Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108
A Public Service Agency
Phone: (805) 969-4200
www.montsan.org

AGENDA

For the Special Meeting of the Board on:

November 4, 2026

The special meeting of the Governing Board will begin at **2:00 p.m. on November 4, 2026** in the District's Board Room at 1042 Monte Cristo Lane, Santa Barbara, CA 93108.

The public may attend the meeting in person or participate remotely via Zoom using the following virtual meeting details:

By visiting: **https://us02web.zoom.us/j/86118975917**
Or by calling: 1-669-900-6833
Meeting ID**:** 861 1897 5917

---

1. CALL TO ORDER

- **A. ROLL CALL**
- **B. PLEDGE OF ALLEGIANCE**
- **C. PRESIDENT'S REPORT**

2. PUBLIC COMMENT

Public comment on items not on the agenda is **limited to 3 minutes** and is at the discretion of the Board President. For further instructions, please see Instructions for Public Comment on the District's website.

3. COMMITTEE REPORTS

It is recommended that the Board receive and file a report provided by the following committee(s):

- **A.** The Montecito Sanitary District Finance Committee will report on their November 2, 2026 meeting (Page 4).

4. CONSENT CALENDAR

- **A.** Meeting Minutes of the October 14, 2026 Regular Meeting (Page 6)
- **B.** Payables for the period of September 1, 2026 through September 30, 2026 (Page 9)
- **C.** Fiscal Year 2026-27 Unaudited Financial Reports – September 30, 2026 (Page 12)

5. GENERAL MANAGER'S REPORT (PAGE 27)

The General Manager will provide a written report on the District's non-actionable business and operational matters and will provide explanation where requested. Topics include the following:

- **A.** GM Meetings
- **B.** New Administrative Hire
- **C.** Posilipo Lift Station – Automatic Transfer Switch Replacement
- **D.** District Financial Matters
- **E.** Wastewater Treatment Plant Roadmap
- **F.** Flow/Rain Comparison
- **G.** Capital Improvements Projects and Key Effort Status Updates

6. BUSINESS ITEMS

A. AWARD OF CONTRACT – SAN YSIDRO UPSIZING ENGINEERING & DESIGN (PAGE 40)

It is recommended that the Board:

i) Authorize the General Manager to negotiate a contract with Water Systems Consulting, Inc. (WSC) in an amount not to exceed $450,000 to perform design engineering services for the San Ysidro Road Pipeline Capacity Improvements project; and

ii) Authorize the General Manager to approve expenditures of up to ten percent (10%) of the negotiated amount as an amendment allowance for any changes in scope of work.

B. AWARD OF CONTRACT – OLIVE MILL UPSIZING ENGINEERING & DESIGN (PAGE 153)

It is recommended that the Board:

i) Authorize the General Manager to negotiate a contract with BKF Engineers (BKF) in an amount not to exceed $238,000 to perform design engineering services for the Olive Mill Road Pipeline Capacity Improvements project; and

ii) Authorize the General Manager to approve expenditures of up to ten percent (10%) of the negotiated amount as an amendment allowance for any changes in scope of work.

C. WASTEWATER TREATMENT PLANT IMPROVEMENT PROJECT REPORT AND DISCUSSION (PAGE 245)

It is recommended that the Board receive a report from the Wastewater Treatment Plant Improvement Project Ad Hoc Committee and discuss the report content as necessary.

D. REQUESTED BOARD REVIEW OF CAPITAL PROJECT OPTIONS, ALTERNATIVES, AND FUNDING COMPLIANCE (PAGE 254)

It is recommended that the Board discuss and provide direction to Staff regarding the October 27, 2026 letter from Director Johnson regarding "Requested Board Review of Capital Project Options, Alternatives, and Funding Compliance."

7. BOARD COMMUNICATIONS

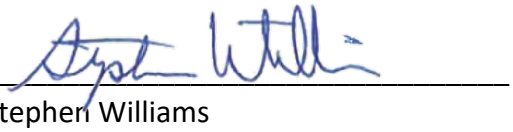
A. Items for future Board meeting

B. Next Board Meeting Date – November 18, 2026

8. ADJOURNMENT

The Montecito Sanitary District conducts its meetings in accordance with the Brown Act. The District also provides alternative methods of remote participation which permit members of the public to observe and address public meetings remotely via telephone or Zoom. These methods of participation can be accessed through the internet link provided at the top of this agenda.

This agenda was posted on the District website, and at the Montecito Sanitary District Bulletin Board in accordance with the requirements of the Brown Act.
Attested by:



Stephen Williams
Business and Administrative Manager/Clerk of the Board

ADA – The Americans with Disabilities Act provides that no qualified individual with a disability shall be excluded from participation in, or denied the benefits of, the District's programs, services or activities because of any disability. If you need special assistance to participate in this meeting, please contact the District Office at 969-4200.

Finance Meeting Summary
11/2/2026
2 pm

Finance committee: Standing board member: John Murphy and Dorienne Johnson

The meeting focused on the Finance Committee's review of the district's financial status and operations. Stephen presented the September payables, which totaled approximately $782,808, and noted that most expenses were standard operations and maintenance, with a large Southland design contract in capital improvements.

The committee discussed the annual Badger meter renewal line item and the rising cost of SCE electricity, which has increased significantly over recent years.

Stephen also reviewed the September bank reconciliations for all operating and investment accounts, including the California class and Charles Schwab funds, and confirmed they were in balance.

A discussion occurred regarding the need for more detailed CIP invoice information, such as project phases and remaining contract balances, to provide better oversight. It should be noted the requested information does appear on the quarterly budget documentation provided to the committee.

The first quarter financial summary showed a cash decrease of $3.45 million due to anticipated capital expenditures, while connection fee revenue was higher than expected due to increased development activity.

Property tax estimates were also higher than budgeted, and the committee noted that these funds must be spent on CIP projects. The district has not historically had any issue with using the conditional funds.

Legal expenses were trending higher than budgeted, partly due to complex construction agreements and a public records request.

Stephen provided an update on the Cal OES reimbursement process, stating that the final report was approved and is now with FEMA. The reimbursement amount is $1.6 MM for expenses associated with 2023 district related weather events

The district received a AA credit rating from S&P. It should be noted S&P noted recent historical audits were late as result of “staff turnover’ and partnership turnover with vendor. Furthermore, “credit strength is supported by recently approved rate increases of 14% annually for the period of 2027–2031, which will enhance future cash flows and bolster financial flexibility. The stable outlook reflects our anticipation that Montecito Sanitary District will maintain its very strong financial profile as evidenced by the district’s proactive rate-setting approach to increase revenue.”

Finally, the ACH payment system is nearing implementation and should be effective and operational at the end of November..

Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108
A Public Service Agency
Phone: (805) 969-4200
www.montsan.org

MINUTES

For the Regular Meeting of the Board on:

October 14, 2026

---

1. CALL TO ORDER

The Governing Board of the Montecito Sanitary District convened a regular meeting at 2:03 pm on Wednesday, October 14, 2026. The meeting was also broadcast using Zoom teleconferencing.

ATTENDANCE

Board Members Present:
Directors Barrett, Johnson, Murphy, Ohlmann, and Rockenbach

Board Members Absent:
None

Also Present and Participating:
John Weigold, MSD General Manager
Stephen Williams, MSD Business and Administrative Manager/Clerk of the Board
Taylor Anderson, District Legal Counsel
Bryce Swetek, MSD Engineering Manager
Carrie Poytress, Stantec

2. PUBLIC COMMENT

Craig Murray, General Manager of the Carpinteria Sanitary District, addressed the Board.

Jeff Kerns, member of the public, addressed the Board.

3. CONSENT CALENDAR

ON MOTION by Director Murphy, Seconded by Director Ohlmann, the Board voted to approve the following Consent Calendar item:

A. Meeting Minutes of the September 23, 2026 Regular Meeting

AYES:	Directors Barrett, Murphy, Ohlmann, and Rockenbach
NAYES:	Director Johnson
ABSTAIN:	None
ABSENT:	None

Motion carries.

4. GENERAL MANAGER'S UPDATE

General Manager John Weigold provided the Board with an informational update on matters affecting the District, including:

- **A.** Mutual Assistance for Carpinteria Sanitary District
- **B.** Monte Cristo Lane Paving Project Update
- **C.** State Laboratory Inspection
- **D.** Westmont College Plant Tour

5. PRESENTATIONS

A. COLLECTION SYSTEM MASTER PLAN

The Board received a presentation from Carrie Poytress, Stantec, regarding the Montecito Sanitary District Collection System Master Plan. No action was taken.

B. MONTECITO SANITARY DISTRICT WORK PLAN

The Board received a presentation from Staff regarding the Staff work plan for the District's Strategic Plan. No action was taken.

6. BUSINESS ITEMS

A. DIRECTOR COMPENSATION

ON MONTION by Director Ohlmann, Seconded by Director Barrett, the Board voted to direct staff to update the Director Compensation Ordinance to keep compensation at $254 per meeting but limit compensation to one regular meeting per month.

AYES:	Directors Barrett, Murphy, Ohlmann, and Rockenbach
NAYES:	Director Johnson
ABSTAIN:	None
ABSENT:	None

Motion carries.

B. WASTEWATER TREATMENT PLANT IMPROVEMENT PROJECT REPORT AND DISCUSSIONAWARD OF CONTRACT – SEWER FLOW MONITORING AND INFLOW AND INFILTRATION DETECTION

The Board received a report from the Montecito Sanitary District Wastewater Treatment Plant Improvements Project on its meeting of October 8, 2026. The Board then engaged in a discussion on the topics included in the report. No action was taken.

C. GRANT OF EASEMENT AT BONNYMEDE SHORES ASSOCIATION, MONTECITO, CALIFORNIA

ON MOTION by Director Rockenbach, Seconded by Director Barrett, the Board voted to:

i) Accept the terms of the Agreement for Grant of Easement between Montecito Sanitary District (MSD) and Bonnymede Shores; and
ii) Direct staff to execute said agreement and a Certificate of Acceptance; and
iii) Determine that this action is not subject to California Environmental Quality Act (CEQA) pursuant to it not being considered a project per CEQA Guidelines §§15060(c)(2)-(3) and 15378.

AYES:	Directors Barrett, Johnson, Murphy, Ohlmann, and Rockenbach
NAYES:	None
ABSTAIN:	None
ABSENT:	None

Motion carries.

7. BOARD COMMUNICATIONS

A. Next Regular Board Meeting Date – October 14, 2026

B. Items for future Board meeting

- No topics were requested to be placed on the next agenda.

8. ADJOURNMENT

ON MOTION by Director Barrett, Seconded by Director Murphy, the meeting ended at 6:26 pm.

These minutes were presented for approval at the Special Board Meeting on November 4, 2026.

_____
Richard "Rock" Rockenbach, President

Minutes taken and prepared by:

_____
Stephen Williams
Business and Administrative Manager/Clerk of the Board

Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108
A Public Service Agency
Phone: (805) 969-4200
www.montsan.org

BOARD LIST OF PAYABLES – SEPTEMBER 2026

CHECK DATE	SUMMARY & TYPE	BATCH TOTAL
09/17/2026	ACCOUNTS PAYABLE	188,197.00
	Subtotal	**$ 188,197.00**
09/17/2026	CAPITAL IMPROVEMENT PROJECTS	354,973.50
	Subtotal	**$ 354,973.50**
09/03/2026	PAYROLL	118,424.75
09/17/2026	PAYROLL	121,213.18
	Subtotal	**$ 239,637.93**
	TOTAL	**$ 782,808.43**

*All Invoices were reviewed and approved by Department Managers
**All Invoices and Payments were reviewed and approved and checks signed by the General Manager

Check History Report

MONTECITO SANITARY DISTRICT (MSD)

Sorted By Check Number

Activity From: 9/1/2026 - 9/30/2026

Bank Code: **B OPERATING CASH (MBT)**

Check Number	Check Date	Vendor Name	Check Amount	Payment Description
31240	9/17/26	ACWA/JPIA	38,090.27	MEDICAL/DENTAL/VISION/LIFE - AUGUST 2026
31241	9/17/26	AMAZON CAPITAL SERVICES	7,135.24	EXHAUST ADAPTER, COOLANT, HANGER CLIPS, MIRROR HOLDER, DYE, VICE GRIPS, CLIPBOARD, HITCH/BALL, GENERAL OPERATING SUPPLIES
31242	9/17/26	AT&T MOBILITY	104.76	iPAD TABLET WIRELESS, STANDBY CELL PHONE
31243	9/17/26	AUTOZONE, INC	6.13	VACUUM TEE
31244	9/17/26	BADGER METER	35,910.00	SMARTCOVER METER ANNUAL RENEWAL
31245	9/17/26	BIG GREEN CLEANING COMPANY	2,799.20	JANITORIAL SERVICES - SEPTEMBER, PAPER TOWELS
31246	9/17/26	CANON FINANCIAL SERVICES INC	371.74	COPIER LEASE
31247	9/17/26	CINTAS CORPORATION #684	1,633.45	UNIFORMS, TOWELS, FLOOR MATS, FIRST AID KIT REPLENISH
31248	9/17/26	COLANTUONO, HIGHSMTIH & WHATLEY, PC	10,481.80	GENERAL COUNSEL SVCS- AUG
31249	9/17/26	CONVERGED	435.00	IT SUPPORT - AUGUST
31250	9/17/26	CORT	44.00	MONTHLY DEED REPORT
31251	9/17/26	COX BUSINESS	192.04	INTERNET SERVICE
31252	9/17/26	CWEA MEMBERSHIP	384.00	CWEA DUES - ROLLINS, FELIX, MORELOS
31253	9/17/26	DOCU PRODUCTS	125.70	COPIER METER CHARGES
31254	9/17/26	ENGEL & GRAY, INC	6,472.57	BISOLIDS DISPOSAL
31255	9/17/26	FISHER SCIENTIFIC	5,420.45	LAB CHECMICALS, AUTOCLAVE
31256	9/17/26	FRONTIER	1,134.06	LIFT STNS PHONE SVC 9/04-10/03/26
31257	9/17/26	GLS COMPANIES	780.00	LANDSCAPE MAINT- AUG
31258	9/17/26	GRAINGER	905.60	BALL VALVES, UNIT 18 V-BELT, ENGINE OIL, PIPE PLUGS
31259	9/17/26	HACH COMPANY	1,677.21	LAB SUPPLIES
31260	9/17/26	HARRINGTON INDUSTRIAL PLASTICS	49.34	COUPLINGS, BUSHINGS,PLUGS, ADAPTORS
31261	9/17/26	IDEXX DISTRIBUTION, INC	1,436.67	GAMMA IRRAD COLILERT - LAB SUPPLIES
31262	9/17/26	KIMBALL MIDWEST	308.97	COTTER PINS, DRILL BITS
31263	9/17/26	LARRY'S AUTO PARTS	172.89	UNIT 18 SERVICE
31264	9/17/26	MARBORG INDUSTRIES	924.02	TRASH AND RECYCLING PICKUP
31265	9/17/26	MCCORMIX CORP	1,768.47	VEHICLE FUEL
31266	9/17/26	MCMASTER-CARR SUPPLY	115.48	STAINLESS STEEL EDGE TRIM
31267	9/17/26	MONTECITO JOURNAL	356.30	LEGAL NOTICE PUBLICATIONS
31268	9/17/26	MOTION INDUSTRIES, INC	143.85	MICRO MIST SEPARATOR
31269	9/17/26	MOUNTAIN SPRING WATER	210.30	DRINKING WATER & COOLER RENTAL
31270	9/17/26	MONTECITO WATER DISTRICT	1,507.87	WATER USE - LIFT STATIONS, WWTP
31271	9/17/26	O'CONNOR PEST CONTROL WEST	209.88	PEST CONTROL
31272	9/17/26	PHOENIX CIVIL ENGINEERING	1,428.00	ON CALL ENGINEERING CONSULTING SERVICES
31273	9/17/26	PLUMBERS DEPOT, INC	5,332.42	JETTER TRUCK HYDRAULIC MOTOR, WATER PUMP REPAIR
31274	9/17/26	PURETEC INDUSTRIAL WATER	190.63	SOFTENER TANK EXCHANGE, WATER TANK RENTAL
31275	9/17/26	QUINN COMPANY	282.47	OIL/FILTER SERVICE
31276	9/17/26	RED WING BUSINESS ADVANTAGE	330.18	BOOT ALLOWANCE - F HERNANDEZ
31277	9/17/26	ROCK ROCKENBACH	2,328.48	CSDA AND CASA ANNUAL CONFERENCE REGISTRATION
31278	9/17/26	ROLLINS, CAROLE	463.18	STAFF LUNCH REIMBURSEMENT
31279	9/17/26	SBCO. CLERK-RECORDER	20.00	RECORDING - RELEASE OF LIEN
31280	9/17/26	SANTA BARBARA COUNTY PUBLIC	769.00	UTILITY INV 25-O54T-UA-108, LONG FORM PERMIT

31281	9/17/26	SOUTHERN CALIFORNIA EDISON CO	24,576.18	ELECTRIC SERVICE - AUG
31282	9/17/26	SMARDAN-HATCHER COMPANY	5,205.10	TANKLESS WATER HEATER AND INSTALLATION SUPPLIES
31283	9/17/26	STANDARD INSURANCE COMPANY	1,972.54	SHORT/LONG TERM DISABILITY INS
31284	9/17/26	UNIVAR SOLUTIONS	17,820.91	SODIUM BISULFITE, SODIUM HYPOCHLORITE
31285	9/17/26	UNDERGROUND SERVICE ALERT	210.40	92 SERVICE ALERT TICKETS
31286	9/17/26	VERIZON BUSINESS	280.25	IPAD TABLETS
31287	9/17/26	ZWORLD GIS	3,380.00	GIS PROGRAM SUPPORT, GIS DEVELOPMENT PROJECT
31288	9/17/26	HADDON DILLON	2,300.00	DEPOSIT REFUND A-5551, 1666 EAST VALLEY
		BANK B TOTAL	**$ 188,197.00**	

Bank Code: **G CIP CASH (MBT)**

Check Number	Check Date	Vendor Name	Check Amount	Payment Description
1678	9/17/26	PHOENIX CIVIL ENGINEERING	2,056.50	L001 - CHANNEL DRIVE PROF SVCS ($1,852.50) C001 - COLLECTION SYSTEM MASTER PLAN ($204.00)
1679	9/17/26	SOUTHLAND INDUSTRIES	260,683.00	T001 - WWTP IMPROVEMENT PROJECT
1680	9/17/26	STANTEC CONSULTING SERVICES INC.	69,637.25	L001 - QA/QC, DESIGN, DOCUMENTATION ($50679.00) C001 - COLLECTION SYSTEM MASTER PLAN ($12,165.50) L001 - CHANNEL DRIVE LIFT STATION ($6,792.75)
1681	9/17/26	WATER SYSTEMS CONSULTING, INC.	22,596.75	S001- MGMT, ALT ANALYSIS, REPORT
		BANK G TOTAL	**$ 354,973.50**	

MONTECITO SANITARY DISTRICT

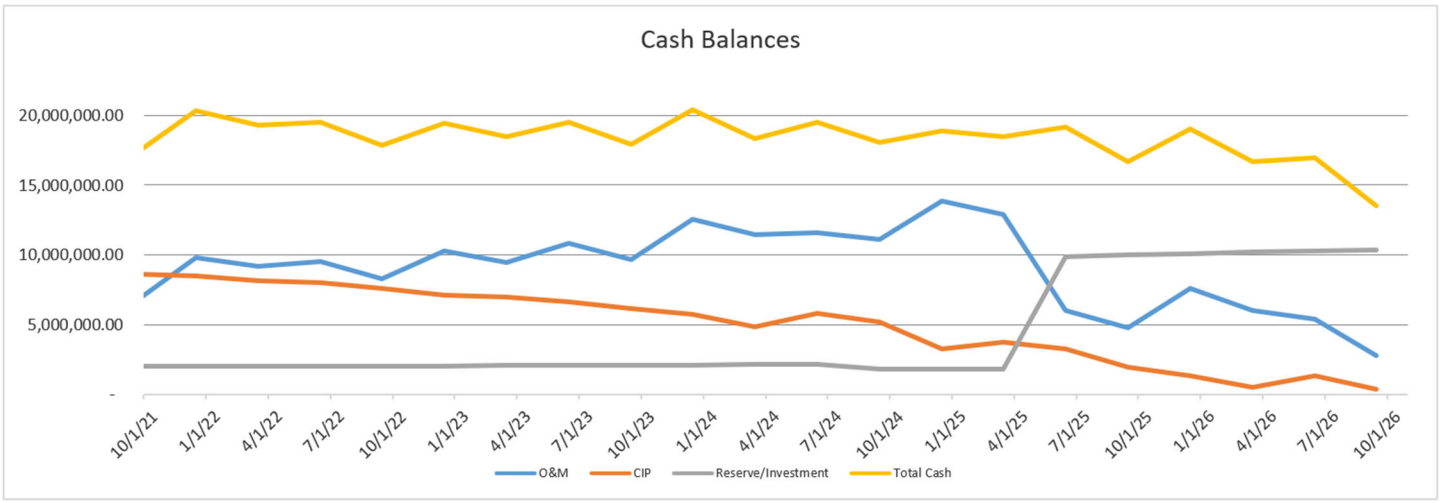
Fiscal Year 2026-27 Unaudited Quarterly Financial Summary Memo

For the Quarter Ended 9/30/2026

FINANCIAL HEALTH AND CASH POSITIONS

As of **September 30, 2026** the District continues to maintain a healthy financial position. Its cash balances are sufficient to cover both its short and long-term obligations as well as keep the District above its adopted **$3.25M** adopted reserve fund policy target. Total cash position of the District ended the quarter at **$13,510,766**, a decrease of **$3,452,927** when compared to the prior quarter. This decrease was anticipated due to the timing of the District's revenue receipts from the County Tax Roll coupled with the expected large capital improvement projects outlay during the first quarter.

Below is a line graph detailing the District's cash position at each quarter for the past five years:



Below is a chart detailing the current cash balances the District maintains compared to last quarter. A detailed breakdown of each account is provided in **Attachment A - Quarterly Cash and Investments Holdings as of 9/30/2026**:

	Balance at 6/30/2026	Balance at 9/30/2026	Difference
Operations & Maintenance	$ 5,363,973	$ 2,781,473	$ (2,582,500)
Capital Improvement Projects	1,327,150	361,835	(965,315)
Investments/Reserves	10,272,570	10,367,458	94,888
Total Available Cash	$ 16,715,053	$ 13,510,766	$ (3,452,927)

Table 1. Fiscal Year 2026-27 Cash Comparison – Current Quarter vs. Prior Quarter

REVENUES

For **Fiscal Year 2026-27**, the District budgeted approximately **$10.5M** in revenues between its two main revenue types: Operating and Non-operating revenue. The District receives approximately 83% of its revenues through two allocations from the County of Santa Barbara's Property Tax apportionment, which occurs in December and April of each year. Non-operating revenues budgeted remained the same as the prior fiscal year due to anticipated reimbursements from FEMA/CalOES not being received by the District yet. Those funds are anticipated to be received in the current fiscal year.

Table 2 below shows the breakdown of revenue received through the period ending **September 30, 2026**.

OPERATIONS & MAINTENANCE BUDGET TO ACTUAL SUMMARY

OPERATING AND NONOPERATING REVENUES

	2026-27 Budget	2026-27 YTD Actuals	Difference
Operating Revenues			
Service Charges	$ 7,371,774	$ (10,558)	$ (7,382,332)
Connection Fees	225,000	119,190	(105,810)
Other Services	65,000	42,278	(22,722)
Total Operating Revenues	$ 7,661,774	$ 150,910	$ (7,510,864)
Nonoperating Revenues			
Property Taxes	$ 865,000	$ -	$ (865,000)
Reimbursements	$ 1,614,297	$ -	
Interest Income	385,000	100,472	(284,528)
Total Nonoperating Revenues	$ 2,864,297	$ 100,472	$ (2,763,825)
Total Revenues	$ 10,526,071	$ 251,382	$ (10,274,689)

Table 2. Fiscal Year 2026-27 Budget to Actuals - Revenue

Operating and Non-operating Revenue Noteworthy Items:

Sewer Service Charges - The District's primary source of revenues comes from Sewer Service Charges. The District submitted all Sewer Service Charges to the County for inclusion on connected properties Property Tax bills in early July. This method saves a substantial amount of administrative time having to bill, collect, and reconcile over 3,000 sewer service bills to customers. Allocations are received in November and April of each Fiscal Year, with true-ups done in June. Total amount reported to the Auditor-Controller's Office was **$7,620,245.36**. This amount reflects the rate increase in Sewer Service Charges adopted by the Board on June 10, 2026.

- **Connection Fees –** The District continues to see a high number of connection fees. In the current quarter there were 16 connection permits initiated for new properties or property improvements, which is 10 more than at this time last fiscal year. It is probable that the District will receive more than the $225,000 budgeted for the fiscal year.

- **Other Services –** The District collects various fees as it relates to inspection services, sewer availability inquiries, engineering review services, agreements, and administrative certifications. There were several agreements recorded in the current quarter that is pushing this revenue source higher than anticipated.

- **Property Tax –** The District's ½ of 1% Property Tax Revenue is collected in the same manner as the Sewer Service Charges. The County released an estimated property tax revenue figures in September and the District is expected to receive **$926,521** for the current fiscal year. Per discussion with the Auditor-Controller Property Tax Divisions Chief this increase is due to several very large property sales in District boundaries that pushed the assessed valuation amount significantly higher.

- **Interest Income –**The **Fiscal Year 2026-27** Interest Income budget was developed with the District's current investment holdings in mind coupled with dwindling cash balances as a result of CIP projects being worked on. During the prior fiscal years cash reserves were moved into higher interest/dividend yielding investment accounts with Charles Schwab and California CLASS resulting in higher earnings when compared to LAIF and the County Treasury. With the declining interest rate environment County interest earnings will continue to perform close to the Districts' holdings in California CLASS and Charles Schwab. Total interest/dividend earnings were **$100,472** in the first quarter.

- **Reimbursements –** In June of 2025 the District received notification from FEMA/CalOES that its 2023 Winter Storms Emergency Projects were approved and obligated. As a result the District is expected to receive approximately **$1.6M.** These are one-time monies and will be put back in the CIP account once received.

EXPENDITURES

The District's Operations and Maintenance expenditures came in at approximately **25%** of what was budgeted for the fiscal year. Table 3 below summarizes **Attachment B – Quarterly Operations & Maintenance Expenditure Status Report as of 9/30/2026** attached to this memo. Noteworthy line items from that attachment are highlighted below to detail the positive or negative differences between the budget and actuals.

	2026-27 Budget	2026-27 YTD Actuals	Difference	% of Budget
Operating Expenditures				
Salaries and Benefits	$ 4,066,042	$ 1,199,177	$ 2,866,865	29%
Insurance	178,000	11,817	166,183	7%
Maintenance & Repairs	180,500	28,861	151,639	16%
Goods & Supplies	155,400	24,091	131,309	16%
Professional Services	227,000	40,915	186,086	18%
Administrative Costs	533,000	73,995	459,005	14%
Plant & Lab Operating Costs	643,750	92,344	551,406	14%
Safety, Training, & Travel	76,000	23,132	52,868	30%
Utilities	319,500	73,157	246,343	23%
Total Operating Expenditures	**$ 6,379,192**	**$ 1,567,488**	**$ 4,811,704**	**25%**

Table 3. Fiscal Year 2026-27 Budget to Actuals - Expenditures

Operating Expenditures Noteworthy Items:

- **6400 – CalPERS Contribution –** Every year the District elects to prepay its CalPERS Unfunded Actuarial Liability (UAL) in July rather than paying in monthly installments. This method saves the District approximately **3.3%** of its total UAL costs. This large expenditure early in the year is causing the percentage of budget utilized for Salaries and Benefits to be high at this point in the fiscal year. The UAL payment totaled **$309,379**, which is more than Staff anticipated. This line item will be monitored to see if a budget adjustment is recommended before fiscal year end.

- **7094 – Insurance-Mobile Equipment –** This line item appears to be trending higher than expected at this point in the fiscal year but is expected. The premium payment for this insurance comes every year during the first quarter with a minor true up in June of each fiscal year. As such, staff expects to be under budget for the current year.

- **7138 – Jetter Truck Equipment/Repairs –** This line item is trending higher than expected as a result of unanticipated repair/replacement needs to the jetters' relief valve, hydraulic motor, and water pump. Staff does not anticipate needing a budget adjustment as any future repairs will be immaterial.

- **7461 – Professional Services – Legal –** The District incurred **$31,020** in legal expenses during the first quarter. If this trend continues a budget adjustment will be necessary later in the fiscal year.

- **7460 – Professional Services – Accounting –** The District incurred **$20,381** in accounting fees related to its FY 2024-25 audit. Staff is currently in fieldwork for the Fiscal Year 2025-26 and expects those charges to be incurred during the current fiscal year as well. Staff does not anticipate needing a budget adjustment at this time for the fiscal year.

- **7508 – Collection/Treatment Fines –** The District incurred a **$9,000** fine from the Central Coast Regional Water Quality Control Board which is causing this line item to trend higher than anticipated. Staff does not anticipate needing a budget revision this is the only fine assessed since 2015.

- **7510 – Contracted Services/Labor –** This line item is trending higher but was expected to do so by staff. In the first quarter every year the District pays its annual Smartcover System Service Warranty in September (**$35,910**). Additionally, the annual service fees for DocuSign (**$5,054**) and the remote monitoring for the lift stations and Wastewater Treatment Plant (**$4,385**) were paid. These one-time annual costs are pushing the percent utilization at this time of the fiscal year higher than 25% but is in alignment with staff expectations.

- **7653 – Chemicals –** The District is currently at 16% of its chemical budget, which is expected as this quarter is in the dry period. Chemical costs are anticipated to increase during the rainy months as more chemicals will be required due to rainfall and staff expects to end the fiscal year close to the budget amount. Updates on chemical usage will continue to be given every quarter.

- **7763 – Electricity –** The District is currently at 22% of its electrical costs and is in alignment with expectations. Updates on electricity usage will continue to be given every quarter.

- **7724 – Staff Training/Conference Registration –** The first quarter of the fiscal year saw an increased number of conference registrations by staff, including CWEA trainings and flagger certification trainings. Staff will continue to monitor this line item to see if any budget adjustments are necessary during the fiscal year.

CAPITAL IMPROVEMENTS PROJECTS

The District maintains separate Capital Improvement Project (CIP) accounts from its Operations and Maintenance funds. The past two fiscal years have seen District CIP activity ramp up to address several maintenance needs, and as such those funds have been drawn upon. At the last quarterly financial report staff anticipated that the District's Operations and Maintenance fund would have to begin funding the capital improvement program, and that funding began near the end of the . This trend will continue during the fiscal year with implementation of the approved capital improvement program.

The CIP Budget passed for **Fiscal Year 2026-27** utilized estimates for the anticipated expenditures for CIP work including permitting, design, construction management, and all other costs associated with projects. The following table details the approved budget for the fiscal year and amount expended year-to-date by program.

Program	2026-27 Approved Budget	Project Expenditures Through 9/30/2026
Collections	$ 1,585,000	$ 40,592
Lift Stations	$ 3,975,000	$ 149,074
Treatment & Lab	$ 1,350,000	$ 260,683
Facilities	$ 750,000	$ -
Total	**$ 7,660,000**	**$ 450,349**

Table 4. Fiscal Year 2026-27 Budget to Actuals – Capital Improvement Program

During the current quarter the District spent **$450,349** on Capital Improvement Projects. It is important to note, however, that there were several large CIP activities at the end of the prior fiscal year where checks were cut for those activities as of **6/30/2026** but cashed in the current fiscal year. Those amounts totaled **$1,371,022.21**, which is a major driver in the District's decrease in cash balances.

Detailed below are some of the noteworthy capital expenditures for the current quarter. A full detail of all CIP expenditures can be found at **Attachment C - Quarterly Capital Improvement Projects Expenditure Status Report as of 9/30/2026.**

- **L001 – Channel Lift Station Improvement - Design –** The District continued design of its Channel Lift Station Improvements project with **$72,456** being expended in the first quarter.

- **L008 – Channel Lift Station Generator –** The District purchased a replacement generator for its Channel Drive Lift Station that totaled **$76,618**.

- **T001 – Wastewater Treatment Plant Project – Design & Engineering –** The District paid invoices totaling **$260,683** in the first quarter on its $1,675,000 contract with Southland Industries. With payment of that invoice there is **$1,146,048** remaining on the contract.

2017 SEWER REFUNDING REVENUE BONDS – CALIFORNIA SPECIAL DISTRICTS ASSOCIATION (CSDA) FINANCE CORPORATION

In May 2017 the District refunded its 2007 Certificates of Participation (COP). The District will make two payments on its bond during Fiscal Year 2026-27 totaling **$940,200**. Of this total **$820,000** will be applied to principal and **$120,200** to interest. After all payments are made in **Fiscal Year 2026-27** the remaining bond debt is **$2,640,000** and is expected to be paid off by July 1, 2030. The current interest rate paid is **5%**.

ANNUAL DEPRECIATION FUNDING

Annually, the District's Operations & Maintenance account contributes to the Capital Replacement Fund and is based on the prior fiscal years' annual depreciation expense. The current year contribution will be **$1,252,985** and staff will make the transfer in June. The District will also continue to fund CIP from District unrestricted funds as needed based on approved projects.

Attachments:

Attachment A – Quarterly Cash and Investments Holdings as of 9/30/2026
Attachment B – Quarterly Operations & Maintenance Expenditure Status Report as of 9/30/2026
Attachment C – Quarterly Capital Improvement Projects Expenditure Status Report as of 9/30/2026
Attachment D – Quarterly Investment Certification

Fiscal Year 2026-27 Capital Improvement Program (CIP)

Adopted by the Board at the June 10, 2026 Regular Meeting

Collections:

Project No.	Description	Estimated Project Cost	2026-27 Approved Budget	Project Expenditures Through 9/30/2026
C001	Collection System Master Plan	**$ 250,000**	$ 60,000	$ 17,995
C004	2026 Sewer Main CIPP Lining - Design	**$ 300,000**	$ 300,000	-
C007	Toyota Tacoma	**$ 50,000**	$ 50,000	-
C008	San Ysidro Upsizing - Design	**$ 500,000**	$ 500,000	-
C009	Olive Mill Road Upsizing - Design	**$ 150,000**	$ 150,000	-
S001	Septic to Sewer Strategic Plan - **CARRYFORWARD**	**$ 120,000**	$ 25,000	22,597
CINI	Collection System Inflow and Infiltration	**$ 500,000**	$ 500,000	-
		Collections Subtotal	**$ 1,585,000**	**$ 40,592**

Lift Stations:

Project No.	Description	Estimated Project Cost	2026-27 Approved Budget	Project Expenditures Through 9/30/2026
L001	Channel Lift Station Improvement - Design - **CARRYFORWARD**	**$ 350,000**	$ 250,000	$ 72,456
L001	Channel Lift Station Improvement - Construction - **CARRYFORWARD**	**$ 3,300,000**	$ 3,300,000	-
L002	Eucalyptus Lift Station Relocation - Design	**$ 350,000**	$ 350,000	-
L008	Channel Lift Station Generator	**$ 75,000**	$ 75,000	76,618
		Lift Stations Subtotal	**$ 3,975,000**	**$ 149,074**

Treatment & Laboratory:

Project No.	Description	Estimated Project Cost	2026-27 Approved Budget	Project Expenditures Through 9/30/2026
T001	Wastewater Treatment Plant Project - Design and Eng.	**$ 1,675,000**	$ 1,150,000	$ 260,683
T002	Outfall Inspection	**$ 200,000**	$ 200,000	-
		Treatment & Laboratory Subtotal	**$ 1,350,000**	**$ 260,683**

Facilities:

Project No.	Description	Estimated Project Cost	2026-27 Approved Budget	Project Expenditures Through 9/30/2026
F010	Monte Cristo Improvements - Design	**$ 100,000**	$ 100,000	$ -
F010	Monte Cristo Improvements - Construction	**$ 500,000**	$ 500,000	-
F011	Administration Building Improvements	**$ 150,000**	$ 150,000	-
		Facilities Subtotal	**$ 750,000**	**$ -**

District Infrastructure Emergency - Not Project Based

Project No.	Description	Estimated Project Cost	2025-26 Approved Budget	Project Expenditures Through 9/30/2026
CEME	Collection System Emergencies	**$ 50,000**	$ 50,000	$ -
CMAIN	Collection System Emergency Maintenance	**$ 150,000**	$ 150,000	-
LEME	Lift Station Emergency Repairs	**$ 50,000**	$ 50,000	-
TEME	Treatment Plan Emergency Repairs	**$ 500,000**	$ 500,000	-
		Sewer Main Extensions Subtotal	**$ 750,000**	**$ -**

Program	2026-27 Approved Budget	Project Expenditures Through 9/30/2026
Collections	$ 1,585,000	$ 40,592
Lift Stations	$ 3,975,000	$ 149,074
Treatment & Lab	$ 1,350,000	$ 260,683
Facilities	$ 750,000	$ -
Total	**$ 7,660,000**	**$ 450,349**

MONTECITO SANITARY DISTRICT OPERATIONS AND MAINTENANCE EXPENDITURE STATUS

FOR THE PERIOD ENDED 9/30/2026

		2026-27 BUDGET	2026-27 YTD ACTUALS	VARIANCE	% OF BUDGET
OPERATING EXPENDITURES					
SALARIES AND BENEFITS					
6100	STAFF SALARIES	$ 2,641,342	$ 622,688	$ 2,018,654	24%
6105	BOARD SALARIES	$ 50,000	$ 11,430	$ 38,570	23%
6108	AUTO ALLOWANCE - GM	$ 3,600	$ 1,200	$ 2,400	33%
6270	STANDBY PAY	$ 52,000	$ 13,275	$ 38,725	26%
6300	OVERTIME	$ 26,000	$ 5,278	$ 20,722	20%
6400	PERS CONTRIBUTION	$ 475,000	$ 363,193	$ 111,807	**76%**
6410	EMPLOYEE BENEFITS	$ 61,000	$ 13,967	$ 47,033	23%
6500	FICA CONTRIBUTION	$ 163,000	$ 40,496	$ 122,504	25%
6510	MEDICARE	$ 38,500	$ 9,471	$ 29,029	25%
6520	UNEMPLOYMENT TAX - STATE	$ 3,500	$ 57	$ 3,443	2%
6600	GROUP MEDICAL - ACWA	$ 372,000	$ 93,625	$ 278,375	25%
6605	RETIREE MEDICAL BENEFITS	$ 51,100	$ 12,768	$ 38,332	25%
6610	LIFE INSURANCE - ACWA	$ 6,500	$ 1,275	$ 5,225	20%
6615	DISABILITY INS - STANDARD	$ 26,000	$ 3,945	$ 22,055	15%
6620	WORKER'S COMPENSATION	$ 58,000	$ -	$ 58,000	0%
6640	DENTAL INSURANCE - ACWA	$ 21,000	$ 4,469	$ 16,531	21%
6645	VISION INSURANCE - ACWA	$ 6,000	$ 1,205	$ 4,795	20%
6650	UNIFORM SERVICE - MISSION	$ 11,500	$ 837	$ 10,663	7%
	TOTAL SALARIES AND BENEFITS	$ 4,066,042	$ 1,199,177	$ 2,866,865	29%
SERVICES AND SUPPLIES					
7090	INS (GEN LIAB/AUTO/E&O) - CSRMA	$ 115,000	$ -	$ 115,000	0%
7091	PROPERTY INSURANCE	$ 48,000	$ -	$ 48,000	0%
7093	INS (EMP DISHONESTY BOND) - CSRMA	$ 1,500	$ -	$ 1,500	0%
7094	INS (MOBILE EQUIP) - CSRMA	$ 13,500	$ 11,817	$ 1,683	**88%**
7110	EMPLOYEE PHYSICALS	$ 1,500	$ -	$ 1,500	0%
7121	PROPERTY MAINTENACE	$ 73,000	$ 14,324	$ 58,676	20%
7122	VEHICLE MAINTENANCE	$ 15,000	$ 2,653	$ 12,347	18%
7126	COLL - EQUIPMENT RENTAL	$ 1,000	$ -	$ 1,000	0%
7127	COLL - SAFETY EQUIPMENT/SUPPLIES	$ 5,000	$ -	$ 5,000	0%
7129	LIFT STATION PARTS	$ 28,000	$ 4,529	$ 23,471	16%
7133	VACCON EQUIPMENT & REPAIRS	$ 15,000	$ -	$ 15,000	0%
7134	CCTV EQUIPMENT/REPAIRS	$ 15,000	$ -	$ 15,000	0%
7136	COLL - MISC COLLECTION TOOLS	$ 10,000	$ 1,270	$ 8,730	13%
7138	JETTER TRUCK EQUIP / REPAIRS	$ 7,000	$ 6,085	$ 915	**87%**
7150	MECHANICAL MAINTENANCE	$ 1,500	$ -	$ 1,500	0%
7200	GENERAL OPERATING SUPPLIES	$ 10,000	$ 3,378	$ 6,622	34%
7201	DRINKING WATER	$ 2,500	$ 421	$ 2,079	17%
7202	GLOVES	$ 8,000	$ 1,434	$ 6,566	18%
7205	COMMUNITY & EMPLOYEE GOODWILL	$ 6,000	$ 585	$ 5,415	10%
7220	MAILING/SHIPPING EXPENSES	$ 5,000	$ 300	$ 4,700	6%
7430	MEMBERSHIPS	$ 47,000	$ 1,897	$ 45,103	4%
7440	MISCELLANEOUS EXPENSES	$ 2,500	$ -	$ 2,500	0%
7450	OFFICE EXPENSES	$ 15,000	$ 2,119	$ 12,881	14%
7452	SCANNING & SHREDDING	$ 10,000	$ -	$ 10,000	0%
7454	BOOKS/SUBSCRIPTIONS/STUDY GUIDES	$ 2,000	$ -	$ 2,000	0%
7456	COMPUTER HARDWARE/SOFTWARE/LICENSING	$ 57,400	$ 13,957	$ 43,443	24%
7461	PROFESSIONAL SERVICES/FEES - LEGAL	$ 100,000	$ 31,020	$ 68,980	**31%**
7462	PROFESSIONAL FEES - ACCOUNTING	$ 40,000	$ 20,381	$ 19,620	**51%**
7463	PROF SERVICES - ENGINEERING	$ 20,000	$ 1,428	$ 18,572	7%
7464	PROFESSIONAL FEES - COMPUTER/GIS	$ 30,000	$ 2,673	$ 27,328	9%
7466	PROF SERVICES - HUMAN RESOURCES	$ 12,000	$ 1,684	$ 10,316	14%
7500	PUBLIC OUTREACH	$ 25,000	$ -	$ 25,000	0%
7506	ADMINISTRATIVE FEES	$ 30,000	$ 3,659	$ 26,341	12%
7508	COLLECTION/TREATMENT FINES	$ 10,000	$ 9,000	$ 1,000	**90%**
7510	CONTRACTED SERVICES/LABOR	$ 103,500	$ 47,360	$ 56,140	**46%**
7530	ADS/NOTICES FOR PUBLICATION	$ 1,500	$ 356	$ 1,144	24%
7610	FURNITURE/FIXTURES	$ 50,000	$ -	$ 50,000	0%
7641	NPDES PERMIT EXPENSES-LAB	$ 16,000	$ 6,155	$ 9,845	38%
7645	NPDES PERMIT REQUIREMENTS - OPERATIONS	$ 180,000	$ -	$ 180,000	0%
7650	ELECTION EXPENSES	$ 500	$ -	$ 500	0%
7651	ANALYZER CHEMICALS	$ -	$ 241	$ (241)	0%
7652	BIOSOLIDS DISPOSAL	$ 70,000	$ 13,950	$ 56,050	20%
7653	CHEMICALS	$ 300,000	$ 48,192	$ 251,808	16%
7654	GENERATOR SERVICE	$ 10,000	$ -	$ 10,000	0%
7655	HAZARDOUS MATERIALS DISPOSAL	$ 2,000	$ -	$ 2,000	0%

7656	PLANT EQUIPMENT RENTAL	$	5,000	$	-	$	5,000	0%
7657	PLANT MAINTENANCE MATERIALS	$	55,000	$	11,758	$	43,242	21%
7658	PLANT MAINTENANCE PROJECTS	$	5,000	$	-	$	5,000	0%
7659	PLANT SAFETY EXPENSES	$	5,000	$	-	$	5,000	0%
7662	SMALL TOOLS/EQUIP	$	4,000	$	-	$	4,000	0%
7670	SPECIAL PROJECTS	$	75,000	$	4,717	$	70,283	6%
7671	ASSET MANAGEMENT	$	131,750	$	5,660	$	126,090	4%
7675	COVID-19 EXPENSES	$	-	$	-	$	-	0%
7681	2023 WINTER STORM	$	52,500	$	2,747	$	49,753	0%
7700	LAB CONSUMABLES-SMALL EQUIPMENT	$	40,000	$	11,293	$	28,707	28%
7702	LAB EQUIPMENT MAINTENANCE	$	10,000	$	1,250	$	8,750	13%
7703	CONTRACT LAB ANALYSES	$	10,000	$	-	$	10,000	0%
7704	Laboratory HVAC Maintenance	$	6,000	$	-	$	6,000	0%
7722	BOARD TRAINING/CONF REGISTRATION	$	12,000	$	2,085	$	9,915	17%
7723	BOARD MEETINGS/TRAVEL EXPENSES	$	12,000	$	3,395	$	8,605	28%
7724	STAFF TRAINING/CONF REGISTRN	$	18,000	$	9,741	$	8,259	**54%**
7725	STAFF TRAVEL EXPENSES	$	15,000	$	5,020	$	9,980	33%
7726	STAFF CERTIFICATIONS/LICENSES	$	8,000	$	1,083	$	6,917	14%
7727	OSHA REQUIRED TRAINING	$	5,000	$	-	$	5,000	0%
7728	SAFETY BOOT ALLOWANCE	$	3,500	$	1,324	$	2,176	38%
7729	APPAREL AND UNIFORMS	$	2,500	$	-	$	2,500	0%
7731	LOCAL MEETING EXPENSES	$	2,500	$	484	$	2,016	19%
7740	FUEL AND OIL	$	20,000	$	5,434	$	14,566	27%
7761	WATER	$	17,000	$	2,944	$	14,056	17%
7762	NATURAL GAS	$	5,500	$	160	$	5,340	3%
7763	ELECTRICITY	$	230,000	$	50,606	$	179,394	22%
7766	TRASH / RECYCLING	$	15,000	$	1,817	$	13,183	12%
7767	TELEPHONE - LOCAL/LD	$	20,000	$	5,092	$	14,908	25%
7768	TELEPHONE CELLULAR	$	12,000	$	7,105	$	4,895	59%
	TOTAL SERVICES AND SUPPLIES	$	2,313,150	$	384,581	$	1,928,569	17%
	TOTAL OPERATING EXPENDITURES	**$**	**6,379,192**	**$**	**1,583,758**	**$**	**4,795,434**	**25%**

Fiscal Year 2026-27 Capital Improvement Program (CIP)

Adopted by the Board at the June 10, 2026 Regular Meeting

Collections:

Project No.	Description	Estimated Project Cost	2026-27 Approved Budget	Project Expenditures Through 9/30/2026
C001	Collection System Master Plan	**$ 250,000**	$ 60,000	$ 17,995
C004	2026 Sewer Main CIPP Lining - Design	**$ 300,000**	$ 300,000	-
C007	Toyota Tacoma	**$ 50,000**	$ 50,000	-
C008	San Ysidro Upsizing - Design	**$ 500,000**	$ 500,000	-
C009	Olive Mill Road Upsizing - Design	**$ 150,000**	$ 150,000	-
S001	Septic to Sewer Strategic Plan - **CARRYFORWARD**	**$ 120,000**	$ 25,000	22,597
CINI	Collection System Inflow and Infiltration	**$ 500,000**	$ 500,000	-
		Collections Subtotal	**$ 1,585,000**	**$ 40,592**

Lift Stations:

Project No.	Description	Estimated Project Cost	2026-27 Approved Budget	Project Expenditures Through 9/30/2026
L001	Channel Lift Station Improvement - Design - **CARRYFORWARD**	**$ 350,000**	$ 250,000	$ 72,456
L001	Channel Lift Station Improvement - Construction - **CARRYFORWARD**	**$ 3,300,000**	$ 3,300,000	-
L002	Eucalyptus Lift Station Relocation - Design	**$ 350,000**	$ 350,000	-
L008	Channel Lift Station Generator	**$ 75,000**	$ 75,000	76,618
		Lift Stations Subtotal	**$ 3,975,000**	**$ 149,074**

Treatment & Laboratory:

Project No.	Description	Estimated Project Cost	2026-27 Approved Budget	Project Expenditures Through 9/30/2026
T001	Wastewater Treatment Plant Project - Design and Eng.	**$ 1,675,000**	$ 1,150,000	$ 260,683
T002	Outfall Inspection	**$ 200,000**	$ 200,000	-
		Treatment & Laboratory Subtotal	**$ 1,350,000**	**$ 260,683**

Facilities:

Project No.	Description	Estimated Project Cost	2026-27 Approved Budget	Project Expenditures Through 9/30/2026
F010	Monte Cristo Improvements - Design	**$ 100,000**	$ 100,000	$ -
F010	Monte Cristo Improvements - Construction	**$ 500,000**	$ 500,000	-
F011	Administration Building Improvements	**$ 150,000**	$ 150,000	-
		Facilities Subtotal	**$ 750,000**	**$ -**

District Infrastructure Emergency - Not Project Based

Project No.	Description	Estimated Project Cost	2025-26 Approved Budget	Project Expenditures Through 9/30/2026
CEME	Collection System Emergencies	**$ 50,000**	$ 50,000	$ -
CMAIN	Collection System Emergency Maintenance	**$ 150,000**	$ 150,000	-
LEME	Lift Station Emergency Repairs	**$ 50,000**	$ 50,000	-
TEME	Treatment Plan Emergency Repairs	**$ 500,000**	$ 500,000	-
		Sewer Main Extensions Subtotal	**$ 750,000**	**$ -**

Program	2026-27 Approved Budget	Project Expenditures Through 9/30/2026
Collections	$ 1,585,000	$ 40,592
Lift Stations	$ 3,975,000	$ 149,074
Treatment & Lab	$ 1,350,000	$ 260,683
Facilities	$ 750,000	$ -
Total	**$ 7,660,000**	**$ 450,349**

Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108
A Public Service Agency
Phone: (805) 969-4200
www.montsan.org

QUARTERLY CERTIFICATION STATEMENTS FOR THE MONTECITO SANITARY DISTRICT

in accordance with
RESOLUTION NO. 2013-883, MSD INVESTMENT POLICY

For the Quarter Ended

September 30, 2026

As Treasurer of the Montecito Sanitary District, I, **Dorinne Lee Johnson**, certify that:

(1) All investment actions executed since the last report have been made in full compliance with the Montecito Sanitary District Investment Policy;

(2) A complete and timely record of all investment transactions is maintained in the District office from reports supplied by LAIF, the Santa Barbara County Treasurer's office, Charles Schwab, and California CLASS; and

(3) The Montecito Sanitary District is able to meet its pool's expenditure requirements for the next six months.

