required by the UWMP Act.

3.2 System Description

- Describe the District's water distribution system, service area, population and demographics, climate, government structure, and known development projects.

3.3 System Demands

- WSC to review District staff updates to the following items based on information compiled as part of Task 2.2:
 - (1) Update historical water demands based on customer consumption and total production data from 2016 through 2020.
 - (2) Revise the 2020 UWMP SB7 baseline and target population calculation methodology based on DWR's Methodologies, analyze different target calculation methods, and calculate possible adjustments to the 2020 compliance water use based on DWR's Methodology 8. Incorporate the revised baseline, target, and compliance values into the 2020 UWMP water demands and supply and demand comparisons as necessary.
 - (3) Incorporate the results of the AWWA Water Audit software distribution system water loss audit prepared by the District.
 - (4) Develop updated water demand projections through 2040 including SB7 targets and lower income household requirements.
 - (5) Update and describe the Water Use Reduction Plan based on changes since the 2015 UWMP.

3.4 System Supplies

- Describe water supply sources, existing and projected supply volumes, potential future water supply options, and future water supply projects based on information provided by the District.

3.5 Supply Reliability and Water Shortage Contingency Planning

- WSC to review District staff updates to the following items based on information compiled as part of Task 2.3:

- Update and describe factors affecting supply reliability.

- (1) Update the District's Water Shortage Contingency Plan integrating components from the 2015 UWMP and the new State requirements to produce a 2020 Water Shortage Contingency Plan. Development of the Water Shortage Contingency Plan will provide a response framework and action plan for emergency and other shortage conditions, including drought. The Water Shortage Contingency Plan also provides the basis for the Water Shortage Assessment Report, due annually beginning on June 1, 2022.

The Water Shortage Contingency Plan is generally expected to contain the following information:

- i. Annual Water Budget Forecast Procedures – Define the process, data inputs, and water year schedule used to develop the Annual Water Budget.
- ii. Annual Water Budget Assessment Methodology – Define the methodology necessary to conduct an Annual Water Budget Forecast assessing shortage risks.
- iii. Annual Water Budget Evaluation Criteria – Define a set of evaluation criteria that will be used to conduct the Water Budget Forecast.
- iv. Shortage Levels – Include six standard shortage levels, representing the actual shortage, or predicted shortage determined by the Annual Water Budget Forecast.
- v. Shortage Response Actions (SRA) – Define locally appropriate short-term water efficiency and/or demand reduction actions, supply augmentation, and/or operational changes necessary to respond to actual or predicted shortage conditions.
- vi. Communication Plan – Describe planned communication strategies and actions intended to quickly inform customers, the public, and regional and State interests, about current shortages or predicted shortages.
- vii. Customer Compliance, Enforcement, and Appeal/Exemption Procedures – Describe methods and procedures in place to gain customer compliance, enable enforcement to gain compliance, and enable customer appeal process for unique circumstances.
- viii. Implementation Authorities – Demonstrate specific ordinances, resolutions, or other authorities are in place to quickly implement SRAs.
- ix. Financial Plan for Drought Conditions – Describe the management of revenue and expense variances when SRAs are triggered, including but not limited to, customer rate adjustments, or use of financial reserves.
- x. Monitoring and Reporting Requirements and Procedures – Outline internal and external monitoring and reporting procedures to assure appropriate data are being collected, tracked, and analyzed for purposes of monitoring customer compliance, and to meet DWR reporting requirements.
- xi. Re-evaluation and Improvement Process – Identify procedures for monitoring and evaluating the functionality of the Water Shortage Contingency Plan.

3.6 Demand Management Measures (DMM)

- Update and provide a narrative description of the DMMs implemented by the District based on any changes to DMM implementation since the 2015 UWMP and revised DWR requirements.

3.7 UWMP Checklist

- Update DWR’s UWMP checklist with relevant sections of the UWMP.

3.8 Draft UWMP

- Prepare the Draft UWMP and compile all appendices into an electronic file in PDF format.

DELIVERABLE(S): One (1) electronic copy of the Draft UWMP

- Plan, organize, and conduct one Draft Review Meeting for the District. The purpose of the meeting will be to: (1) review schedule and deliverables; (2) review outstanding data requests; (3) review District comments on the draft; (4) and establish action items and next steps. Draft agendas including an updated data request log and project schedule will be provided at least two days before the meetings. Meeting notes will be provided within one week following the meeting.