Approved at the **11/4/2026** Regular Board Meeting

_____
Board Treasurer
MONTECITO SANITARY DISTRICT

Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108
A Public Service Agency
Phone: (805) 969-4200
www.montsan.org

MONTECITO SANITARY DISTRICT

STAFF REPORT – 5

DATE: November 4, 2026

TO: Board of Directors

FROM: John Weigold, General Manager

SUBJECT: General Manager Report

The District continues its mission of providing wastewater collection and treatment services. In addition to the daily operations of the District, the following is an update on some of our current ongoing projects and activities.

A. GM Meetings

Since my last report, on October 14, 2026, I attended:

- The monthly **Montecito Association meeting** on October 13, 2026 to provide an operations update and I attended two hearings of the Montecito Planning Commission, where I provided public comment regarding proposed changes to the County permitting process.
- The October 26, 2026 meeting of the **Santa Barbara Chapter of the California Special District Association (CSDA)** with Director Johnson, where we received an update on legislative activities affecting special districts in the state, and a presentation from GovDeals, an online auction site for liquidating government property and equipment.

B. New Administrative Hire

I am happy to announce that Natalia Adomaitis will fill our vacant administrative technician role beginning on November 2, 2026. Natalia will handle administrative tasks, assist the engineering department with permitting, and she will begin assisting with Board secretary duties.

C. Posilipo Lift Station – Automatic Transfer Switch Replacement

Trinity Alternative Power Solutions completed the replacement of the automatic transfer switch (ATS) at the Posilipo Lift Station on October 28, 2026. The existing ATS experienced ongoing control issues, and replacement parts were no longer supported by the manufacturer. The need for replacement was also identified in the District's Collection

System Master Plan Life Expectancy Analysis. This upgrade improves the reliability of the lift station's emergency backup power system and helps ensure continued operation during power outages. Let me know if you need additional information.

D. District Financial Matters

1. **District Investments.** Below is a summary of the Districts' investment activities during the month of August. Investment statements are attached to the General Manager's report for reference:

Investment Account	Account Balance at 09/30/2026	Earning Yield
Charles Schwab	$6,120,677.77	3.80%
California CLASS	$4,228,960.49	3.82%

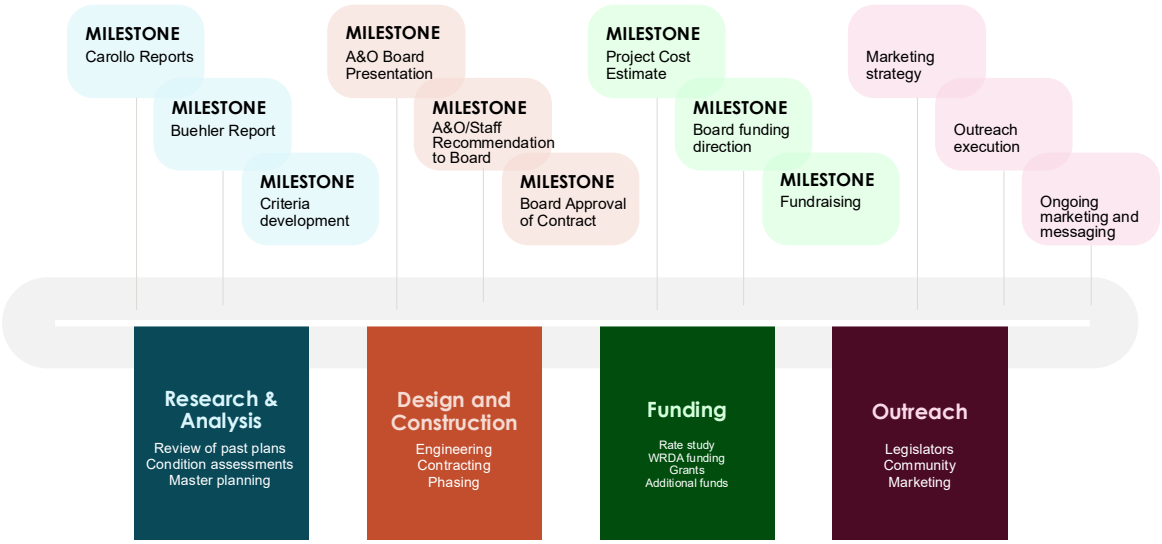
During the past month the District's investment earnings were as follows:

- $18,173.85 in cash dividends earned by the Charles Schwab account.
- $13,229.52 in earned income by the California CLASS account.

E. Wastewater Treatment Plant Roadmap

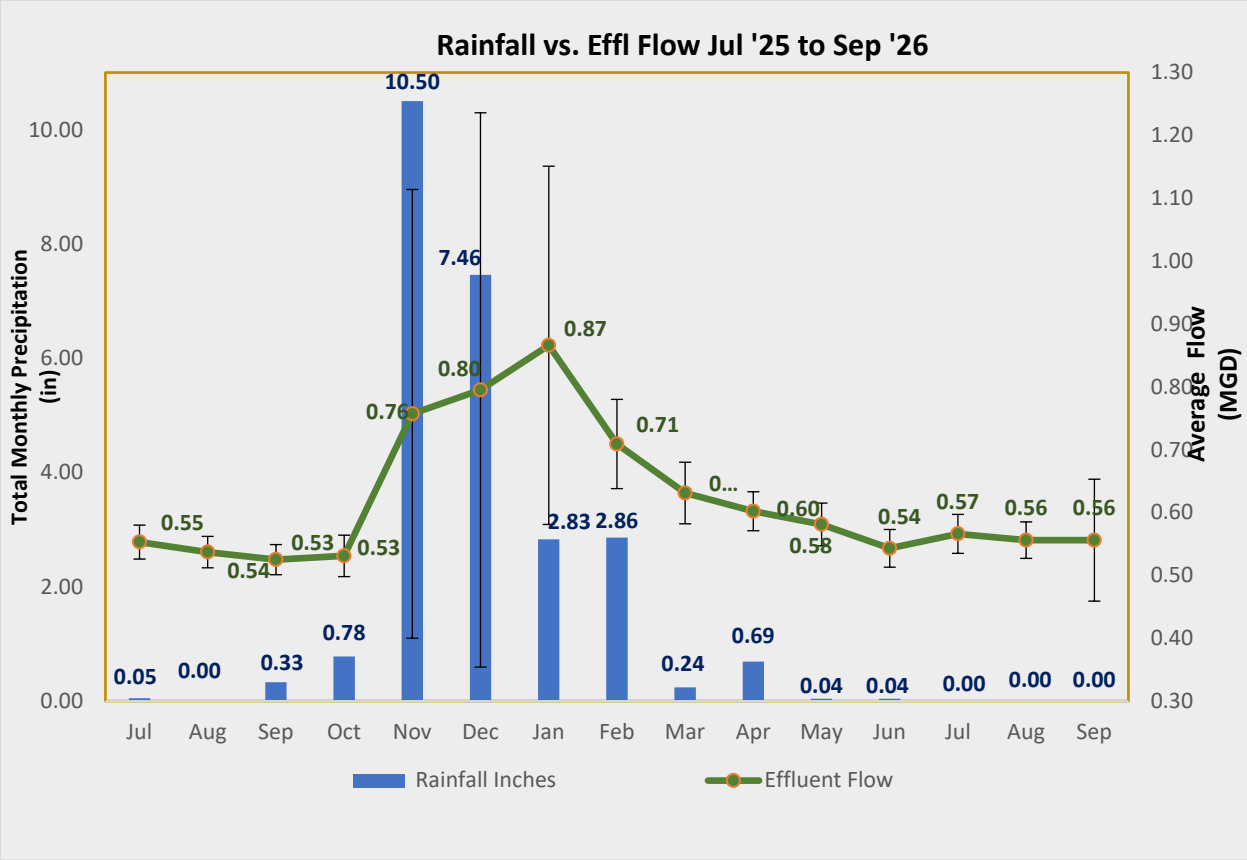
1. The following diagram outlines the significant District efforts currently ongoing in support of the wastewater treatment plant upgrade project. The following significant event occurred during this report period:
   a. Design and Construction: Staff released an RFP on October 22, 2026 to Southland Industries and Carollo Engineering for consulting services for wastewater connection to the City of Santa Barbara alternatives analysis. Responses are due by Friday, November 6,2026 at 4pm. Staff plans to review the proposals with the Wastewater Treatment Plant Improvement Project Ad Hoc committee, who will make a recommendation to the Board at a future Board meeting.
   b. Funding: The District was evaluated by Standard & Poor's who awarded the District with an AA credit rating. The District is eligible for reevaluation in two years.
   c. Funding: Staff met with Holman Capital Corporation to review District capital needs and receive an update regarding Holman Capital's products and services.

Montecito Sanitary District
Wastewater Treatment Plant Upgrade Project
Roadmap – Four Lines of Effort



F. Flow/Rain Comparison

Note: Error bar was higher for September due to irregular flow following outfall inspection.



G. MSD Capital Improvements Projects – Gantt Chart

MSD Capital Improvement Projects

CURRENT PLANNING STATUS — This view reflects anticipated sequencing and timing based on information presently available. Phases and timing are expected to change as design, permitting, funding, procurement, Board decisions, field conditions, staff capacity, and other dependencies develop. It is not a baseline schedule or a measure of early/late performance.

ID	Initiative / Project	FY25/26 Q1 July - Sept.	FY25/26 Q2 October - Dec.	FY25/26 Q3 January - March	FY25/26 Q4 April - June	FY26/27 Q1 July - Sept.	FY26/27 Q2 October - Dec.	FY26/27 Q3 January - March	FY26/27 Q4 April - June	FY27/28 Q1 July - Sept.	FY27/28 Q2 October - Dec.	FY27/28 Q3 January - March	FY27/28 Q4 April - June
COLLECTION SYSTEM													
C-001	Collection System Master Plan	Planning											
C-003	2025 Sewer Main CIPP Lining	Design/Permitting	Bidding/Award	Construction		Closeout							
C-004	FY 2028 Sewer Main CIPP Lining					RFP	Proposal/Award	Design			Bidding/Award	Construction	
C-005	Manhole Lining Project	Construction		Closeout									
C-007	District Vehicle (Truck)												
C-007	S. Jameson Relocation (On Hold)												
C-008	San Ysidro Road Upsizing					RFP	Proposal/Award			Design		Bidding/Award	Construction
C-009	Olive Mill Road Upsizing					RFP	Proposal/Award	Design			Bidding/Award	Construction	
S001	Septic to Sewer Strategic Plan	Planning											
CINI	Collection System I&I Reduction Program					RFP/Proposal/Award	Data Gathering Monitoring		Decision Point				
LIFT STATIONS / FORCE MAINS													
L-001	Channel Drive Lift Station / Force Main	Design/Permitting						Bidding/Award	Construction				
L-002	Eucalyptus Lift Station Relocation					RFP	RFP/Permitting	Proposal/Award	Preliminary Design			Proposal/Award	Design
L-005	Channel Lift Station Generator	Design/Permitting			Procurement	Construction/Closeout							
TREATMENT & LABORATORY													
T001	WWTP Improvement Project			IGA					Decision Point	Detailed Design/Permitting			
T001*	City of Santa Barbara Interconnect Assessment			Preliminary	Scope	Review	RFP/Award	Assessment	Decision Point	Detailed Design/Permitting			
T002	Outfall Inspection					RFP/Award	Inspection						
FACILTIES													
F010	Monte Cristo Lane Improvements		RFP	RFP/Proposal/Award		Residential Support	and	Design		Bidding/Award	Construction /Closeout		
F011	Administration Building Improvements												
DISTRICT INFRASTRUCTURE EMERGENCY													
CEME	Collection System Emergencies					RFP	RFP/Proposal/Award						
CMAIN	Collection System Maintenance					RFP	RFP/Proposal/Award						
LEME	Lift Station Emergencies					RFP	RFP/Proposal/Award						
TEME	Treatment Plant Emergencies					RFP	RFP/Proposal/Award						

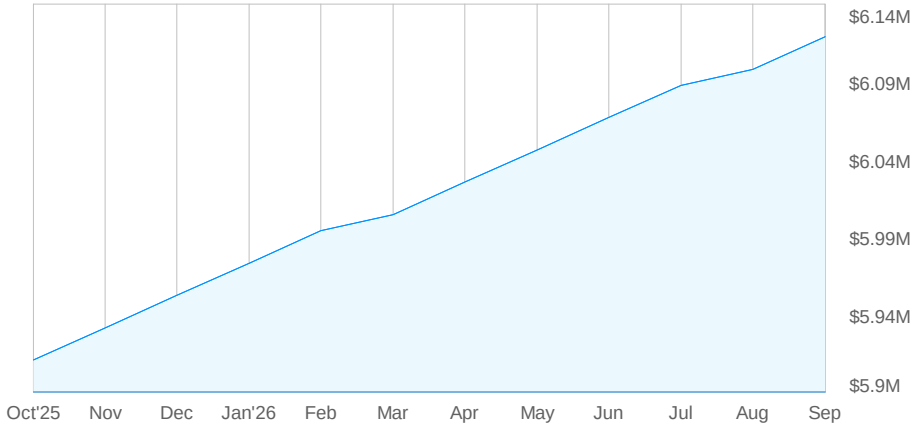
Schwab One® Account of

MONTECITO SANITARY DISTRICT

Account Number	Statement Period
4526	September 1-30, 2026

Account Summary

Ending Account Value as of 09/30	Beginning Account Value as of 09/01
$6,120,677.77	$6,102,503.92



	This Statement	YTD
Beginning Account Value	**$6,102,503.92**	$5,961,379.22
Deposits	**0.00**	0.00
Withdrawals	**0.00**	0.00
Dividends and Interest	**18,173.85**	159,298.55
Market Appreciation/(Depreciation)	**0.00**	0.00
Expenses	**0.00**	0.00
Ending Account Value	**$6,120,677.77**	**$6,120,677.77**

Account Ending Value reflects the market value of your cash and investments. It does not include pending transactions, unpriced securities or assets held outside Schwab's custody.

Your Consultant

Marc Myers
VP - Sr Financial Consultant
1 310-546-7063
Marc.Myers@schwab.com

Manage Your Account

Customer Service and Trading:
Call your Schwab Representative
1-800-435-4000
24/7 Customer Service

For the most current records on your account visit schwab.com/login. Statements are archived up to 10 years online.

Commitment to Transparency

Client Relationship Summaries and Best Interest disclosures are at schwab.com/transparency.
Charles Schwab & Co., Inc. Member SIPC.

Online Assistance

Visit us online at schwab.com

Visit schwab.com/stmt to explore the features and benefits of this statement.

MONTECITO SANITARY DISTRICT
1042 MONTE CRISTO LN
SANTA BARBARA CA 93108-2809

Schwab One® Account of

MONTECITO SANITARY DISTRICT

Account Number
****-*526

Statement Period
September 1-30, 2026

Asset Allocation

Investment Objective: Capital Preservation	This Period	Current Allocation
Cash and Cash Investments	6,120,677.77	100%
Total	**$6,120,677.77**	100%

Top Account Holdings This Period

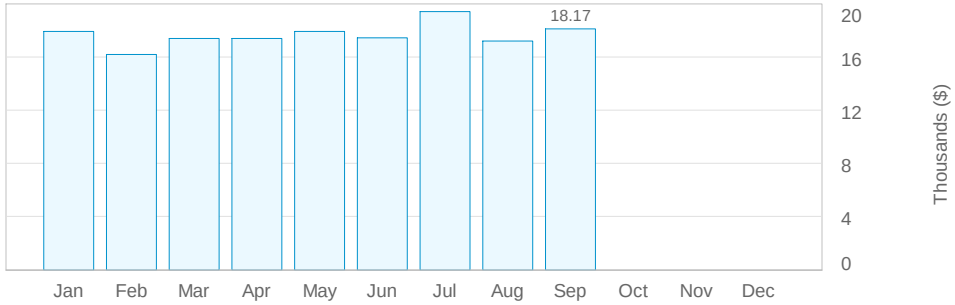
SYMBOL CUSIP	Description	Market Value	% of Accounts
SUTXX	SCHWAB US TREASURY MONEY	6,120,672.26	100%
	CHARLES SCHWAB BANK	5.51	<1%

Gain or (Loss) Summary

	Short-Term (ST)			Long-Term (LT)		
	Gain	(Loss)	Net	Gain	(Loss)	Net
This Period	0.00	0.00	0.00	0.00	0.00	0.00
YTD			0.00			0.00
Unrealized						**$0.00**

Values may not reflect all of your gains/losses and may be rounded up to the nearest dollar; Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings and may change or be adjusted in certain cases. Please login to your account at Schwab.com for real-time gain/loss information. Statement information should not be used for tax preparation, instead refer to official tax documents. For additional information refer to Terms and Conditions.

Income Summary



	This Period		YTD	
Federal Tax Status	Tax-Exempt	Taxable	Tax-Exempt	Taxable
Cash Dividends	0.00	18,173.85	0.00	159,298.55
Total Income	**$0.00**	**$18,173.85**	**$0.00**	**$159,298.55**

A Message About Your Account

Statement of Financial Condition

The most recent statement of financial condition for Charles Schwab & Co., Inc. (CS&Co) may be obtained at no cost, via the Internet at http://www.schwab.com/legal/financials or by contacting CS&Co at 1-800-435-4000. If you are a client of an independent investment advisor, contact Schwab Alliance at 1-800-515-2157. International clients, please call us at +1-415-667-7870 and Charles Schwab Hong Kong clients, please call +852-2101-0500. At June 30, and July 31, 2026, CS&Co had net capital of $16.1 billion and $16.5 billion, respectively, and a net capital requirement of $3.5 billion and $3.5 billion, respectively. A copy of the report may be requested via: Investor Relations, 3000 Schwab Way, Westlake, TX 76262. Independent investment advisors are not owned by, affiliated with, or supervised by CS&Co.

Positions - Summary

Beginning Value as of 09/01	+	Transfer of Securities(In/Out)	+	Dividends Reinvested	+	Cash Activity	+	Change in Market Value	=	**Ending Value as of 09/30**	Cost Basis	Unrealized Gain/(Loss)
$6,102,503.92		$0.00		($18,173.85)		$18,173.85		$18,173.85		**$6,120,677.77**	$0.00	$0.00

Values may not reflect all of your gains/losses; Schwab has provided accurate gain and loss information wherever possible for most investments. Cost basis may be incomplete or unavailable for some of your holdings and may change or be adjusted in certain cases. Statement information should not be used for tax preparation, instead refer to official tax documents. For additional information refer to Terms and Conditions.

Cash and Cash Investments

Type	Symbol	Description	Quantity	Price($)	Beginning Balance($)	Ending Balance($)	Change in Period Balance($)	Pending/Unsettled Cash($)	Interest/ Yield Rate	% of Acct
Bank Sweep		CHARLES SCHWAB BANK [X,Z]			5.51	5.51	0.00		0.01%	<1%
Money Fund (Non-Sweep)	SUTXX	SCHWAB US TREASURY MONEY [+]	6,120,672.2600	1.0000	6,102,498.41	6,120,672.26	18,173.85			100%
Total Cash and Cash Investments					**$6,102,503.92**	**$6,120,677.77**	**$18,173.85**			**100%**

Rates for Bank Sweep and Schwab One® Interest are the annual percentage yields (APY) determined as of the last business day of the statement period or the last day a balance was held.

Transactions - Summary

Beginning Cash* as of 09/01	+	Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Expenses	=	Ending Cash* as of 09/30
$5.51		$0.00		$0.00		($18,173.85)		$0.00		$18,173.85		$0.00		$5.51

Other Activity **$0.00**

Other activity includes transactions which don't affect the cash balance such as stock transfers, splits, etc.

*Cash (includes any cash debit balance) held in your account plus the value of any cash invested in a sweep money fund.

Transaction Details

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share($)	Charges/ Interest($)	Amount($)	Realized Gain/(Loss)($)
09/30	Purchase	Reinvested Shares	SUTXX	SCHWAB US TREASURY MONEY ULTRA	18,173.8500	1.0000		(18,173.85)	

Transaction Details (continued)

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share($)	Charges/ Interest($)	Amount($)	Realized Gain/(Loss)($)
09/30	Dividend	Div For Reinvest	SUTXX	SCHWAB US TREASURY MONEY ULTRA				18,173.85	
Total Transactions								**$0.00**	

Date column represents the Settlement/Process date for each transaction.

Bank Sweep Activity

Date	Description	Amount
09/01	**Beginning Balance** [X,Z]	**$5.51**

Date	Description	Amount
09/30	**Ending Balance** [X,Z]	**$5.51**

Date	Description	Amount
09/30	**Interest Rate** [* Z]	**0.01%**

* Your interest period was 08/16/26 - 09/15/26. [Z]

Endnotes For Your Account

+ Dividends paid on this security will be automatically reinvested.

X Bank Sweep deposits are held at one or more FDIC-insured Program Banks. Charles Schwab & Co., Inc. is not an FDIC-insured bank and deposit insurance covers the failure of an insured bank. Certain conditions must be satisfied for FDIC insurance coverage to apply. Please review the Cash Features Program Disclosure Statement for a list of the Program Banks at schwab.com/cashfeaturesdisclosure.

Z For the Bank Sweep and Bank Sweep for Benefit Plans features, interest is paid for a period that differs from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period.

Terms and Conditions

GENERAL INFORMATION AND KEY TERMS: This Account statement is furnished solely by Charles Schwab & Co., Inc. ("Schwab") for your Account at Schwab ("Account"). Unless otherwise defined herein, capitalized terms have the same meanings as in your Account Agreement. If you receive any other communication from any source other than Schwab which purports to represent your holdings at Schwab (including balances held at a Depository Institution) you should verify its content with this statement. **AIP (Automatic Investment Plan) Customers:** Schwab receives remuneration in connection with certain transactions effected through Schwab. If you participate in a systematic investment program through Schwab, the additional information normally detailed on a trade confirmation will be provided upon request. **Average Daily Balance:** Average daily composite of all cash balances that earn interest and all loans from Schwab that are charged interest. **Bank Sweep and Bank Sweep for Benefit Plans Features:** Schwab acts as your agent and custodian in establishing and maintaining your Deposit Account(s) as a feature of your brokerage account(s). Deposit accounts held through these bank sweep features constitute direct obligations of one or more FDIC-insured banks ("Program Banks") that are not obligations of Schwab. Funds swept to Program Banks are eligible for deposit insurance from the FDIC up to the applicable limits for each bank for funds held at that bank in the same insurable capacity. The balance in the Deposit Accounts can be withdrawn on your order and the proceeds returned to your brokerage account or remitted to you as provided in your Account Agreement. For information on FDIC insurance and its limits, as well as other important disclosures about the bank sweep feature(s) in your account(s), please refer to the Cash Features Program Disclosure Statement available online or from a Schwab representative. **Cash:** Any Free Credit Balance owed by us to you payable upon demand which, although accounted for on our books of record, is not segregated and may be used in the conduct of this firm's business. **Interest:** For the Schwab One Interest, Bank Sweep, and Bank Sweep for Benefit Plans features, interest is paid for a period that differs from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period. For the Schwab One Interest feature, interest accrues daily from the second-to-last business day of the prior month and is posted on the second-to-last business day of the current month. For the Bank Sweep feature, interest accrues daily from the 16th day of the prior month and is credited/posted on the first business day after the 15th of the current month. If, on any given day, the interest that Schwab calculates for the Free Credit Balances in the Schwab One Interest feature in your brokerage account is less than $.005, you will not accrue any interest on that day. For balances held at Program Banks with Schwab in the Bank Sweep and Bank Sweep for Benefit Plans features, interest will accrue even if the amount is less

California CLASS

Summary Statement

September 30, 2026

Investor ID:

0000189-0000876 PDFT 238723

Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108

California CLASS

California CLASS

Average Monthly Yield: 3.8181%

		Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
	Investment Fund	4,215,730.97	0.00	0.00	13,229.52	116,276.94	4,216,171.95	4,228,960.49
TOTAL		**4,215,730.97**	**0.00**	**0.00**	**13,229.52**	**116,276.94**	**4,216,171.95**	**4,228,960.49**

Account Number:

Investment Fund

Account Summary

Average Monthly Yield: 3.8181%

	Beginning Balance	Contributions	Withdrawals	Income Earned	Income Earned YTD	Average Daily Balance	Month End Balance
California CLASS	4,215,730.97	0.00	0.00	13,229.52	116,276.94	4,216,171.95	4,228,960.49

Transaction Activity

Transaction Date	Transaction Description	Contributions	Withdrawals	Balance	Transaction Number
09/01/2026	Beginning Balance			4,215,730.97	
09/30/2026	Income Dividend Reinvestment	13,229.52			
09/30/2026	Ending Balance			4,228,960.49	

California CLASS

	California CLASS	
Date	Dividend Rate	Daily Yield
09/01/2026	0.000103007	3.7598%
09/02/2026	0.000102942	3.7574%
09/03/2026	0.000102863	3.7545%
09/04/2026	0.000411872	3.7583%
09/05/2026	0.000000000	3.7583%
09/06/2026	0.000000000	3.7583%
09/07/2026	0.000000000	3.7583%
09/08/2026	0.000103000	3.7595%
09/09/2026	0.000102897	3.7557%
09/10/2026	0.000102981	3.7588%
09/11/2026	0.000308301	3.7510%
09/12/2026	0.000000000	3.7510%
09/13/2026	0.000000000	3.7510%
09/14/2026	0.000102800	3.7522%
09/15/2026	0.000102919	3.7565%
09/16/2026	0.000102966	3.7583%
09/17/2026	0.000103769	3.7876%
09/18/2026	0.000318069	3.8698%
09/19/2026	0.000000000	3.8698%
09/20/2026	0.000000000	3.8698%
09/21/2026	0.000106004	3.8691%
09/22/2026	0.000106370	3.8825%
09/23/2026	0.000106707	3.8948%
09/24/2026	0.000106923	3.9027%
09/25/2026	0.000321510	3.9117%
09/26/2026	0.000000000	3.9117%
09/27/2026	0.000000000	3.9117%
09/28/2026	0.000107501	3.9238%
09/29/2026	0.000107406	3.9203%
09/30/2026	0.000107326	3.9174%

Performance results are shown net of all fees and expenses and reflect the reinvestment of dividends and other earnings. Many factors affect performance including changes in market conditions and interest rates and in response to other economic, political, or financial developments. Investment involves risk including the possible loss of principal. No assurance can be given that the performance objectives of a given strategy will be achieved. **Past performance is no guarantee of future results. Any financial and/or investment decision may incur losses.**

Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108
A Public Service Agency
Phone: (805) 969-4200
www.montsan.org

MONTECITO SANITARY DISTRICT

STAFF REPORT – 6A

DATE: November 4, 2026

TO: Board of Directors

FROM: John Weigold, General Manager
Bryce Swetek, Engineering Manager

SUBJECT: Award of Contract – San Ysidro Road Pipeline Capacity Improvements Project

---

RECOMMENDATION:

It is recommended that the Board:

i) Authorize the General Manager to negotiate an agreement with Water Systems Consulting, Inc. (WSC) in an amount not to exceed $450,000 to perform design engineering services for the San Ysidro Road Pipeline Capacity Improvements project; and

ii) Authorize the General Manager to approve expenditures of up to ten percent (10%) of the negotiated amount as an amendment allowance for any changes in scope of work.

DISCUSSION:

Background – Staff issued a Request for Proposal (RFP) (Attachment 1) seeking proposals from professional engineering consultants to prepare construction ready plans, specifications, and cost estimate for the San Ysidro Road Pipeline Capacity Improvements project. This project is part of the District's Sewer Collection System Master Plan (Master Plan) where San Ysidro Road was identified as being undersized and requires improved capacity to address current and future flows (such as septic to sewer conversions) in the pipeline. The project is listed as CIP #1, per the Master Plan and is provided as Attachment 2. Addressing dry weather flow capacity deficiencies is a top priority per the District's Master Plan. Maps depicting a range of flow capacity scenarios along San Ysidro Road are provided as Attachment 3.

Request for Proposal Process and Results – Staff issued the RFP on September 23, 2026, to four engineering consultants. The RFP required the consultants to propose on the Basis

Scope of Work (Basis), as well provide any Additional/Optional Scope of Work (Optional) as recommended by the consultant. An addendum to the RFP was issued (Addendum No. 1) consisting of minor changes in scope and responses to consultant questions was provided to the consulting firms on October 13, 2026. The District received three proposals from consulting firms, including Water Systems Consulting, Inc. (WSC), BKF Engineers (BKF), and Stantec Consulting Services, Inc. (Stantec).

District Staff and Phoenix Civil Engineering reviewed the proposals and filled out an Evaluation Form for each consulting firm. The purpose of the evaluation is to review the firm's qualifications, approach to the project, schedule, references, and level of effort. Each criteria was scored from 1-10 with 1 showing poorly and 10 showing excellence. The criteria were averaged amongst the review panel and then a weighted value was applied based on the RFP to tally a final weighted score. The table below represents a summary of the evaluation as well as the anticipated fee and responsiveness from each firm:

Consulting Firm	Qualifications (40%)	Approach (20%)	Schedule (10%)	References (15%)	Effort (15%)	Approx. Proposal Amount "Basis" and "Optional"	Weighted Score / Proposal Status
WSC	9	8.7	8	8.2	8.3	$450,000 $40,000	**86.08** Responsive
BKF	7.7	8.2	8.8	7.7	7.6	$362,000 $4,000	**78.71** Responsive
Stantec	7.5	7.5	8	8.2	7.8	$497,000	**77.00** Responsive

Analysis – Justifications – The anticipated base proposal amount of approximately $450,000 submitted by WSC is responsive to and meets the requirements of the RFP but is a higher amount than anticipated. This is in part due to WSC's multiple subconsultants, where markups are included. WSC also submitted optional services amounting to $40,000 and appears to offer an array of additional services. Staff notes that all three firms are well qualified and capable of executing this project and Staff is grateful for their proposal efforts.

Staff recommends the Board authorize the General Manager to negotiate an agreement with WSC for the design phase of the project. Staff has had a preliminary discussion with WSC to confirm the proposal amount, however, there will be a reduction in scope and hours compared to the attached proposal (Attachment 3). Staff notes that the optional scope of work provided by WSC is not anticipated to be exercised. WSC's proposal demonstrates relevant project experience, a strong multi-disciplinary team of engineering professionals, reputable subconsultants, a clear understanding and approach to perform the work, and an acceptable schedule. Staff notes rates for ESA were not provided in the proposal, but they were shared by WSC ahead of this staff report to assist with calculating the approximate proposal amount.

Staff reiterates that this negotiated Agreement is for professional design services. Pursuant to California Government Code section 4526, consultant selection is based on

demonstrated competence and the professional qualifications necessary to perform the required services, with compensation that is fair and reasonable to the District. Accordingly, the District is not required to select the lowest-priced proposal.

Fiscal Impact – The San Ysidro Road Capacity Improvements Project is included in the Fiscal Year 2026-27 CIP Budget with $500,000. Staff plans to negotiate with WSC further to look for efficiencies and confirm scope of this effort. Staff recognizes the anticipated proposal amount is a significant portion of the budgeted amount; however, this is in part due to additional scope of work that was added during the RFP process. Staff notes additional funding may be required for unforeseen scope changes, potential potholing, and project management. A budget adjustment is not anticipated at this time.

DEPARTMENTS INVOLVED: Engineering and Administration

ATTACHMENTS:

1. Montecito Sanitary District RFP
2. CIP #1 Project (Master Plan)
3. Flow Capacity Scenarios
4. WSC Proposal

Montecito Sanitary District

1042 Monte Cristo Lane
Santa Barbara, CA 93108
General Manager: John Weigold

A Public Service Agency

PHONE: (805) 969-4200
FAX: (805) 969-9049
E-MAIL: jweigold@montsan.org

Request for Proposal (RFP)

Consultant Services
For
San Ysidro Road Pipeline Capacity Improvements
Project No. C008

September 23, 2026

Submittals due October 21, 2026, by 4:00 PM Pacific Time

I. INTRODUCTION

Montecito Sanitary District is located in Santa Barbara County approximately 3 miles south of the City of Santa Barbara. It provides wastewater collection, pumping and treatment to the 10,000 residents of the unincorporated community. The wastewater collected is primarily residential. There are some commercial customers and no industrial customers in the District's wastewater system. The District boundaries are located along the coastline and extending to the foothills. As part of the District's wastewater collection system master plan, a pipeline that runs along and east of San Ysidro Road was identified as being undersized and requiring an improved capacity to address current and future flows in the pipeline.

The Montecito Sanitary District (MSD/District) is seeking proposals from professional engineering consultants to prepare construction ready plans, specifications, and cost estimate for the San Ysidro Road Pipeline Capacity Improvements project. The project is anticipated to include a new 8-inch diameter PVC pipeline for approximately 2,059 feet (0.39 miles) from the intersection of the East Valley Road (Hwy 192) and San Ysidro Road to the southern end of Montecito Union Elementary School District. From there, potential alternatives for capacity improvements include, but are not limited to:

1. Upsize approximately 2,690 feet (0.51 miles) of existing 8-inch to 10-inch diameter CIPP lined VCP pipeline to 12-inch PVC pipe via trenchless technology or conventional construction.
2. Approximately 2,690 feet (0.51 miles) of new 12-inch PVC pipe and abandon the existing pipeline.
3. Approximately 2,690 feet (0.51 miles) of new 8-inch PVC pipe and maintain the existing pipeline.

All alternatives will end near the intersection of San Ysidro Road and San Leandro Lane. An atlas of the proposed pipeline replacement work is provided as Attachment A. The project plans will detail the limits of the work, access structures, existing utilities, right of way and easement limits, access constraints, and permit requirements. This RFP will focus on design services only. Bid and construction phase services will be under a separate contract.

II. SCOPE OF WORK

Consultant is expected to perform the following services/tasks described below. The District will consider any additions or refinements to the proposed scope of work that the Consultant may recommend, provided the changes meet the intent of the scope.

TASK 1: PROJECT MANAGEMENT, QUALITY ASSURANCE/QUALITY CONTROL, MEETINGS, AND SITE VISITS.

This task includes project management and coordination activities as well as quality control/assurance, and meetings with the project team.

Task 1.1 Project Management. Monitoring and coordination of budget, schedule, subconsultants, jurisdictional/public agencies, Caltrans (SR 192), and internal project team. Prepare monthly invoices and updated schedule.

The District's Project Manager will coordinate access to assets within the study site as needed by the Consultant.

Task 1.2 Quality Control/Quality Assurance. Review and quality control all deliverables prior to submittal to the District.

Task 1.3 Meetings. Anticipated Meetings include:

- Project kick-off meeting and site visit with District staff.
- Draft Geotechnical Report review meeting (video)
- Draft Preliminary Design Alternatives Report review meeting (video)
- 50% Deliverables review meeting (video)
- 90% Deliverables review meeting (video)

Prepare agenda and conduct design kick-off meeting with District staff to review project scope and District's and Consultant's expectations. Prepare a schedule for completion of the design of the Contract Documents to be discussed at the kick-off meeting. Include milestone dates for submittals and review meetings. Consultant should anticipate two weeks for District review of each submittal. Consultant shall prepare and distribute the meeting summaries following meetings.

TASK 2: REVIEW EXISTING INFORMATION & PRELIMINARY DESIGN

This task includes review of existing information and preliminary investigation and design efforts.

Task 2.1 Existing Documents. Consultant shall review background documents to the extent needed to understand the existing constraints and challenges. Example documents include existing pipeline plans.

Task 2.2 Utility Research. Consultant will contact utility agencies with below-grade facilities in the project area to obtain atlas maps and other available information regarding the type, size, location, material, and depth of existing utilities. Information received will be incorporated into the Project base map and considered in the Project design. Consultant will file an Underground Service Alert of Southern California ticket prior to the topographic survey in order to have existing utility locations marked in the Project area.

Task 2.3 Topographic Survey. Consultant will provide survey services to facilitate the design work for the project. It is anticipated this work will utilize NAD 83 and NAVD 88 datums based on local benchmarks, but Consultant may suggest datums/epoch to be confirmed by the District prior to beginning the work. This work shall be provided and signed by a Professional Land Surveyor (PLS) licensed in the state of California.

Task 2.4 Geotechnical Investigation and Report. Consultant will provide a geotechnical investigation (historical documentation and field obtained soil sampling) and report for use as a basis for the design and construction for the upsizing of the sewer main (pipe burst/split potential).

Task 2.4.1 Draft Report. Consultant will develop a draft geotechnical report in coordination with the District. The draft shall be provided in Word (.doc) format so District staff may provide comments and suggested edits via "track changes" as well as PDF. Consultant should anticipate a remote review meeting with the District to clarify comments per Task 1.3.

Task 2.4.2 Final Report. Consultant will provide a final geotechnical report incorporating comments provided in the draft report. The report shall be provided in PDF format and signed by a Professional Geotechnical Engineer registered in the State of California.

Task 2.5 Environmental Document Preparation and Permitting. Consultant will provide environmental and permitting services, as needed, to facilitate design and approval of the project. This task shall include, but is not limited to:

- Assisting the District in providing all applicable documents for CEQA compliance.
- Assisting the District in preparing and providing all applicable permit applications and documents as required by jurisdictional/public agencies, such as County and Caltrans encroachment permits.

Task 2.6 Preliminary Design Alternatives Report. Consultant will review/consider existing utilities, geotechnical report, constructability, environmental/CEQA constraints, and analyze three or more capacity improvement alternatives. The District retains a sewer modeling consultant, which an alternative may be hydraulically modeled to support the alternative analysis. The Consultant shall recommend an alternative to achieve the District's objective of capacity improvements.

Task 2.6.1 Draft Report. Consultant will develop a draft report in coordination with the District. The draft shall be provided in Word (.doc) format so District staff may provide comments and suggested edits via "track changes" as well as PDF. Consultant should anticipate a remote review meeting with the District to clarify comments per Task 1.3.

Task 2.6.2 Final Report. Consultant will provide a final report incorporating comments provided in the draft report. The report shall be provided in PDF format and signed by a Professional Civil Engineer registered in the State of California.

TASK 3: CONTRACT DOCUMENT PREPARATION

Based on the District's selected alternative, Consultant shall prepare construction ready plans, technical specifications, and cost estimate for the pipeline design project. Plans will incorporate the pipeline section plan and profile drawings, crossing utilities (from consultant performed utility research), the technical parameters related to the pipeline installation, access structures, etc. The District will supply the record drawings and GIS data of its existing infrastructure that can be used as a base map; however, it is expected that the design team will have the alignment (existing and proposed) surveyed by a licensed in the State of California land surveyor. Technical specifications will be in the District format (CSI format 6 digit).

Task 3.1 Draft Deliverable Preparation. Consultant will prepare plans, technical specifications, and cost estimate deliverables for District review at the 50% and 90% design stages. The draft deliverables shall be provided in Word (.doc) format so District staff may provide comments and suggested edits via "track

changes" as well as PDF. Consultant should anticipate a remote review meeting with the District to clarify comments per Task 1.3. The Consultant shall anticipate two weeks for District review.

Task 3.2 Final Deliverable Preparation. Consultant will provide Final plans, technical specifications, and cost estimate deliverables in PDF format, which each shall be signed and stamped by a Professional Civil Engineer registered in the State of California. These will be considered the Issued for Bid electronic set for the District.

III. RESPONSES

The response shall include at a minimum the information listed herein; incomplete or unclear information may be grounds for rejection. The response shall be organized as follows:

1. Letter Proposal

The Proposal may be submitted as a letter proposal addressed to:

Bryce Swetek, P.E.
Engineering Manager
Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108

The letter proposal shall be submitted electronically to Bryce Swetek, P.E. at bswetek@montsan.org. The email subject line shall say, "RFP: San Ysidro Road Pipeline Capacity Improvements". The proposal must be received by **4:00 PM Pacific Time, October 21, 2026.**

Late proposals will not be accepted. Any proposal received prior to the time and date specified above may be withdrawn or modified by written request of the proposer provided the modified proposal is received prior to the time and date specified above.

2. Experience and Qualifications

a. Provide a brief history of the firm, including name of the firm, the year the firm was established under the current name, and the closest office location to the project. Indicate any other previous names for the firm during the last five years and the year any name change was effective.
b. Provide general information concerning the Consultant's qualifications and descriptions of at least 3 relevant projects. Indicate who in the firm performed specific functions on the projects. For any incomplete projects, clearly indicate the status of the project. Inclusion of general information for any subconsultant qualifications and listing where Consultant and subconsultant have previously worked together is encouraged.
c. Identify firm personnel, including any subconsultants, that will be assigned to the key positions and show the relationships on an Organizational Chart and provide which office they are located.
d. Provide three clients as a reference, including at least two for whom services were rendered during the past two years, preferably for services similar to those outlined in this solicitation; include contact information for each reference.

3. Project Understanding and Approach

Provide a statement demonstrating the Consultant's understanding of the Project and proposed approach to the Project scope of work, broken down by tasks and subtasks. Proposals shall identify specific milestones and deliverables for each task. Consultant may revise the scope of services in this RFP, including considerations of additional capacity improvement alternatives, and should call out the proposed revisions/considerations in their proposal with any supporting context.

4. Estimated Schedule

The proposal must include an estimated schedule to complete the Project scope of work. Describe the Consultant's ability to meet the proposed schedule and timing of each task in the scope of work.

5. Estimated Level of Effort

The proposal shall include a table listing the personnel involved in the project and the anticipated hours associated with each individual's level of effort identified by task based on a Professional Rate Sheet listing the different classifications of labor. The Professional Rate Sheet shall be included in the proposal. The table is to be based on the Consultant's estimation for performing the services based on the Consultant's Project Understanding and Approach.

6. Conflicts

Identify any conflicts which could affect the ability to perform the work in a timely fashion over the duration of the contract.

7. Quality Assurance/Quality Control

Provide a brief description of in-place and proposed Quality Assurance & Quality Control practices applicable for this project.

8. Assumptions and Additional Comments

The proposal shall include any assumptions made, comments, suggestions, or additions for the District to consider in selecting the firm. Identify the potential benefit, value, or impact these may have to the District.

9. Contract Requirements

The District will be utilizing a Professional Services Agreement (PSA) included as Attachment B for review. The terms of Agreement are not subject to change. The Consultant must comply with applicable local, State, and Federal laws including prevailing wage rates and their payment in accordance with California Labor Code, Section 1775. Provide an affirmative statement indicating acceptance of the terms of the Agreement.

IV. SELECTION CRITERIA

From the proposals received, the District will select the most qualified firm for the project. Selection will be based on information provided in the proposal and will be based on the following criteria:

1. Qualifications: The Consultant's (including subconsultants, if any) firm as well as relevant experience and ability to perform the Scope of Works as outlined above, based on information provided by the Consultant and client references – **40%.**
2. Approach: The Consultant's understanding of the Project as demonstrated by their approach to completing the Scope of Work as outlined in this RFP – **20%**.
3. Schedule: The Consultant's availability and ability to perform the Scope of Work as outlined in this RFP – **10%**.
4. References: The Consultant's client references, the Consultant's performance on similar studies, and their knowledge of, and familiarity with, the District's geographic region – **15%**.
5. Level of Effort: The District is seeking a reasonable level of effort for the Scope of Work as outlined in this RFP and will consider the significance of staffing for the project as well as alignment to the proposed Approach/Scope of Work – **15%**.

V. RESERVATION OF RIGHTS

The following is a list of rights of the District:

1. The Montecito Sanitary District reserves the right to:
    a. Reject any and all responses received.
    b. Issue a subsequent RFP.
    c. Cancel the entire RFP.
    d. Remedy technical errors in the RFP process.
    e. Negotiate with any, all, or none of the Respondents to the RFP.
    f. Waive informalities and irregularities.
    g. Make multiple recommendation(s) to the MSD Board.
    h. Request additional information or clarification.
    i. All responses and their contents will become the property of MSD.
2. The District will not reimburse Consultants or sub-consultants for any costs associated with any travel and/or per diem incurred in any presentations or for any costs in preparing and submitting the responses.
3. The District reserves the right to end, in its sole discretion, negotiations at any time with any or all Consultants. This RFP does not commit the District to enter into a contract, nor does it obligate it to pay any costs incurred in the preparation and submission of responses or in anticipation of a contract.
4. Failure to respond to the requirements outlined in this RFP may result in the Consultant's disqualification as non-responsive to the RFP.

VI. INQUIRIES

All inquiries related to this RFP shall be sent to Bryce Swetek, P.E. at bswetek@montsan.org and Michael Pardo at mpardo@montsan.org no later than **4:00 PM Pacific Time, October 9, 2026.** Any clarifications or modifications to this RFP resulting from proposer inquiries shall be issued by the District through written addenda and distributed to all proposers no later than **4:00 PM Pacific Time, October 13, 2026.** If any addenda are issued, Consultant shall provide an affirmative statement indicating acknowledgement of the addenda.

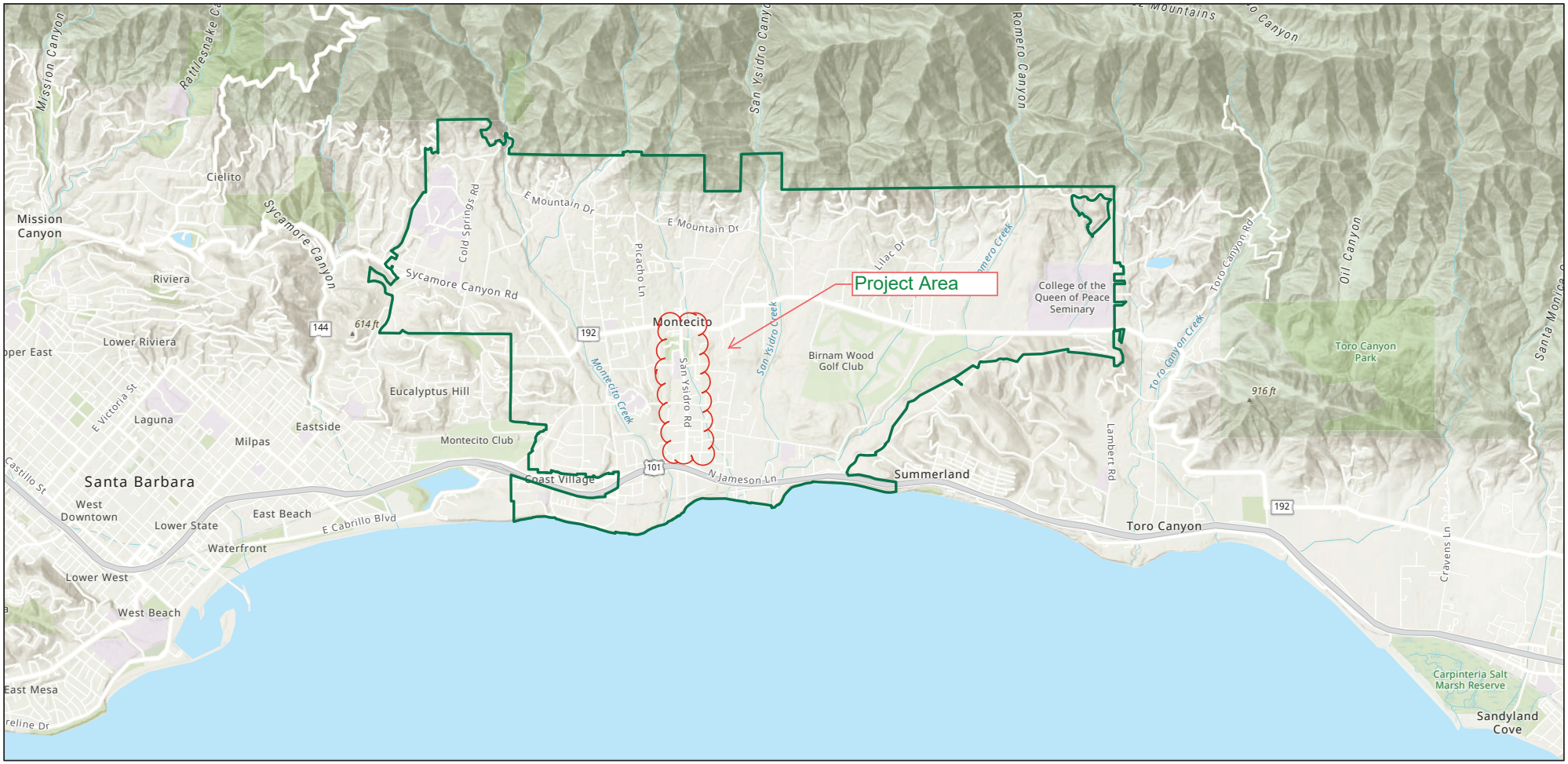
VII. ATTACHMENTS

A. District GIS Atlas Map
B. Sample Professional Services Agreement

Attachment A

District GIS Atlas Maps

San Ysidro Road Pipeline Capacity Improvements



8/26/2026, 2:21:20 PM

Montecito Sanitary District Boundary

SBC Assessor Parcels – Mailing Labels

World_Hillshade

World_Hillshade

1:52,198

0 0.5 1 2 mi

0 0.75 1.5 3 km

Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community, Esri, NASA, NGA, USGS, FEMA

San Ysidro Road Pipeline Capacity Improvements



8/26/2026, 2:19:26 PM

- Cleanouts
- Maintenance Holes
  - Standard
  - Drop
- Pipes
  - GRAVITY MAIN
- Montecito Sanitary District Boundary
- SBC Assessor Parcels – Mailing Labels
- Street Labels
- ZWG_Santa_Barbara_Southcoast_Region_3INCH_2024.sid
  - Red: Band_1
  - Green: Band_2
  - Blue: Band_3
- World_Hillshade

1:3,340

0 0.03 0.06 0.12 mi

0 0.05 0.1 0.2 km

Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community, Sources: Esri, Vantor, Airbus DS, USGS, NGA, NASA, CGIAR, N Robinson, NCEAS, NLS, OS, NMA, Geodatastyrelsen, Rijkswaterstaat, GSA, Geoland, FEMA,

San Ysidro Road Pipeline Capacity Improvements



8/26/2026, 2:20:02 PM

Cleanouts

Maintenance Holes

Standard

Drop

Pipes

GRAVITY MAIN

FORCE MAIN

SIPHON

Montecito Sanitary District Boundary

SBC Assessor Parcels – Mailing Labels

Street Labels

ZWG_Santa_Barbara_Southcoast_Region_3INCH_2024.sid

Red: Band_1

Green: Band_2

Blue: Band_3

World_Hillshade

1:3,340

0 0.03 0.06 0.12 mi

0 0.05 0.1 0.2 km

Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community, Sources: Esri, Vantor, Airbus DS, USGS, NGA, NASA, CGIAR, N Robinson, NCEAS, NLS, OS, NMA, Geodatastyrelsen, Rijkswaterstaat, GSA, Geoland, FEMA,

Attachment B

Sample Professional Services Agreement

PROFESSIONAL SERVICES AGREEMENT
FOR DESIGN PROFESSIONALS

(Montecito Sanitary District / *[Company or Individual]*)

1. IDENTIFICATION

This PROFESSIONAL SERVICES AGREEMENT ("Agreement") is entered into by and between the Montecito Sanitary District, a California Special District ("District"), and _____, a _____ ("Consultant").

2. RECITALS

2.1. District has determined that it requires the following professional services from a consultant: **[enter description of consultant's services]**

2.2. Consultant represents that it is fully qualified to perform such professional services by virtue of its experience and the training, education and expertise of its principals and employees. Consultant further represents that it is willing to accept responsibility for performing such services in accordance with the terms and conditions set forth in this Agreement.

2.3. Consultant represents that it has no known relationships with third parties, District Board members, or employees of the District which would (1) present a conflict of interest with the rendering of services under this Agreement under Government Code Section 1090, the Political Reform Act (Government Code Section 81000 *et seq.*), or other applicable law, (2) prevent Consultant from performing the terms of this Agreement, or (3) present a significant opportunity for the disclosure of confidential information.

NOW, THEREFORE, for and in consideration of the mutual covenants and conditions herein contained, District and Consultant agree as follows:

3. DEFINITIONS

3.1. "Design Professional": A Design Professional is any individual satisfying one or more of the following: (1) licensed as an architect pursuant to Business and Professions Code 5500 et seq., (2) licensed as a landscape architect pursuant to Business and Professions Code 5615 et seq., (3) licensed as a professional land surveyor pursuant to Business and Professions Code 8700 et seq., or (4) registered as a professional engineer pursuant to Business and Professions Code 6700 et seq.

3.2. "Scope of Services": Such professional services as are set forth in Consultant's **[enter consultant's proposal date]** proposal to District attached hereto as Exhibit A and incorporated herein by this reference.

[CAUTION – avoid attaching Consultant's written proposal for the Scope of Work, as it may include provisions that conflict with the terms and conditions of this Agreement. It is best to draft a separate scope as Exhibit A.]

3.3. "Agreement Administrator": The Agreement Administrator for this project is [Name and title]. The Agreement Administrator shall be the principal point of contact at the District for this project. All services under this Agreement shall be performed at the request of the Agreement Administrator. The Agreement Administrator will establish the timetable for completion of services and any interim milestones. District reserves the right to change this designation upon written notice to Consultant

3.4. "Approved Fee Schedule": Consultant's compensation rates are set forth in the fee schedule attached hereto as Exhibit B and incorporated herein by this reference. This fee schedule shall remain in effect for the duration of this Agreement unless modified in writing by mutual agreement of the parties.

3.5. "Maximum Amount": The highest total compensation and costs payable to Consultant by District under this Agreement. The Maximum Amount under this Agreement is _____ Dollars ($_____).

3.6. "Commencement Date": [date].

3.7. "Termination Date": [date]

4. TERM

The term of this Agreement shall commence at 12:00 a.m. on the Commencement Date and shall expire at 11:59 p.m. on the Termination Date unless extended by written agreement of the parties or terminated earlier under Section 18 ("Termination") below. Consultant may request extensions of time to perform the services required hereunder. Such extensions shall be effective if authorized in advance by District in writing and incorporated in written amendments to this Agreement.

5. CONSULTANT'S DUTIES

5.1. **Services**. Consultant shall perform the services identified in the Scope of Services. District shall have the right to request, in writing, changes in the Scope of Services. Any such changes mutually agreed upon by the parties, and any corresponding increase or decrease in compensation, shall be incorporated by written amendment to this Agreement.

5.2. **Coordination with District**. In performing services under this Agreement, Consultant shall coordinate all contact with District through its Agreement Administrator.

5.3. **Budgetary Notification**. Consultant shall notify the Agreement Administrator, in writing, when fees and expenses incurred under this Agreement have reached

eighty percent (80%) of the Maximum Amount. Consultant shall concurrently inform the Agreement Administrator, in writing, of Consultant's estimate of total expenditures required to complete its current assignments before proceeding, when the remaining work on such assignments would exceed the Maximum Amount.

5.4. **Professional Standards.** Consultant shall perform all work consistent with the degree of care and skill ordinarily exercised by other similar professionals providing the same or similar services under the same or similar circumstances. Consultant shall keep itself fully informed of and in compliance with all local, state, and federal laws, rules, and regulations in any manner affecting the performance of this Agreement, including all Cal/OSHA requirements, the conflict of interest provisions of Government Code § 1090 and the Political Reform Act (Government Code § 81000 et seq.).

5.5. **Campaign Contributions.** This Agreement is subject to Government Code section 84308, as amended by Senate Bill 1439 (2022), Senate Bill 1181 (2024), and Senate Bill 1243 (2024). Consultant shall disclose any contribution to an elected or appointed District official's campaign or committee in an amount of more than five hundred dollars ($500) made within 12 months preceding the Commencement Date, by Consultant, its, her, or his agent, or another party affiliated with Consultant. Consultant shall provide a signed copy of the attached Campaign Contribution Disclosure Form to District prior to, or concurrent with, Consultant's execution of this Agreement and no later than the Commencement Date.

5.6. **Avoid Conflicts.** During the term of this Agreement, Consultant shall not perform any work for another person or entity for whom Consultant was not working at the Commencement Date if such work would present a conflict interfering with performance under this Agreement. However, District may consent in writing to Consultant's performance of such work.

5.7. **Appropriate Personnel.** Consultant has, or will secure at its own expense, all personnel required to perform the services identified in the Scope of Services. All such services shall be performed by Consultant or under its supervision, and all personnel engaged in the work shall be qualified to perform such services. [Name of Consultant's Project Manager] shall be Consultant's project administrator and shall have direct responsibility for management of Consultant's performance under this Agreement. No change shall be made in Consultant's project administrator without District's prior written consent.

5.8. **Substitution of Personnel.** Any persons named in the proposal or Scope of Services constitutes a promise to the District that those persons will perform and coordinate their respective services under this Agreement. Should one or more of such personnel become unavailable, Consultant may substitute other personnel of at least equal competence upon written approval of District. If District and

Consultant cannot agree as to the substitution of key personnel, District may terminate this Agreement for cause.

5.9. **Permits and Approvals.** Consultant shall be responsible for applying for, at its sole cost and expense, all permits and regulatory approvals necessary for Consultant's performance of this Agreement. This includes, but shall not be limited to, professional licenses, encroachment permits and building and safety permits and inspections.

5.10. **Notification of Organizational Changes.** Consultant shall notify the Agreement Administrator, in writing, of any change in name, ownership or control of Consultant's firm or of any subcontractor. Change of ownership or control of Consultant's firm may require an amendment to this Agreement.

5.11. **Records.** Consultant shall maintain any and all ledgers, books of account, invoices, vouchers, canceled checks, and other records or documents evidencing or relating to charges for services or expenditures and disbursements charged to District under this Agreement for a minimum of three (3) years, or for any longer period required by law, from the date of final payment to Consultant under this Agreement. All such documents shall be made available for inspection, audit, and/or copying at any time during regular business hours, upon oral or written request of District. In addition, pursuant to Government Code Section 8546.7, if the amount of public funds expended under this Agreement exceeds ten thousand dollars, all such documents and this Agreement shall be subject to the examination and audit of the State Auditor, at the request of District or as part of any audit of District, for a period of three (3) years after final payment under this Agreement.

6. SUBCONTRACTING

6.1. **General Prohibition.** This Agreement covers professional services of a specific and unique nature. Except as otherwise provided herein, Consultant shall not assign or transfer its interest in this Agreement or subcontract any services to be performed without amending this Agreement.

6.2. **Consultant Responsible.** Consultant shall be responsible to District for all services to be performed under this Agreement.

6.3. **Identification in Fee Schedule.** All subcontractors shall be specifically listed and their billing rates identified in the Approved Fee Schedule, Exhibit B. Any changes must be approved by the Agreement Administrator in writing as an amendment to this Agreement.

7. COMPENSATION

7.1. **General.** District agrees to compensate Consultant for the services provided under this Agreement, and Consultant agrees to accept payment in accordance with the Fee Schedule in full satisfaction for such services. Compensation shall

not exceed the Maximum Amount. Consultant shall not be reimbursed for any expenses unless provided for in this Agreement or authorized in writing by District in advance.

7.2. **Invoices.** Consultant shall submit to District an invoice, on a monthly basis or as otherwise agreed to by the Agreement Administrator, for services performed pursuant to this Agreement. Each invoice shall identify the Maximum Amount, the services rendered during the billing period, the amount due for the invoice, and the total amount previously invoiced. All labor charges shall be itemized by employee name and classification or position with the firm, the corresponding hourly rate, the hours worked, a description of each labor charge, and the total amount due for labor charges.

7.3. **Taxes.** District shall not withhold applicable taxes or other payroll deductions from payments made to Consultant except as otherwise required by law. Consultant shall be solely responsible for calculating, withholding, and paying all taxes.

7.4. **Disputes.** The parties agree to meet and confer at mutually agreeable times to resolve any disputed amounts contained in an invoice submitted by Consultant.

7.5. **Additional Work.** Consultant shall not be reimbursed for any expenses incurred for work performed outside the Scope of Services unless prior written approval is given by the District through a fully executed written amendment. Consultant shall not undertake any such work without prior written approval of the District.

8. PREVAILING WAGES

Consultant is aware of the requirements of California Labor Code Section 1720, et seq., and 1770, et seq., as well as California Code of Regulations, Title 8, Section 16000, et seq., ("Prevailing Wage Laws"), which require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects including the design and preconstruction phases of a covered public works project. Consultant shall defend, indemnify, and hold the District, its elected officials, officers, employees, and agents free and harmless form any claim or liability arising out of any failure or alleged failure of Consultant to comply with the Prevailing Wage Laws.

9. OWNERSHIP OF WRITTEN PRODUCTS

All reports, documents or other written material, and all electronic files, including computer-aided design files, developed by Consultant in the performance of this Agreement (such written material and electronic files are collectively known as "written products") shall be and remain the property of District without restriction or limitation upon its use or dissemination by District except as provided by law. Consultant may take and retain copies of such written products as desired, but no such written products shall be the subject of a copyright application by Consultant.

10. RELATIONSHIP OF PARTIES

10.1. **General.** Consultant is, and shall at all times remain as to District, a wholly independent contractor.

10.2. **No Agent Authority.** Consultant shall have no power to incur any debt, obligation, or liability on behalf of District or otherwise to act on behalf of District as an agent. Neither District nor any of its agents shall have control over the conduct of Consultant or any of Consultant's employees, except as set forth in this Agreement. Consultant shall not represent that it is, or that any of its agents or employees are, in any manner employees of District.

10.3. **Independent Contractor Status.** Under no circumstances shall Consultant or its employees look to the District as an employer. Consultant shall not be entitled to any benefits. District makes no representation as to the effect of this independent contractor relationship on Consultant's previously earned California Public Employees Retirement System ("CalPERS") retirement benefits, if any, and Consultant specifically assumes the responsibility for making such a determination. Consultant shall be responsible for all reports and obligations including, but not limited to: social security taxes, income tax withholding, unemployment insurance, disability insurance, and workers' compensation, and other applicable federal and state taxes.

10.4. **Indemnification of CalPERS Determination.** In the event that Consultant or any employee, agent, or subcontractor of Consultant providing services under this Agreement claims or is determined by a court of competent jurisdiction or CalPERS to be eligible for enrollment in CalPERS as an employee of the District, Consultant shall indemnify, defend, and hold harmless District for the payment of any employee and/or employer contributions for CalPERS benefits on behalf of Consultant or its employees, agents, or subcontractors, as well as for the payment of any penalties and interest on such contributions, which would otherwise be the responsibility of District.

11. INDEMNIFICATION

11.1. **Definitions.** For purposes of this Section 11, "Consultant" shall include Consultant, its officers, employees, servants, agents, or subcontractors, or anyone directly or indirectly employed by either Consultant or its subcontractors, in the performance of this Agreement. "District" shall include District, its board, officials, officers, agents, employees and volunteers.

11.2. **Consultant to Indemnify District.** Where the services to be provided by Consultant under this Agreement are design professional services, as that term is defined under Civil Code Section 2782.8, Consultant agrees to indemnify, defend and hold harmless, the District, its officers, officials, employees and volunteers from any and all claims, demands, costs or liability that actually or allegedly arise out of, or pertain to, or relate to the negligence, recklessness or willful misconduct

of Consultant and its agents in the performance of services under this contract, but this indemnity does not apply to liability for damages for bodily injury, property damage or other loss, arising from the sole negligence, active negligence or willful misconduct by the District, its officers, official employees, and volunteers. If it is finally adjudicated that liability is caused by the comparative active negligence or willful misconduct of the District, then Consultant's indemnification and defense obligations shall be reduced in proportion to the established comparative liability of the District and shall not exceed Consultant's proportionate percentage of fault.

As respects all acts or omissions which do not arise directly out of the performance of design professional services, including but not limited to those acts or omissions normally covered by general and automobile liability insurance, and to the full extent permitted by law, Consultant agrees to indemnity, defend and hold harmless the District, its board, officers, officials, agents, employees, and volunteers from and against any claims, demands, losses, liability of any kind or nature (including liability for claims, suits, actions, arbitration proceedings, administrative proceedings, regulatory proceedings, losses, expenses or costs of any kind, whether actual, alleged or threatened, including attorney's fees and costs, court costs, interest, defense costs, and expert witness fees) where the same arise out of, are in connection with, are a consequence of, or are in any way attributable to, in whole or in part, the performance of this Agreement by Consultant or by any individual or entity for which Consultant is legally liable, including but not limited to officers, agents, employees or sub-contractors of Consultant, excepting those which arise out of the active negligence, sole negligence or willful misconduct of the District, its board, officers, officials, employees and volunteers.

11.3. **Scope of Indemnity.** Personal injury shall include injury or damage due to death or injury to any person, whether physical, emotional, consequential or otherwise, Property damage shall include injury to any personal or real property. Consultant shall not be required to indemnify District for such loss or damage as is caused by the sole active negligence or willful misconduct of the District. If it is finally adjudicated that liability is caused by the comparative negligence or willful misconduct of an indemnified party, then Consultant's indemnification obligation shall be reduced in proportion to the established comparative liability.

11.4. **Waiver of Statutory Immunity.** The obligations of Consultant under this Section 11 are not limited by the provisions of any workers' compensation act or similar act. Consultant expressly waives its statutory immunity under such statutes or laws as to District.

11.5. **Indemnification by Subcontractors.** Consultant agrees to obtain executed indemnity agreements with provisions identical to those set forth here in this Section 11 from each and every subcontractor or any other person or entity involved in the performance of this Agreement on Consultant's behalf.

11.6. **Insurance Not a Substitute.** District does not waive any indemnity rights by accepting any insurance policy or certificate required pursuant to this Agreement. Consultant's indemnification obligations apply regardless of whether or not any insurance policies are determined to be applicable to the claim, demand, damage, liability, loss, cost or expense.

11.7. **Civil Code.** The parties are aware of the provisions of Civil Code 2782.8 relating to the indemnification and the duty and the cost to defend a public agency by a Design Professional and agree that this Section 11 complies therewith.

12. INSURANCE

12.1. **Insurance Required.** Consultant shall maintain insurance as described in this section and shall require all of its subcontractors, consultants, and other agents to do the same. Approval of the insurance by the District shall not relieve or decrease any liability of Consultant Any requirement for insurance to be maintained after completion of the work shall survive this Agreement.

12.2. **Documentation of Insurance.** District will not execute this agreement until it has received a complete set of all required documentation of insurance coverage. However, failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them. Consultant shall file with District:

- Certificate of Insurance, indicating companies acceptable to District, with a Best's Rating of no less than A:VII showing. The Certificate of Insurance must show the Montecito Sanitary District, its board of directors, commissions, officers, and employees of Montecito Sanitary District as additional insured parties. The Certificate of Insurance must include the following reference: [insert project name]
- Documentation of Best's rating acceptable to the District.
- Original endorsements effecting coverage for all policies required by this Agreement.

12.3. **Coverage Amounts.** Insurance coverage shall be at least in the following minimum amounts:

- Professional Liability Insurance: $1,000,000 per claim
  $2,000,000 aggregate

- General Liability:
  - General Aggregate: $2,000,000
  - Products Comp/Op Aggregate $2,000,000
  - Personal & Advertising Injury $1,000,000

- Each Occurrence $1,000,000
- Fire Damage (any one fire) $ 50,000
- Medical Expense (any 1 person) $ 5,000

- Workers' Compensation:
  - Workers' Compensation Statutory Limits
  - EL Each Accident $1,000,000
  - EL Disease - Policy Limit $1,000,000
  - EL Disease - Each Employee $1,000,000

- Automobile Liability
  - Any vehicle, combined single limit $1,000,000

Any available insurance proceeds broader than or in excess of the specified minimum insurance coverage requirements or limits shall be available to the District as additional insured. Furthermore, the requirements for coverage and limits shall be the greater of (1) the minimum coverage and limits specified in this Agreement, or (2) the broader coverage and maximum limits of coverage of any insurance policy or proceeds available to the named insured

12.4. **General Liability Insurance.** Commercial General Liability Insurance shall be no less broad than ISO form CG 00 01. Coverage must be on a standard Occurrence form. Claims-Made, modified, limited or restricted Occurrence forms are not acceptable.

12.5. **Worker's Compensation Insurance.** Consultant is aware of the provisions of Section 3700 of the Labor Code which requires every employer to carry Workers' Compensation (or to undertake equivalent self-insurance), and Consultant will comply with such provisions before commencing the performance of the work of this Agreement. If such insurance is underwritten by any agency other than the State Compensation Fund, such agency shall be a company authorized to do business in the State of California.

12.6. **Automobile Liability Insurance.** Covered vehicles shall include owned if any, non-owned, and hired automobiles and, trucks.

12.7. **Professional Liability Insurance or Errors & Omissions Coverage.** The deductible or self-insured retention may not exceed $50,000. If the insurance is on a Claims-Made basis, the retroactive date shall be no later than the commencement of the work. Coverage shall be continued for two years after the completion of the work by one of the following: (1) renewal of the existing policy; (2) an extended reporting period endorsement; or (3) replacement

insurance with a retroactive date no later than the commencement of the work under this Agreement.

12.8. **Claims-Made Policies.** If any of the required policies provide coverage on a claims-made basis the Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work. Claims-Made Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract of work. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the Consultant must purchase "extended reporting" coverage for a minimum of five (5) years after completion of contract work.

12.9. **Additional Insured Endorsements.** The District, its Board of Directors, Commissions, officers, and employees of the District must be endorsed as an additional insured for each policy required herein, other than Professional Errors and Omissions, for liability arising out of ongoing and completed operations by or on behalf of the Consultant. Consultant's insurance policies shall be primary as respects any claims related to or as the result of the Consultant's work. Any insurance, pooled coverage or self-insurance maintained by the District, its elected or appointed officials, directors, officers, agents, employees, volunteers, or consultants shall be non-contributory. All endorsements shall be signed by a person authorized by the insurer to bind coverage on its behalf. General liability coverage can be provided using an endorsement to the Consultant's insurance at least as broad as ISO Form CG 20 10 11 85 or both CG 20 10 and CG 20 37.

12.10. **Failure to Maintain Coverage.** In the event any policy is canceled prior to the completion of the project and the Consultant does not furnish a new certificate of insurance prior to cancellation, District has the right, but not the duty, to obtain the required insurance and deduct the premium(s) from any amounts due the Consultant under this Agreement. Failure of the Consultant to maintain the insurance required by this Agreement, or to comply with any of the requirements of this section, shall constitute a material breach of this Agreement.

12.11. **Notices.** Consultant shall provide immediate written notice if (1) any of the required insurance policies is terminated; (2) the limits of any of the required policies are reduced; (3) or the deductible or self-insured retention is increased. Consultant shall provide no less than 30 days' notice of any cancellation or material change to policies required by this Agreement. Consultant shall provide proof that cancelled or expired policies of insurance have been renewed or replaced with other policies providing at least the same coverage. Such proof will be furnished at least two weeks prior to the expiration of the coverages. The name and address for Additional Insured Endorsements, Certificates of Insurance and Notices of Cancellation is: Montecito Sanitary District, Attn: John Weigold, General Manager, 1042 Monte Cristo Lane, Santa Barbara, CA 93108.

12.12. **Consultant's Insurance Primary.** The insurance provided by Consultant, including all endorsements, shall be primary to any coverage available to District. Any insurance or self-insurance maintained by District and/or its officers, employees, agents or volunteers, shall be in excess of Consultant's insurance and shall not contribute with it.

12.13. **Waiver of Subrogation.** Consultant hereby waives all rights of subrogation against the District. Consultant shall additionally waive such rights either by endorsement to each policy or provide proof of such waiver in the policy itself.

12.14. **Report of Claims to District.** Consultant shall report to the District, in addition to the Consultant's insurer, any and all insurance claims submitted to Consultant's insurer in connection with the services under this Agreement.

12.15. **Premium Payments and Deductibles.** Consultant must disclose all deductibles and self-insured retention amounts to the District. The District may require the Consultant to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within retention amounts. Ultimately, District must approve all such amounts prior to execution of this Agreement.

District has no obligation to pay any premiums, assessments, or deductibles under any policy required in this Agreement. Consultant shall be responsible for all premiums and deductibles in all of Consultant's insurance policies. The amount of deductibles for insurance coverage required herein are subject to District's approval.

12.16. **Duty to Defend and Indemnify.** Consultant's duties to defend and indemnify District under this Agreement shall not be limited by the foregoing insurance requirements and shall survive the expiration or early termination of this Agreement.

13. MUTUAL COOPERATION

13.1. **District Cooperation in Performance.** District shall provide Consultant with all pertinent data, documents and other requested information as is reasonably available for the proper performance of Consultant's services under this Agreement.

13.2. **Consultant Cooperation in Defense of Claims.** If any claim or action is brought against District relating to Consultant's performance in connection with this Agreement, Consultant shall render any reasonable assistance that District may require in the defense of that claim or action.

14. NOTICES

Any notices, bills, invoices, or reports required by this Agreement shall be deemed received on: (i) the day of delivery if delivered by hand, electronic mail or overnight courier service during Consultant's and District's regular business hours; or (ii) on the third business day following

deposit in the United States mail if delivered by mail, postage prepaid, to the addresses listed below (or to such other addresses as the parties may, from time to time, designate in writing).

If to District
Montecito Sanitary District
Attn: John Weigold
General Manager
1042 Monte Cristo Lane
Santa Barbara, CA 93108

If to Consultant
[Name]
[Address]
[Address]
Telephone:
Email:

With courtesy copy to:

Aleks R. Giragosian, Esq.
Montecito Sanitary District General Counsel
Colantuono, Highsmith & Whatley, PC
790 E. Colorado Blvd.., Ste. 850
Pasadena, Angeles, CA 91101
Telephone: (213) 542-5700
Email: agiragosian@chwlaw.us

15. SURVIVING COVENANTS

The parties agree that the covenants contained in paragraph 5.11 (Records), paragraph 10.4 (Indemnification of CalPERS Determination), Section 11 (Indemnity), paragraph 12.8 (Claims-Made Policies), paragraph 13.2 (Consultant Cooperation in Defense of Claims), paragraph 12.13 (Waiver of Subrogation), paragraph 12.6 (Automobile Liability Insurance), Section 15 (Surviving Covenants), Section 17 (Interpretation of Agreement), and Section 18 (General Provisions) of this Agreement shall survive the expiration or termination of this Agreement, subject to the provisions and limitations of this Agreement and all otherwise applicable statutes of limitations and repose.

16. TERMINATION

16.1. **District Termination.** District may terminate this Agreement for any reason on five calendar days' written notice to Consultant. Consultant agrees to cease all work under this Agreement on or before the effective date of any notice of termination. All District data, documents, objects, materials or other tangible things shall be returned to District upon the termination or expiration of this Agreement.

16.2. **Consultant Termination.** Consultant may terminate this Agreement for a material breach by the District of this Agreement upon 30 days' notice.

16.3. **Compensation Following Termination.** Upon termination, Consultant shall be paid based on the work satisfactorily performed at the time of termination. In no event shall Consultant be entitled to receive more than the amount that would be paid to Consultant for the full performance of the services required by this Agreement. The District shall have the benefit of such work as may have been completed up to the time of such termination.

16.4. **Remedies.** District retains any and all available legal and equitable remedies for Consultant's breach of this Agreement.

17. INTERPRETATION OF AGREEMENT

17.1. **Governing Law.** This Agreement shall be governed and construed in accordance with the laws of the State of California.

17.2. **Integration of Exhibits.** All documents referenced as exhibits in this Agreement are hereby incorporated into this Agreement. In the event of any material discrepancy between the provisions of this Agreement and its exhibits, the provisions of this Agreement shall prevail. This instrument contains the entire Agreement between District and Consultant with respect to the transactions contemplated herein. No other prior oral or written agreements are binding upon the parties. Amendments hereto or deviations herefrom shall be effective and binding only if made in writing and executed on by District and Consultant.

17.3. **Headings.** The headings and captions appearing at the commencement of the sections hereof, and in any paragraph thereof, are descriptive only and for convenience in reference to this Agreement. Should there be any conflict between such heading, and the section or paragraph thereof at the head of which it appears, the language of the section or paragraph shall control and govern in the construction of this Agreement.

17.4. **Pronouns.** Masculine or feminine pronouns shall be substituted for the neuter form and vice versa, and the plural shall be substituted for the singular form and vice versa, in any place or places herein in which the context requires such substitution(s).

17.5. **Severability.** If any term or provision of this Agreement or the application thereof to any person or circumstance shall, to any extent, be invalid or unenforceable, then such term or provision shall be amended to, and solely to the extent necessary to, cure such invalidity or unenforceability, and shall be enforceable in its amended form. In such event, the remainder of this Agreement, or 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 each term and provision of this Agreement shall be valid and be enforced to the fullest extent permitted by law.

17.6. **No Presumption Against Drafter.** Each party had an opportunity to consult with an attorney in reviewing and drafting this agreement. Any uncertainty or

ambiguity shall not be construed for or against any party based on attribution of drafting to any party.

18. GENERAL PROVISIONS

18.1. **Confidentiality.** All data, documents, discussion, or other information developed or received by Consultant for performance of this Agreement are deemed confidential and Consultant shall not disclose it without prior written consent by District. District shall grant such consent if disclosure is legally required. All District data shall be returned to District upon the termination or expiration of this Agreement.

18.2. **Conflicts of Interest.** Consultant maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement. Further, Consultant warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, brokerage fee, gift or other consideration contingent upon or resulting from the award or making of this Agreement. Consultant further agrees to file, or shall cause its employees or subcontractor to file, a Statement of Economic Interest with the District's Filing Officer if required under state law in the performance of the services. For breach or violation of this warranty, District shall have the right to rescind this Agreement without liability. For the term of this Agreement, no member, officer, or employee of District, during the term of his or her service with District, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

[Add the following paragraph 18.3, 18.3.1 and/or 18.3.2, as applicable, for consulting contracts with multiple phases, or contracts that relate to, or are prior to, subsequent phases of a larger project.]

18.3. **Conflict of Interest / Multiple Phase Projects** – This Agreement is subject to the requirements of Government Code § 1097.6 relating to consultants entering into subsequent or multiple contracts for the same project..

18.3.1 Engaging or Advising on Public Contracting on behalf of the District.

A. The scope of Consultant's work is limited to conceptual, preliminary, or initial plans or specifications for a prior stage of the project.

B. Consultant shall provide access to the work, such that all bidders or proposers for the subsequent stages shall have access to the same information as Consultant, including all conceptual, preliminary, or initial plans or specifications prepared by Consultant pursuant to this Agreement.

18.3.2 Multiple Project Phases.

A. Consultant's duties and services under this Agreement shall not include preparing or assisting the District with any portion of the District's preparation of a request for proposals, request for qualifications, or any other solicitation regarding a subsequent or additional contract with the District.

B. The District shall at all times retain responsibility for public contracting, including with respect to any subsequent phase of this project. Consultant's participation in the planning, discussions, or drawing of project plans or specifications shall be limited to conceptual, preliminary, or initial plans or specifications.

C. Consultant shall cooperate with the District to ensure that all bidders for a subsequent contract on any subsequent phase of this project have access to the same information, including all conceptual, preliminary, or initial plans or specifications prepared by Consultant pursuant to this Agreement.

18.4. **Non-assignment.** Consultant shall not delegate, transfer, subcontract or assign its duties or rights hereunder, either in whole or in part, without District's prior written consent, and any attempt to do so shall be void and of no effect. District shall not be obligated or liable under this Agreement to any party other than Consultant.

18.5. **Binding on Successors.** This Agreement shall be binding on the successors and assigns of the parties.

18.6. **No Third-Party Beneficiaries.** Except as expressly stated herein, there is no intended third-party beneficiary of any right or obligation assumed by the parties.

18.7. **Time of the Essence.** Time is of the essence for each and every provision of this Agreement.

18.8. **Non-Discrimination.** Consultant shall not discriminate against any employee or applicant for employment because of race, sex (including pregnancy, childbirth, or related medical condition), creed, national origin, color, disability as defined by law, disabled veteran status, Vietnam veteran status, religion, age (40 and above), medical condition (cancer-related), marital status, ancestry, or sexual orientation. Employment actions to which this provision applies shall include, but not be limited to, the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; or in terms, conditions or privileges of employment, and selection for training. Consultant agrees to post in conspicuous places, available to employees and applicants for employment, the provisions of this nondiscrimination clause.

18.9. **Waiver.** No provision, covenant, or condition of this Agreement shall be deemed to have been waived by District or Consultant unless in writing signed by one authorized to bind the party asserted to have consented to the waiver. The waiver by District or Consultant of any breach of any provision, covenant, or condition of

this Agreement shall not be deemed to be a waiver of any subsequent breach of the same or any other provision, covenant, or condition.

18.10. **Excused Failure to Perform.** Consultant shall not be liable for any failure to perform if Consultant presents acceptable evidence, in District's sole judgment, that such failure was due to causes beyond the control and without the fault or negligence of Consultant.

18.11. **Remedies Non-Exclusive.** Each right, power and remedy provided for herein or now or hereafter existing at law, in equity, by statute, or otherwise shall be cumulative and shall be in addition to every other right, power, or remedy provided for herein or now or hereafter existing at law, in equity, by statute, or otherwise. The exercise, the commencement of the exercise, or the forbearance from the exercise by any party of any one or more of such rights, powers or remedies shall not preclude the simultaneous or later exercise by such party of any or all of such other rights, powers or remedies.

18.12. **Attorneys' Fees.** If legal action shall be necessary to enforce any term, covenant or condition contained in this Agreement, the prevailing party shall be entitled to an award of reasonable attorneys' fees and costs expended in the action.

18.13. **Venue.** The venue for any litigation shall be Santa Barbara County, California and Consultant hereby consents to jurisdiction in Santa Barbara County for purposes of resolving any dispute or enforcing any obligation arising under this Agreement.

18.14. **Counterparts; Electronic Signatures.** This Agreement may be signed in one or more counterparts, each of which shall be deemed an original, but all of which together shall be deemed one and the same instrument. The parties acknowledge and agree that this Agreement may be executed by electronic signature, which shall be considered as an original signature for all purposes and shall have the same force and effect as an original signature. Without limitation, "electronic signature" shall include faxed or emailed versions of an original signature, electronically scanned and transmitted versions (e.g., via pdf) of an original signature, or a digital signature.

(Signature page follows)

TO EFFECTUATE THIS AGREEMENT, the parties have caused their duly authorized representatives to execute this Agreement on the dates set forth below.