DELIVERABLE(S): Electronic copies of agenda and meeting materials at least two (2) working days prior to the meeting. Summary of action items within five (5) working days following the meeting

3.9 Final Draft UWMP

- Incorporate comments and direction from the Draft UWMP Review Meeting. Prepare the Final Draft UWMP and compile all appendices into an electronic file in PDF format.

DELIVERABLE(S): One (1) electronic copy of the Draft UWMP

- Attend one UWMP Public Hearing and Adoption Meeting in which the Board will consider adoption of the UWMP. Provide technical expertise and answer questions posed at the District Board of Directors meetings, prepare and review draft and final agenda reports, and assist with creation of presentations. Based on the input received, WSC will make any necessary adjustments to the Final Draft UWMP.

DELIVERABLE(S): Electronic copies of meeting materials at least one week prior to the meeting.

3.10 Final UWMP, DWR Standardized Reporting Forms and Electronic Submittal

- Compile Final UWMP based on feedback received in the UWMP Public Hearing and Adoption Meeting and the signed adoption resolution
- Report on progress towards meeting water conservation targets specified by SB7 in the standardized water use reporting form established by DWR.
- Prepare and submit an electronic copy of the UWMP to DWR, including any standardized forms, tables, or displays specified by DWR.

DELIVERABLE(S): One (1) electronic copy of the Final UWMP to the District, County, surrounding agencies, wholesale suppliers, DWR, and the California State Library

TASK 4.0 AWTP AND SUPPLY PROTOCOL EVALUATION FOR THE UWMP

4.1 AWTP and Supply Protocol Evaluation

- Develop preliminary AWTP and supply protocol analysis as follows:
 - (1) Alternative scenarios for using the AWTP
 - (2) Identify issues involving the Adaptive Management Plan
 - (3) Develop preliminary protocols for pumping and recharge/release of AWTP product water
 - (4) Prepare for meetings and discussions with staff of the County of San Luis Obispo and the Coastal Commission relating to the District's water supply and possible operating scenarios for the AWTP
- AWTP and Supply Protocol Review Meeting
 - (1) Discuss results of AWTP and supply protocol analysis
- Due to the unknown level of effort that will be required for this task, WSC will allocate the hours and expenses identified in the attached Cost Proposal, which are to be used on a time and materials not-to-exceed basis as directed by the District, to develop preliminary pumping and AWTP protocols to inform development of the UWMP. It is anticipated that through completion of the UWMP Initial Scope of Services and other coordination with regulatory and permitting agencies that additional technical analysis and budget may be required to complete the pumping protocols for the CDP. The place holder level of effort to start those efforts is described in Task 5.

DELIVERABLE(S): Electronic copies of agenda and meeting materials at least two (2) working days prior to the meeting. Summary of action items within five (5) working days following the meeting

TASK 5.0 CDP SUPPORT

5.1 Additional Technical Analysis

- Assist the District in evaluating additional technical analyses needed to obtain a CDP for the AWTP.
- Perform additional Technical Analysis to support the District in obtaining a CDP.
- Additional Technical Analysis Evaluation Review Meeting(s)
 - (1) Supplemental meetings to support the District in obtaining a CDP.

- Due to the unknown level of effort that will be required for this task, WSC will allocate the hours and expenses identified in the attached Cost Proposal, which are to be used on a time and materials not-to-exceed basis as directed by the District, to provide additional technical support services for the CDP. It is anticipated that the CDP process will likely require work beyond this task, however this task is included as a place holder to scope and start the additional technical analysis required. WSC will work with the District staff for scoping and approval prior to conducting any efforts under this task.

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5.2 Permitting Agency Coordination

- In addition to previously identified meetings, it is assumed that there may be additional coordination that is required with District and Permitting Agency Staff to support the District in obtaining a CDP for the AWTP. The tasks included in these meetings may include, but are not limited to the following:
 - (1) Review historical information
 - (2) Define issues that need to be further addressed based on the required findings for the CDP
 - (3) Discuss an agreement on additional technical efforts that may require a contract amendment. Any additional technical efforts will need to be developed in concurrence with staff of the appropriate Resource Agencies to assist the District in obtaining a CDP for the AWTP.
- Due to the unknown level of effort that will be required for this task, WSC will allocate the hours and expenses identified in the attached Cost Proposal, which are to be used on a time and materials not-to-exceed basis as directed by the District, to provide additional permitting agency coordination support services for the CDP. It is anticipated that the CDP process will likely require work beyond this task, however this task is included as a place holder to scope and start the permitting agency coordination and outreach required. WSC will work with the District staff for scoping and approval prior to conducting any efforts under this task.

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