"DISTRICT" Montecito Sanitary District **Authorized Signatories:**	"CONSULTANT" [Name of Company or Individual]
Signature:_____	Signature:_____
Printed:_____	Printed:_____
Title: _____	Title: _____
Date: _____	Date: _____

Attest:

Signature:_____

Printed:_____

Title: District Clerk

Date: _____

Approved as to Form:

Signature:_____

Printed:_____

Title: District Counsel

Date: _____

EXHIBIT A

SCOPE OF SERVICES

[Insert Scope of Work text here]
[Do not attach vendor's proposal]

EXHIBIT B

FEE SCHEDULE

[INSERT FEE SCHEDULE TEXT HERE]
[DO NOT ATTACH VENDOR'S PROPOSAL]

1. CAMPAIGN CONTRIBUTION DISCLOSURE PROVISIONS

Cities are subject to the campaign disclosure provisions detailed in Government Code Section 84308.

Please carefully read the following information to determine if the provisions apply to you. If you determine that the provisions are applicable, the Campaign Disclosure Form must be completed and returned to the District with your application.

1. No District board member shall accept, solicit, or direct a contribution of more than $500 from any party,[1] financially interested participant,[2] or agent[3] while a proceeding is pending or for 12 months subsequent to the date a final decision is rendered by the District. This prohibition commences when your application has been filed, or the proceeding is otherwise initiated.

2. A party to a District proceeding shall disclose on the record of the proceeding any contribution of more than $500 made to any board member by the party, or agent, during the preceding 12 months. No party to or participant in a District proceeding shall make a contribution of more than $500 to a board member during the proceeding and for 12 months following the date a final decision is rendered by the District. No agent to a party or participant shall make a contribution in any amount to a board member during the proceeding and for 12 months following the date a final decision is rendered by the District.

3. Prior to rendering a decision on a District proceeding, any board member who received contribution of more than $500 within the preceding 12 months from any party, or agent, to a proceeding shall disclose that fact on the record of the proceeding, and shall be disqualified from participating in the proceeding. However, if any board member receives a contribution that otherwise would require disqualification, and returns the contribution within 30 days of making the decision, or knowing about the contribution and the relevant proceeding, whichever comes last, that board member shall be permitted to participate in the proceeding.

To determine whether a campaign contribution of more than $500 has been made by you or your agent to a board member within the preceding 12 months, all contributions made by you or your agent during that period must be aggregated.

Names of current District board members available on the District's website. If you have questions about Government Code Section 84308, FPPC regulations, or the Campaign Disclosure Form, please contact the District Clerk.

2. CAMPAIGN CONTRIBUTION DISCLOSURE FORM

(a) Document:

- □ License
- □ Lease
- □ Permit
- □ Franchise
- □ Other Contract
- □ Other Entitlement

Name and address of any party, participant, or agent who has contributed more than $500 to any board member within the preceding 12 months:

1. _____
2. _____
3. _____

(b) Date and amount of contribution:

Date _____ Amount $ _____

Date _____ Amount $ _____

Date _____ Amount $ _____

(c) Name of board member to whom contribution was made:

1. _____
2. _____
3. _____

(d) I certify that the above information is provided to the best of my knowledge.

Printed Name _____

Signature _____

Date _____ Phone _____

To be completed by District:

Document No: _____

[1] "Party" is defined as any person who files an application for, or is the subject of, a proceeding.[2] "Participant" is defined as any person who actively supports or opposes a particular decision in a proceeding.

[3] "Agent" is defined as a person who represents a party in connection with a proceeding for compensation who appears before or otherwise communicates with the District for the purpose of influencing the proceeding. If an individual acting as an agent also is acting as an employee or member of a law, architectural, engineering, or consulting firm, or a similar entity or corporation, both the individual and the entity or corporation are agents. When a closed corporation is a party to a proceeding, the majority shareholder is subject to these provisions.

MONTECITO SANITARY DISTRICT
SANTA BARBARA COUNTY, CALIFORNIA

Addendum No.1

TO PROSPECTIVE RESPONDENTS
SAN YSIDRO ROAD PIPELINE CAPACITY IMPROVEMENTS

PROJECT NO. C008

October 13, 2026

Notice is hereby given that the Request for Proposal for San Ysidro Road Pipeline Capacity Improvements are amended as hereinafter set forth.

GENERAL INFORMATION

This addendum provides responses to inquiries/questions as well as additional information. Please review these changes.

The proposal due date remains September 21, 2026.

RESPONDENT'S QUESTIONS AND RESPONSES OR CLARIFICATIONS:

Answers or clarifications to any questions received via Planet Bids or email which do not impact contract terms are provided below. All others that result in changes to the contract are addressed in the previous section.

1. Does the District have information on the condition of the existing manholes?
    a. Yes, it does and the information may be supplied to the selected consultant.
2. Should the consultant assume rehabilitation or replacement of existing manholes or will this be determined during preliminary design?
    a. Consultant should not assume rehabilitation of the manholes as the District has not flagged them for rehabilitation at this time.
3. Does the District have any existing geotechnical studies in the project area?
    a. The District does not have any existing geotechnical studies in the project area.
4. Can the District please identify on the system map where the transition from 8-inch to 10-inch diameter sewer occurs?
    a. Yes, please see the attached atlas map.
5. Please confirm that East Valley Road is located in Caltrans ROW.
    a. Yes, East Valley Road is located in Caltrans ROW.
6. Task 2.2 – Utility Research: Please confirm the District's expected basis for existing utility information shown on the plans (e.g., utility agency records and USA markings picked up during the topographic survey). Does the District have any additional utility information available for the project corridor, such as prior potholing data or utility as-builts? Task 2.2 Utility Research states the Consultant is to have USA mark all utilities in the

work areas and the Surveyor will pick them up while completing the topo survey. USA does not mark for design, especially in an area this large.

   a. As stated in the RFP, the expectation is the Consultant will contact utility agencies with below-grade facilities in the project area to obtain atlas maps and other available information regarding the type, size, location, material, and depth of existing utilities; this includes the County of Santa Barbara for their storm drain data. The District has its record drawings to share, but no pothole data. Contacting USA would be for the database of utilities in the project area and to confirm what's out there to reduce chances for a realignment during the construction phase. There is no need for the USA to field mark during design. The Contract Documents will require potholing of utilities by the Contractor prior to the start of excavation.

7. Does the District intend to procure potholing services directly (e.g., through its prequalified contractor list), or should consultants include potholing in their proposed scope and any basis for the number or limit?
   a. It's recommended the Consultant not include potholing in their proposed scope. Depending on the utility information obtained by the Consultant, the District may retain a contractor to perform potholing services of select utilities during design (which a field USA would be called at that time).
8. Task 2.5 – Please clarify the level of CEQA documentation the District anticipates for the project, and whether consultants should include any supporting technical studies (e.g., cultural or biological resources).
   a. Based on initial investigation, the CEQA documentation is anticipated to be limited. Consultant should include an initial cultural or biological assessment to determine if monitoring during construction is required or anticipated.
9. Does the District expect the Caltrans encroachment permit to be issued prior to bid advertisement, or will the permit be finalized during the bid or construction phase?
   a. We anticipate the permit to be finalized during the construction phase as it will contain the contractor's traffic control plans for the Caltrans ROW.
10. Task 2.5 references County and Caltrans encroachment permits, and Section 5.9 of the Professional Services Agreement assigns the Consultant responsibility for permits required for its own performance at its sole cost. For encroachment permits needed for consultant field work (e.g., survey, geotechnical borings, and potholing), please confirm the District will apply as the permittee and pay fees? Or if consultants should include permit fees in their proposals.
    a. The District will apply as the permittee and pay the associated fees for any consultant field work.
11. Should consultants include engineered traffic control plans in the design deliverables, or will traffic control plans be the responsibility of the construction contractor?
    a. Traffic control plans will be the responsibility of the Contractor.
12. Will the District provide the front-end contract documents (e.g., bid forms and general conditions), or should consultants include them in the scope in addition to the technical specifications?
    a. The District will provide the front-end contract documents; however, the Consultant should anticipate to review the front ends and ensure they align with the technical specifications.
13. Section III, Item 5 requests a level of effort table with hours by classification and a Professional Rate Sheet. Should proposals also include a total not-to-exceed fee?
    a. The proposals should not include a not-to-exceed fee.

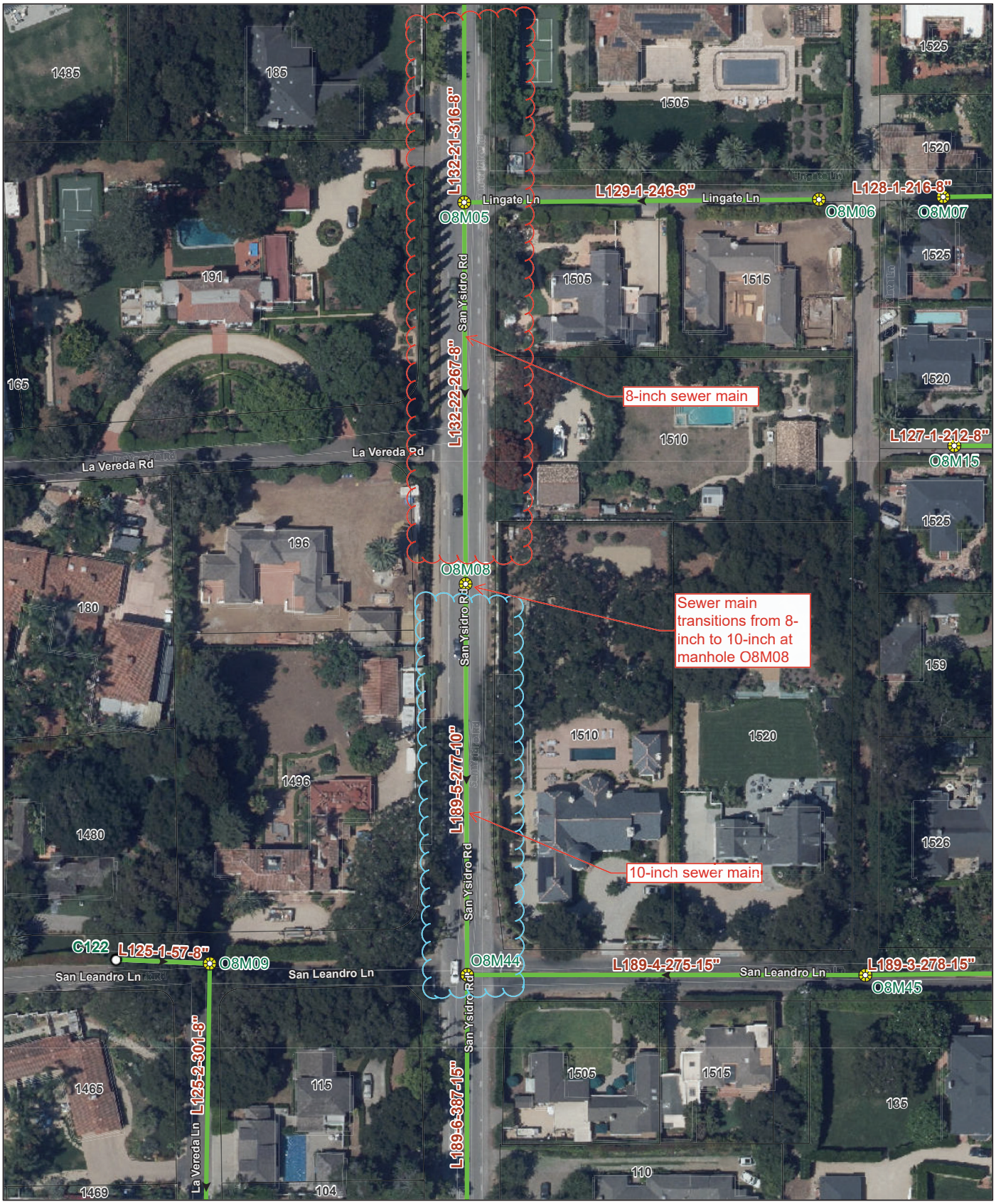
This Addendum No.1 shall be included in and form a part of the contract documents. The receipt and review of the addendum, as part of the RFP, shall be acknowledged by the responder in their letter proposal to be considered responsive.

Bryce Swetek, P.E.
Engineering Manager
bswetek@montsan.org

Attachments:

1. Atlas Map

San Ysidro Road Pipeline Capacity Improvements



10/9/2026, 10:56:29 AM

Cleanouts

Maintenance Holes

Standard

Pipes

GRAVITY MAIN

Montecito Sanitary District Boundary

SBC Assessor Parcels

SBC Assessor Parcels – Mailing Labels

Street Labels

ZWG_Santa_Barbara_Southcoast_Region_3INCH_2024.sid

Red: Band_1

Green: Band_2

Blue: Band_3

World_Hillshade

1:932

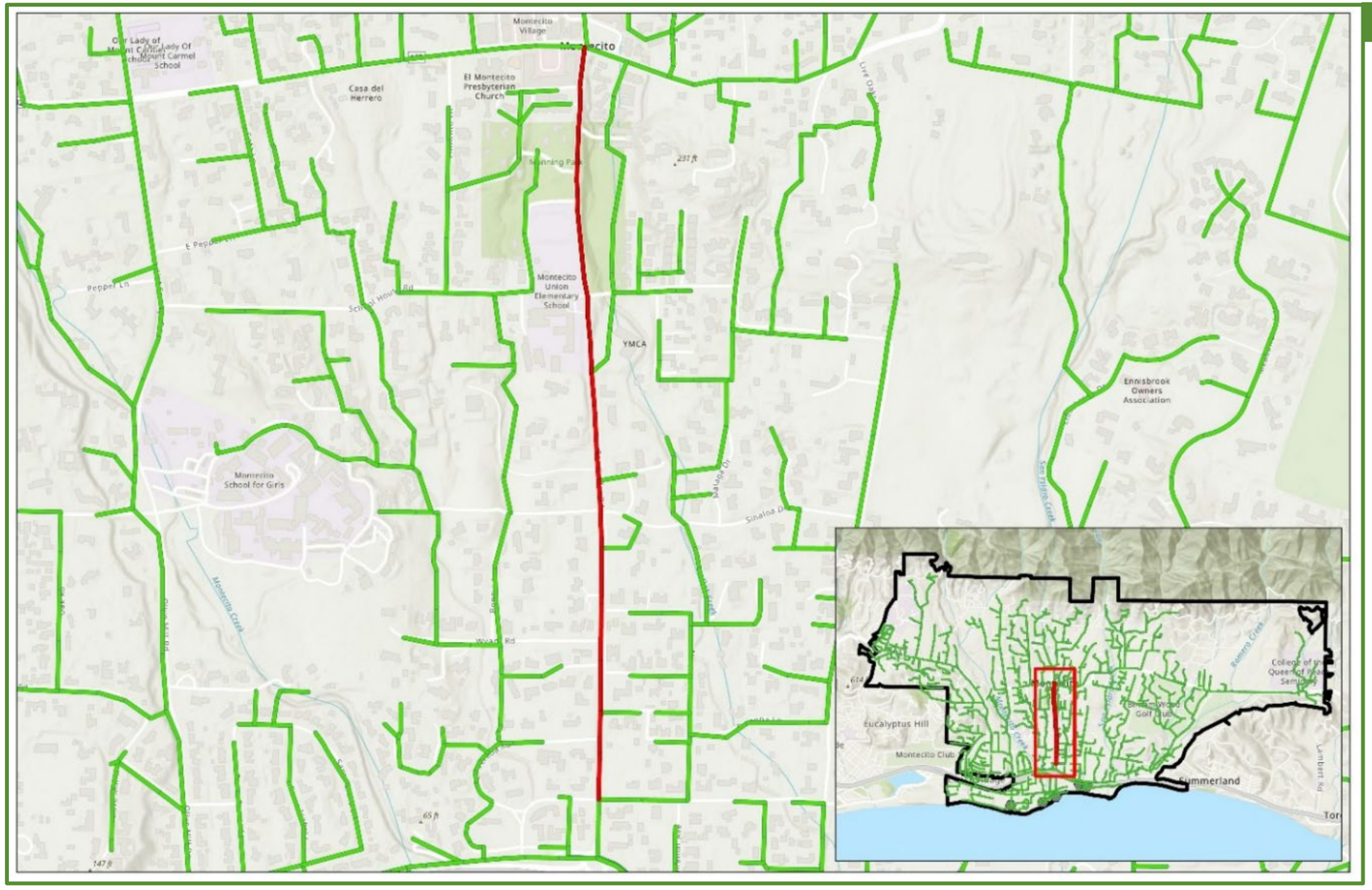
0 0.01 0.01 0.03 mi

0 0.01 0.03 0.05 km

N

Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community, Sources: Esri, Vantor, Airbus DS, USGS, NGA, NASA, CGIAR, N Robinson, NCEAS, NLS, OS, NMA, Geodatastyrelsen, Rijkswaterstaat, GSA, Geoland, FEMA,

CIP #1: Gravity Main New Alignment, Upsizing, and Replacement — San Ysidro Road



DRY-WEATHER CAPACITY DEFICIENCY

LOCATION

San Ysidro Road, from East Valley Road (Highway 192) to manhole O8M44 at San Leandro Lane

PURPOSE

Hydraulic model shows existing sewer mains flow about 50% full during dry-weather and 100% full during 10-year storm event, causing sanitary sewer overflows at multiple locations. Project will increase system capacity and reduce the risk of overflows during storms.

PROJECT DESCRIPTION

Install 0.39 miles of new 8-inch PVC gravity sewer main piping. Upsize ten existing vitrified clay pipe gravity sewer main segments (0.61 miles) to 12-inch PVC piping.

PHASE	ESTIMATED COST	DURATION
Design/Planning	$450,000	12 months
Construction	$3,000,000	12 months

Figure 5.2. DWF d/D Capacity (Current Flows)

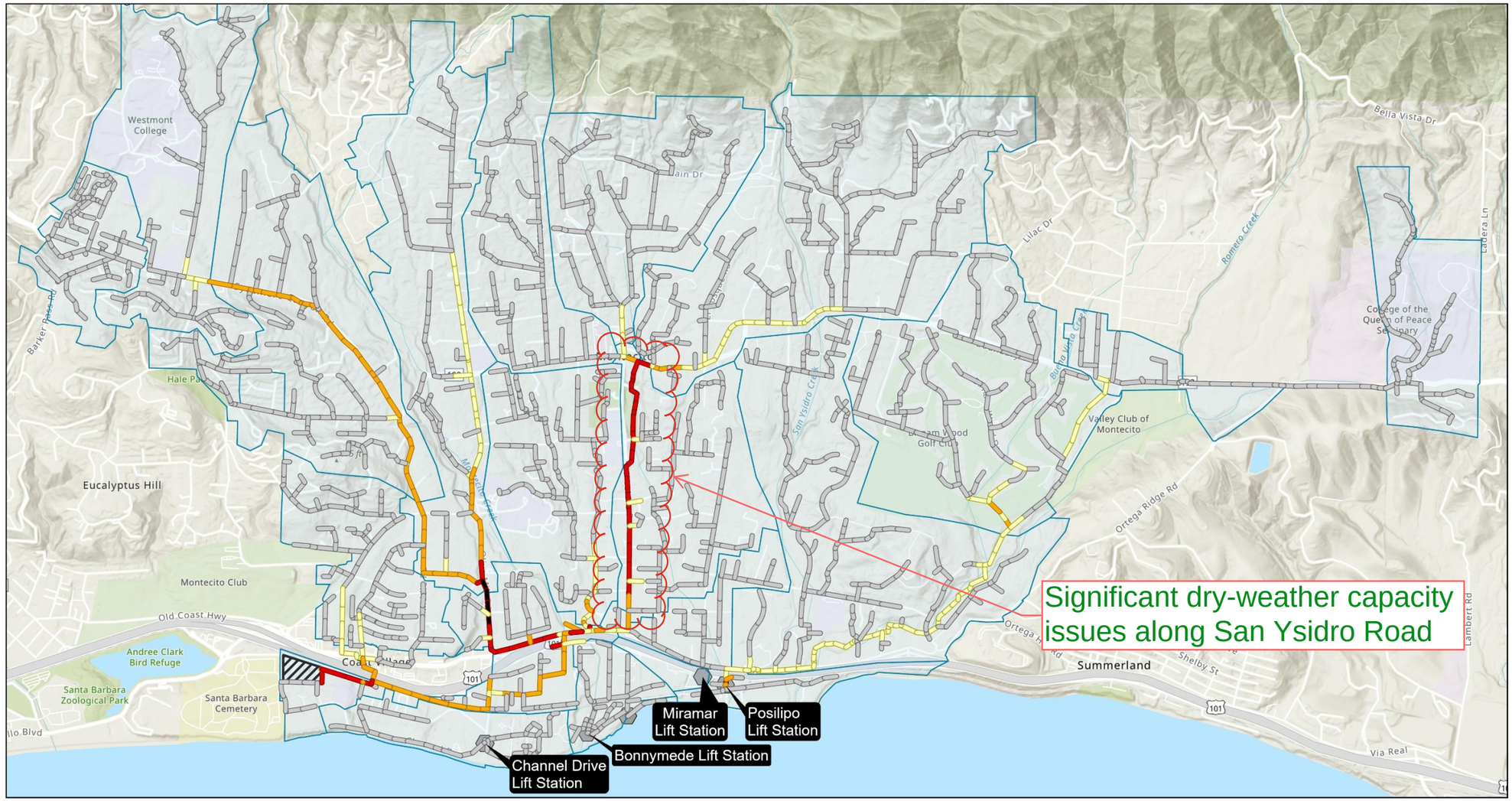


Figure 5.3. DWF d/D Capacity (Current Flows and Additional Septic-to-Sewer Conversion Flows)



Capacity Criteria:
For pipe sizes 12 inches and smaller, d/D = 0.50
For pipe sizes 15 inches and larger, d/D = 0.67

0 0.25 0.5 1 Miles

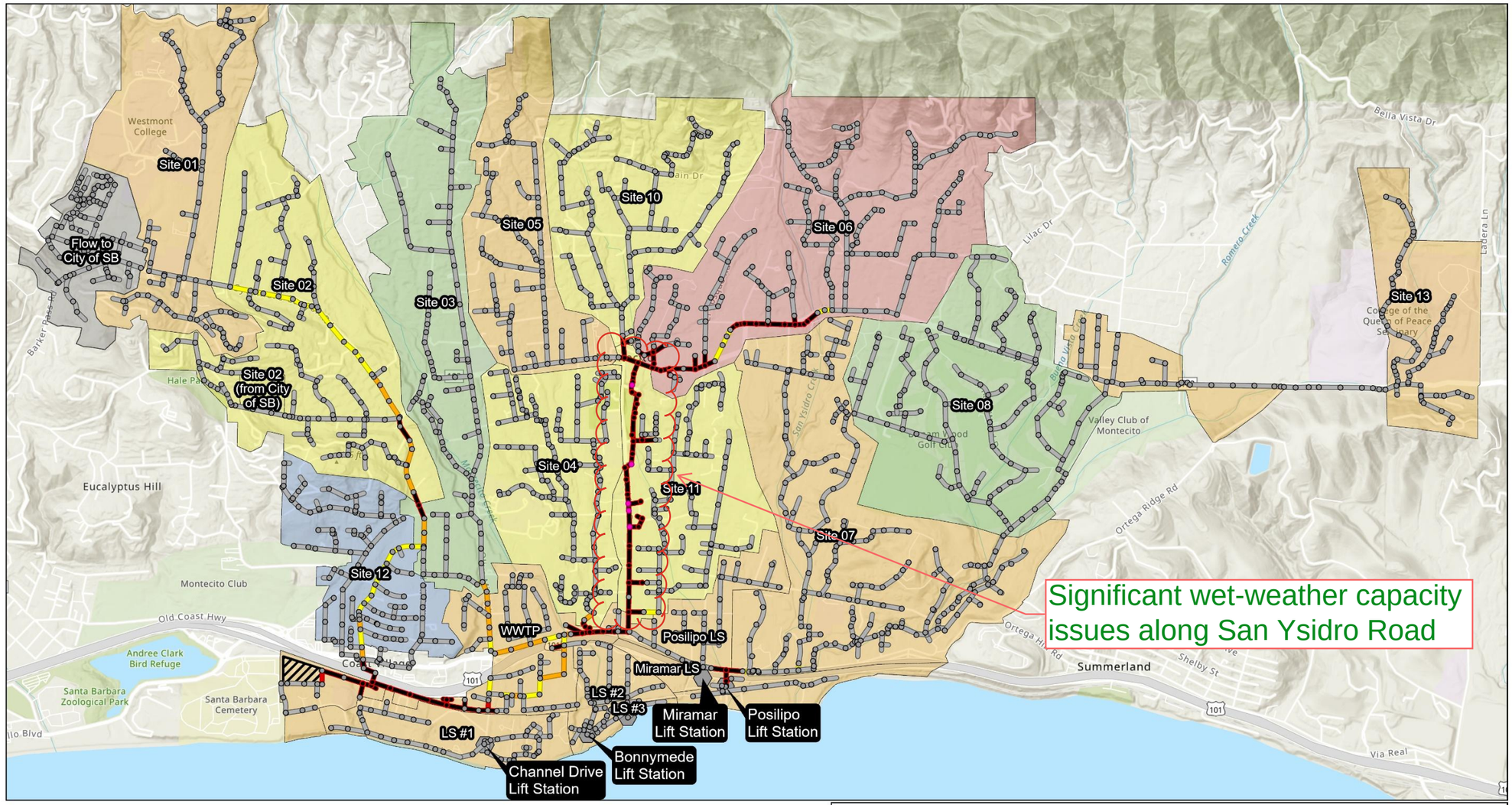
N

Dry Weather Flow d/D Capacity
(Current + Additional Septic Flows)

Legend
- Wastewater Treatment Plant
- Basins

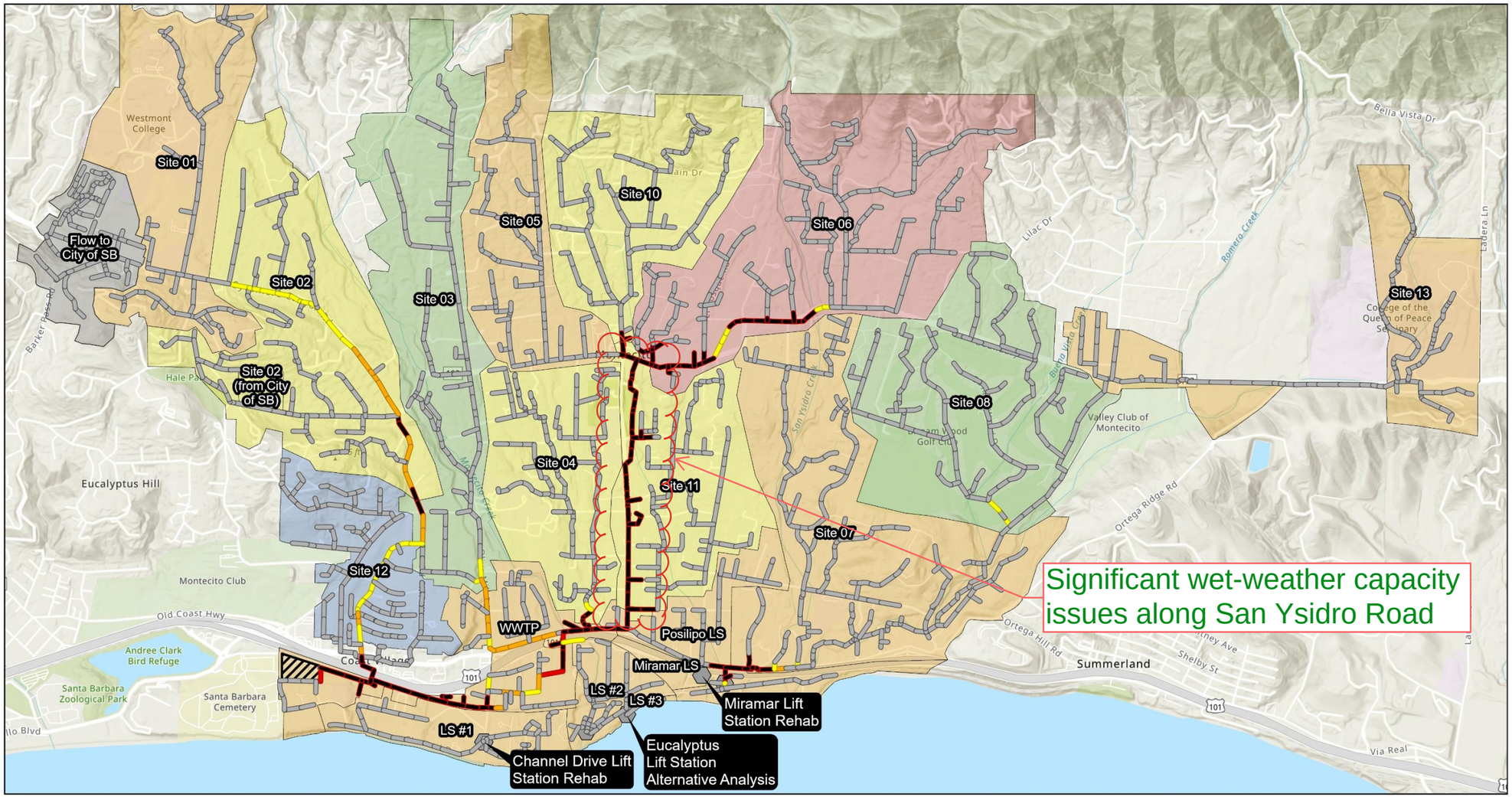
DWF Pipes d/D Capacity (Current Flows + Additional Septic Flows)
- <20%
- 20%-29%
- 30%-39%
- 40%-49%
- 50%-59%

Figure 5.4. 10-Year Storm Flow d/D Capacity (Current Flows)



10-Year Storm d/D Capacity (Current Flows)

Figure 5.5. 10-Year Storm Flow d/D Capacity (Current and Additional Septic-to-Sewer Conversion Flows)



10-Year Storm d/D Capacity
(Current + Additional Septic-to-Sewer Conversion Flows)

Montecito Sanitary District

CONSULTANT SERVICES FOR

San Ysidro Road Pipeline Capacity Improvements

PROJECT NO. C008







WSC

October 21, 2026

Bryce Swetek PE

Engineering Manager
Montecito Sanitary District

1042 Monte Cristo Lane
Santa Barbara, CA 93108

WSC Local Office

805 Aerovista Place
Suite 201
San Luis Obispo CA 93401

P: (805) 457-8833

Mirko Maher PE

Project Manager

P: (949) 316-0593

E: mmaher@wsc-inc.com

Justin Pickard PE,

Principal in Charge/ Authorized Officer

P: (805) 221-7766

E: jpickard@wsc-inc.com

Re: Request for Proposal — Consultant Services for San Ysidro Road Pipeline Capacity Improvements, Project No. C008

Dear Bryce,

Water Systems Consulting, Inc. (WSC) is pleased to submit this proposal to the Montecito Sanitary District (MSD/District) for design engineering services for the San Ysidro Road Pipeline Capacity Improvements project. Our proposal is submitted in response to the Request for Proposals issued by the District on September 23, 2026, and we acknowledge receipt and review of Addendum No. 1, dated October 13, 2026.

The project includes approximately 2,059 feet of new 8-inch polyvinyl chloride (PVC) sewer from East Valley Road south to the Montecito Union Elementary School District boundary, and capacity improvements along approximately 2,690 feet continuing south to San Leandro Lane; the pipeline your Wastewater Collection System Master Plan identified as undersized for current and future flows.

The benefits of selecting WSC include:

- **We already know this system, and your hydraulic model.** WSC developed and maintains the District's sewer hydraulic model, calibrated it using measured data from ten temporary flow meter locations, and calibrated it further during the 2024/2025 wet weather season. We have also delivered your Septic-to-Sewer Strategic Plan, the Sewer Main CIPP Lining design, and the MSD-SSD intertie evaluation. Our familiarity with your system makes WSC uniquely qualified as your selected consultant for this project. We identified potential cost savings solutions and discuss them in further detail in this proposal.
- **An experienced project manager with extensive pipeline design and rehabilitation experience. WSC's Project Manager, Mirko Maher, PE, has 28 years of experience planning and designing water and sewer conveyance infrastructure, and will serve as the District's single point of accountability for scope, schedule, budget, and coordination.** Mirko has led trunk sewer replacement and upsizing projects for Irvine Ranch Water District, Orange County Sanitation District, and the City of Anaheim; all which had alignments in busy public thoroughfares, in close proximity to schools and residences, and with similar utility conflicts and community sensitivities that San Ysidro Road presents. Mirko and our design staff are active members of the North American Society for Trenchless Technology (NASTT), and they keep current on trenchless replacement and upsizing methods. Applicable to the lower reach upsizing/replacement: the existing main is CIPP-lined vitrified clay pipe (VCP), and not every trenchless method performs the same way through a lined host pipe. Mirko is supported by our local San Luis Obispo team, who have worked on your system directly, and who work in the same city as Caltrans District 5, which administers the SR 192 encroachment permit.

We are engineers who are passionate in solving problems, and this project has real ones to solve. WSC has developed an approach that pairs what we already know about your system with a disciplined process for reaching a decision the District can defend. Our approach is built around providing MSD the following which are our keys to success:

- Provide MSD a team that has planned and designed this work before; one that already knows your system, your staff, and how the District makes decisions.
- Provide an alternatives analysis that produces a clear, defensible decision with construction methods screened, project alternatives developed, and workshopped with the District. Confirm evaluation criteria established with the District before scoring begins, and a decision record your staff and Board can follow.
- Provide utility research and risk mitigation: this reduces risk before it reaches construction, so that what the contractor finds in the ground matches what the plans show. Providing a biddable, permittable, constructible project that minimizes risks and community impacts.

Our team is ready to begin immediately and is eager to support the District on this important project. We hope this proposal demonstrates our interest and our commitment to being a long-term partner to MSD. Thank you for your consideration. Should you have any questions or wish to discuss our proposal in more detail, please contact our Project Manager, Mirko Maher, at (949) 316-0593 or mmaher@wsc-inc.com, or our Principal in Charge, Justin Pickard, at (805) 221-7766 or jpickard@wsc-inc.com.

Sincerely,

Water Systems Consulting

Mirko Maher PE
Project Manager

Justin Pickard PE, CCM
Principal in Charge

Experience and Qualifications

WSC supports public agencies across California with water and sewer conveyance engineering solutions that respond to capacity, condition, and community needs. We are purposefully organized to work collaboratively with our clients, applying proven approaches, state-of-the-art tools, and knowledge-driven innovation to deliver truly outstanding results.



WSC provides design and rehabilitation services for water and sewer systems, helping agencies maintain reliable, code-compliant infrastructure that safely delivers water and transports wastewater from source to service. Our team designs and rehabilitates water mains, gravity sewer mains, force mains, and associated infrastructure using conventional and trenchless methods to minimize disruption and extend asset life. We support annual rehabilitation programs and capital improvement projects, delivering practical, constructible solutions that address aging infrastructure, capacity constraints, and system reliability.

Services WSC Provides

- Hydraulic Modeling
- Alternatives Analyses
- Utility Conflict Evaluations
- Pipeline Replacement Design
- Trenchless Rehabilitation Design
- Permitting
- Public Outreach
- Engineering Services During Construction

Firm History

WSC

Year Established: 2007

Previous Names: None

Nearest Office: San Luis Obispo, CA

KDM Meridian (KDM)

Year Established: 2000

Previous Names: None

Nearest Office: Irvine, CA

Earth Systems Pacific (Earth Systems)

Year Established: 1969

Previous Names: None

Nearest Office: Santa Barbara, CA

Environmental Science Associates (ESA)

Year Established: 1969

Previous Names: None

Nearest Office: Rancho Cucamonga, CA

Traffic Control Engineering, Inc. (TCE)

Year Established: 1989

Previous Names: None

Nearest Office: Brea, CA

Collections Systems Experience

WSC's team members have led many sewer system design projects, giving us a deep understanding of the opportunities and risks associated with that work. Our experience includes planning and design for new facilities, rehabilitation of existing facilities, and maintenance and repair projects.

	Material	Diameter	Linear Feet	Hydraulic Analysis	Condition Assessment	Preliminary Engineering	Permitting Support	Final Design	Bidding Support	Construction Support
Annual Wastewater Main Rehabilitation Program City of Santa Barbara	VCP host; spiral-wound PVC	6-inch to 21-inch	76,643	■	■	■	■	■	■	■
Sewer Creek Crossing Rehabilitation and Repair Sacramento Area Sewer District	VCP, DIP, PVC C900, welded steel	4-inch to 33-inch	1,141	■	■	■	■	■	■	■
Airport Area Utilities Extension City of Paso Robles	PVC SDR 35; PVC C900 DR14	6-inch to 12-inch	13,017	■		■	■	■	■	■
Division Drive Sewer Rehabilitation Big Bear City Community Services District	PVC SDR 35	12-inch to 18-inch	900	■	■	■				
Hamilton Trunk Sewer Replacement Preliminary Design Novato Sanitary District	PVC SDR 35	18-inch	1,400	■		■				
Auburn Ravine Force Main Replacement County of Placer	HDPE DR17	14-inch	5,758	■		■	■	■	■	■
Sewer Lining and Manhole Rehabilitation Program San Miguel Community Services District	VCP host; CIPP liner; new PVC	6-inch to 12-inch	10,872	■	■	■			■	
Five Cities Lift Station and Force Main Replacement City of Pismo Beach	PVC C900, HDPE, DIP	8-inch	2,345	■	■	■	■	■	■	■
Sewer Main CIPP Lining Montecito Sanitary District	VCP host	8-inch & 21-inch	6,471		■	■	■	■	■	■
Manhole Rehabilitation Program Camarillo Sanitary District		4-feet & 5-feet	-			■		■	■	■
Toro Creek Bridge Force Main Replacement Cayucos Sanitary District	316L stainless steel, DIP CL350	12-inch	416			■	■	■	■	■
Chaney to Toro Main Replacement Cayucos Sanitary District	PVC	36-inch	1,922			■	■	■		
Force Main Replacement Big Bear Area Regional Wastewater Agency	PVC C900 DR14	16-inch	1,100					■	■	■
Wastewater Transfer Pipeline Sonoma County Water Agency	HDPE DR11/ DR7	4-inch & 6-inch	29,300	■		■				
Via Lucero Force Main City of Santa Barbara	HDPE DR17 IPS; PVC C900	8-inch to 15-inch	2,670				■		■	■

We Understand Your Sewer System

WSC has supported MSD with several sewer system projects in recent years, providing our team with fluency in the District's hydraulic model, an understanding of your prior investments, and insight into the community surrounding this project's alignment.

Sewer Modeling and System Analysis

WSC developed and maintains a hydraulic model of the District's sewer system. WSC assigned sanitary and wet weather flows to manholes throughout the system and calibrated the flow assignment using measured data from 10 temporary flow meter locations. WSC used the model to identify potential capacity constraints and evaluate potential improvements. The model has been updated in recent years, and WSC calibrated the model further during the 2024/2025 wet weather season.

Key Staff: Jeroen Olthof, Cason Roberts

As the District's hydraulic modeling consultant, WSC will coordinate modeling scenarios efficiently, and our design and modeling staff will work together directly to evaluate alternatives, add value, and resolve issues.

Septic-to-Sewer Strategic Plan

WSC evaluated sewer service extensions to properties currently served by septic systems. The resulting Strategic Plan provides guidance and information about implementing the extension. WSC developed a framework for the service expansion that considered feasibility, costs, and impact to MSD and its community. WSC conducted field visits, hydraulic modeling, vendor outreach, cost estimation, and the alternatives analysis. WSC identified challenges and considerations for areas that were not included in past sewer expansions, such as elevation change, creek crossing, and infrastructure requirements. WSC provided implementation and guidance to connect individual parcels, clusters of properties, or entire neighborhoods to the MSD system.

Key Staff: Michael Goymerac, Cason Roberts

The Strategic Plan gives us insight into areas that add flow to the San Ysidro pipeline, risks in the immediate vicinity, and how to present a defensible implementation plan to the Board.

Sewer Main CIPP Lining

WSC led rehabilitation design for a 21-inch trunk sewer that conveys wastewater from the District's collection system to the treatment plant. The pipeline crosses Highway 101 and is routed through easements, residential streets, and Union Pacific Railroad (UPRR) right-of-way. The project included rehabilitation of 6,019 LF of aging 21-inch pipe using CIPP technology, three 8-inch diameter sewers totaling 452 LF connected to the trunk sewer, and 24 manholes. WSC reviewed the condition of the pipelines to identify defects that needed to be addressed prior to CIPP liner installation, and developed design strategies to improve performance and reduce risk of failure. WSC prepared bypass plans as part of the UPRR permitting process.

Key Staff: Justin Pickard, Cason Roberts, Mary Harrington

Enhanced Recycled Water Feasibility Analysis & Collection System and Flow Equalization Analysis for Reuse

As a subconsultant, WSC supported MSD on two projects related to recycled water. For the Enhanced Recycled Water Feasibility Analysis, WSC evaluated pipeline alternatives, including Highway 101/Caltrans crossings, GIS mapping, hydraulic calculations, and cost estimates documented in a technical memorandum. WSC also ran collection system modeling for the City of Santa Barbara to map available sewer capacity, and prepared costs and presentation materials for joint strategic committee meetings and board workshops.

WSC also prepared the Collection System and Flow Equalization Analysis for the MWD Reuse Study. The report was an extension of a regional reuse evaluation. WSC performed a flow analysis, collection system analysis, and evaluated feasible intertie locations. WSC then evaluated four alternatives, which included impacts to existing systems, costs, benefits, and other criteria. Results were documented in a summary report and board presentations with the stakeholder agencies.

Key Staff: Michael Goymerac, Cason Roberts

Annual Sewer Rehabilitation Program

City of Santa Barbara, CA



WSC has supported the City's Wastewater Rehabilitation Program since 2018. WSC reviewed CCTV inspection videos and PACP defect scoring to recommend the appropriate rehabilitation method for each segment. WSC led design workshops with the City's engineering and operations staff to confirm condition findings, review maintenance history, evaluate probability and consequence of failure, and provide recommendations for each segment. Recommended improvements consisted of point repairs, trenchless pipe rehabilitation, open cut replacement, and manhole rehabilitation. Trenchless rehabilitation methods included CIPP and spiral wound PVC liner. The project included a bypassing spec that became the responsibility of the contractor to determine when necessary on the locations in need of rehabilitation work. WSC also provided engineering services during construction including submittal review, pre-and post-lining CCTV review, and technical support to address field challenges.

Client Reference: Caitlin Knauss, Acting Supervising Engineer, City of Santa Barbara, (805) 897-1908, cknauss@santabarbaraca.gov

Key Staff: Justin Pickard (Project Manager), Michael Goymerac (Engineering Support), Cason Roberts (Engineering Support)

Status: WSC continues to support the City's Annual Sewer Rehabilitation Program through an on-call contract.

Alternatives Analysis Case Study:
Division Drive Sewer Main Up-sizing Alternatives Analysis

Big Bear City Community Services District, Big Bear, CA

WSC was selected to conduct an alternatives analysis and design a sewer main improvement project for a sewer main that was over capacity under existing and future peak hour wet weather flow. The project initially included the replacement of approximately 1,175 LF of 10- and 12-inch diameter pipeline with 15- and 18-inch diameter pipe in Division Drive and Rainbow Boulevard.

WSC reviewed utility as-built documents, assessed existing site conditions, and evaluated hydraulic model scenarios. Given the magnitude and location of the utilities within Division Drive, adequate space for the proposed sewer main was limited. WSC identified new 950-LF sewer main down Gildart Drive as an alternative to the replacement and upgrade of the Division Drive sewer main. The alternative will intercept the flow upstream of the Division Drive sewer main and direct a percentage down Gildart Drive, relieving flows that would otherwise exceed the accepted capacity of the existing pipe. Because the original project was capacity-driven, the relief alternative alleviates the need for replacement of the existing sewer main. The new project was added to the District's CIP for future implementation.



Sewer Creek Crossing Rehabilitation and Replacement

Sacramento Area Sewer District

WSC performed an alternatives evaluation for mitigating the risks of 17 exposed sewer crossings of creeks across the County service area. WSC then designed, provided permitting support, and assisted in construction of the creek crossing repairs of gravity sewers which included obtaining necessary easements, U.S. Army Corps of Engineers and Regional Water Quality Control Board Section 404/401 permits, and California Department of Fish and Wildlife Lake and Streambed Alteration Agreements. Sizes ranged from 4-inch to 48-inch pipelines of varying materials.

The recommended repairs and replacements include protections in place from ongoing erosion within the creek, additional structural protections for aerial crossings, rerouting of sewer mains, replacement of force mains, and CIPP rehabilitation. Several locations were designed as aerial crossings using drilled piers. The WSC team also assisted in obtaining property easements, CEQA Initial Study preparation, obtaining permits for work within the creeks, and supporting outreach to affected stakeholders.

Key Staff: Michael Goymerac (Design Lead)



Auburn Ravine Force Main Replacement

Placer County Public Works Department

WSC led a condition assessment, alternatives analysis, detailed design, and provided construction support services for replacement of approximately 6,000 LF of 12-inch asbestos cement force main. WSC conducted a condition assessment using CCTV for visual inspection of the pipe interior and hydroexcavation potholing to locate the pipe exterior. Non-destructive and destructive testing methods were evaluated but eliminated from further consideration due to the costs and level of confidence.

WSC evaluated rerouting, in-place rehabilitation, and parallel pipeline installation alternatives, and developed cost estimates, assessed trenchless technologies, and evaluated bypass scenarios to maintain operations during construction. WSC facilitated an alternatives workshop that ranked alternatives based on safety, operational access, public impacts, and environmental considerations. WSC then prepared a PDR that included significant subsurface utility exploration to reduce risk of change orders and meet separation requirements.

WSC completed final design for replacing the pipeline with a 14-inch HDPE force main. The design incorporated a parallel alignment and a permanent bypass connection to the City of Auburn's system, reducing costs by reusing portions of the existing alignment and avoiding hard rock excavation. An 800-foot horizontal directional drill was used to eliminate exposed creek crossings and avoid sensitive environmental areas requiring permitting.

Key Staff: Justin Pickard (QA/QC)

Airport Area Utility Extension

City of Paso Robles, CA

WSC performed an alternatives analysis, and developed preliminary and final designs for the expansion of the City's potable water, recycled water, and wastewater system into the area around the Paso Robles Airport. WSC used spatially allocated sewer flows, a GIS-based hydraulic model, detailed constraints analysis, and life-cycle cost evaluation to evaluate alternative pipeline and pump station configurations for a multi-phased utilities expansion in this area. The analysis included evaluating up-sizing existing pipelines to the expansion area through dig-and-replace and trenchless methods.

WSC then designed approximately 8,190 LF of 8-, 10-, and 12-inch PVC SDR 35 gravity sewer main and 3,500 LF of 6-inch PVC DR-14 sewer force main, in addition to water and recycled water pipelines. WSC updated base mapping and conducted utility research to avoid critical conflicts in the project area. The project required existing services and equipment to remain functional during construction.

Key Staff: Justin Pickard (QA/QC), Michael Goymerac (Engineering Support)

Small Diameter Sewer Rehabilitation

San Miguel Community Services District, CA

WSC coordinated and reviewed the visual assessment and documentation of more than 28,000 LF of 6-, 8-, and 10-inch VCP gravity sewer, as well as approximately 80 manholes in the District's collection system. WSC prepared a preliminary engineering report that identified approximately 10,800 LF of main for rehabilitation or replacement. Of the mains evaluated, approximately 8,300 LF will be CIPP rehabilitation while the remaining segments are dig and replace or jack and bore.

WSC is preparing plan sets and specifications, coordinating survey needs and as-builts, and performing alternatives analysis supported by sewer modeling, feasibility checks, and cost estimating. WSC is supporting the project's environmental documentation requirements through coordination with an environmental subconsultant.

Key Staff: Justin Pickard (Principal in Charge & QA/QC), Michael Goymerac (Engineering Support), Cason Roberts (Engineering Support)

Status: WSC continues to serve as the District's on-call consultant for design services.



Hamilton Trunk Sewer Replacement Preliminary Design

Novato Sanitary District

WSC provided preliminary design services for the Hamilton Trunk Sewer Replacement Project for the Novato Sanitary District. The project consists of replacing approximately 1,500 LF of existing 15-inch reinforced concrete pipe with new 18-inch PVC pipeline to address identified capacity constraints within the system. A key component of the effort included close coordination with the District's hydraulic modeling consultant to evaluate system performance and refine the limits of replacement necessary to achieve the desired level of service and operational reliability.

The project alignment traverses developed areas with limited access and potential utility conflicts, which influenced the evaluation of constructability and phasing considerations during the preliminary design. WSC's approach focused on identifying feasible alignment alternatives, developing conceptual design criteria, and supporting decision-making to balance hydraulic performance improvements with cost-effective implementation. The resulting preliminary design provides a clear framework for advancing the project into final design while minimizing impacts to the surrounding community and maintaining system functionality during construction.

Key Staff: Justin Pickard (Project Manager)

Key Personnel & Org Chart

WSC is committed to providing the District with responsive, high-quality service grounded in strong, established partnership. Our project team brings local knowledge and technical expertise with a proven track record of working together on similar in-street sewer replacements.

Montecito Sanitary District

PRINCIPAL IN CHARGE & QA/QC
Justin Pickard PE

PROJECT MANAGER
Mirko Maher PE

ENGINEERING SUPPORT

DESIGN LEAD
Michael Goymerac PE

DESIGN SUPPORT & HYDRAULIC EVALUATION
Cason Roberts EIT
Jazmine Ramos

DESIGN/3D CIVIL
Mary Harrington

COMMUNICATIONS & OUTREACH
Cynthia Kahn

SUBCONSULTANTS

SURVEY/MAPPING
Rich Maher PLS
KDM

GEOTECHNICAL
Todd Tranby PG, EG
Earth Systems

CEQA SUPPORT
Tamara Klug
ESA

TRAFFIC CONTROL SUPPORT
David Kuan PE
TCE

Resumes for key personnel are included in Appendix A.

WSC's Jeroen Olthof is the District's hydraulic modeler and is available to support our team in evaluating alternatives either through this scope of work or in his role as the District's hydraulic modeler.

Meet Your Project Manager



Mirko Maher PE
Project Manager

Mirko has over 28 years of experience planning, designing, and managing construction of water and wastewater conveyance infrastructure. His prior work includes replacing aging VCP gravity sewer with larger-diameter PVC pipe, and upsizing undersized water mains within the public right-of-way. He has experience developing preliminary and final design documents which include alignment evaluation, easement acquisition, and utility coordination.

As project manager, Mirko has led design teams on similar projects, delivering bid-ready construction documents that minimize the risk of change orders during construction. He is an active member of the North American Society for Trenchless Technology and for years has helped clients implement trenchless methods to minimize risks and potential impacts.

Our Team is Organized to Quickly Begin Work and Deliver High-Quality Design Documents

Mirko will be supported by a team of pipeline design experts who have the experience and capacity to meet the District's goals and objectives. WSC's Principal-in-Charge and QA/QC Lead, Justin Pickard, and Design Lead, Adam Donald, have delivered dozens of similar pipeline design projects, enabling them to anticipate and mitigate risk as well as identify opportunities to add value.

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 94 of 257

Project Team

Name, Role, Experience & Capabilities



Justin Pickard PE, LEED AP BD+C — Principal in Charge & Authorized Official

Justin has 24 years of experience as a supervising engineer, project manager, and construction manager both as a consultant for public agencies and as a supervising engineer for West Basin Municipal Water District. Justin's experience includes serving as a project manager and project principal for the City of Santa Barbara's annual sewer rehabilitation program and City of Thousand Oaks' trenchless rehabilitation projects.



Michael Goymerac PE — Design Lead

Michael has over 14 years of experience designing water and wastewater conveyance infrastructure. He has led alternatives analyses and developed design documents for sewer pipelines, including rehabilitation and replacement projects. He recently led MSD's Septic-to-Sewer Strategic Plan, evaluating and developing alternatives to connect properties currently on septic systems to the District's sewer system.



Cason Roberts EIT, PACP — Engineering Support

Cason has four years of experience providing hydraulic modeling, condition assessment, and infrastructure planning for pipeline rehabilitation and replacement projects. He has worked with WSC's project team on more than a dozen pipeline rehabilitation and replacement projects, and has supported MSD by providing sewer system hydraulic modeling services and as a member of WSC's Septic-to-Sewer Strategic Plan project team.



Jazmine Ramos — Engineering Support

Jazmine has three years experience supporting wastewater collection system projects. She has evaluated rehabilitation alternatives, provided hydraulic analysis of flow monitoring data, and provided CCTV inspection of pipelines. She has also conducted long-term sanitary sewer overflow analysis and developed risk-based capital improvement recommendations.



Mary Harrington — CAD/3D Civil Designer

Mary has 32 years of experience working directly with civil engineers to produce design drawings, utility maps, and report graphics. Her expertise includes pipeline plan and profiles, site work and cross sections, lateral improvements, and road design. She has provided record drawings and conformed design drawings for MSD's Sewer Main CIPP Lining project.



Cynthia Kahn — Communications & Outreach Support

Cynthia is a strategic communications professional with eight years of experience developing audience-centered communication strategies. Cynthia specializes in translating complex technical information into clear, compelling messaging that informs and engages her target audience. She provides WSC's engineering team with informational materials such as community fact sheets, press releases, and public outreach strategy.

Todd Tranby PG, EG — Geotechnical (Earth Systems)

Earth Systems has provided geotechnical engineering, geologic assessment, environmental consultation, materials testing, and special inspection services for wastewater treatment and conveyance projects for more than 50 years. Earth Systems' project manager, Todd Tranby, has performed laboratory testing, grading observation and testing, geologic logging of borings and fault trenches, and geologic hazards evaluations throughout Santa Barbara County.

Rich Maher PLS — Survey and Mapping (KDM Meridian)

KDM Meridian will provide accurate topographic mapping, survey control, right-of-way research, utility structure inventory, and supporting base mapping to facilitate the evaluation and design of the project. Their high-quality work will provide WSC with a reliable survey foundation for our preliminary engineering, utility evaluation, and final design activities.

Tamara Klug — CEQA Support (ESA)

ESA will provide biological and cultural resources services to our team. Tamara is a senior ecologist with more than 30 years of experience in biology, botany, field investigations, impact analysis, and environmental planning, including in Santa Barbara County. She has extensive experience preparing and managing NEPA and CEQA documentation and advising on compliance with state and federal regulations.

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 95 of 257

References

We encourage the District to contact our references to gain perspective into the value of working with WSC and our proposed Project Manager, Mirko Maher. We provided references for WSC clients as well as the City of Anaheim, one of Mirko's clients before he joined WSC.

Irvine Ranch Water District

Contact: Michael Lu PE, Engineer, (949) 453-5658, lumi@irwd.com

Description: WSC has supported IRWD with Decommissioning of two Recycled Water PRVs and is providing design services for the replacement and rehabilitation of five supply-pipeline appurtenant structures and associated pipelines. WSC prepared and coordinated encroachment permit applications with the City of Irvine and the County of Orange, and supported IRWD's CEQA Notice of Exemption. Prior to joining WSC, Mirko supported IRWD on five projects. Three of the projects were focused on conveyance system improvements, including: a hydraulic evaluation and condition assessment of seven inverted sewer siphon facilities; design of San Diego Creek Trunk Sewer Protection improvements for a 36-inch trunk sewer across a creek in coordination with a Caltrans widening project for State Route 133, and design of 1,600 LF of 8- and 10-inch PVC sewer through open-cut and pilot-tube guided auger boring methods.

City of Anaheim

Contact: William Grigsby PE, Principal Engineer, (714) 765-5259, wgrigsby@anaheim.net

Description: WSC's proposed Project Manager, Mirko Maher, led multiple similar sewer rehabilitation and replacement projects for the City of Anaheim prior to joining WSC. Mirko was responsible for the preliminary and final design of the Knollwood Circle Sewer Improvements, which included the preliminary and final design of approximately 3,000 LF of 18-inch and 21-inch VCP gravity sewer, and 2,000 LF of 12-inch gravity sewer. The projects included evaluation of alignment alternatives and preparation of design plans, specifications, cost estimates, easement acquisition, and soil contamination testing. The alignments included City right-of-way, private properties, and significant underground utilities. The sewer construction included pilot-tube guided auger boring and open cut methods.

City of Santa Barbara

Contact: Caitlin Knauss PE, Supervising Engineer, (805) 897-1908, cknauss@santabarbaraca.gov

Description: WSC has supported the City's Wastewater Rehabilitation Program since 2018. WSC reviewed CCTV inspection videos and PACP defect scoring to recommend the appropriate rehabilitation method for each segment. WSC worked with City's engineering and operations staff to confirm condition findings, review maintenance history, evaluate probability and consequence of failure, and provide recommendations for each segment. Recommended improvements consisted of point repairs, trenchless pipe rehabilitation, open cut replacement, and manhole rehabilitation. Trenchless rehabilitation methods included CIPP and spiral wound PVC liner. WSC also provided engineering services during construction including submittal review, pre-and post-lining CCTV review, and technical support arising from challenges in the field.

City of Paso Robles

Contact: Kirk Gonzalez PE, Planning and Engineering Manager, (805) 227-7238, kgonzalez@prcity.com

Description: WSC has provided alternatives evaluation, hydraulic modeling, and design services to the City of Paso Robles through on-call and stand-alone contracts for the past decade. One representative project was an expansion of potable water, recycled water, and wastewater utilities into the area around the Paso Robles Airport. WSC evaluated alternatives for capacity, hydraulics, permitting constraints, utility conflicts, and life-cycle cost. The analysis included evaluating upsizing existing pipelines to the expansion area through dig-and-replace and trenchless methods. WSC then designed approximately 8,190 LF of 8-, 10-, and 12-inch PVC gravity sewer main and 3,500 LF of 6-inch PVC force main, in addition to water and recycled water pipelines. The project required existing services and equipment to remain functional during construction.

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 96 of 257

Project Understanding & Approach

Project Understanding

Two Segments with Fundamentally Different Needs and Opportunities

The District's collection system master plan identified the sewers along the San Ysidro corridor as undersized for current and future flows. The project includes two segments that prompt fundamentally different design questions, and we have organized our approach around that distinction.

Segment A

Description: 2,059 feet of new 8-inch PVC from East Valley Road (SR 192) at San Ysidro Road south to the southern end of Montecito Union Elementary School District.

Considerations: Diameter and need are settled.

Decisions:

- Alignment
- Depth
- Utility Conflicts
- Caltrans crossing at the north end and impacts to the south end

Segment B

Description: 2,690 feet from the school district's southern boundary to San Ysidro Road at San Leandro Lane.

Considerations: The evaluation of alternatives is where preliminary design efforts are focused, and where we have concentrated our approach.

Decisions:

- Alternative 1 - Upsize the existing 8- to 10-inch CIPP-lined VCP to 12-inch PVC by trenchless or conventional means.
- Alternative 2 - Install new 12-inch PVC and abandon the existing line.
- Alternative 3 - Install new 8-inch PVC and keep the existing line in service.

As a Main North-South Arterial, Community Impact and Caltrans Permitting Are Important Considerations

This project has significant constraints within the alignment corridor, specifically related to traffic, utilities, and proximity to public (schools and residences). San Ysidro Road is one of Montecito's main north-south arterials, yet it functions as a narrow residential street fronting Montecito Union Elementary and Laguna Blanca schools. San Ysidro is a two-way road with one lane in each direction. On the southern reach of the project (Reach B), the existing sewer is located in center or just off center of roadway. Improvements will impact both north and southbound traffic lanes requiring carefully coordinated closure/detours and phasing; adjacent are bike paths, residential frontages and driveways.

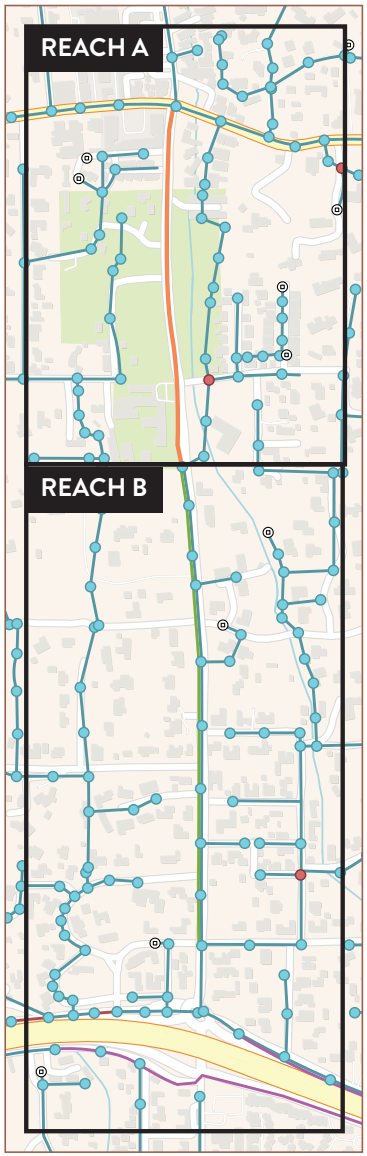
The corridor has mature landscaping, stone walls, and private hardscape at the right-of-way line through much of its length. It is the route residents depend on to reach the neighborhoods it serves, and it carries concentrated school traffic during morning drop-off and afternoon pick-up.

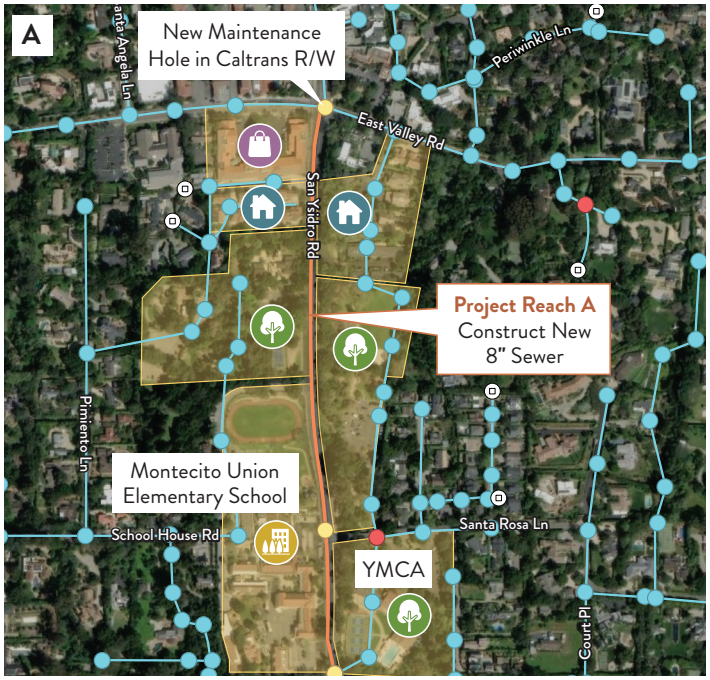
The north end of the corridor begins at the San Ysidro Road and East Valley Road (SR 192) intersection, the heart of the Upper Village, where neighborhood, school, commercial, and through traffic converge, where even a short lane closure would be felt across the community. Construction on this corridor has to be planned around neighborhood access, school schedules, and intersection operations from the start of design. East Valley Road is State Route 192 on the north end of the project, and the south end potentially impacts State Highway 101, so both the north and south ends carry a Caltrans District 5 encroachment permit.

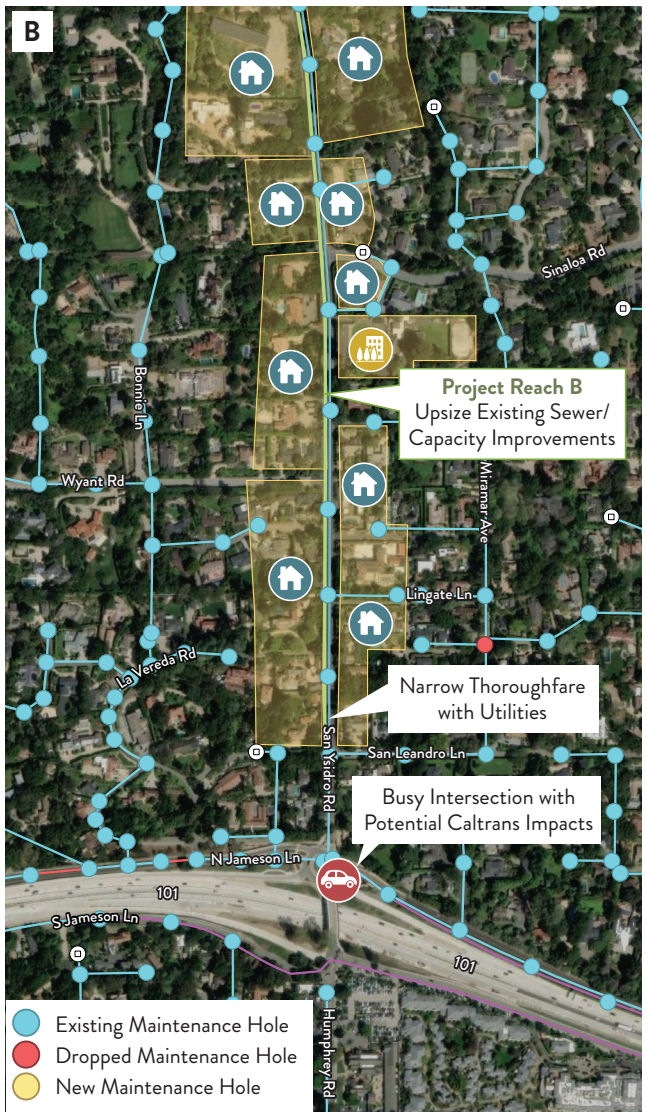
The system dates to the 1960s (the Segment B main has already been lined once) and is a key consideration for any trenchless alternative that replaces existing pipe in place, and one we address below in our approach.

Each Segment of this Project has its Own Considerations

The San Ysidro Road alignment presents interesting challenges and opportunities. WSC's approach considers the risks and avenues to mitigate them through a thorough review of available data, consideration of impacts to traffic, school access, and residents. The map below highlights important community considerations for this project that we will address to move this project forward successfully.







KEY CHALLENGES

Caltrans/Commercial Impact

Coordination of work with District 5 will be required to minimize impacts to busy intersections and determine constraints.

Residential

Evaluate construction methods and alignment to minimize disruption, maintain service. Identify lateral locations, driveway access, and schedule work within approved work hours.

Narrow Traffic Thoroughfare

Contractor will be limited by equipment they can use. Consideration will be made to implement technologies to limit excavations.

Public Space Access

Work in areas near public space such as Manning Park and picnic area will need to be maintained.

Schools

Coordination with school district to time work appropriately with drop off and pick up timeframes, as well as time work during school recess.

PROPRIETARY & CONFIDENTIAL Water Systems Consulting, Inc.

Project Approach

Our Keys to Project Success

Based on our understanding of the District and project needs, our approach is focused on three key success factors:

1. A Team That Has Planned and Delivered This Work Before
2. An Alternatives Analysis That Produces a Clear, Defensible Decision
3. Utility Research That Mitigates and Reduces Risk Before Construction

A Team That Has Planned and Designed This Work Before

The project requires a planning solution before a detailed drafting solution is developed. That is why WSC has staffed this with people who have strong backgrounds is in pipeline planning and alternatives evaluation as well as detailed design.

Experienced Project Manager and Design Team With Significant, Local Experience

Mirko will serve as WSC's Project Manager. Mirko brings 28 years of water and sewer planning and design in California, including trunk sewer and force main replacement and rehabilitation for Orange County Sanitation District, City of Anaheim, City of Manhattan Beach, Irvine Ranch Water District, and Sausalito Marin City Sanitation District. He is a member of NASTT and actively tracks the development of trenchless replacement and upsizing methods. This is directly relevant to the Segment B alternatives analysis that is central to the project. Mirko will be the District's single point of accountability for scope, schedule, budget, and coordination.



Mirko Maher PE
Project Manager

Mirko will be supported by key staff from our San Luis Obispo office who have worked closely with the District on recent hydraulic modeling, sewer system alternatives evaluations, and trenchless pipeline design projects. That matters for two practical reasons beyond proximity: it puts our team in the same region as the corridor for field walks and District meetings, and it puts us in the same city as Caltrans District 5 headquarters, which administers the SR 192 and Highway 101 encroachment permits.

Michael, who is based in WSC's San Luis Obispo office, will work closely with Mirko as the Design Lead for this project. He recently delivered the District's Septic-to-Sewer Strategic Plan and previously played a key role on the Enhanced Recycled Water Feasibility Analysis and Summerland Sewer Intertie projects. He also has extensive pipeline replacement and rehabilitation design experience in coastal communities.



Michael Goymerac PE
Design Lead

Our Expertise and Project Management Approach Optimizes and Amplifies Your Staff's Input

We recognize that District staff are busy and carrying a heavy workload, and that a consultant who needs close direction only adds to it. Our team's recent work with the District means we already know the collection system, the operations staff, and how the District makes decisions.

We have the capability to steer this project with minimal oversight and to use District staff time efficiently, asking for it only where District input shapes the outcome. We have mapped those touch-points in advance: a kickoff meeting to confirm objectives and data needs; a corridor field walk with operations staff; a workshop to set evaluation criteria and weighting before alternatives are scored; a review of the evaluation matrix before the draft Preliminary Design Alternatives Report; the alternatives report review meeting and District selection; and review meetings at each design submittal. Between touch-points, our Project Manager will provide brief status updates so staff stay informed without having to manage the work.

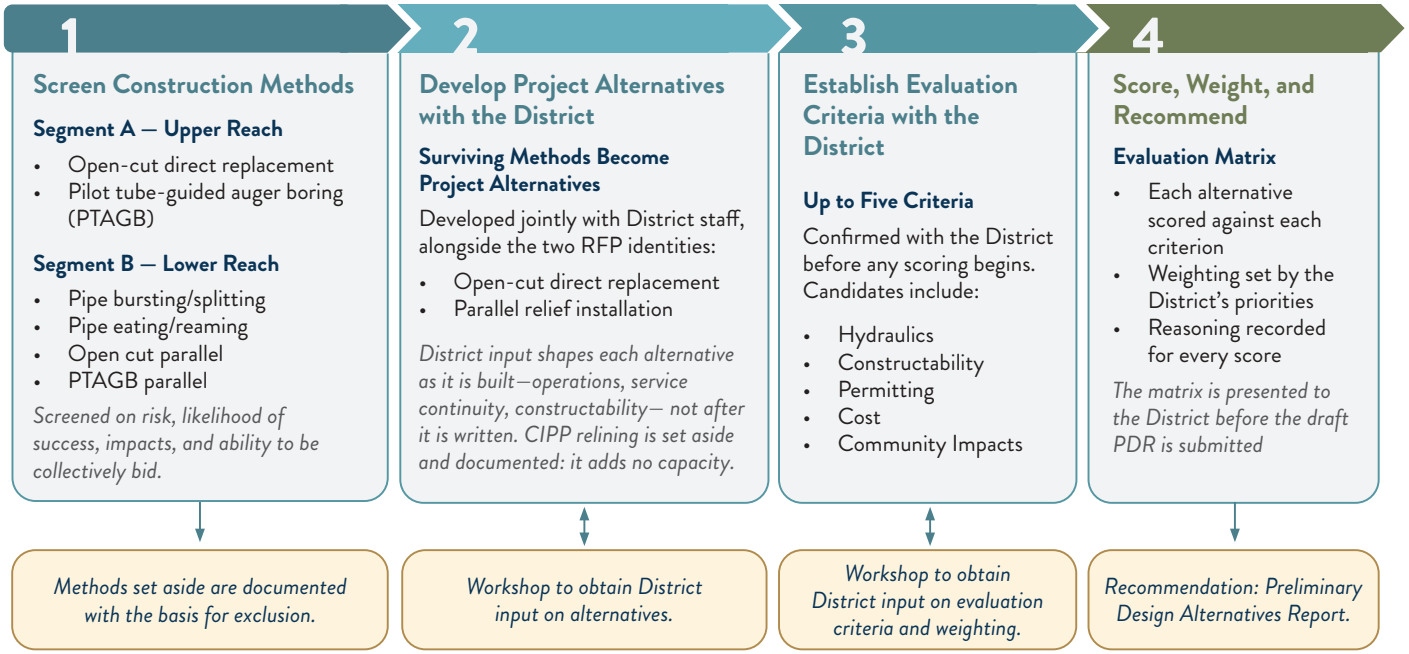
An Alternatives Analysis That Produces a Clear, Defensible Decision

The District's objective for this task is a decision it can stand behind and is defensible to the Board. Our approach is to screen a menu of feasible replacement and upsizing methods against this corridor's actual constraints first, and then develop the alternatives that survive the initial screening.

After the initial screening, three alternatives will be carried into the Preliminary Design Alternatives Report for evaluation against criteria followed by ranking and selection. Up to three alternatives will be evaluated using criteria that could include but is not limited to cost, community impacts, O&M, hydraulic performance, and permitting. From this analysis, a recommended and preferred alternative will arise and the District can memorialize why the others were set aside.

Screening and Alternative Development Approach

WSC has delivered planning-level alternatives analyses that carried through to successful detailed design, using an approach that separates technical screening from alternative evaluation.



Alternatives are reconciled with WSC's working knowledge of the District's hydraulic model. WSC and District staff will establish the criteria and develop the alternatives together, producing a decision record staff and the Board can follow: what was considered, what was set aside, and why.

Our approach is a collaborative process with the District involved every step of the way. The scope of work includes additional meetings to obtain feedback from the District in an alternative development workshop, and another meeting to establish evaluation criteria. The following summarizes our approach and discusses additional detail for construction methods screening and alternative screening/selection for evaluation.

We Will Screen Segment A and B for Potential Trenchless Construction Methods Feasibility

WSC's design staff are members of NASTT. NASTT membership keeps our engineers current on the development of trenchless replacement and upsizing methods, including those that have matured well past the point where most agencies last evaluated them.

Segment A Trenchless Considerations

For Segment A, open cut is assumed to be the method of construction, however it should be noted that the grades increase southward on a positive slope from the intersection of San Ysidro and SR 192. The existing sewer was likely not originally installed along this portion of San Ysidro is due to the grades and very steep embankment on the east side of San Ysidro. The existing sewer follows more of the natural grade along the existing creek located on the east side of San Ysidro. Considering this, a trenchless method may be investigated during preliminary design efforts and alternatives development. Considering the constraints along this portion of the alignment, pilot tube guided auger boring (PTGAB) considering the constraints along this portion of the alignment.

PTGAB is one of the most popular and cost-effective trenchless methods to accurately install underground utilities, waterlines, and sanitary sewers. This method combines pinpoint accuracy of the pilot tube installation to control line and grade with the excavation process of horizontal auger boring. Though the RFP has identified open cut as a preferred method, given the constraints identified on the north end of the project, including a steep embankment, and the depths that would be necessary to achieve downward slope of the sewer, and the risks to the adjacent utilities, considering PTGAB as an option would be recommended. Should the District seek to investigate this method, the WSC Team can investigate and screen its feasibility as part of the alternative project development.

Segment B Trenchless Considerations

Similarly, PTGAB can be considered for Segment B for a parallel alignment. For replacement of existing pipelines along their current alignments, pipe bursting and pipe-eating will be investigated.

The existing Segment B main is CIPP-lined VCP. Pipe bursting will need to consider the fracturing of the host pipe and displacement into the surrounding soil; the compressibility of surrounding soil and heaving potential will need to be known; and utility crossings will need to be identified and confirmed, including location of existing casings (concrete or steel). Additionally, the risks associated with how a cured liner deforms and tears rather than shattering will need to be considered, because liners can be dragged ahead of the head instead of breaking cleanly. Work space requirements are more localized at manhole locations where pipe would be inserted and pulled from. These are risks associated with pipe splitting and bursting.

Pipe eating removes the host pipe rather than displacing it with a microtunneling-type machine that excavates the existing pipe together with enough surrounding ground to accommodate the new one, and the liner is cut and carried back with the spoil. The constraint moves from liner behavior to shaft logistics, cover depth, and contractor availability.

WSC's subconsultant, Earth Systems, will provide geotechnical investigation to provide soil study, and with this information we will determine (with contractor outreach), pipe burst and split potential. The goal is to determine feasiblity and host behavior and resolve decisions to carry forward or screen out. Feasibility will be discussed collaboratively with the goal of fully understanding the risks, so the District will be able to make a decision prior to issuance of the alternatives report.

It should be noted that pipe eating is far more established in Europe than in California, and a method with a small regional bidder pool can carry bid risk that belongs in the evaluation alongside constructability and cost. The alternatives report will document the feasibility of of both bursting and pipe eating, including whether it is commercially available and understand bidding pool of specialty contractors to perform the work.

Trenchless Construction Method Screening for Segment B, Actions to Address Potential Constraints

Method	Specific Screening Considerations	Next Actions
Pipe Bursting/Pipe Splitting	• Constructability of CIPP through lined VCP: • Contractors available to bid the work • Cover requirements • Show stoppers – casings, utilities, conflicts, concrete encasements	• Confirm with contractor tools • Confirm contractor availability • Confirmed cover requirements with geotechnical team during design • Investigate show stoppers with utility investigation during design
Pipe eating/Pipe Reaming	• Can it pass through CIPP lined VCP? • Are there contractors available to bid it? • Does it work at its current cover • Any method "show stoppers" like casings, utilities, conflicts, concrete encasements?	• Confirm pass through ability • Confirm with California contractors • Confirm suitability of current cover • Investigate show stoppers with utility research

Screening and Evaluation of Project Alternatives (Segment B)

Once a screening of trenchless methods has been performed, the feasible methods would be carried forward. Such in the case assuming both trenchless methods be feasible, alternatives would be screened so three alternatives are carried forward for evaluation. A sample screening, as shown below, would assist in ruling out the alternative that carries the most risk. In this case, because Alternative 1 and Alternative 2 are close, the one with the least risk would be carried forward along with Alternative 3 or Alternative 4..

After construction methods have been screened for both Reach A and Reach B, three alternatives will be carried forward at a consistent level of detail with each considered against established scoring criteria. WSC will engage with the District to confirm evaluation criteria and weighting based on preference. Criteria will include, but are not limited to, hydraulic performance/capacity gain, constructability, community impacts, permitting, construction cost, and whole-life cost. This approach provides for a quantitative and qualitative comparison of alternatives based on what matters to the District, as represented by the weighting factors applied to each evaluation criterion. For example, a relief sewer would need whole-life treatment rather than construction cost alone, since maintaining the existing lined main in service leaves the District with an asset it will still have to renew and maintain.

Example Construction Method Alternative Screening Approach

Screening Criterion	Pipe Bursting/ Splitting	Pipe Eating/ Reaming	Open-Cut Replacement	Parallel (Relief) Installation
	Alternative 1	Alternative 2	Alternative 3	Alternative 4
Achieves required capacity gain	Favorable	Favorable	Favorable	Favorable
Performs through CIPP-lined VCP host	Conditional	Favorable	Favorable	Favorable
Corrects grade as well as diameter	Unfavorable	Favorable	Favorable	Favorable
Limits surface disruption	Conditional	Conditional	Unfavorable	Unfavorable
Suitable at ~8 ft of cover	Conditional	Conditional	Favorable	Favorable
Tolerates congested utility corridor	Conditional	Conditional	Unfavorable	Unfavorable
Avoids lateral re-excavation	Unfavorable	Unfavorable	Unfavorable	Favorable
Regional contractor availability	Favorable	Unfavorable	Favorable	Favorable
Relative construction cost	Conditional	Unfavorable	Conditional	Favorable

Favorable Conditional Unfavorable

Note: Ratings are preliminary and will be confirmed against CCTV, geotechnical findings, and utility research

WSC will work with MSD to identify which alternatives to screen and what criteria to use. The example above demonstrates how an initial alternatives screening can narrow down the alternatives to the most feasible construction methods.

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 102 of 257

WSC's Knowledge of Your Collection System Enables Efficient Screening of Other Alternatives to Shed Flows Away from San Ysidro Road

Alternative Example: Flow Diversion of Miramar Avenue

The three alternatives identified in the RFP all address the capacity deficiency by adding capacity within the San Ysidro Road alignment. We recommend the District also consider an alternative that approaches the problem from the other direction — reducing the flow conveyed by the San Ysidro Road sewer.

A short segment of new sewer connecting the San Ysidro Road system east to the existing gravity main on Miramar Avenue would shed a portion of the tributary flow into a parallel downstream path. If the Miramar Avenue system has available capacity, diverting flow at the right point could shorten the reach of San Ysidro Road requiring upsizing, reduce the required diameter, or both.

As the District's hydraulic modeling consultant, WSC is uniquely positioned to assist in identifying any other cost saving solutions that would keep rehabilitated assets in place. The District has invested in lining the existing San Ysidro sewer pipe, and its structural service life has been extended accordingly. Each of the three RFP alternatives either replaces that asset or leaves it in place while building a second pipe alongside it. An alternative that relieves the existing main hydraulically, rather than replacing or duplicating it, enables the District to keep the benefit of a rehabilitation it has already paid for. Where capacity can be resolved without discarding sound infrastructure, that is worth evaluating alongside construction cost.

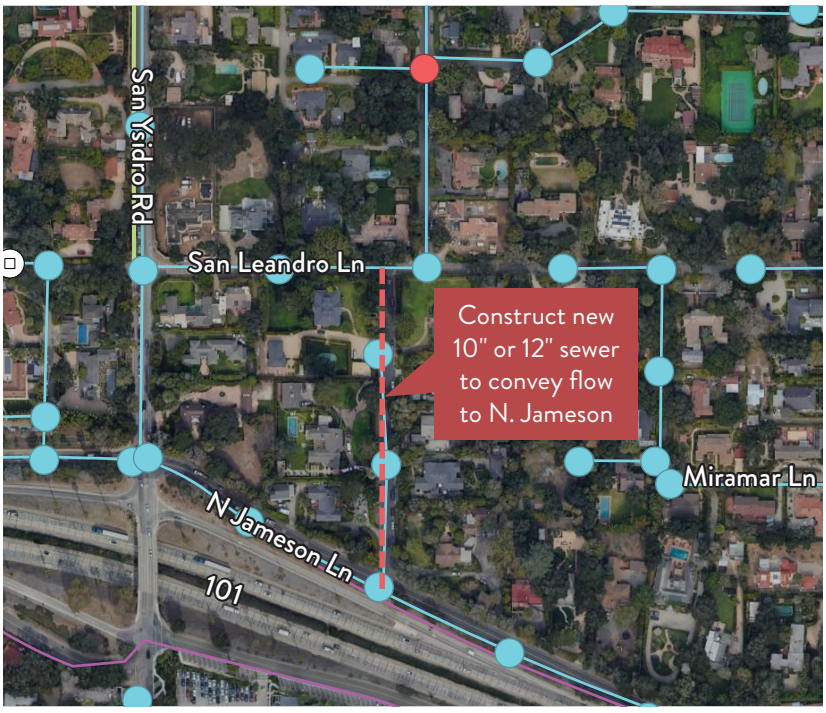
The reduced construction footprint carries its own benefits: a fraction of the 2,690 feet described in the RFP alternatives, shorter construction duration, less disruption along a residential frontage and school corridor, and lower capital cost.

Feasibility will need to be confirmed with the hydraulic model by evaluating how much flow can be diverted, how much flow can stay in the San Ysidro Road reach, how much flow is added downstream, and where to locate the diversion. The most important of these considerations is the downstream impact. Additional flow routed from Miramar Avenue will reach the downstream Posilipo Lift Station, and any diversion has to be evaluated against that station's firm capacity, wet-well cycling, and force main hydraulics before it can be recommended.

WSC recently evaluated and estimated the cost of the Posilipo Lift Station capacity improvements as part of the MSD-SSD intertie project; those costs were carried into the applicable alternative and discussed with District staff. Given the potentially high cost of upgrades at this site, WSC will carry those cost implications into the evaluation of any diversion that adds flow to the Posilipo reach, and will look at routing options that bypass the Posilipo reach where the system allows.

Even if the District elects not to pursue a diversion, we believe it is important that District staff and the Board see the full picture of how these flows could affect future

Thinking Outside the Box: Are There Other Possible Solutions?



WSC can evaluate alternative alignments that preserve the City's prior investment in CIPP rehabilitation of the San Ysidro pipeline without causing other downstream issues to the District's system. This could include diverting flows to the Posilipo Lift Station or other parts of the system.

system operations and rates. **A diversion that solves a gravity capacity problem by creating a pumping capacity problem will not be considered a solution.**

WSC has been maintaining the District's sewer model since 2021, and the alternatives we carry forward will be grounded in the model rather than in assumptions about how the system behaves. That is why we raise the Posilipo reach before an alternative is selected rather than after. The result is an alternatives report that reflects the District's actual system, the downstream consequences, and a recommendation the District can act on, or set aside with confidence.



WSC staff met with MSD operations staff as part of a field investigation for the MSD-SSD intertie project. WSC and MSD staff confirmed pump sizes and capacity at the Posilipo Lift Station site. The results informed costs for the intertie infrastructure alternatives and can be used to evaluate feasibility of a flow diversion alternative.

Utility Research Mitigates and Reduces Risk Before Construction

Most change orders on an in-street pipeline trace back to something in the ground that was not on the plans. The RFP's utility scope is records-based. Our approach is to obtain atlas and as-built records from utility owners to develop a base map utilizing surveys with "boots on the ground" field verification. WSC will visit the site and confirm utility locations against developed plans at preliminary and 90% final design stages.

Records, base mapping, and boots on the ground

We will request atlas maps from every owner that USA returns, file the design ticket ahead of geotechnical and survey, and build the base map from the District's record drawings and GIS. Our engineers will then walk the full alignment with the base map in hand and verify locations of valve can, manhole, meter box, cleanout, pull box, pavement scar, and riser that the records do not show, reconciling it before the alternatives report rather than at 50%. Crossings will be modeled in three dimensions so profile conflicts update automatically should shifts in the alignment be required during design.

A potholing plan will reduce utility conflict risks in construction plans

The portion of San Ysidro Road within the project scope contains roughly ten intersections between East Valley Road and San Leandro Lane, and each is a crossing cluster that contains water, gas, and a joint electric and telecom trench at minimum.

Because the District's RFP requests potholing not be included in the design, it is assumed WSC will develop base mapping from desktop research including dig alert information and utility agency requests. This utility base mapping will be rectified against surveyed utilities and other markings identified through field investigations. We will prepare a potholing plan that states, for each location, where designating a test hole is proposed for the entire alignment with weighted focus toward the SR 192 crossing, the larger cross-street intersections, and the San Leandro Lane tie-in. It is important to note that trenchless alternatives would require additional verification of clearance to parallel utilities along the run, not only at crossings. The goal is to provide a minimum baseline for contractors to include in their bid a unit price, so additional locations will not require negotiations on price. Depending on the utility information obtained, the District may retain a contractor to perform potholing services of select utilities during design, or WSC will perform potholing under separate scope and fee.

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 104 of 257

Risks we expect, and how the design will mitigate them

WSC will develop a risk register with the District at the start of design and maintain it through final design. Each entry carries an owner, a mitigation, and the milestone by which it must be resolved. The risks on this corridor are specific to its setting; a school frontage, residential driveways along most of the alignment, and a utility corridor carrying high pressure gas, underground electrical, telecommunications, and water services. Our team has designed in these conditions before, and our approach is to reduce risks to the extent possible. A risk register assists in achieving this goal, and exists so that risks are mitigated during design, when they are still inexpensive to address, rather than discovered during construction. The table below presents a select list of the specific risks we already expect on this corridor based on the RFP, the District atlas, and our review of the project area. During preliminary and design phases, the risk register will be expanded to include community and permitting risks.

How Design Can Reduce and Mitigate Risks

Method	Specific Screening Considerations
Unverified utility crossings at intersections	Layered records review and USA design ticket; develop a potholing plan that states, for each location, what design decision it informs; crossings modeled in 3D so profiles update when the alignment moves. WSC recommends having potholing performed ahead of alignment confirmation to minimize field change conditions during construction.
CIPP liner defeats the trenchless alternative	Liner condition and host pipe behavior treated as a governing question in the geotechnical investigation and soil compressibility. This will be resolved before the alternatives report is issued rather than discovered in the field
Caltrans SR 192 and Hwy 101 encroachment permit timing	Crossing exhibit prepared early and pre-application coordination with District 5 in San Luis Obispo, where our lead office sits; contact and arrange to meet early on once recommended project is confirmed.
School access during construction	Montecito Union Elementary drop-off and pick-up zones mapped during the corridor walk; work-hour and phasing restrictions written into the specifications rather than left to the contractor.
Private frontage restoration disputes	Mature landscaping, stone walls, and hardscape at the right-of-way line inventoried parcel by parcel during the field walk and carried into restoration details and pay items. Establishing ROW lines on drawings and identifying the District's policy for replacing property that may have encroached into ROW. Incorporate vibration monitoring needs with established limits and clearly have those requirements defined in the project plans and specifications. Preconstruction videos and photograph requirements in the specifications to provide record of pre- and post-construction conditions.
Service interruption to residents	Lateral inventory drives connection details and bypass sequencing; the parallel alternative is evaluated specifically for its ability to keep the existing main in service and reduce bypass duration.
Ambiguity that becomes a change order	Independent senior QC review at every submittal, a single comment log returned with each, and bid documents written to remove the ambiguity that drives requests for information.

Utility research, subsurface verification, and the risk register are three parts of one effort; making what the contractor finds in the ground match what the plans show. The goal is to identify risks and have informed discussions with the District about which risks they are comfortable carrying forward into construction and which risks they would like to invest in mitigating during the design phase.

A phased approach to minimize community impacts and risks

Regardless of selected construction method and approach, this project will require careful phased planning and outreach to mitigate negative community perception, keep it on schedule, and advance the goals of the project. WSC is an integrated water engineering and communications firm, meaning our in-house team of communications specialists has the technical expertise on projects such as these to deliver the right messages at the right time.

WSC is currently supporting MSD's neighbors on both sides: the City of Santa Barbara for their Via Lucero Force Main Replacement Project and Carpinteria Valley Water District on the Carpinteria Advanced Purification Project, a historic project for Santa Barbara County.

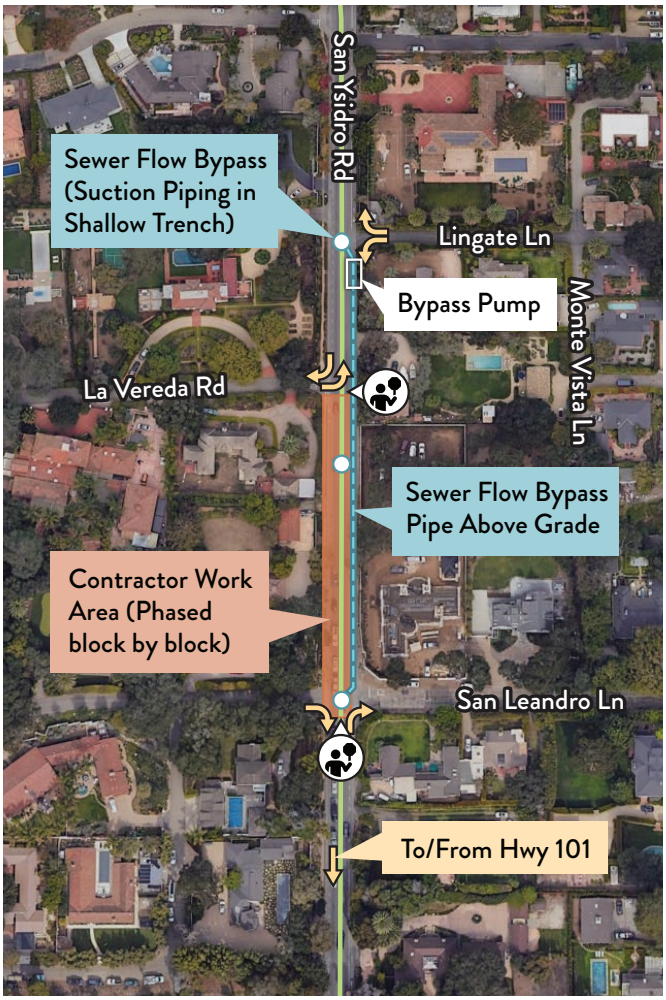
For this project, our team recommends:

- Preliminary project information on MSD's website, including description, frequently asked questions, and contact information.
- Identification of specifically impacted customers for individualized outreach.
- Mailed postcard notifying the community of project development and community benefits.
- News releases such as articles for distribution to local journalists and MSD's own email communication.

All deliverables include graphic design support such as infographics and illustrations.

WSC will coordinate closely with the District and engage County, City, community stakeholders, and Caltrans early to secure jurisdictional buy-in before the design is fixed rather than after.

Thoughtful Phasing Reduces Disruption

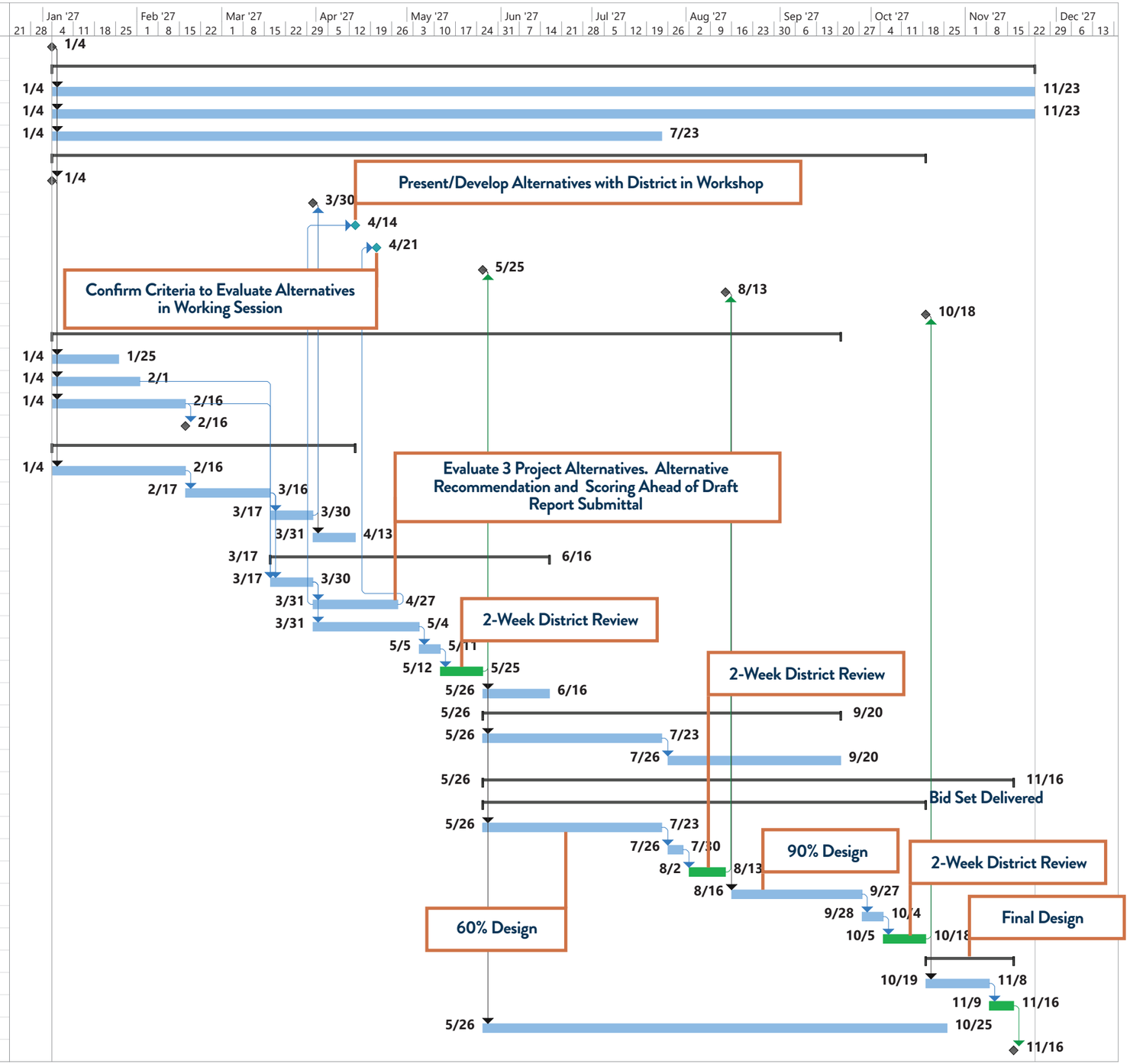


This project will require careful, phased planning and outreach to minimize impacts to the community. Our approach is to phase the work block-by-block with appropriate detours for traffic flow and residential access. The figure above is an example of potential traffic flow for a potential open-cut replacement with implemented bypass from the south terminus to Lingate Lane. Communicating solutions such as this to jurisdictional agencies is recommended to obtain stakeholder buy in; manage and minimize risk of change, keep project on track, and determine constraints for contractor to bid within.



Estimated Schedule

ID	Task Name	Duration
1	Notice to Proceed	0 days
2	**Task 1 Project Management, QA/QC, Meetings, and Site Visits**	**225 days**
3	1.1 Project Management	225 days
4	1.2 Quality Control / Quality Assurance	225 days
5	1.4 Subconsultant Management	140 days
6	**1.3 Meetings**	**200 days**
7	1.3.1 Project Kick-Off Meeting and Site Visit	0 days
8	1.3.2 Draft Geotechnical Report Review Meeting	0 days
9	Alternative Development Meeting	0 days
10	Alternative Evaluation/Criteria Meeting	0 days
11	1.3.3 Draft PDAR Review Meeting - District Selects Alternative	0 days
12	1.3.4 50% Deliverables Review Meeting	0 days
13	1.3.5 90% Deliverables Review Meeting	0 days
14	**Task 2 Review Existing Information and Preliminary Design**	**180 days**
15	2.1 Existing Documents Review (records, master plan, CCTV)	15 days
16	2.2 Utility Research and USA Database Coordination	20 days
17	2.3 Topographic Survey and Base Mapping	30 days
18	2.7 Preliminary Field Walk	0 days
19	**2.4 Geotechnical Investigation and Report**	**70 days**
20	2.4 Geotechnical Field Investigation	30 days
21	2.4.1 Draft Geotechnical Report	20 days
22	District Review - Draft Geotechnical Report	10 days
23	2.4.2 Final Geotechnical Report	10 days
24	**2.6 Preliminary Design Alternatives Report**	**65 days**
25	Trenchless and Conventional Method Screening	10 days
26	Alternatives Development and Evaluation Criteria	20 days
27	2.6.1 Draft Preliminary Design Alternatives Report	25 days
28	2.8 QA/QC Review - Preliminary Design	5 days
29	District Review - Draft PDAR	10 days
30	2.6.2 Final Preliminary Design Alternatives Report	15 days
31	**2.5 Environmental Document Preparation and Permitting**	**80 days**
32	2.5.1 CEQA Compliance Support (incl. cultural / biological)	40 days
33	2.5.2 Permit Applications - County and Caltrans D5	40 days
34	**Task 3 Contract Document Preparation**	**120 days**
35	**3.1 Draft Deliverable Preparation**	**100 days**
36	3.1.1 50% Plans, Specifications, and Cost Estimate	40 days
37	3.1.3 QA/QC Review - 50% Submittal	5 days
38	District Review - 50% Submittal	10 days
39	3.1.2 90% Plans, Specifications, and Cost Estimate	30 days
40	3.1.3 QA/QC Review - 90% Submittal	5 days
41	District Review - 90% Submittal	10 days
42	**3.2 Final Deliverable Preparation**	**20 days**
43	3.2.1 Final Plans, Specifications, and Cost Estimate	15 days
44	3.2.2 QA/QC Review - Final Deliverables	5 days
45	3.3 Agency and Utility Coordination During Design	105 days
46	Issued for Bid Electronic Set	0 days



PROPRIETARY | Water Systems Consulting, Inc.

Estimated Level of Effort and Rate Sheet

		WSC								KDM Meridian	Earth Systems Pacific	ESA	TCE
Task No.	Task Description	Principal in Charge	Project Manager	Design Manager	Design Engineer	CAD Designer	Project Administrator	Communication Strategist	WSC Labor Hours	Labor Hours	Labor Hours	Labor Hours	Labor Hours
		Justin Pickard	Mirko Maher	Michael Goymerac	Cason Roberts	Mary Harrington	Kay Merrill	Cynthia Kahn-Flynn					
		Principal II	Principal I	Senior III	Staff I	Technician/ Designer I	Administration/Clerical III	Communication Strategist I					
1	**Project Management, Quality Assurance/Quality Control, Meetings, and Site Visi**												
1.1	Project Managemen	4	12	44	22		13		**95**				
1.2	Quality Control/Quality Assuranc	56		4	16				**76**				
1.3	**Meetings**												
1.3.1	Kick-Off Meeting		6	6	8				**20**				
1.3.2	Draft Geotechnical Report Review Meetin		2		2				**4**				
1.3.3	Draft Preliminary Design Meetings		8	8					**16**				
1.3.4	50% Deliverables Review Meetin		2	3					**5**				
1.3.5	90% Deliverables Review Meetin		2	3					**5**				
	SUBTOTAL	**60**	**32**	**68**	**48**	**-**	**13**	**-**	**221**	**-**	**-**		**-**
2	**Review Existing Information and Preliminary Desig**												
2.1	Existing Documents Review		8	8	16				**32**				
2.2	Utility Research and USA Coordinatior		4	8	24				**36**				
2.3	Topographic Survey and Base Mappin				16	48			**64**	342			
2.4	**Geotechnical Investigation and Repor**												
2.4.1	Draft Geotechnical Report		1	4	8				**13**		135		
2.4.2	Final Geotechnical Report		1	2	4				**7**				
2.5	Environmental Document Preparation and Permittin		6	20	8	8			**42**			118	16
2.6	**Preliminary Design Alternatives Report (PDAR**												
2.6.1	Draft Report	2	12	24	40				**78**				
2.6.2	Final Report		4	24	24				**52**				
2.7	Preliminary Field Walk of Corridor		8	8	8				**24**				
	SUBTOTAL	**2**	**44**	**98**	**148**	**56**	**-**	**-**	**348**	**342**	**135**	**118**	**16**
3	**Contract Document Preparatior**												
3.1	**Draft Deliverable Preparatior**												
3.1.1	50% Plans		16	24	80	140			**260**				
3.1.2	50% Technical Specifications		12	16	40		8		**76**				
3.1.3	50% Cost Opinion		6	8	16				**30**				
3.1.4	90% Plans - Plan and Profile		16	16	60	120			**212**				
3.1.5	90% Technical Specifications		12	16	36		8		**72**				
3.1.6	90% Cost Opinion		6	8	12				**26**				
3.2	**Final Deliverable Preparatior**												
3.2.1	Final Plans		4	10	32	80			**126**				
3.2.2	Final Technical Specifications		2	6	24		8		**40**				
3.2.3	Final Cost Opinior		2	4	8				**14**				
	SUBTOTAL	**-**	**76**	**108**	**308**	**340**	**24**	**-**	**856**	**-**	**-**		**-**
	TOTALS Hours (Tasks 1 through Task 3)	**62**	**152**	**274**	**504**	**396**	**37**	**-**	**1,425**	**342**	**135**		**16**
OT	**Optional Tasks (not included in base scope of work**												
OT-1	Public Outreach Support and Community Fact Shee		4	4				80	**88**				
OT-2	Supplemental Hydraulic Modeling Suppo		4	16	40				**60**				
OT-3	Additional Capacity Improvement Alternatives Beyond Thre		2	12	20	8			**42**				
	OPTIONAL TASKS TOTAI	**-**	**10**	**32**	**60**	**8**	**-**	**80**	**190**	**-**	**-**		**-**

PROPRIETARY // Water Systems Consulting, Inc.

Classification	2026 Rate
Engineers / Project Managers / Planners / Hydrogeologists	
Engineering Intern	$ 154.00
Assistant	$ 177.00
Staff I	$ 188.00
Staff II	$ 199.00
Staff III	$ 211.00
Associate I	$ 227.00
Associate II	$ 240.00
Associate III	$ 250.00
Senior I	$ 278.00
Senior II	$ 291.00
Senior III	$ 313.00
Principal I	$ 330.00
Principal II	$ 370.00
Principal III	$ 415.00
Outreach and Communications	
Communications Support I	$ 145.00
Communications Support II	$ 165.00
Communications Support III	$ 185.00
Communication Strategist I	$ 220.00
Communication Strategist II	$ 240.00
Communication Strategist III	$ 260.00
Senior Communication Strategist I	$ 280.00
Senior Communication Strategist II	$ 300.00
Senior Communication Strategist III	$ 320.00
CAD / Design Services	
Technician/Designer I	$ 163.00
Technician/Designer II	$ 192.00
Technician/Designer III	$ 214.00
Hydrogeology Field Services	
Geologist I	$ 170.00
Geologist II	$ 186.00
Geologist III	$ 200.00
Construction Managers / Resident Engineers / Construction Inspectors	
Inspector I	$ 175.00
Inspector II	$ 192.00
Inspector III	$ 206.00
Inspector (Prevailing Wage)	$ 210.00
Resident Engineer I	$ 185.00
Resident Engineer II	$ 208.00
Resident Engineer III	$ 225.00
Construction Manager I	$ 237.00
Construction Manager II	$ 287.00
Construction Manager III	$ 332.00
Administrative Services	
Administration/Clerical I	$ 150.00
Administration/Clerical II	$ 165.00
Administration/Clerical III	$ 180.00

Other Expenses

10% mark-up on direct expenses; 15% mark-up for sub-contracted services

Mileage will be reimbursed at the prevailing federal milage reimbursement rate in effect at the time of travel.

Rates are subject to revision as of January 1 each year.

EARTH SYSTEMS
5917 Olivas Park Drive, Suite F | Ventura, CA 93003 | (805) 642-6727 | www.earthsystems.com

FEE SCHEDULE

(Effective July 1, 2026)

This schedule presents rates for professional and technical services in the fields of geotechnical engineering, engineering geology, environmental consulting, construction observation and testing, and special inspection. Listed are charges for services most frequently performed by Earth Systems. Additional services not listed are available and can be discussed upon request; fixed-fee quotes for some services can also be provided upon request. To discuss a scope of work and fees for a specific project, please contact our office.

PERSONNEL	Hourly Rate
Principal Professional	$280.00
Associate Professional	$245.00
Senior Professional	$225.00
Project Professional	$195.00
Staff Professional	$175.00
Certified Welding Inspector, Prevailing Wage*	$200.00
Field Services Supervisor	$165.00
Non-Destructive Testing (NDT) Inspector	$165.00
Certified Welding Inspector	$170.00
Special Inspector, Prevailing Wage*	$185.00
Technical Assistant	$155.00
Technician, Prevailing Wage*	$170.00
Special Inspector	$135.00
Technician	$125.00
Clerical/Administrative	$115.00

*Technician/Inspector Classifications as defined by the State of California Department of Industrial Relations.

BASIS OF CHARGES

1. Field technician services for non-prevailing wage projects on regular workdays will be subject to a 2-hour minimum charge and billed in 2-hour increments. Special inspection services and all prevailing wage project services will be subject to a 4-hour minimum charge and billed in 4-hour increments. Hourly charges will accumulate on a portal-to portal basis. Work performed on weekends, holidays, and when work starts outside of regular business hours is subject to a 4-hour minimum charge. A 2-hour cancellation charge will apply if scheduled inspection or testing is cancelled after 3 p.m. the day prior to the scheduled work. Saturdays, night work, and premium hours (before 7 a.m., after 5 p.m. or in excess of 8 hours in one day) for personnel are at time and one-half; Sundays and holidays are at double time.
2. The prevailing wage rates presented above are based on current rates established by the Department of Industrial Relations (DIR). If, during the course of the project, prevailing wage rates are increased by DIR, the quoted rates will be adjusted to correspond to the change. Also, please note that requirements concerning overtime, shift work, travel time, holidays, and other factors can vary for different classifications of work under prevailing wage regulations.
3. Nuclear gauge charge: $16.50/hour.
4. Mileage zone charge (portal to portal): $30 within 10 miles, $60 within 20 miles, $85 within 30 miles, $110 within 40 miles, $130 within 50 miles. For more remote sites, a quote can be provided.
5. Subcontractors and other expenses will be charged at cost plus 20 percent.
6. Out-of-town travel and expenses will be charged at cost plus 20 percent. Fixed per diem rates for specific projects can be provided upon request.
7. Minimum report charge: $550.00. Posting of electronic documents to project websites will be charged at clerical/administrative services rate.

8. Client or project portal management, administration, uploads, and related coordination billed at applicable personnel rates.
9. Invoices are payable upon presentation. Invoices thirty days past due will be subject to a service charge of one and one-half percent per month.
10. Fees for depositions, hearings, and/or court appearances (as Expert Witness) are listed on a supplemental fee schedule.
11. Due to State regulations requiring electronic submittal of Certified Payroll to DIR for prevailing wage projects, a fee of $120 per project will be assessed weekly over the duration of the project.
12. Payments using a credit card will be assigned a 3% convenience fee.
13. Rates are effective through **December 31, 2026**. Hourly rates for prevailing wage work will be subject to adjustment based upon changes in general prevailing wage determinations by the Department of Industrial Relations (DIR). For estimating purposes, an annual fee increase of 6 to 8 percent should be assumed for prevailing wage rates.

SUBCONTRACTED SERVICES

Subcontracted services are to be billed at cost plus 20%. Subcontracted services include, but are not limited to, consultants' fees, equipment rental (such as drilling, trenching and special access equipment), materials, freight, outside laboratory tests, aerial photographs, permit fees, and incidental expenses. Subcontracted services do not include subcontracted Special Inspectors, who will be billed at the rates shown on Page 1 of this Fee Schedule

SPECIAL FIELD SERVICES

Geophysical work, pile load tests, vane shear tests, piezometer installations, slope indicator installations, and other special tests can be quoted on an individual basis.

ENVIRONMENTAL SERVICES

Rates for environmental sampling, safety, and testing equipment can be provided on request. All rentals or purchases of required equipment and supplies, as well as subcontracted services, will be invoiced at cost plus 20%. Testing of contaminated soil will be per quote. Contaminated samples will be returned to sender for proper disposal.

SOILS LABORATORY FEES

Atterberg Limits/Plasticity Index (ASTM D 4318): $260.00
California Bearing Ratio, 3 points (ASTM D 1883) $800.00
California Impact (CT 216) $285.00
Consolidation, one dimensional (ASTM D 2435) $260.00
Consolidation, timed, per point $110.00
Corrosivity Tests (EPA 300) $250.00
Direct Shear, 3 points (ASTM D 3080) $430.00
Expansion Index Test (ASTM D 4829) $230.00
Hydrocollapse Potential Test (ASTM D 5333) $175.00
Long Hydrometer Analysis, assumed specific gravity, with 200 wash (ASTM D 422, CT 203) $315.00
Maximum Density and Optimum Moisture:
- 4” Mold (ASTM D 1557) $330.00
- 6" Mold (ASTM D 1557) $380.00

Maximum Density and Optimum Moisture: California Impact $285.00
Moisture and Unit Weight Determination, from ring samples (ASTM D 2937) $50.00
Moisture Only (ASTM D 2216) $40.00
Permeability Tests, constant head, falling head (EPA 9100) ..... Per Quote
R-Value (ASTM D 2844, CT 301) $425.00
R-Value, CA State Hwy/set of 3, Cement, Lime, Other additives $500.00
Sand Equivalent (ASTM D 2419, CT 217) $180.00

Short Hydrometer, assumed specific gravity, with 200 wash (ASTM D 422) $210.00
Sieve Analysis with 200 wash (ASTM D 1140, CT 202) $230.00
Sieve Analysis without 200 wash, Aggregate Base or Sub-base $180.00
Sieve Analysis, Percent Passing No. 200 Sieve $145.00
Sieve Analysis of Oversize Material ..... Per Quote
Specific Gravity (ASTM D 854) $185.00
Swell Test, Undisturbed $215.00
Swell Test, Remolded $240.00
Unconfined Compressive Strength, untreated (ASTM D 2166) $185.00
Unconfined Compressive Strength, Lime or Cement Treated Material $560.00

MATERIALS LABORATORY TESTING FEES

An additional hourly charge ($100/hr.) will be applied for cutting, capping, or other preparation of non-standard samples.All compression test fees include formal report following 28-day tests. Formal reports for earlier tests will be subject to an additional report fee of $25.

AGGREGATE

Abrasion, L.A. Rattler, 100 & 500 revolutions, ASTM C 131 (Small Size Aggregate) $310.00
Abrasion, L.A. Rattler, 100 and 500 revolutions ASTM C535 (Large Size Aggregate) $570.00
Absorption, Coarse Aggregate (ASTM C 127, CT 206) $110.00
Absorption, Fine Aggregate (ASTM C 128, CT 207) $160.00
Clay Lumps and Friable Particles in Aggregate (ASTM C 142) $150.00
Cleanness Value of Coarse Aggregate (CT 227) $160.00
Crushed Particles, each size (CT 205) $160.00
Durability Index, Coarse or Fine Aggregate (ASTM C 3744, CT 229) $210.00
Flat and Elongated Particles in Aggregate (ASTM C 4791) $120.00
Organic Impurities in Fine Aggregate (ASTM C 40, CT 213) $110.00
Potential Reactivity of Aggregate by Chemical Method, each size (ASTM C 289) ..... Per Quote
Sieve Analysis, washed (ASTM C 117, CT 202) $220.00
Soundness, Sodium Sulfate, 5 cycles (ASTM C 88) $510.00
Specific Gravity, Coarse Aggregate (ASTM C 127) $160.00
Specific Gravity, Fine Aggregate (ASTM C 128) $160.00
Uncompacted Void Content, Fine Aggregate, incl. specific gravity (ASTM C 1252, AASHTO T304, CT 234) $290.00
Unit Weight of Aggregate (ASTM C 29) $160.00

CONCRETE CYLINDERS, BEAMS AND CORES

Compression Test of Cast Cylinders, includes disposal fee and report after 28 days (ASTM C 39) $45.00
Compression Test of Cored Samples, cored at laboratory $145.00
Compression Test of Cores Delivered by Others $90.00
Compression Test of Lightweight Concrete (ASTM C 495) $55.00
Grading of Shotcrete Cores, does not include coring (ACI 506.2) $330.00
Density of Concrete Cylinders (ASTM C 138) $85.00
Density of Hardened Concrete (ASTM C 642) $115.00
Shrinkage of Beams, set of 3 (ASTM C 157) $480.00
Flexural Strength, Simple Beam with Third Point Loading (ASTM C 78, CT 523) $225.00
Unit Weight of Lightweight Concrete (ASTM C 567) $140.00
Enviro Recycle Fee/Form Stripping, Per Shotcrete Panel/Beam $75.00

MASONRY

Absorption of Block, set of 3 (ASTM C 140) $180.00
Compression Test on Block, set of 3 (ASTM C 140) $195.00

Compression Test on Grout Prisms, includes cutting and disposal fee (ASTM C 1314). $310.00
Compression Test on Masonry Cores (ASTM C 140) $90.00
Compression Test, 2" x 4" Mortar Cylinders (ASTM C 780) $55.00
Compression Test, 3" x 3" x 6" Grout Samples (ASTM C 1019) $55.00
Moisture Content of Block as received, set of 3 (ASTM C 140) $145.00
Shear Test on Masonry Cores, 2 faces $185.00
Unit Weight of Block, set of 3 (ASTM C 140) $185.00
Coring of Grouted Masonry by Subcontractor .....cost + 20%
Enviro Recycling Fee, Per Masonry Prism $10.00
Enviro Recycling Fee, Per Mortar or Grout Sample $10.00

ASPHALTIC CONCRETE

All fees for asphaltic concrete assume that asphalt mix is made in the field. Please request quotes if mix is to be made at our laboratory.

Bulk Specific Gravity of Core Samples (ASTM D 2726 and 1188, CT 308).....$80.00
California Kneading Compactor (Hveem LTMD) Max Density on set of 3 (CT 308).....$460.00
Extraction of Oil from AC Mixtures.....$310.00
Extraction of Oil from Rubberized Mixtures (ASTM C 2172) $400.00
Gyratory Compactor, field mixed asphalt (AASHTO 3112) ..... Per Quote
Hamburg Wheel Tracker Test, per set of field mixed asphalt (AASHTO 324)..... Per Quote
Hazardous Waste Handling Charge for Extracted Oils.....$40.00
Ignition Oven Binder Content Correction Value, per mix (ASTM D 6307) $860.00
Ignition Oven Binder Content after initial correction value is determined $215.00
Ignition Oven Gradation Correction Value, per mix ..... Per Quote
Ignition Oven Gradation after initial correction value is determined $280.00
Sieve Analysis of Extracted Aggregate (ASTM C 5444) $250.00
Specific Gravity, Theoretical Maximum, Rice Method (ASTM D 2041, CT 309) $160.00
Stabilometer (Hveem S-Value), set of 3 (ASTM D 1560, CT 366) $350.00
Enviro Recycling Fee, Per Sample $10.00
Enviro Recycling Fee for Extracted Oils $55.00

MISCELLANEOUS TESTING AND EQUIPMENT CHARGES

Anchor Pull Test Equipment. $25.00/hr
Curing Containers.....$50.00/day
Dynamic Cone Penetrometer (DCP) $150.00/day
Hand Auger/Sampler Equipment..... $85.00/day
High Strength Bolt, Nut, Washer Testing.....Per Quote + 20%
Manometer (Liquid Level) Survey Equipment ..... $160.00 day
Nuclear Gauge .....$15.00/hr.
Pachometer ..... $210.00 day
Pile Load Test Equipment ..... Per Quote
Rebound Hammer (Schmidt Hammer) $85.00/day
Reinforcing Steel Tensile and Bend Tests, No. 3 through No. 9 Bars (ASTM A 615).....$200.00
Reinforcing Steel Tensile and Bend Tests, No. 10 Bars and larger ..... Per Quote
Skidmore Device $260.00/day
Torque Wrench..... $85.00/day
Water Level Indicator $65.00/Day
Per Diem ..... Per Quote
DIR Compliance/eCPR, per week.....$120.00
DSA Box Posting, per week.....$120.00

EXPERT WITNESS SERVICES

The following rates apply to deposition testimony, arbitration testimony, hearings and court appearances.

HOURLY CHARGES FOR PERSONNEL

Principal Professional $600.00
Associate Professional $500.00
Senior Professional..... $450.00
Clerical/Admin Services $200.00

SPECIAL SERVICES

Deposition ..... $650.00/hr.
Arbitration ..... $650.00/hr.
Court Appearance/Hearings ..... $3,000.00/half day
Standby to Appear $1,750.00/day

BASIS OF CHARGES

1. Hourly rates are charged during investigation, analysis, consultation, and preparation services.
2. Estimated deposition fee payable in advance by party requesting deposition. The difference between advancepayment and final fee to be billed or refunded in accordance with the fee and billing information in this schedule.Fee for reviewing deposition transcript will be billed at hourly rates to the party requesting the review.
3. Minimum half-day charge will apply to court appearances and hearings. Time extending through the noon hour will be subject to the full day charge of $4,000.00.
4. Days, or portions thereof, reserved for appearances at hearings, court, or arbitrations, during which we are not required to be away from our offices will be subject to a standby charge of $750.00. Standby at other locationswill be charged at the general hourly rates.

TRAFFIC CONTROL ENGINEERING, INC.

FEE SCHEDULE
2026-2028

EMPLOYEE	HOURLY RATE
Principal/Project Manager	$ 320.00
Transportation Engineer (Project Engineer)	$ 273.00
Design Engineer	$ 191.00
CAD Technician.....	$ 143.00

DK:dr

2687 Saturn St.
Brea, Ca 92821
TEL (714) 447-6077
FAX (714) 447-6081

KDM Meridian Fee Schedule

Version Code: v.270101_PWR

Professional Services

Schedule Category	Hourly Rate
Principal	$265
Project Manager	$245
Project Surveyor	$230
Senior Survey Technician (II)	$195
Survey Technician (I)	$160
Administration	$140
Expert Witness (4-hour minimum)	$525
Survey Crew (1-person)	$315
Survey Crew (2 persons)	$430
Survey Crew (3 persons)	$540

Reimbursables

Schedule Category	Rate
Rental of Special Equipment or Special Supplies	Cost + 5%
Subconsultants	Cost + 5%
Agency Fees	Actual Cost
Travel	Cost +5%
Per Diem (Meals & Lodging)	GSA Published Rates

Miscellaneous Fee Schedule Terms

Fee Schedule Terms and Conditions
A minimum of 4 hours per day will be charged for survey crews and expert witness services.
Over-time will be charged at 1.35 times the regular rate.
Double-time will be charged at 1.75 times the regular rate.
The above rates shall be charged portal to portal (time spent on project site plus travel time) excluding meal breaks.
This fee schedule expires 12/31/2027.

1340 Reynolds Ave | Suite 110
Irvine, CA 92614
www.KDMMeridian.com

Conflicts

WSC does not have any conflicts which could affect our ability to perform the work in a timely fashion over the duration of the contract.

Quality Assurance/Quality Control

We Deliver Quality Through a Proven Process

Our Quality Lead, Justin Pickard, will implement a QA/QC program specific to the project and will be responsible for monitoring and documenting the team's adherence to the process. The three components of WSC's quality process are:

Plan Quality. The first step to a successful QA/QC program is to align the WSC team with the project scope of work and the District's requirements. An internal kick-off meeting unites our team and key subconsultants around project goals, client requirements, preferred lines of communication, QA/QC roles and expectations, project schedule, and budget.

Assure Quality. WSC's approach to quality assurance focuses on the prevention of errors and omissions through the use of best practices, conformance to standards, and an understanding of client expectations. One QA tool that we use to help guide QC reviews is a standardized QC checklist that can be configured for each project deliverable. These checklists allow our technical reviewers to confirm that calculations, drawings, specifications, and reports are thoroughly reviewed. Early engagement from the Quality Manager and quality reviewers will position the project for success, identify opportunities to refine approaches, and increase overall quality and efficiency.

Control Quality. WSC's approach to quality control includes quality checks and reviews throughout the project lifecycle. During the preliminary design phase, our quality reviewers will assess conceptual ideas, assumptions, and preliminary results and work products to make sure the project is aligned with your needs and expectations.

After the preliminary design concepts have been reviewed and detailed design commences, WSC will conduct QC reviews at pre-established milestones. Proven tools and experienced staff drive QC processes, assuring review comments are discussed, tracked, and addressed before deliverables are submitted to you. We will also work with our subconsultants to provide cross-company reviews of each other's deliverables to reduce the risk of conflicts between civil, mechanical, structural, and traffic control.

What is WSC's philosophy on quality?

WSC delivers high-quality work products and service to our clients because it is critical to our success, our clients' success, and our professional integrity. We understand that our work is often used to make key decisions, build critical infrastructure, and has a direct effect on public health, safety, and resource management. Our philosophy is to prioritize quality in everything we do with a focus on exceeding our clients' expectations and our own high standards.

What are the key elements of WSC's approach to quality?

At WSC, we put people first and provide the ability for our staff to focus on quality. Our approach to quality starts with teaming a QA/QC lead with the right expertise and availability. Our QA/QC lead will follow progress and regularly check in with the Project Manager and other team members. They will help anticipate, identify, and resolve issues as they arise and develop project-specific QA/QC plans that are grounded in the philosophies, policies, and best practices outlined in our corporate Quality Management System Manual (available upon request).

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 118 of 257

Assumptions & Additional Comments

The following tasks define the scope of work to be completed and are aligned with the task structure in the RFP for the project.

WSC has organized the work into three tasks matching the Scope of Work in Section II of the RFP. Subtask numbering follows that included in the RFP so that the District can trace each element of our proposal directly to its scope. Optional tasks that we believe improve the project are presented at the end of this scope and are not included in the base scope or level of effort.

Task 1 Project Management, Quality Assurance/Quality Control, Meetings and Site Visits

1.1 Project Management

- Provide oversight of internal resources and subconsultants, manage communication, assign resources, and coordinate the efforts of the WSC team.
- Monitor and manage the project scope, schedule, and budget.
- Prepare monthly invoices and monthly schedule updates.

Deliverables:

(1) Monthly invoices, progress reports, and schedule updates.

Assumptions:

(1) Project duration of 11 months.

1.2 Quality Control/Quality Assurance

- Provide quality control for all deliverables prior to submittal to the District.

Deliverables:

(1) None

Assumptions:

(1) Quality reviews will be performed by a senior engineer independent of the design team.

1.3 Meetings

- Plan, organize, and conduct the meetings identified below.
- Prepare draft agendas in advance of each meeting and prepare and distribute meeting summaries following each meeting.
- Plan, organize, and conduct bi-weekly meetings (i.e., every other week) to update District on activities and progress and obtain feedback on decisions.

- **1.3.1 Project Kick-Off Meeting and Site Visit**
  - Plan, organize, and conduct a project kick-off meeting and site visit with District staff to review the project scope and the District's and WSC's expectations.
- **1.3.2 Draft Geotechnical Report Review Meeting**
  - Plan, organize, and conduct a meeting with District staff to review comments on the draft geotechnical report.
- **1.3.3 Draft Preliminary Design Alternatives Report Review Meeting(s)**
  - Plan, organize, and conduct an alternative development workshop to review and reach consensus on alternatives to evaluate in subsequent steps.
  - Plan, organize, and conduct an alternative evaluation criteria evaluation meeting to discuss and reach consensus on criteria and weighting factors to be used to rank alternatives.
  - Plan, organize, and conduct a meeting to review comments on the draft Preliminary Design Alternatives Report.
  - Alternative development workshop over video, with the District to go over Alternatives and received input prior to moving forward. This meeting is assumed to be no longer than 2 hours with two WSC staff (including PM). In this meeting, WSC will present alternatives to communicate feasibility, and construction methods.
  - Alternative criteria evaluation meeting (Video). This meeting will discuss evaluation criteria (discuss what is important to the District) and will be used in the alternatives evaluation Matrix that will be presented for review prior to development of the PDAR.
  - WSC will conduct a video meeting with District staff to clarify comments on the draft Preliminary Design Alternatives Report. This meeting is where the District selects the alternative that will be carried into Task 3, and WSC will document the selection and its basis in a decision log distributed after the meeting so that design direction is traceable through final design.
- **1.3.4 50% Deliverables Review Meeting**
  - Plan, organize, and conduct a meeting with District staff to discuss comments on the 50% deliverables.
- **1.3.5 90% Deliverables Review Meeting**
  - Plan, organize, and conduct a meeting with District staff to discuss comments on the 90% deliverables.

Deliverables:

(1) Meeting agendas and meeting summaries.

Assumptions:

(1) The kick-off meeting and site visit will be four hours in duration and attended by three WSC team members.

(2) All other meetings will be one hour in duration, held via video conference, and attended by two WSC team members.

Task 2 Review Existing Information and Preliminary Design

2.1 Existing Documents

- Prepare and submit a data request. Maintain data request spreadsheet to track status of each item.
- Review background documents including existing pipeline plans, collection system master plan, CCTV video, inspection reports, record drawings, and GIS data.

Deliverables:

(1) Data request log.

Assumptions:

(1) The District will provide record drawings, GIS data, the collection system master plan, and available CCTV video and inspection reports in electronic format.

(2) CCTV inspection is not included in this scope. WSC will review existing CCTV video and inspection reports provided by the District. If additional CCTV inspection is determined to be required, WSC will notify the District so that it can be provided under a separate scope and fee.

2.2 Utility Research

- Contact Underground Service Alert of Southern California to obtain the database of utilities in the project area and confirm the facility owners present.
- Contact utility agencies with below-grade facilities in the project area to obtain atlas maps and other available information regarding the type, size, location, and material of existing utilities.
- Incorporate utility information into the project base map.
- Depict utilities on base map consistent with Quality Level D as defined by ASCE/UESI/CI 38-22, based on record drawings and utility owner records for horizontal and vertical location.

Deliverables:

(1) Utility records.

(2) Base map.

Assumptions:

(1) Field marking by USA during design is not included.

(2) Utility potholing not included.

2.3 A - Topographic Survey

- Perform topographic survey along the project alignment to support design of the proposed pipeline improvements. Topographic mapping will be developed utilizing a combination of aerial photogrammetric mapping and supplemental ground survey.
- Establish horizontal and vertical survey control and prepare topographic mapping of existing surface features, utilities observable at the surface, and accessible utility structures within the survey limits.
- Survey limits are assumed to consist of a corridor generally 75 feet wide along San Ysidro Road, with mapping extending through project intersections and approximately 25 feet beyond intersection returns where required to support design.
- Provide supplemental field survey to support aerial mapping and collection of surface utility features, roadway features, drainage improvements, and other features not readily identifiable from aerial photography.
- Locate visible utility structures, including utility lids, valves, vaults, cleanouts, pull boxes, and other observable utility appurtenances encountered within the survey limits.
- Prepare a base map suitable for preliminary design, alternatives evaluation, and preparation of contract documents.
- Obtain invert elevations, pipe sizes, and pipe flow direction information at accessible sanitary sewer maintenance holes within the project limits.
- Coordinate traffic control activities required to safely access maintenance holes located within traveled roadways.
- Incorporate collected rim and invert information into the survey base mapping for use during alternatives evaluation and design.

Deliverables:

(1) Topographic survey files (PDF and CAD).
(2) Survey control information.
(3) Base map including topographic survey and utility information.

Assumptions:

(1) Survey will be provided and signed by a Professional Land Surveyor licensed in the State of California
(2) Survey will utilize NAD 83 (CCS 83) and NAVD 88 datums based on local reference stations and benchmarks.
(3) Utility information shown on the base map by survey will be based on visible surface evidence and include existing utility marking if existing.
(4) This scope assumes all work is located within public right-of-way. Right-of-way and easement research is limited to review of record documents. The RFP describes the existing pipeline as running along and east of San Ysidro Road; if the alignment requires easement acquisition or temporary construction easements, those services,

including plats and legal descriptions, would be provided under a separate scope and fee.

Deliverables:

(1) Maintenance hole rim and invert data.
(2) Updated base map incorporating collected maintenance hole information.

Assumptions:

(1) Maintenance hole measurements are limited to accessible sanitary sewer structures within the project limits.
(2) Two days of traffic control assistance are assumed for completion of field operations.
(3) Maintenance holes are assumed to be accessible and capable of being opened using standard industry practices.
(4) Confined space entry is not included.
(5) Cleaning, pumping, dewatering, obstruction removal, or maintenance hole rehabilitation services are not included.
(6) Investigation of private sewer laterals is not included.
(7) Additional traffic control, lane closures, night work, or specialty access requirements identified after commencement of field activities would be provided under a separate scope and fee.

2.4 Geotechnical Investigation and Report

- Prepare a geotechnical report to inform design of new sewer.
- Perform exploratory borings along the pipeline alignment.
- Perform laboratory testing for soil classification, strength, expansion, consolidation, corrosion, and compaction.
- **2.4.1 Draft Report**
  - Prepare and submit a draft geotechnical report for the District's review.
- **2.4.2 Final Report**
  - Prepare and submit a final geotechnical report incorporating comments provided on the draft report.
  - The report will be provided in PDF format and signed by a Professional Geotechnical Engineer registered in the State of California.

Deliverables:

(1) Draft and final geotechnical report.

Assumptions:

(1) District review period of two weeks.
(2) One consolidated set of review comments to be provided.

(3) Four geotechnical borings are assumed. Per Addendum No. 1, the District has no existing geotechnical studies in the project area, so no prior subsurface data is available to reduce the investigation. Additional borings would be performed only with prior District authorization and under a separate scope and fee.

2.5 Environmental Document Preparation and Permitting

- Provide environmental and permitting services, as needed, to facilitate design and approval of the project.
- Prepare initial biological and cultural resources assessments to determine the need for construction monitoring.
- Assist District with Caltrans and Santa Barbara encroachment permit applications.

Deliverables:

(1) Cultural and biological resources assessment.

Assumptions:

(1) CEQA is assumed to be satisfied by an exemption or an Initial Study and Mitigated Negative Declaration, consistent with the District's statement in Addendum No. 1 that documentation is anticipated to be limited. Preparation of an Environmental Impact Report, additional technical studies, construction monitoring, or re-circulation is not included.

(2) Per Addendum No. 1, the District will apply as permittee and pay the associated fees for any consultant field work, including encroachment permits for survey and geotechnical investigation. No permit fees are carried by WSC.CEQA compliance and documentation to be led by District.

(3) Preparation of traffic control plans for Caltrans permit application not included.

(4) Encroachment permits to be finalized during construction phase per Addendum No. 1.

(5) Due to the uncertainty regarding the level of effort required for environmental and permitting services, 42 staff hours have been assumed.

(6) All submittals will be electronic.

(7) WSC and their sub ESA will update the draft report based on one consolidated set of comments.

(8) No changes to the project design will occur once ESA starts its surveys or analysis.

(9) Additional surveys and analysis may be required and is not included in this budget. Some types of surveys that are not included but may be required include detailed botanical surveys, protocol surveys for special status species, and/or wetland delineations.

(10) No built historic resources or archaeological resources will be identified during the survey.

(11) No paleontological resources assessment will be conducted.

(12) District would conduct any tribal outreach needed.

2.6 Preliminary Design Alternatives Report

- Develop and analyze a minimum of three capacity improvement alternatives.
- Develop preliminary set of criteria for use in alternatives evaluation. Criteria may include, capacity and hydraulic performance, constructability, lifecycle cost, operations and maintenance, permitting complexity, and public impacts.
- Coordinate with District to establish weighting factors for each criterion reflecting District preferences.
- Rank each alternative using agreed-upon criteria and weighting factors to identify the preferred alternative that will be carried forward into detailed design.
- Establish the basis of design for the preferred alternative including, design flows, hydraulic criteria, alignment, pipe and bedding material, maintenance hole and lateral reconnection standards, utility separation criteria, construction constraints including bypass and restoration, and the applicable District, County, and Caltrans standards.
- **2.6.1 Draft Report**
  - Prepare and submit a draft report detailing the alternatives analysis, recommended alternative, and basis of design for the selected alternative for District's review.
- **2.6.2 Final Report**
  - Prepare a final report incorporating comments provided on the draft report.

Deliverables:

(1) Alternatives evaluation matrix with criteria, weighting, and scoring.
(2) Draft and final Preliminary Design Alternatives Report.

Assumptions:

(1) Hydraulic model development or updates to the District's existing model are not included. Model runs supporting the alternatives analysis will be performed under the District's separate Sewer Modeling Contract. WSC will define the scenarios to be modeled and carry the results into the alternatives analysis.
(2) Four alternatives are assumed to be included in the alternatives analysis, consisting of the three identified in the RFP plus the flow diversion alternative described in the approach. Analysis of additional alternatives is included in Optional Task 5. Per Addendum No. 1, rehabilitation or replacement of existing maintenance holes is not assumed, as the District has not flagged them for rehabilitation.
(3) Maintenance hole condition information will be provided by the District.
(4) The existing main transitions from 8-inch to 10-inch at maintenance hole O8M08.

2.7 Preliminary Field Walk

- Perform a site walk of the full alignment from East Valley Road to San Leandro Lane to assess existing conditions, utilities, access constraints, and other features that may require significant permitting or design effort.
- Document existing conditions with photo log for use during design, including mature landscaping, stone walls, and private hardscape at the right-of-way line, and the school drop-off and pick-up zones fronting Montecito Union Elementary School.

Deliverables:

(1) Georeferenced photo log of the corridor

Assumptions:

(1) Site walk to be attended by two WSC staff members.

Task 3 Contract Document Preparation

Based on the District's selected alternative, WSC will prepare construction ready plans, technical specifications, and cost estimate for the pipeline design project. Plans will incorporate the pipeline section plan and profile drawings, crossing utilities from WSC-performed utility research, the technical parameters related to the pipeline installation, and access structures. Technical specifications will be in District format (CSI 6-digit). Per Addendum No. 1, the District will provide the front-end contract documents; WSC will review them and confirm they align with the technical specifications.

3.1 Draft Deliverable Preparation

- Prepare plans, technical specifications, and opinions of probable construction cost (cost opinions) for District review at the 50% and 90% design stages.
- The draft deliverables will be provided in Word format so District staff may provide comments and suggested edits via track changes, as well as in PDF.
- WSC will prepare plan and profile drawings at 1" = 20' horizontal scale and 1" = 4' vertical scale on 24" x 36" construction plans.
- **3.1.1 50% Submittal**
  - Prepare 50% plans, technical specifications, and cost opinion (consistent with AACE Class 4 estimate).
  - The 50% plans will include the proposed alignment, utility crossings, access structures, right-of-way and easement limits, access constraints, and major construction constraints.
- **3.1.2 90% Submittal**
  - Prepare 90% plans, technical specifications, and cost opinion (consistent with AACE Class 3 estimate), incorporating District comments on the 50% submittal.

– The 90% plans will include intersection connection details, service lateral reconnection details, and pavement restoration limits.

Deliverables:

(1) 50% and 90% deliverables (plans, specifications, and cost opinions).
(2) Response to comments spreadsheet in Microsoft Excel format.

Assumptions:

(1) Level of effort is based on the sheet list presented below.
(2) District to provide recent bid tabulations to inform preparation of cost opinions.

3.2 Final Deliverable Preparation

- Prepare final plans, technical specifications, and cost opinion deliverables in PDF format, each signed and stamped by a Professional Civil Engineer registered in the State of California.
- These will be considered the Issued for Bid electronic set for the District.
- **3.2.1 Final Deliverables**
  – Prepare final plans, technical specifications, and cost opinion (consistent with AACE Class 2) incorporating District review comments on the 90% submittal.
  – Final CAD drawings will be provided to the District in AutoCAD format in addition to the signed PDF set.

Deliverables:

(1) Final signed and stamped plans, technical specifications, and cost opinion in PDF (Issued for Bid set)
(2) Final CAD drawings in AutoCAD format
(3) Agency and utility coordination log with permit condition crosswalk

Assumptions:

(1) Two weeks is assumed for District review of each submittal, consistent with the RFP.
(2) One consolidated set of District and agency review comments is assumed at each submittal.
(3) The District will provide its technical specification template in CSI 6-digit format in Microsoft Word.
(4) Deliverables are electronic only. Printing and reproduction are not included.
(5) Traffic control plans are not included. Per Addendum No. 1, traffic control plans are the responsibility of the Contractor.
(6) Bid phase and construction phase services are not included. The RFP states that these services will be provided under a separate contract.
(7) The sheet count assumes the selected alternative is constructed by open cut. Selection of a trenchless alternative would reduce plan and profile content but add

pit, bypass, and receiving structure details; the net sheet count is assumed unchanged and will be confirmed at the 50% submittal.

Assumed Drawing List

WSC will provide the following drawings as part of the design contract documents. This assumes 20 sheets in the final bid set, developed in accordance with MSD standards. Stationing will be provided once survey control is established under Subtask 2.3.

Sheet No.	Series	Sheet Title	50%	90% - Final
G-1	General	Cover Sheet, Vicinity Map, and Sheet Index	X	X
G-2	General	General Notes, Abbreviations, and Legend	X	X
G-3	General	Survey Control, Benchmarks, and Basis of Bearings	X	X
G-4	General	Overall Project Key Map and Sheet Layout	X	X
G-5	General	Existing Utility Contact List and Utility Data Table	X	X
C-1	Civil	Pavement Restoration Notes and Trench Sections		X
SS-1	Sewer	Sewer Plan and Profile - San Ysidro Rd 1	X	X
SS-2	Sewer	Sewer Plan and Profile - San Ysidro Rd 2	X	X
SS-3	Sewer	Sewer Plan and Profile - San Ysidro Rd 3	X	X
SS-4	Sewer	Sewer Plan and Profile - San Ysidro Rd 4	X	X
SS-5	Sewer	Sewer Plan and Profile - San Ysidro Rd 5	X	X
SS-6	Sewer	Sewer Plan and Profile - San Ysidro Rd 6	X	X
SS-7	Sewer	Sewer Plan and Profile - San Ysidro Rd 7	X	X
SS-8	Sewer	Sewer Plan and Profile - San Ysidro Rd 8	X	X
SS-9	Sewer	Scaled Plan View - East Valley Road (SR 192) Crossing	X	X
SS-10	Sewer	Scaled Plan View - San Leandro Lane Tie-In	X	X
SS-11	Sewer	Sewer Service Lateral Reconnection Plan and Schedule		X
SS-12	Sewer	Sewer Details I - Manhole, Pipe Trench Detail, Bedding, and Connections		X
SS-13	Sewer	Sewer Details II - Bypass / Flow Concept Plan 1		X
SS-14	Sewer	Sewer Details III - Bypass / Flow Concept Plan 2		X

Optional Tasks

The RFP invites consultants to recommend additions or refinements to the scope of work. The following tasks are not included in the base scope and are shown separately in the level of effort.

Optional Task 1 Public Outreach Support

The corridor fronts Montecito Union Elementary School and dense residential frontage with service laterals that will require reconnection. WSC's in-house team of communications specialists can prepare and implement a comprehensive outreach strategy with collateral including a project landing page for MSD's website, responses to frequently asked questions, informational postcards with graphics to give notice before construction starts, and a doorhanger template the District can use during construction to reduce the risk of complaints and calls about service interruptions. Because so many community groups are affected, WSC will identify critical stakeholders, such as the school and residents whose driveways will be blocked for long periods, and recommend tailored outreach. Every deliverable includes graphic design support, such as infographics and illustrations, where they help explain the project. Proactive communication like this reduces negative public perception and keeps the project on schedule by heading off opposition that could cause delays. An estimated budget has been included in the fee estimate, and we welcome the opportunity to tailor the scope and approach for public outreach to meet the District's needs.

Optional Task 2 Supplemental Hydraulic Modeling Support

Hydraulic model runs supporting the alternatives analysis are performed under the District's separate Sewer Modeling Contract. If the District elects to have that work carried under this project instead, including evaluation of the flow diversion alternative and its downstream effects at the Posilipo lift station, WSC will perform it under this optional task. Sixty staff hours are assumed in the fee estimate for supplemental hydraulic modeling, which is subject to change based on the required modeling effort.

Optional Task 3 Additional Capacity Improvement Alternatives

The RFP invites consideration of additional capacity improvement alternatives. If evaluation identifies alternatives beyond the three carried (evaluated) in the base scope, WSC will develop and evaluate them on a per-alternative basis to the same level of detail. Forty-two staff hours are assumed in the fee estimate for additional alternatives analysis, which is subject to change based on the level of effort required for evaluation.

Contract Requirements

WSC affirms it is able to accept the City's professional services agreement and will comply with applicable local, State, and Federal laws including prevailing wage rates and their payment in accordance with California Labor Code, Section 1775. WSC is currently under contract with the City to perform similar professional services and respectfully requests the District considering using the previously negotiated contract language.

Appendix A: Resumes

Mirko Maher PE



PROJECT MANAGER

Mirko 28 years of experience specializing in the planning, design, and construction management of water and wastewater infrastructure, with a focus on trenchless rehabilitation gravity pipelines and pressurized force mains. His expertise includes the evaluation, design, and implementation of advanced rehabilitation technologies, particularly pipe bursting and pressure CIPP systems for conveyance infrastructure. His work spans complex, high-risk projects involving continuous service requirements, high flows, and environmentally sensitive corridors, where he has successfully developed constructable trenchless solutions that minimize bypass durations, reduce community impacts, and extend asset service life.

His deep technical expertise in condition assessment, rehabilitation alternatives analysis, liner design criteria, constructability, and risk mitigation, enables owners to select optimal trenchless approaches such as pressure CIPP, sliplining, HDD, microtunneling, and pipe bursting. He has managed multidisciplinary teams from planning through design and construction, consistently delivering projects with minimal change orders and high reliability. He is a member of the National Association of Trenchless Technologies community enabling him to keep up to date on latest advancments of construction methods and technology.

REPRESENTATIVE PROJECTS

Knollwood Circle Sewer Improvement Project, City of Anaheim, CA. *Project Manager.* Responsible for the preliminary and final design of an approximately 3,000 LF of 18-inch and 21-inch diameter VCP gravity sewer through City right-of-way and private properties. The preliminary design effort consisting of an evaluation of ten alignment alternatives and preparation of a preliminary design report. Mirko managed the preparation of final design plans, specifications, and cost estimates, easement acquisition, and soil contamination testing. Sewer construction consisted of 700 feet of pilot-tube guided auger boring and 2,300 feet of open-cut.

Wastewater Collection and Recycled Water Distribution System, City of Malibu, CA. *Senior Engineer.* Provided review of design and construction cost estimates. The collection system included 2 lift stations and dual-force-mains made of ductile iron. The design consisted of a Caltrans Bridge crossing which was made of ductile iron pipe utilizing two force balance coupling to accommodate deflection. Additional water main designs were provided for potable and recycled water mains made of both HDPE and Ductile Iron pipe. Portions of the dispersal system conveys treated effluent to groundwater injection wells.

Alvarado Trunk Sewer Phase IV Replacement Project, City of San Diego, CA. *Engineering Technical Support.* Supported replacement of approximately 3.5 miles of 30- to 42-inch gravity sewer, ranging in depth from 15 feet to 30 feet. The scope of work includes microtunneling of approximately 3,000 LF of sewer across College Avenue and Waring Road, which required permitting coordination with Caltrans and the San Diego MTS. Responsible for field investigation efforts to support design of trenchless crossing.

Newport Force Main Rehabilitation Project # 5-60, Orange County Sanitation District, CA. *Project Engineer/Task Leader.* Responsible for preparation and management of project tasks and subconsultants for the planning, analysis, and rehabilitation design of the 20- to 36-inch ductile iron force main. Provided design assistance which included investigations for identifying utilities,

WSC

EDUCATION

BS, Civil and Environmental Engineering, University of California, Berkeley

PROFESSIONAL REGISTRATIONS

Professional Engineer - Civil, California, No. C64645

"Solving a client's challenges is the part of this work I enjoy most, and the San Ysidro Road project has some interesting ones to solve. My experience in alternatives evaluation and detailed planning is what I will bring to this project, and I look forward to working with the District."

feasibilities and alternative analysis. Assessed rehabilitation methods, and design included open cut and trenchless technologies to rehabilitate 28,000 LF of pressurized 20-inch, 30-inch and 36-inch ductile iron force main, including pressure CIPP methods. The network conveys 30 mgd of raw sewage to the Plant 2 for treatment. Rehabilitation consisted of CIPP lining, micro tunnel replacement, and open cut methods. Led research to support recommendations and design activities, and developed rehabilitation recommendations, alternative analysis, and cost planning. He provided engineering services and production of construction drawings using Civil 3D.

Kentfield Techite Force Main Project, Ross Valley Sanitary District, Larkspur, CA. *Project Engineer.* Provided engineering design services needed to evaluate alignment alternatives, providing support to environmental consultants, performing utility research, and developing contract drawings and specifications for rehabilitation and replacing the existing techite Kentfield Force Main. The existing 36-inch diameter force main was rehabilitated and replaced with HDPE pipe. This project rehabilitates 6,000 LF of existing techite pipe with 32-inch HDPE, replaces 2,000 LF with 42-inch HDPE, and designs an additional 3,600 LF of 30-inch HDPE. He collected as-built information and coordinated potholing throughout design to obtain accurate utility depths and locations for the design of the new pipeline.

Beach Force Main and Main Street Pump Station Rehabilitation Project, Sausalito Marin City Sanitary District, CA. *Project Manager.* Led the planning and design of upgrades to the Main Street Pump Station to accommodate the rehabilitated 2,200 LF of 20-inch cast iron and ductile iron force main, including installation of new submersible pumps, a discharge header and two new VFDs with connections to the existing electrical panels. Developed preliminary design concepts, final design and specifications, to rehabilitate the decommissioned force main with trenchless technology. The project also includes modifying the pump station and treatment plant to utilize the Beach Force Main during dry weather periods and the Main Street Force Main during wet weather periods. The objective of the project was to provide more operational flexibility and efficiency during low flow periods, while minimizing impacts on the surrounding community. Supported Sausalito Marin City Sanitary District to provide necessary permit information for the San Francisco Bay Conservation and Development Commission jurisdiction and the California Coastal Commission.

Lake Forest Woods Sewer Improvements, Irvine Ranch Water District, CA. *Technical Advisor.* Supported the preliminary and final design of approximately 1,600 LF of 8-inch and 10-inch diameter PVC sewer through privately owned undeveloped lots containing dense Eucalyptus tree groves paralleling two creeks. Approximately 900 LF of 10-inch sewer and 200 LF of 8-inch sewer will be constructed with the trenchless pilot-tube guided auger boring method. Assisted with permit acquisition, coordinating with property owners and impacted homeowners that will be connecting to the new sewer mains.

San Diego Creek Trunk Sewer Protection, Irvine Ranch Water District, CA. *Project Manager.* Responsible for designing protective measures and repair improvements to coordinate with Caltrans Widening of SR 133 on ramp. The preliminary design phase included alternative evaluation for implementing a sewer bypass during the periods of bridge pier construction and replacement and repair measures which included sectional lined CIPP. The design included detailed solutions to bridge temporary bypassing of 36-inch trunk sewer across San Diego Creek, and coordination with Caltrans Design Staff of the bridge widening project to determine schedule and project constraints.

Sewer Main Lining and Repair, #3 and #4, Garden Grove Sanitation District, CA.. *Project Manager.* Led the design for rehabilitation and spot repairs of approximately 23,000 LF of 8- and 10-inch VCP sewer using CIPP. Services include assistance with evaluation of rehabilitation alternatives, preparation of a preliminary design report, and development and submittal of 60, 90, and 100 percent design documents. Mirko and his team were responsible in assisting the District with bidding and provide construction management and inspection services.

Sewer Rehabilitation and Replacement Project, City of Pittsburg, CA. *Assistant Project Manager and Design Task Lead.* Led the renewal and replacement of approximately 5 miles of aging sewer infrastructure. Most of the project consisted of direct replacement of VCP pipe which exhibited offset joints and cracks, to provide better hydraulics and eliminate sags at various locations due to settlement. Design also featured re-alignment of sewer lines to be relocated out of park jurisdictional boundaries, as well as rehabilitation by trenchless methods which included Jack and Bore, CIPP, and Pipe Bursting methods.

Taft Avenue Branch Trunk Sewer Rehabilitation, Orange County Sanitation District, CA. *Senior Project Engineer.* The existing sewers on Taft Avenue and Tustin Avenue lack sufficient capacity to convey peak wet weather flow. The first task is to evaluate and rank seven alternative alignments using six criteria including public impact, easements/ROW, constructability, and O&M. This 10,600 LF project includes diameters ranging from 12- to 24-inches. Efforts included alternative analysis which considered 7,000 LF of pipe bursting. Challenges included a MWD transmission main crossing, a Caltrans highway crossing, and traffic control design on streets with high traffic volume.

Magnolia and Broadway Sanitary Sewer Improvements, City of Anaheim, CA. *Project Manager.* Provided design services for a high-priority sewer improvement project that addresses a broken 8-inch diameter inverted sewer siphon crossing underneath a 93-inch diameter concrete storm drain in the City of Anaheim's Broadway collection system. Evaluated improvement alternatives consisting of repairing the broken siphon, construction of a new siphon, and constructing a new gravity sewer line to replace the siphon. The preliminary design report and final design plans, specifications, and cost estimates were developed for the recommended improvements. The critical components of the design include construction of a new 8-inch VCP sewer under the large 93-inch storm, minimizing sewer service interruptions, traffic control, and utility coordination.

Justin Pickard PE, CCM, LEED AP BD+C



PRINCIPAL IN CHARGE

Justin Pickard has more than 24 years of experience as a construction manager, supervising engineer, and project manager on a diverse range of civil engineering projects. He has worked both as a consultant for numerous public agencies and as a supervising engineer for one of the largest municipal water districts in California, managing complex water, wastewater, and recycled water projects. Justin's expertise includes program, project, and construction management for water resources projects.

REPRESENTATIVE PROJECTS

Sewer Main CIPP Lining, Montecito Sanitary District, CA. *Principal in Charge.* Provided design services for a CIPP rehabilitation of 21-inch pipeline that serves as a trunk sewer. This included a pipeline condition review, alternatives analysis, and design. The pipeline crosses Highway 101 and is routed through easements, residential streets, and Union Pacific Railroad right-of-way before terminating at the Wastewater Treatment Plant. Rehabilitated two 8-inch diameter sewers connected to the trunk sewer and 28 manholes along the alignment.

Hamilton Trunk Sewer Replacement Project Preliminary Design, Novato Sanitary District, CA. *Project Manager.* Provided preliminary design services of a sewer capacity improvement project, replacing approximately 1,500 LF of 15-inch reinforced concrete pipe (RCP) with a new 18-inch polyvinyl chloride (PVC) pipeline. Led the coordination with the District's hydraulic modeling consultant to evaluate system performance and refine replacement limits. Provided evaluation of alignment alternatives, constructability, and phasing in constrained, developed areas to balance hydraulic reliability, cost, and community impacts.

Via Lucero FM Constructability Review, City of Santa Barbara. *Principal in Charge.* The Via Lucero project was a critical infrastructure replacement designed to prevent sanitary sewer overflows by replacing an aging and failure-prone wastewater forcemain. Project involved replacing approximately 2,300 feet of the original 1960s-era 6-inch asbestos cement pipe with a new, larger 8-inch PVC forcemain. Project also included replacing a nearby gravity sewer main on Hope Avenue to improve overall system reliability and maximize construction efficiency.

Force Mains Condition Assessment Prioritization, Novato Sanitary District, Novato, CA. *Project Manager.* Project included a risk analysis and ranking of the District's pressurized pipelines and an evaluation of commercially available technologies. Prepared technical memoranda and cost-loaded schedule to inform District's capital improvement budgeting process.

Unit W Lining Project, City of Thousand Oaks, CA. *Project Manager.* Project consisted of rehabilitation of 1.6 miles of 8- to 27-inch diameter wastewater pipeline and maintenance access holes near the 101 Freeway using CIPP and Spiralwound PVC. Provided technical review of the City's plans, technical specifications, and cost opinion to help the City augment their deliverable for larger diameter pipelines and the significant traffic control and bypass needs. Provided engineering services during construction including submittal review, field testing review, CCTV review, and RFI responses.

Desalination Link CCTV Review, City of Santa Barbara, CA. *Project Manager.* Performed CCTV review on behalf of the City for sewer mains, sewer laterals, and storm drains along the alignment of a new 24-inch potable water pipeline to establish pre- and post-construction condition of adjacent utilities. Prepared technical memoranda to document issues identified during review of CCTV video and coordinated with City and contractor to resolve issues.

WSC

EDUCATION

BS, Civil Engineering, University of Texas at Austin, Austin, TX

PROFESSIONAL REGISTRATIONS

Professional Engineer - Civil, California, No. 71816

Certified Construction Manager, No. 14107

LEED AP BD+C, No. 10183662

"I'm passionate about helping our clients deliver projects and programs from concept through construction and operation. It's incredibly rewarding to see the culmination of a team's hard work in the physical improvements that benefit the communities where we live and work."

Justin Pickard

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 134 of 257

Sewer Main Rehabilitation Projects (Fiscal Years 2018-Current), City of Santa Barbara, CA. *Principal in Charge.* Projects include evaluation of over 10 miles of gravity sewer main ranging from 6-inch to 18-inch diameter and preparing construction documents. Rehabilitation strategies included dig and replace, trenchless rehabilitation through cured-in-place pipe (CIPP) or spiral wound PVC pipe liner, point repairs, rehabilitation of manholes, and replacement of cleanouts with new manholes. Prepared the technical specifications and engineer's opinion of probable construction cost and assisted the City during the bidding phase by preparing addenda and evaluating substitution requests. Assisted the City during construction by reviewing pre- and post-lining CCTV videos, reviewing submittals, preparing responses to RFIs, and resolving constructability issues.

Central Coast Blue, City of Pismo Beach, Pismo Beach, CA. *Program Manager.* Providing program management, detailed design, funding, and permitting support services for an indirect potable reuse, groundwater replenishment and seawater intrusion prevention project. The project includes design of a new advanced water purification facility with ultrafiltration, reverse osmosis, and ultraviolet disinfection/advanced oxidation; design of injection and monitoring wells; design of purified water and secondary effluent pipelines; grant funding and low-interest financing application preparation; regulatory coordination; and public outreach.

Hollywood Park Recycled Water Project, West Basin Municipal Water District, Carson, CA. *Project Manager.* Served as the project manager for the Hollywood Park Recycled Water Project which includes the construction of approximately 22,000 linear feet of recycled water pipeline to serve a mixed-use redevelopment project including the future home of the Los Angeles Rams. Mr. Pickard is responsible for developing an inspection plan and providing quality control/quality assurance for the recycled water improvements that are to be constructed by a third-party developer and subsequently transferred to West Basin.

Title 22 Engineering Report, City of San Luis Obispo, San Luis Obispo, CA. *Project Manager.* Project included preparation of an Engineering Report to satisfy Title 22 requirements governing the use of recycled water produced though an upgraded treatment process (MBR and UV) at the City's Water Resource Recovery Facility. Authored report sections and coordinated with City staff to compile report content related to City's operation and maintenance of the recycled water treatment process. Coordinated with the State Water Resources Control Board Division of Drinking Water to facilitate approval of report.

On-Call Grant Writing Management, Water Replenishment District of Southern California, Lakewood, CA. *Project Manager.* Prepared application materials to pursue grant funding and low-interest financing in support of the District's capital improvement program. Researched and identified available funding opportunities that aligned with District's projects. Prepared grant applications for USBR Drought Contingency Planning Program, US EPA Community Grant Program, and Cal OES Cybersecurity Grant Program. Prepared loan application materials for US EPA WIFIA Program.

Wastewater Treatment Plant Improvements, City of Camarillo, CA. *Technical Advisor.* Assisted with delivery of several upgrades to the District's Water Reclamation Plant (WRP) including design, project management, construction administration, and construction observation. The projects included upgrades to the Plant 3 Aeration Basins, Digester Cleaning and Rehabilitation, and Blower Optimization and Upgrade for Plant 1 Aeration Basins. WSC also developed a Wastewater Master Plan focused on preparing the District for a major WRP upgrade to meet new NPDES requirements.

Water Reclamation Facility Alternatives Analysis, City of Atascadero, CA. *Technical Advisor.* Oversight and technical guidance for alternatives analysis for treatment compliance relative to current and future regulations. The alternatives analysis establishes effluent limit targets, updates WRF flows and loads, and creates two alternatives for further economic and non-economic evaluations. The proposed alternatives include upgrading the current planned improvements to include membrane or MBR filtration with side stream reverse osmosis for salt reduction. The final alternatives will depend on effluent limits, specifically TDS and chloride. The alternatives will also be evaluated using a pairwise analysis. Cost analysis includes construction capital costs and comparative life cycle costs, and comparative life cycle cost analysis focuses on understanding the differences in near-term and future costs for the alternatives.

Montecito Reservoir Retrofit and Replacement Project, Montecito Water District, Montecito, CA. *Principal in Charge.* The project includes leveraging state funding to improve the resilience and reliability of the District's water storage infrastructure, including eight concrete reservoirs. WSC has completed a constructability review for the first two phases of the project, and was selected to perform construction management and inspection services on the first phase of the project with subsequent phases to follow.

CSA16 Shandon Dual Water Tank Project, County of San Luis Obispo Public Works Department, Shandon, CA. *Project Manager.* Project includes design of a new 375,000-gallon welded steel storage tank to provide supplemental storage and meet fire flow demands in the Shandon area. Improvements include a new storage tank, control panel and instrumentation with solar power system, tank overflow and drain piping, and miscellaneous site improvements. Prepared detailed design drawings, technical specifications, and opinion of probable construction cost.

Cayucos Sustainable Water Project - Design A1, Cayucos Sanitary District, Cayucos, CA. *Technical Advisor and QA/QC.* Provided technical support and QA/QC oversight during development of design for a program to create a sustainable water source for the community of Cayucos, cumulating in the design and construction of a 1.2 MGD Water Resource Recovery Facility. Assisted design staff in the development of piping and instrumentation diagrams detailing plant unit processes.

Michael Goymerac PE



DESIGN LEAD

Michael is a Professional Engineer with 13 years of experience in water and wastewater infrastructure design and construction. This includes new pipelines, existing pipeline rehabilitation, storage tanks, recycled water system retrofits and permitting, water system automation retrofits, production groundwater wells, headworks, solids dewatering systems, reverse osmosis systems, and pump stations. He also has experience in hydraulic modeling, authoring grant applications, alternatives analysis, storm water resource plans, and regional water management plans. Michael has been involved in projects from planning through design and construction including project and construction management roles.

REPRESENTATIVE PROJECTS

Enhanced Recycled Feasibility Study, Montecito Water and Sanitary Districts, Montecito, CA. *Engineering Lead/Assistant Project Manager.* The project provided Montecito with clear direction for implementation of a joint water reuse project with the goal of producing a new local drought-proof water supply for the community and reducing the discharge of treated wastewater to the ocean. This collaborative project built on the previous recycled water planning efforts by evaluating regional partnerships and developing next steps, as well as incorporating updated information, such as California's draft direct potable reuse regulations. The project contained a "mini" master plan for the wastewater treatment plant, evaluating flows, capacity, upgrade/replacement needs, and costs. WSC performed a pipeline modeling and alternatives analysis for the conveyance infrastructure (pump stations, tanks, and pipelines) to deliver recycled water to various customers depending on the scenario. Capital, implementation, construction, and future ongoing operations/maintenance costs were developed for each alternative. The study looked at four primary project concepts: non-potable reuse and irrigation within Montecito, regional indirect potable reuse in partnership with neighboring Carpinteria, local direct potable reuse within Montecito, and regional direct potable reuse in partnership with neighboring Santa Barbara.

Summerland Sanitary District and Montecito Sanitary District Collection System and Flow Equalization Analysis for Montecito Water District Reuse Study, Montecito Sanitary District, Montecito, CA. *Project Manager.* WSC performed the collection system evaluation for the Summerland Sanitary District (SSD) and Montecito Sanitary District (MSD) intertie study. The Santa Barbara County Board of Supervisors tasked the engineering team with evaluating a collaborative water reuse project between SSD, MSD, and Montecito Water District (MWD). The report was an extension of a broader potable water reuse evaluation within Santa Barbara County. Michael lead the flow analysis, collection system analysis, and evaluated a range of feasible intertie locations. These locations were vetted in the field and presented to MSD and SSD for input. From these feasible locations, WSC evaluated four alternative intertie locations presenting the various required infrastructure, impacts to existing collection system, costs, criteria, and project benefits. Results were documented in a Summary Report as well as through a series of Board presentations with the various stakeholder agencies (MSD, SSD, MWD, etc.).

Septic-to-Sewer Strategic Plan, Montecito Sanitary District, Montecito, CA. *Project Manager.* Montecito Sanitary District (MSD) was interested in developing a strategic plan for guiding residences, business, and developers in potential connections of parcels and areas within their district boundaries from septic to sewer service. The plan included

EDUCATION

BS, Environmental Engineering, California Polytechnic University, San Luis Obispo, CA

MS, Civil & Environmental Engineering, California Polytechnic University, San Luis Obispo, CA

PROFESSIONAL REGISTRATIONS

Professional Engineer - Civil, California, No. 84894

CERTIFICATIONS AND TRAINING

Construction Quality Management, USACE

40-hr HAZWOPER Certified, OSHA

8-hr HAZWOPER Supervisor, OSHA

First Aid and CPR certified

"I enjoy bringing attention to the often unseen world of water and communicating the ways in which it impacts our communities and environment."

Michael Goymerac

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 136 of 257

evaluation of different technologies (vacuum, low pressure force mains, etc.), alternatives, model evaluation and optimization, cost analysis, and was combined into an innovative report format for ease of access and future reference.

Medio Creek Emergency Pump Station and Force Main, Granada Community Services District, Half Moon Bay, California. *Engineer of Record .* Mr. Goymerac acted as the assisted the District Engineer in design and permitting of a small emergency pump station and sewer force main. The original gravity sewer pipeline attached to the side of a bridge traversing Medio Creek was badly damaged during flooding when a section of the abutment dislodged and deflected the pipe at one of the joints. Mr. Goymerac designed a small 2 hp pump station to be inserted into a nearby sewer manhole and a new 3-inch force main line to replace the damaged gravity line. He worked closely with the District Engineer, local permitting agencies, stakeholders, and the Contractor.

Engineering Design Services for the Creek Crossing Project, Sacramento Area Sewer District, CA. *Project Engineer/Design Lead.* Led an alternatives evaluation for mitigating the risks of 12 exposed sewer crossings of creeks across the County service area. WSC is evaluating alternatives and will design, permit, and assist in construction of 12 creek crossing repairs which included obtaining necessary easements, U.S. Army Corp of Engineers (USACE) and Regional Water Quality Control Board Section 404/401 permits, California Department of Fish and Wildlife (DFW) Lake and Streambed Alteration Agreements, and supporting public outreach. Sizes ranged from 4-inch to 48-inch sewers. Repairs and replacements will include protections in place from ongoing erosion within the creek, additional structural protections for aerial crossings, and CIPP linings. Several locations were designed as aerial crossings using drilled piers. WSC's team will also assist in obtaining property easements, assisting CEQA Initial Study preparation, obtaining permits for work within the creeks, and supporting outreach to affected stakeholders.

Los Osos Intertie Project, Los Osos Community Services District, CA. *Project Manager.* WSC is supporting a potable water intertie project that will improve water supply reliability and resilience by connecting the community to imported water sources outside the Los Osos Basin. The nearly 16,000-linear-foot pipeline will allow delivery of up to 600 AFY of State Water Project water from the County's Chorro Valley Pipeline to LOCSD's 16th Street tanks. WSC performed hydraulic modeling, evaluated operational considerations and alternatives, coordinated private property access agreements, and secured encroachment permits. WSC also reviewed environmental requirements and recommended construction methods to reduce impacts along a complex alignment that includes tidally sensitive areas, bridge crossings, and varied soil conditions.

Turnout Alternatives Analysis & Design, San Luis Obispo County Public Works Department, CA. *Project Engineer.* WSC evaluated alternatives for repair or relocation of a State Water Project turnout pipeline exposed during the 2023 storm events. The analysis considered trenchless installation, in-kind repair, and structural protection options using County-furnished aerial mapping and subconsultant geotechnical and scour studies. WSC evaluated qualitative and quantitative criteria, FEMA Benefit-Cost Analysis Toolkit methods, life-cycle comparisons, Class 4 construction cost estimates, replacement benefits, implementation schedule, public impacts, and right-of-way and easement needs. WSC is nearing completion of the selected design alternative, including utility coordination and development of plans and specifications. Michael served as the engineer of record.

Program C Water Transmission Mains, Los Osos Community Services District, Los Osos, CA. *Project Manager.* Led the design of a new transmission main to connect a new well on the south side of the community to tie into the previously WSC designed South Bay Well transmission main. The tie in includes appropriate valving to allow the District to manually control the new well discharge to either the boosted zone or directly into the main zone. The transmission main terminates approximately 5 feet into the new well site. Worked with the contractor during construction to use horizontal directional drilling to reduce community and traffic impacts for large segments of the alignment.

South Bay Well Transmission Pipeline, Los Osos Community Services District, Los Osos, California. *Project Manager and Engineer of Record .* The Los Osos Community Services District (LOCSD) owns and operates a water distribution system to serve water to the community of Los Osos. The water distribution system consists of two pressure zones: a main pressure zone and a boosted pressure zone that is supplied through the 16th Street Pump Station. The South Bay Well currently pumps directly into the boosted zone on a demand basis. LOCSD desires to use the South Bay Well to fill the storage tanks in the main zone. WSC assisted LOCSD in preparing construction documents for a new 8-inch transmission main that ties into the existing South Bay Well discharge pipe and runs approximately 2,330 feet west until it connects to the main zone. Mr. Goymerac served as the Project Manager and Engineer of Record overseeing a small team responsible for generating design plans, technical specifications, construction cost estimates, potholing and utility investigation efforts, surveying, and bid phase services.

TLC Fill Station Project, Santa Cruz County Department of Public Works, Soquel, CA. *Project Manager.* The project was completed as part of the Pure Water Soquel SWIP Injection Wells Project and was conceptualized out of a mutual need between Soquel Creek Water District (SqCWD) and the Santa Cruz County Public Works (SCDPW). SCDPW uses potable and non-potable water to fill flush trucks that perform regular collection system flushing. SqCWD's TLC SWIP Injection Well site was limited on the volume and rate of water which could be discharged during injection well backwash events. WSC designed an innovative fill station comprised of separate pumps, controls, and piping connection to allow the SCDPW to fill their flush trucks using untreated groundwater (recently injected purified water).

Water System Improvements, San Lorenzo Valley Water District, Santa Cruz County, California. *Project Engineer.* Prepared design and construction documents for several small water system improvement projects. On project included design of over 400 feet of recently damaged pipeline within the Highway 9 right of way. The project included close coordination with Cal Trans and the District. Other water system improvement projects included preparation of construction documents related to replacement of pressure reducing valves throughout the District's Lompico Distribution System.

Cason Roberts



WSC

ENGINEERING SUPPORT

Cason is a staff engineer with experience supporting water, wastewater, and reuse projects throughout California. His experience includes the planning, design, and condition assessment. He has extensive experience in water and wastewater system modeling in a variety of software, and he has performed modeling and distribution system analysis for demand projections, capacity evaluations, and infrastructure analysis to inform design projects. He has experience in database management and development, focused on providing clients with the best available data. His academic projects focused on hydrologic modeling pertaining to atmospheric river response management and large-scale agricultural irrigation design and optimization.

REPRESENTATIVE PROJECTS

Summerland Sewer Intertie, Montecito Sanitary District, Montecito, CA. *Engineering Support.* Provided engineering support services for a feasibility analysis pertaining to directing Summerland Sanitary District's wastewater flows to Montectio Sanitary District's collection system. Evaluated the feasibility of varying pipeline alignments for the alternative connection points to the MSD system. Evaluated the pump station requirements associated with new and existing pump stations to transfer the SSD flows. Provided GIS analysis and cost estimating support.

Small Diameter CCTV Program, City of Santa Barbara, CA. *Engineering Support.* Reviewed CCTV footage of small diameter sewer pipes throughout the City of Santa Barbara to QA/QC the assessed condition of the sewer pipe, according to PACP guidelines. Assisted with creating a spreadsheet that summarizes the condition of sewer pipe segments throughout the City of Santa Barbara.

FY23 Sewer Main Rehabilitation Project, City of Santa Barbara, CA. *Engineering Support.* Provided engineering services during construction for 2.3 miles of gravity sewer main ranging from 6- to 18-inches in diameter. Rehabilitation strategies included dig and replace, trenchless rehabilitation through cured- in-place pipe (CIPP) or spiral wound PVC pipe liner, point repairs, rehabilitation of manholes, and replacement of cleanouts with new manholes.

Sanitary Sewer and Manhole Condition Assessment and Preliminary Rehabilitation Design, San Miguel Community Services District, San Miguel, CA. *Engineering Support.* Analyzed results of NASSCO- compliant CCTV inspections of most of the CSD's 8.9 miles of sanitary sewer pipelines. Prioritized sewer mains for rehabilitation based on overall risk scores, resulting from likelihood and consequence of failure analyses. Analyzed data of manhole inspections to prioritize manholes for rehabilitation. Assisted with cost estimating for rehabilitation alternatives. Reviewed CCTV, identified defective sewer laterals, identified laterals which could require a dye test, could not fit a top hat, required cleaning prior to CIPP before reinstating.

Influent/Effluent Pumping Rehabilitation Project, Sonoma Valley County Sanitation District, Sonoma Valley, CA. *Engineering Support.* Supported a project to address aging infrastructure at the District's wastewater treatment plant through rehabilitation of the Influent/Effluent Pump Building that was originally constructed in 1966. The facility houses four influent and three effluent pumps in the building basement. The influent pumps are vertical non-clog centrifugal pumps (125 hp) and the effluent pumps are two Allis-Chalmers vertical non-clog pumps (75 hp). There is also a fifth swing pump for influent or effluent pumping. This project will entirely replace the influent and effluent pumps, all exposed influent suction and discharge piping, valves and flow meters within the building basement, and associated electrical and controls equipment. Analyzed as-built drawings to inform preliminary

EDUCATION

MS, Agriculture with Specialization in Water Engineering, California Polytechnic State University, San Luis Obispo

BS, BioResource and Agricultual Engineering, California Polytechnic State University, San Luis Obispo

PROFESSIONAL REGISTRATIONS

PACP Certified No. P0045685-012024

"Our lives depend on the future of our water. That is why I am dedicated to helping communities develop creative, sustainable solutions to their complex water problems"

Cason Roberts

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 138 of 257

design. Compiled specifications and performed backchecks on design drawings.

On-Call Hydraulic Modeling, City of Paso Robles, Paso Robles, CA. *Engineering Support.* Provided hydraulic modeling support for a variety of water and sewer system analyses. Projects included Railroad Crossing Modeling, Buena Vista and Outward Stays Water Analysis, The Landing Water System Analysis, Scott Street Sewer Analysis, Mill Road Area Utility Service Plan, Vinedo Development Booster Pump Station, and Fox Well No. 21 Pump and System Evaluation. Simulated the impact of new developments on the City's distribution system under various scenarios. Assessed changes in system performance, such as pressure and available fire flow and provided recommendations to mitigate adverse impacts.

On-Call Hydraulic Modeling, City of Santa Maria, Santa Maria, CA. *Engineering Support.* Provided hydraulic modeling support for a variety of sewer system analyses. Projects included Hydraulic Model Updates, Blosser Ranch Sewer Impact Analysis, Westgate Village Sewer Impact Analysis, Bellecrest Sewer Impact Analysis, Downtown Sewer Study. Simulated the impact of proposed developments and annexation areas on the sewer system and analyzed flow under different conditions. Evaluated the ability of the existing sewer infrastructure to handle additional wastewater flows. Recommended system improvements to mitigate adverse impacts.

Paso Robles Blended Water Supply Feasibility and Engineering Study, County of San Luis Obispo, Paso Robles, CA. *Engineering Support.* Provided engineering services to assess the feasibility of the Paso Basin Blended Water Supply Project. The proposed project consists of delivering a combination of treated surface water and recycled water from the City of Paso Robles to supplement irrigation and offset groundwater production. Assisted in evaluating pipeline alignment feasibility to serve potential customers of the Project. Assisted in grower outreach and stakeholder engagement to develop an understanding of Project participant expectations. Analyzed and optimized feasible connection points for new infrastructure to existing City infrastructure. Provided GIS technical support.

Hydraulic Model Update and Booster Pump Station Alternatives Evaluation, San Miguel Community Services District, San Miguel, CA. *Engineering Support.* Developed a new water system hydraulic model using the latest version of Bentley WaterGEMS based on the District's current GIS database. Calibrated the model to observed conditions during steady-state conditions using results of fire flow tests to adjust pipe roughness factors and minor losses to achieve acceptable agreement between model results and observed test results. Used the calibrated hydraulic model to model three alternatives for a new booster pump station and pressure zone. Provided client with a preferred alternative recommendation for the booster pump station and developed ACCE Class 5 cost opinions for each alternative. The recommended booster pump station will provide adequate pressure and deliver fire flow to the east side of the District's system from now, until system buildout.

Larkfield Comprehensive Planning Study, California American Water, Larkfield, CA. *Engineering Support.* Supported development of a comprehensive planning study of the Larkfield Water System that analyzed customer demands and supply reliability, used the hydraulic model within Bentley WaterGEMS to evaluate the distribution system and identify deficiencies, and helped develop a Capital Improvement Plan. Supported technical report writing, data collection, and GIS database development to inform distribution system modeling.

Drought Contingency Plan, East Valley Water District, Highland, CA. *Engineering Support.* Supported development of a DCP that creates a drought monitoring framework that can identify when to trigger drought responses. The DCP builds on drought response actions from the WSCP, and collaboratively defines a comprehensive suite of mitigation activities and projects. These actions include currently planned and newly envisioned projects and activities that help build resilience to drought and vulnerabilities. This DCP, through the development of mitigation and response actions and collaboration with its stakeholders, enables the District to provide water for public health and safety, and minimize impacts of drought on economic activity and environmental resources, while protecting the interest of its customers.

Rialto-Colton Drought Contingency Plan (DCP), City of Rialto, CA. *Engineering Support.* Supported development of a DCP that systematically outlines drought monitoring, vulnerability assessment, mitigation actions, and a framework for response actions. Developed a coded process to convert machine readable files to a Python data frame. The coded process was used to extract essential data from California's electronic annual reports and inform the DCP.

Water Purveyor Data Research and Needs Assessment, Ventura County Watershed Protection District, Ventura, CA. *Engineering Support.* Supported development of a County hosted, public GIS map to provide easily accessible drinking water data. Analyzed public drinking water system datasets to determine the best, most up to date, data resources for the County to utilize. The goal of the Project was to allow citizens to access their drinking water purveyor's boundaries to better understand the intricacies of their drinking water system. In addition, the data compiled in the County's database will be used to assist in emergency response management. Compiled and recommended datasets to build a GIS centric database for community access.

Waterline Hydraulic Analysis, Camrosa Water District, Camarillo, CA. *Engineering Support.* Provided hydraulic modeling support in the District's Infowater Pro hydraulic model to evaluate alternatives to alleviate stress on the District's Conejo Booster Pump Station. Modeled various alternatives to lower discharge pressure at the pump station. Provided informed recommendations to the District based on model analysis results.

Cynthia Kahn-Flynn



COMMUNICATIONS & OUTREACH

Cynthia Kahn-Flynn is a strategic communications professional with eight years of experience developing audience-centered communication strategies across nonprofit, public, and private sectors, with a recent focus on high-impact water infrastructure initiatives. Cynthia specializes in translating complex technical information into clear, compelling messaging that informs and engages her target audience. Drawing on a foundation in mission-driven nonprofit work, Cynthia leads high-impact communications campaigns that not only exceed performance goals, but connect with her audience in ways that matter most. At WSC, collaborates across teams to deliver polished, goal-oriented deliverables that support our clients and build public trust.

REPRESENTATIVE PROJECTS

CAPP PM/CM, Carpinteria Valley Water District, CA. *Communications Support.* Cynthia developed a media plan for local coverage, wrote website content, created public-facing construction updates, and collaborated on grant-related messaging to ensure transparency and consistency across all outreach materials.

Willamette Water Supply TO2 Comms, Tualatin Valley Water District, OR. *Strategic Communications Lead.* Cynthia currently delivers comprehensive communications support for a major water infrastructure program, producing digital advertising campaigns, websites, videos, social media content, print materials, and stakeholder outreach collateral. Through strategic storytelling and audience-focused messaging, she helped inform the community affected by the project.

Carpinteria Advanced Purification Project, CA. *Communications Leadership and Event Coordination* Cynthia led the planning and execution of the groundbreaking ceremony for CAPP while developing the project's construction-phase communications strategy. She managed event logistics, coordinated vendors, balanced the priorities of multiple agencies, and secured sponsorships that offset nearly all event costs. The highly successful event elevated regional awareness of the project and demonstrated her ability to deliver complex, high-profile initiatives.

Replenish Big Bear, Big Bear Area Regional Wastewater Agency, CA. *Strategic Communications Support.* WSC's team is working with the Big Bear Area Regional Wastewater Agency to implement a regional One Water solution that will help to replenish the groundwater basin and keep recycled water within the watershed. WSC works with project leads on developing outreach content for the website, printed materials, newsletters, and media communication.

Water Supply Integration Communications, Willamette Water Supply System Commission, OR. *Strategic Communications Support.* Supported a large-scale communications initiative to raise awareness around the integration of the Willamette River as a new drinking water source for over 450,000 customers in Washington County, OR. Assisted with the development and management of a comprehensive communications plan, print and digital advertising, complete photography and videography coordination, stakeholder mapping, and a suite of collateral to build community pride in this significant infrastructure investment.

Folsom Water Vision, City of Folsom, CA. *Communications Support.* Providing outreach and engagement support for the City's first long-range, 50-year plan that will serve as a guiding document for near- and long-term water decisions and management that result in a more reliable, resilient, and sustainable water supply.

EDUCATION

BA, Journalism, Azusa Pacific University

BA, English, Azusa Pacific University

Digital Marketing Certificate, University of California, Davis

"Having grown up on the Samala Chumash reservation, I come from a community of indigenous water protectors and environmentalists. It's with a deep sense of pride and responsibility that I work each day to provide sustainable, clean, and affordable water for our clients and their communities."

Cynthia Kahn

Cynthia Kahn-Flynn continued...

Wastewater Reclamation Facility Replacement Program Management, City of Atascadero, CA. *Communications Support.* WSC is serving as the Program Manager for the replacement of the Atascadero Water Resource Recovery Facility. WSC is leading the development of technical reports, negotiations with the Regional Water Quality Control Board and potential project partners. Cynthia led quality control for all technical reports.

Strategic Plan, San Bernardino Municipal Water Department, San Bernardino, CA. *Communications Support.* Support the Department in updating Strategic Plan that sets a forward-thinking approach to water supply resiliency and quality management. The plan serves as a framework for guiding policy, informing decisions, defining clear goals and objectives, and prioritizing investment. Work includes facilitating workshops with the Board and staff to foster collaboration and develop measurable strategies that support goals.

Strategic Plan, West Valley Water District, Rialto, CA. *Communications Support.* WSC supported the West Valley Water District's updated Strategic Plan after a previous contractor faced challenges completing the task. Helped orchestrate a series of workshops, ensured comprehensive input and alignment with the District's objectives, and developed communication collateral to effectively disseminate the plan's key points. The new Strategic Plan received approval from the Board in January 2024.

Bay Area Water Supply and Conservation Agency and Santa Clara Valley Water District, CA. *Workshop Coordination* In support of BAWSCA and Valley Water, Cynthia collaborated to implement a multi-session workshop series aimed at helping water professionals navigate California's emerging water use efficiency regulations. She developed communications and educational materials, coordinated workshop logistics, supported facilitation, and synthesized complex technical topics into accessible content. The workshops provided practical tools, encouraged peer-to-peer learning, and helped agencies build understanding and readiness for upcoming regulatory requirements.

2025 Regional Urban Water Management Plan, Various Clients, CA. *UWMP Support.* Cynthia formats Urban Water Management Plans (UWMPs), meticulously structuring headers and footers, building dynamic cross-references, and ensuring full accessibility compliance. All UWMPs are aligned with the 2020 UWMP Guidebook, verified for consistency, and designed with clear, data-rich tables that elevate both usability and presentation.

2025 Regional Urban Water Management Plan, San Bernardino Valley Municipal Water District, CA. *UWMP Support.* Cynthia formats Urban Water Management Plans (UWMPs), meticulously structuring headers and footers, building dynamic cross-references, and ensuring full accessibility compliance. All UWMPs are aligned with the 2020 UWMP Guidebook, verified for consistency, and designed with clear, data-rich tables that elevate both usability and presentation.

2025 Urban Water Management Plans, Cucamonga Valley Water District, CA. *UWMP Support.* Cynthia formats Urban Water Management Plans (UWMPs), meticulously structuring headers and footers, building dynamic cross-references, and ensuring full accessibility compliance. All UWMPs are aligned with the 2020 UWMP Guidebook, verified for consistency, and designed with clear, data-rich tables that elevate both usability and presentation.

Communications Audit and Strategic Plan, MamaBaby International. *Marketing Specialist.* Completed exclusively by Cynthia, this document included an evaluation and list of improvements for the organization's system for gathering and producing content oversees, an annual campaign calendar, and upgrades to their social media to increase brand awareness and drive donations. Notably, the audit included the development of the organization's first brand book. In one month during her time with MamaBaby, Cynthia ran a 6-week campaign that increased monthly donors from $11,600.45/ month and 169 monthly donors to 17,551.95 and 290 monthly donors, a growth rate of 151.3%.

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 141 of 257

Jazmine Ramos



WSC

ENGINEERING SUPPORT

Jazmine is a Project Engineer with three years of experience in wastewater collection system planning, condition assessment, and regulatory compliance. This includes dry- and wet-weather flow monitoring analysis, hydraulic bottleneck identification, Sanitary Sewer Management Plan (SSMP) audits and updates, long-term sanitary sewer overflow (SSO) analysis, and CCTV inspection review using NASSCO PACP standards. She also has experience developing risk-based rehabilitation recommendations for capital improvement planning, GIS spatial analysis and mapping, and construction project engineering.

EDUCATION

BS, Civil Engineering, University of California, Berkeley

REPRESENTATIVE PROJECTS

Flow Monitoring and Capacity Analysis, Various Municipal Clients, CA. *Project Engineer.* Analyzed dry- and wet-weather flow monitoring data from systems with more than 20 flow meters using Excel and GIS. Identified hydraulic bottlenecks and evaluated high-risk infrastructure under design storm conditions to support wastewater system planning.

Capital Improvement Planning, CCTV Condition Assessment and Rehabilitation Prioritization, Various Municipal Clients, CA. *Project Engineer.* Supporting capital improvement planning by developing risk-based rehabilitation recommendations and prioritizing high-risk pipelines using CCTV inspection data, PACP standards, and GIS analysis. Evaluated more than 1,000 CCTV inspections using NASSCO PACP standards to select rehabilitation methods (point repair vs. replacement) based on defect severity, distribution, and cost-effectiveness. Prioritized high-risk pipelines using inspection data and GIS analysis and developed risk-based rehabilitation recommendations to support capital improvement planning.

Long-Term Sanitary Sewer Overflow Analysis, Various Municipal Clients, CA. *Project Engineer.* Performed long-term SSO analysis using multi-decade datasets, including reconciling outdated NASSCO defect codes to current standards to support accurate condition assessment.

Sanitary Sewer Management Plan Audits, Bay Area Municipalities, CA. *Project Engineer.* Led more than 15 SSMP audits for Bay Area municipalities, performing full plan reviews, identifying regulatory gaps, and implementing updates to bring each plan into compliance with the current Statewide Waste Discharge Requirements (WDR).

Construction Project Engineering, Turner Construction Company, Anaheim, CA. *Project Engineering Intern.* Managed material deliveries for 11 trades, coordinating with suppliers and subcontractors to prevent shortages and maintain the schedule. Worked with the interiors superintendent on a color-coded delivery tracking system and implemented a Lean visual management system for trade scopes, contacts, and scheduling priorities.

Mid-Pacific (MIDPAC) Wastewater Treatment Competition, UC Berkeley, Berkeley, CA. *Project Manager.* Led the team to 2nd place in the final wastewater treatment design competition, managing coordination, task delegation, scheduling, and deliverables. Taught two weekly sessions of treatment lectures and lab activities, and designed and built a physical filtration system, using jar testing to reach target pH, turbidity, EC, and DO.

"I enjoy diving into the details and data that can positively influence the decisions and investments of municipalities, ultimately providing the best infrastructure solutions for their communities."

Jazmine Ramos

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 142 of 257

Mary Harrington



DESIGN/3D CIVIL

For the past 32 years, Mary has worked directly with civil engineers, surveyors, architects, structural, mechanical, and electrical engineers to produce design drawings, utility maps, and report graphics. Specific types of work included pipeline plan and profiles, detailed mechanical and piping drawings for water treatment plants, wastewater treatment plants, site work and cross sections, earthwork drawings, lateral/canal improvements, pump stations, road design, bridges, and figure graphics for land zoning and presentations. Mary is proficient in both AutoCad and MicroStation.

REPRESENTATIVE PROJECTS

Central Coast Blue, City of Pismo Beach, CA. *Drafter.* Responsible for creating design drawings for injection and monitoring wells as part of the Central Coast Blue indirect potable reuse project.

Chino Basin Program Preliminary Design Report, Inland Empire Utilities Agency, Chino, CA. *Drafter.* Responsible for creating design documents for the report for the preliminary design report, which includes conveyance and groundwater extraction wells.

Klamath Booster Pump Station, Big Bear Lake Department of Water and Power, Big Bear Lake, CA. *Drafter.* Created design drawings for a booster pump station.

Vinedo Development Booster Pump Station, City of Paso Robles. *Drafter.* Creating design drawings for Booster Pump Station in the new Vinedo Development.

Emergency Intertie Connection Preliminary Design Report, Oak Lodge Water Services District, Oak Grove, OR. *Drafter.* Responsible for the design drawings for an emergency intertie booster pump station to help solve Oak Lodge's water supply resiliency challenges.

Water Reclamation Facility Upgrade Design, Heritage Ranch Community Services District, Paso Robles, CA. *Drafter.* Responsible for creating mechanical sheets for the headworks, dewatering, and effluent and utility water pump stations as part of a package MBR treatment process for the District's WWTP upgrade.

Sonoma Valley County Sanitation District Influent and Effluent Pump Station, Sonoma County Water Agency, Sonoma, CA. *Drafter.* Creating design drawings for improvements at the Sonoma Valley County Sanitation District Treatment Plant Influent/Effluent pumping and piping upgrades.

Bijou Pump Station Rehabilitation, South Tahoe Public Utility District, South Lake Tahoe, CA. *Drafter.* Responsible for creating design drawings for the rehabilitation of the Bijou pump station, which is the District's largest and most important pump station.

Five Cities Lift Station Replacement, City of Pismo Beach, CA. *Drafter.* Created design drawings for Lift Station improvement design and the upgrade of existing force main.

New Groundwater Production Well, City of Pismo Beach. *Drafter.* Creating design drawings for a new groundwater production well adjacent to the site of the Central Coast Blue Advanced Treatment Facility.

Sunflower Well Replacement, Golden State Water Company, Anaheim, CA. *Drafter.* Creating design drawings for equipping of the Sunflower No. 1 production well.

La Crescenta and Division #6 Well Site Improvement, Big Bear Lake Department of Water and Power, Big Bear Lake, CA. *Drafter.* Created design drawings for site improvements of an existing well. The project included demolition of existing building and design drawings for new building.

WSC

EDUCATION

BS, Design, California State University, Chico

"I am proud to be a part of a team that is committed to finding solutions for providing clean water to communities."

Mary Harrington

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 143 of 257

Sandra Jensen

Staff Geologist and Field Technician



Sandra Jensen performs compaction testing of grading, borehole logging, and caisson observation. Ms. Jensen's responsibilities include observation and density testing of mass grading operations, engineered fills, overexcavation, keyways, and benching. She provides field density testing, obtains samples, observes and monitors construction procedures, prepares reports documenting field observations and test results, and verifies that materials and placement are in compliance with project plans and specifications. She also works as a laboratory technician, conducting a variety of tests on soil.

AREAS OF SPECIALIZATION

- Soil classification and testing, including maximum density vs. optimum moisture, expansion index, and many other ASTM soil test methods
- In-place field density testing of soils
- Inspection of general earthwork operations
- Qualitative Hillslope stability analysis
- Onsite sediment identification
- Special sample preparation and testing

PROJECT EXPERIENCE

- Advanced Water Purification Facility Pipeline, Carpinteria, CA
- City of Ventura Waterline Eastside to Midtown, Ventura, CA
- Emergency Waterline Repair, Moorpark, CA
- Extraction Barrier Brackish Water (EBB) Treatment Plant, Point Mugu, CA
- Farmer's Irrigation Company Reservoir, Santa Paula, CA
- Goleta Water District (GWD) La Patera Rancho Emergency Repair, Goleta, CA
- County of Santa Barbara Calle Real Campus Water Distribution System, Santa Barbara, CA
- Cachuma Operation and Maintenance Board (COMB) Lauro Canyon Bypass Channel, Santa Barbara, CA
- Via Lucero Force Main, Santa Barbara, CA
- Newport Drive Box Culvert Repair, Goleta, CA

REGISTRATIONS AND CERTIFICATIONS

Certified Geologist in Training (No. 23033171)

Certified Nuclear Gauge Operator

EDUCATION

B.S., Geoscience, University of Washington

EMAIL

sjensen@earthsystems.com

Meng Wei Lu, PE, GE

Senior Engineer

Meng Wei Lu is a senior geotechnical engineer responsible for technical oversight of design phase geotechnical investigations, as well as supervision of materials testing and special inspection during construction. He has worked extensively on projects requiring deep excavation, earth retention, mitigation of seismic-induced settlement, soil stabilization, deep foundations, and underpinning. In keeping with Earth Systems' philosophy of hands-on experience, Mr. Lu has spent considerable time in the field, performing functions such as drill logging, CPT supervision, soil sampling, grading observation and testing, concrete batch plant inspection, and asphalt batch plant inspection and is therefore familiar with all aspects of the site development process. He obtained a Bachelor of Science in Civil Engineering from the National Chiao Tung University in Taiwan and a master's degree in civil engineering with a concentration in geotechnical engineering from the University of California, Los Angeles. He has been employed with Earth Systems since 2015.

AREAS OF EXPERTISE

- Geotechnical analysis of soil/structure interaction
- Evaluation of liquefaction potential
- Interpretation of cone penetrometer testing data
- Settlement analysis
- Analysis of slopes for local and global stability
- Development of geotechnical criteria for bearing capacity, lateral earth pressures, pavement design, and deep excavations
- Shear key and buttress design for landslide stabilization
- Earth retention systems
- Field testing and geotechnical observation of mass grading operations
- Proficient in geotechnical software programs such as Slide2, LPile, Cliq, Settle3

PROJECT EXPERIENCE

- Montecito Sanitary District New Pipeline Construction Under US-101, Montecito, CA
- Via Lucero Force Main, Santa Barbara, CA
- Carpinteria Advanced Water Purification Facility, Carpinteria, CA
- Rancho Monte Alegre Water Tank & Pump Station, Carpinteria, CA
- Central Coast Water Authority (CCWA) Santa Ynez Pump Station, Santa Ynez, CA
- Harbor Boulevard Force Main Extension, Ventura, CA
- 2900 Maricopa Highway Water Tank, Ojai, CA
- Cachuma Operation and Maintenance Board (COMB) Lauro Canyon Bypass Channel, Santa Barbara, CA
- County of Santa Barbara Calle Real Campus Water Distribution System, Santa Barbara, CA
- Extraction Barrier Brackish Water (EBB) Treatment Plant, Point Mugu, CA



REGISTRATIONS AND CERTIFICATIONS

Registered Professional Engineer (Civil), State of California (No. 89106)

Registered Professional Engineer (Geotechnical), State of California (No. 3249)

Certified Nuclear Gauge Operator

EDUCATION

M.S., Civil Engineering, Geotechnical Concentration, University of California, Los Angeles

B.S., Civil Engineering, National Chiao Tung University, Taiwan

PROFESSIONAL AFFILIATIONS

Member – American Society of Civil Engineers

Member – American Public Works Association

Member – California Geotechnical Engineering Association

EMAIL

mlu@earthsystems.com

Todd Tranby, PG, CEG

Engineering Geologist



Todd Tranby is an engineering geologist with over 35 years of experience in the Ventura and Santa Barbara regions, having served as a project manager and primary point of contact for numerous area projects, including hospitals, colleges, water treatment facilities, master planned communities, commercial developments, and industrial facilities. Mr. Tranby is known for his excellent client service and attention to meeting client goals with respect to services, budget, and timeframes. He is responsible for team management, scheduling of services, and oversight of technical services. As a registered professional geologist and certified engineering geologist, his areas of expertise include geologic hazards study, fault assessment, and analysis of seismicity, including potentials for liquefaction, lateral spreading, and seismically induced slope failure. For projects under construction, he oversees scheduling of field activities and supervises the field technician and special inspection staff. Mr. Tranby received a Bachelor of Science in Geophysics from the University of California at Santa Barbara. He has been with Earth Systems since 1989.

AREAS OF EXPERTISE

- Geologic and geotechnical engineering investigations, including subsurface exploration, laboratory testing of soil samples, engineering analyses, and report preparation
- Evaluation and mitigation of potential geologic hazards such as faulting, ground rupture, seismicity, liquefaction, slope stability, bluff retreat, and landslides
- Engineering analyses related to seismically induced and static settlements, slope stability, soil liquefaction, and slope stabilization
- Exploratory trenching and test pit logging
- Geotechnical issues related to grading and excavation
- Oversight of laboratory/field testing programs and special inspection operations
- Grading observation and special inspection during construction activities

PROJECT EXPERIENCE

- Montecito Sanitary District New Pipeline Construction Under US-101, Montecito, CA
- Advanced Water Purification Facility Pipeline, Carpinteria, CA
- Cachuma Operation and Maintenance Board (COMB) Lauro Canyon Bypass Channel, Santa Barbara, CA
- County of Santa Barbara Calle Real Campus Water Distribution System, Santa Barbara, CA
- Via Lucero Force Main, Santa Barbara, CA
- Goleta Water District (GWD) La Patera Rancho Emergency Repair, Goleta, CA
- City of Ventura Waterline Eastside to Midtown, Ventura, CA
- Alameda Padre Serra Water Line & Pipe Bridge, Santa Barbara, CA
- Lake Cachuma Secured Pipeline, Santa Barbara, CA
- City of Port Hueneme Cross Base Water Pipeline Extension, Port Hueneme, CA

REGISTRATIONS AND CERTIFICATIONS

Registered Professional Geologist,
State of California, 1996 (No. 6550)

Certified Engineering Geologist,
State of California, 1997 (No. 2078)

EDUCATION

B.S., Geophysics, University of California, Santa Barbara, 1988

PROFESSIONAL AFFILIATIONS

Geological Society of America

Association of Engineering Geologists

Coast Geologic Society

American Society of Civil Engineers

American Council of Engineering Companies

EMAIL

ttranby@earthsystems.com

RESUME

Keith Klagge, PLS

Project Surveyor



(949) 768-0731
KKlagge@KDMMeridian.com

Years of Experience
40 total
25 with KDM

Years as Licensed PLS
7

Professional Land Surveyor Licensed In
State of California 9534
Issued 6/21/2019
Expiration 9/30/2027

Education
San Diego State University: BS | Computer Science. 1984-1986

Home Office
Irvine, CA

Affiliations
California Land Surveyors Association (CLSA): Member

CLSA – Orange County Chapter: Member

Keith M. Klagge is a professional land surveyor registered in California, bringing nearly 40 years of experience in the land surveying and civil engineering industry. Over his extensive career, including 25 years at KDM Meridian as a Senior Survey Technician and 7 years as a Project Surveyor, Keith has contributed to project teams serving over 50 different local, county, state, and utility agencies, as well as private clients.

Keith's expertise encompasses staking for heavy and light construction, design topographic surveys, aerial control networks, boundary surveys, records of survey, control network diagrams, Government Land Office (GLO) corner searches, and monument perpetuation surveys. He specializes in public works projects, including street, sewer, water, storm drain, parks, and municipal building improvements. In his current role, Keith is responsible for pre-calculating staking projects, verifying design plan data, and serves as the firm's Safety Manager.

Project Experience

Year 2 Sewer & Water Improvements, City of Santa Monica, Santa Monica, CA

Project Surveyor. City of Santa Monica's Year 2 Sewer & Water Improvements project replaces and rehabilitates aging utility lines across the city. Keith managed the KDM's field surveying crew and was responsible for all mapping deliverables. For the sewer lines, KDM surveyed manhole inverts, coordinates, rim elevations and street centerlines along about 9,400 linear feet of pipeline replacement and sliplining, plus several separate manhole repair locations. For the water lines, KDM completed topographic surveys of 12 main replacement segments totaling 4,567 linear feet, where aging cast-iron and ductile-iron mains are being replaced with new 8-inch and 12-inch PVC. The team also surveyed a recycled water corridor along Ocean Park Boulevard that grew from 1,000 to about 5,127 linear feet during design. Drones were not allowed in the project area, so KDM's work was a comprehensive ground survey. When the City upgraded two sewer sites from manhole-only work to full topographic surveys, Keith adjusted the surveying scope to match. Keith delivered maps in order of sewer first, then recycled water, then water, so design could start on the early sites while continuing survey work on the rest. This approach gave the design team accurate, design-ready base mapping on a schedule that kept pace with design.

Chapman–Wilshire Sewer Improvements, City of Fullerton, Fullerton, CA

Project Surveyor. KDM provided surveying services to the City of Fullerton for the Chapman–Wilshire Sewer Improvements, a sewer upgrade near 1250 E. Chapman Avenue. Keith managed the KDM's field surveying crew and was responsible for all mapping deliverables. The field crew surveyed each sewer manhole on the project, recording rim elevations and incoming and outgoing invert elevations, and drew a diagram of every manhole to support the hydraulic design. Keith prepared a controlled topographic base map by ground survey, covering the proposed alignment plus 10 feet on each side, with cross sections at least every 25 feet. Horizontal control used NAD83 California State Plane Zone VI, and vertical control used the City's own benchmark system, so the mapping fits directly with City records. Deliverables were 20-scale base mapping in PDF and CAD, drafted to Fullerton's layering standards, plus an ASCII point file and supporting field notes. He planned the base mapping to be finished within one to two weeks of notice to proceed, and met the City's certified payroll requirements. The work also sets KDM up to carry the project into construction staking under the City's on-call so the same team would handle it from design survey through construction.

Tamara Klug

Project Director



EDUCATION

BA, Ecology & Evolution, University of California, Santa Barbara

30 YEARS' EXPERIENCE

CERTIFICATIONS/ REGISTRATION

Jurisdictional Delineation of Wetlands and Waters of the United States, USACE, Wetlands Training Institute, 1995

Identification of species in the genus Carex, The Jepson Herbarium, 1996

Rapid Habitat Assessment, Elkhorn Slough Foundation, 2004. Instructors: Todd Keeler Wolfe and Julie Evens (CDFW)

Defining and Delineating Maritime Chaparral on California's Central Coast, Elkhorn Slough Foundation, 2007

CRAM wetlands functional assessment, 2011

PROFESSIONAL AFFILIATIONS

Association of Environmental Professionals

California Native Plant Society

Tamara Klug is a senior ecologist with more than 30 years of experience in biology, botany, field investigations, impact analysis, and environmental planning throughout the western United States, with work spanning numerous ecological subregions. She has extensive experience preparing and managing NEPA and CEQA documentation and advising on compliance with state and federal regulations, including Endangered Species Act Section 7 biological assessments, listed species protection and mitigation plans, and Section 10 permitting support, including the preparation and implementation of habitat conservation plans, natural community conservation plans, and multiple species habitat conservation plans from early planning through implementation. Her regulatory expertise also includes US Army Corps of Engineers Section 404 and California Department of Fish and Wildlife Section 1600 permitting, wetland delineations using the Arid West and Western Mountains, Valleys, and Coast regional methodologies and the California wetland definition, and application of the California Rapid Assessment Method to evaluate wetland function. Tamara has managed complex field programs and multidisciplinary subcontractor teams to ensure surveys are completed on schedule and in accordance with agency protocols. She has designed and led floristic and vegetation surveys, habitat mapping and characterization, and developed practical approaches to challenging survey conditions. In addition, she brings substantial experience in restoration planning, implementation oversight, monitoring, and adaptive management across a range of habitats including conifer forest, riparian systems, maritime chaparral, grassland, coastal scrub, wetlands, and oak woodlands.

Relevant Experience

Santa Clara River Estuary Pre-Construction Assessment Program (PCAP) Implementation, Ventura, California, *Project Manager/Project Oversight.* Tamara brought together the project team, provided oversight, and developed/ approved standard operating procedures for the PCAP. Tamara worked through technical and staffing challenges together with the team and the City. She reviewed and approved stakeholder meeting presentations, provided feedback, and attended meetings. As the process progressed, Tamara stepped back from the project, but would step back in to help with technical and staffing challenges. Tamara also worked with the City and ESA on the Adaptive Management Matrix to understand how to determine if the City could move from Phase 1a to Phase 1b of the project without take of list species.

Lower Sycamore Creek Improvement Project, Santa Barbara, CA. *Restoration Specialist.* The project consists of widening Lower Sycamore Creek for about 350 feet and restoring the habitat. Initial work consisted of conducting a wetland delineation, rare plant survey, and vegetation study to determine impacts of the project. Tamara worked closely with the City of Santa Barbara Creeks Division and the landscape architect to develop a planting palette that would be both functional and aesthetically pleasing. She is currently working with the landscape contractor and construction manager to ensure that restoration plantings are installed according to plan. An unanticipated project delay resulted in part of the project being delayed an entire year, and Tamara worked with the nursery, construction contractor, construction manager, landscape contractor, and the City to ensure that portions of the

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 148 of 257

project that were completed could be planted to shorten the disruption of the riparian function of the project. She also worked with the construction manager and the landscape contractor to ensure that areas that would be disturbed again during project completion were properly stabilized to protect the creek during storms while minimizing cost for these temporary features.

Cabrillo Bridge Replacement Project, Santa Barbara, CA. *Restoration Specialist.* The project is located at the waterfront area of the City of Santa Barbara. The project includes a number of key coastal habitats including coastal dunes, coastal bluff scrub, coastal lagoon, and riparian habitat. Tamara coordinated with the City, seed collection contractors, the construction contractor, and restoration contractors to ensure plant materials are consistent with the project plans. Initial work on this project consisted of mapping resources and providing the necessary documentation for project permits. Tamara worked closely with the City of Santa Barbara Creeks Division and the landscape architect to develop a planting palette that would be both functional and aesthetically pleasing. She oversaw the acquisition and installation of plant species on the project site. Several challenges were encountered including a late summer storm that resulted in prolonged flooding of the planting areas making some areas inaccessible for planting and causing mortality of plants. One landscape contractor failed to keep up with the weed infestation, increasing the need for site visits and follow up. Eventually, a volunteer crew was enlisted to remove many of the weed species. Tamara trained the volunteer crew to ensure that the correct species were removed, and no damage was done to endangered species habitat.

Confidential Road and Trail Review – Santa Barbara, CA. *Project Manager / Lead Biologist*. Tamara led a team of scientists to review several roads and trails allegedly graded without proper permits. The County alleged that the roads were new based on aerial photographs in which the segments were visible, but the aerials were taken after the site was cleared of vegetation by wildfire. She conducted a study to determine evidence in the record and on the ground that roads pre- existed the date claimed by the County as new. She also conducted an analysis regarding what the impacts of new road construction would have been, if they had been new roads as alleged by the County.

Central Coast Water Authority State Water Project, Kern, Santa Barbara, and San Luis Obispo Counties, CA. *Revegetation Coordinator*. Tamara served as lead botanist to conduct preconstruction field surveys for vegetation, rare plants (e.g., Gambel's watercress [Rorippa gambelii], and marsh sandwort [Arenaria paludicola]), and other sensitive botanical resources (i.e., oak trees) for portions of the project between Arroyo Grande and Santa Ynez. She prepared vegetation maps on project strip maps for the project from Arroyo Grande to the Santa Ynez Valley. She prepared the project revegetation plans, which included mitigation ratios for impacts to Burton Mesa chaparral (a sensitive habitat) and sensitive plant species, such as Sand Mesa manzanita (Arctostaphylos rudis), La Purisma manzanita (Arctostaphylos purissima), Santa Barbara ceanothus (Ceanothus cuneatus var. fascicularis), and Wells' manzanita (Arctostaphylos wellsii). She worked with agency personnel (i.e., CDFW) to determine mitigation hierarchy for different classes of Burton Mesa chaparral. She developed a Microsoft Access database and tracking system to follow success of sections of the pipeline right-of-way over time. She prepared and implemented a 25-acre offsite Burton Mesa chaparral mitigation project that was successful six years after initiation. She is currently directing revegetation monitoring, maintenance, and reporting for all portions of the project from Tank 1, east of Cholame in San Luis Obispo County, to Meadow Lark Lane in the Santa Ynez Valley of Santa Barbara County. Habitats being restored include wetlands, riparian habitat, native and non-native grassland, coastal scrub, oak woodlands and forests (including over 10,000 oak trees), and chaparral (including Nipomo Mesa and Burton Mesa). She prepares annual revegetation reports for the project. Currently, onlya few areas are still being monitored, including a 40-acre riparian offsite mitigation area along Arroyo Grande Creek, a hilltop in Reservoir Canyon, and thousands of individual oak trees. The Central Coast Water Authority received the Theodore Roosevelt Environmental Award for the quality of their environmental program.



David Kuan, PE

Senior Engineer

Firm

AET & Associates, Inc. &
Traffic Control Engineering, Inc.

Years of Experience

40 years

Education

- MS, Transportation Engineering, University of California, Berkeley
- BS, Civil Engineering, University of California, Irvine

Areas of Expertise

- Traffic Engineering and Transportation Planning
- Public Infrastructure Planning and Implementation
- Transportation Policy and Committee Leadership

Licenses/Certifications

- Professional Engineer – Civil, California No. C57387

Affiliations

- Chairperson of Orange County Traffic Engineering Council (OCTEC)
- Institute of Transportation Engineers (ITE) member
- Work Area Temporary Traffic Control Handbook (WATCH BOOK) Committee member

ABOUT DAVID

David is the President of Traffic Control Engineering, Inc., which he founded in 1989. Prior to establishing the firm, he served as the City Transportation Engineer for the City of Orange from 1984 to 1989, where he led a wide range of local and regional traffic and transportation projects. His responsibilities included development of the City's General Plan Circulation Element, preparation of a circulation master plan for a 7,100-acre planning area, and leadership on the City's Transportation Planning Committee. David also served as the City's Transportation Demand Management Coordinator, developing traffic reduction strategies for the City and major employers. Throughout his career, he has worked extensively with state and federal transportation funding programs and collaborated closely with agencies including Caltrans, Orange County Transportation Authority, and the Transportation Corridor Agencies.

He played a key role in I-5 widening and interchange alternative studies and served on the Route 55 Carpool Lane Technical Advisory Committee, bringing valuable agency coordination experience that helps streamline project approvals. Prior to joining the City of Orange, David worked at PRC Voorhees, leading transportation projects throughout Southern California involving traffic impact analyses, circulation studies, parking studies, traffic signal coordination, and master planning.

Traffic Control Engineering, Inc. currently maintains ongoing contracts with Irvine Ranch Water District, City of Newport Beach, City of Chino, Costa Mesa Sanitary District, Long Beach Water Department, Los Angeles County Sanitation Districts, Orange County Sanitation District, Orange County Water District, South Coast Water District, Santa Margarita Water District, and East Orange County Water District to provide as-needed traffic control design services.

RELEVANT PROJECT EXPERIENCE

David has prepared traffic control designs and provided construction support for the following projects:

- **Howiler Water Treatment Plant Intertie to IRWD Zone 5 Pipeline Project,** *IRWD, City of Orange, CA*
- **Serrano Green Raw Water Pipeline Replacement,** *IRWD, City of Lake Forest, CA*
- **Woodbridge Recycled Water Replacement Project,** *IRWD, City of Irvine, CA*
- **Technology Dr. and Ada Recycled Water Pipeline,** *IRWD, Caltrans and City of Irvine, CA*
- **Water Service Repair, Santiago Canyon Rd.,** *IRWD, City of Orange, CA*
- **Park Plaza Recycled Water Replacement,** *IRWD, Irvine Company and City of Irvine, CA*

- **Bonita Canyon Recycled Water Zone D to B,** *IRWD, City of Irvine, CA*
- **Sewer Siphon Improvement Phase II,** *IRWD, City of Irvine, CA*
- **Culver Dr. Recycled Water Replacement,** *IRWD, City of Irvine, CA*
- **Newport Coast Lift Station Rehab.,** *IRWD, City of Newport Beach, CA*
- **IRWD Emergency Waterline Repair, Bake Pkwy. at I-5 Truck Bypass,** *IRWD, City of Irvine, CA, and Caltrans*
- **IRWD 2019 Vault Rehab, Culver Dr./Irvine Blvd.,** *IRWD, City of Irvine, CA*
- **Relocating Cathodic Protection Test Station, Laguna Canyon Rd.,** *IRWD, City of Irvine, CA and Caltrans*
- **Orange County Sanitation District (OCSAN) Taft Branch Improvements Project,** *OCSAN, Cities of Orange and Villa Park, CA*
- **IRWD ILP North Conversion Project, Chapman Ave./Jamboree Rd.,** *IRWD, City of Orange, CA*

David also prepared traffic control designs for the following projects:

- **Taft Branch Improvement Project,** *OCSAN, City of Orange*
- **Gisler-Redhill Interceptor and Baker Force Main Rehab., Project 7-65,** *OCSAN, City of Costa Mesa, CA, and Caltrans*
- **Newport Force Main, Project 5-60,** *OCSAN, City of Newport Beach, CA, and Caltrans*
- **Westminster Blvd. Force Main Replacement, Project 3-62,** *OCSAN, Cities of Seal Beach and Westminster, CA*
- **Newhope-Placentia Trunk Sewer Replacement, Project 2-72 in State College Blvd.,** *OCSAN, Cities of Fullerton and Anaheim, CA*
- **East Lido Force Main Rehab., Newport Blvd.,** *OCSAN, City of Newport Beach, CA*
- **Seal Beach Pump Station Project 3-62,** *OCSAN, City of Seal Beach, CA*
- **Santa Ana River Interceptor (SARI) Relocation Project, SR91 at Coal Canyon Rd.,** *Caltrans*
- **Southbound I-5 Off-Ramp to Alton Pkwy. Closure/Detour for Overhead Sign Modifications,** *City of Newport Beach, CA, and Caltrans*
- **District 18 Trunk Sewer Group 1 Rehab. Whittier Blvd. at Washington Ave. Closure/Detour,** *Los Angeles County Sanitation District, City of Whittier, CA, and Caltrans*
- **SR 73 S/B to Macarthur Blvd. Off-Ramp Closure/Detour for OC-44 Appurtenance Relocation Project,** *City of Newport Beach, CA, and Caltrans*

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 151 of 257



WSC

betterwaterfuture.com

Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108
A Public Service Agency
Phone: (805) 969-4200
www.montsan.org

MONTECITO SANITARY DISTRICT

STAFF REPORT – 6B

DATE: November 4, 2026

TO: Board of Directors

FROM: John Weigold, General Manager
Bryce Swetek, Engineering Manager

SUBJECT: Award of Contract – Olive Mill Road Pipeline Capacity Improvements Project

---

RECOMMENDATION:

It is recommended that the Board:

i) Authorize the General Manager to negotiate a contract with BKF Engineers (BKF) in an amount not to exceed $280,000 to perform design engineering services for the Olive Mill Road Pipeline Capacity Improvements project; and
ii) Authorize the General Manager to approve expenditures of up to ten percent (10%) of the negotiated amount as an amendment allowance for any changes in scope of work.

DISCUSSION:

Background – Staff issued a Request for Proposal (RFP) (Attachment 1) seeking proposals from professional engineering consultants to prepare construction ready plans, specifications, and cost estimate for the Olive Mill Road Pipeline Capacity Improvements project. This project is part of the District's wastewater collection system master plan, where Olive Mill Road was identified as being undersized ad requires improved capacity to address current and future flows in the pipeline.

Request for Proposal Process and Results – Staff issued the RFP on September 30, 2026, to four engineering consultants. The RFP required the consultants to propose on the Basis Scope of Work (Basis), as well provide any Additional/Optional Scope of Work (Optional) as recommended by the consultant. The District received two proposals from consulting firms, including BKF Engineers (BKF) and Stantec Consulting Services, Inc. (Stantec).

District Staff reviewed the proposals and filled out an Evaluation Form for each consulting firm. The purpose of the evaluation is to review the firm's qualifications, approach to the

project, schedule, references, and level of effort. Each criteria was scored from 1-10 with 1 showing poorly and 10 showing excellence. The criteria were averaged amongst the review panel and then a weighted value was applied based on the RFP to tally a final weighted score. The table below represents a summary of the evaluation as well as the anticipated fee and responsiveness from each firm:

Consulting Firm	Qualifications (40%)	Approach (20%)	Schedule (10%)	References (15%)	Effort (15%)	Approx. Proposal Amount "Basis" and "Optional"	Weighted Score / Proposal Status
BKF	8.3	8.5	8.0	8.0	8.0	$280,000 $4,000	**82.00** Responsive
Stantec	7.5	7.5	8	8.0	7.8	$287,000	**76.63** Responsive

Analysis – Justifications – The anticipated base proposal amount of approximately $280,000 submitted by BKF is responsive to and meets the requirements of the RFP but is a higher amount than anticipated. BKF also submitted optional services amounting to $4,000 and appears to offer an array of additional services. Staff notes that both firms are well qualified and capable of executing this project and Staff is grateful for their proposal efforts.

Staff recommends the Board authorize the General Manager to negotiate a contract with BKF for the design phase of the project. Staff has had a preliminary discussion with BKF to confirm the proposal amount. Staff notes that the optional scope of work provided by BKF is not anticipated to be exercised. BKF's proposal (Attachment 2) demonstrates relevant project experience, a strong multi-disciplinary team of engineering professionals, a reputable subconsultant, a clear understanding and approach to perform the work, an acceptable schedule, and includes fair a level of effort.

Fiscal Impact – The Olive Mill Road Capacity Improvements Project is included in the Fiscal Year 2026-27 CIP Budget with $150,000. Staff plans to negotiate with BKF to look for efficiencies and confirm scope of this effort. Staff recognizes the anticipated proposal amount is more than the budgeted amount; however, this is in part due to additional scope of work that was added during the RFP process. Staff notes additional funding may be required for unforeseen scope changes, potential potholing, and project management. A budgetary adjustment of $160,000 for this project is anticipated, resulting in a new budget of $310,000.

DEPARTMENTS INVOLVED: Engineering and Administration

ATTACHMENTS:

1. Montecito Sanitary District RFP
2. BKF Proposal

Montecito Sanitary District

1042 Monte Cristo Lane
Santa Barbara, CA 93108
General Manager: John Weigold

A Public Service Agency

PHONE: (805) 969-4200
FAX: (805) 969-9049
E-MAIL: jweigold@montsan.org

Request for Proposal (RFP)

Consultant Services
For
Olive Mill Road Pipeline Capacity Improvements
Project No. C009

September 30, 2026

Submittals due October 28, 2026, by 4:00 PM Pacific Time

I. INTRODUCTION

Montecito Sanitary District is located in Santa Barbara County approximately 3 miles south of the City of Santa Barbara. It provides wastewater collection, pumping and treatment to the 10,000 residents of the unincorporated community. The wastewater collected is primarily residential. There are some commercial customers and no industrial customers in the District's wastewater system. The District boundaries are located along the coastline and extending to the foothills. As part of the District's wastewater collection system master plan, a pipeline that runs along Olive Mill Road was identified as being undersized and requiring an improved capacity to address current and future flows in the pipeline.

The Montecito Sanitary District (MSD/District) is seeking proposals from professional engineering consultants to prepare construction ready plans, specifications, and cost estimate for the Olive Mill Road Pipeline Capacity Improvements project. The project is anticipated to include potential alternatives for capacity improvements which include, but are not limited to:

1. Upsize approximately 1,300 feet (0.25 miles) of existing 8-inch to 10-inch diameter CIPP lined VCP pipeline to 12-inch PVC pipe via trenchless technology or conventional construction.
2. Approximately 1,300 feet (0.25 miles) of new 12-inch PVC pipe and abandon the existing pipeline.
3. Approximately 1,300 feet (0.25 miles) of new 8-inch PVC pipe and maintain the existing pipeline.

The project limits start at the intersection of Olive Mill Rd and Mesa Rd; and then end near the intersection of Olive Mill Road and N. Jameson Lane. An atlas of the proposed pipeline upsize work is provided as Attachment A. The project plans will detail the limits of the work, access structures, existing utilities, right of way and easement limits, access constraints, and permit requirements. This RFP will focus on design services only. Bid and construction phase services will be considered under a separate contract.

II. SCOPE OF WORK

Consultant is expected to perform the following services/tasks described below. The District will consider any additions or refinements to the proposed scope of work that the Consultant may recommend, provided the changes meet the intent of the scope.

TASK 1: PROJECT MANAGEMENT, QUALITY ASSURANCE/QUALITY CONTROL, MEETINGS, AND SITE VISITS.

This task includes project management and coordination activities as well as quality control/assurance, and meetings with the project team.

Task 1.1 Project Management. Monitoring and coordination of budget, schedule, subconsultants, jurisdictional/public agencies, and internal project team. Prepare monthly invoices and updated schedule.

The District's Project Manager will coordinate access to assets within the study site as needed by the Consultant.

Task 1.2 Quality Control/Quality Assurance. Review and quality control all deliverables prior to submittal to the District.

Task 1.3 Meetings. Anticipated Meetings include:

- Project kick-off meeting and site visit with District staff.
- Draft Geotechnical Report review meeting (video)
- Draft Preliminary Design Alternatives Report review meeting (video)
- 50% Deliverables review meeting (video)
- 90% Deliverables review meeting (video)

Prepare agenda and conduct design kick-off meeting with District staff to review project scope and District's and Consultant's expectations. Prepare a schedule for completion of the design of the Contract Documents to be discussed at the kick-off meeting. Include milestone dates for submittals and review meetings. Consultant should anticipate two weeks for District review of each submittal. Consultant shall prepare and distribute the meeting summaries following meetings.

TASK 2: REVIEW EXISTING INFORMATION & PRELIMINARY DESIGN

This task includes review of existing information and preliminary investigation and design efforts.

Task 2.1 Existing Documents. Consultant shall review background documents to the extent needed to understand the existing constraints and challenges. Example documents include existing pipeline plans.

Task 2.2 Utility Research. Consultant will contact utility agencies with below-grade facilities in the project area to obtain atlas maps and other available information regarding the type, size, location, material, and depth of existing utilities. Information received will be incorporated into the Project base map and considered in the Project design. Consultant will file an Underground Service Alert of Southern California ticket prior to the topographic survey in order to have existing utility locations marked in the Project area.

Task 2.3 Topographic Survey. Consultant will provide survey services to facilitate the design work for the project. It is anticipated this work will utilize NAD 83 and NAVD 88 datums based on local benchmarks, but Consultant may suggest datums/epoch to be confirmed by the District prior to beginning the work. This work shall be provided and signed by a Professional Land Surveyor (PLS) licensed in the state of California.

Task 2.4 Geotechnical Investigation and Report. Consultant will provide a geotechnical investigation (historical documentation and field obtained soil sampling) and report for use as a basis for the design and construction for the upsizing of the sewer main (pipe burst/split potential).

Task 2.4.1 Draft Report. Consultant will develop a draft geotechnical report in coordination with the District. The draft shall be provided in Word (.doc) format so District staff may provide comments and suggested edits via "track changes" as well as PDF. Consultant should anticipate a remote review meeting with the District to clarify comments per Task 1.3.

Task 2.4.2 Final Report. Consultant will provide a final geotechnical report incorporating comments provided in the draft report. The report shall be provided in PDF format and signed by a Professional Geotechnical Engineer registered in the State of California.

Task 2.5 Environmental Document Preparation and Permitting. Consultant will provide environmental and permitting services, as needed, to facilitate design and approval of the project. This task shall include, but is not limited to:

- Assisting the District in providing all applicable documents for CEQA compliance.
- Assisting the District in preparing and providing all applicable permit applications and documents as required by jurisdictional/public agencies, such as County and Caltrans encroachment permits.

Task 2.6 Preliminary Design Alternatives Report. Consultant will review/consider existing utilities, geotechnical report, constructability, environmental/CEQA constraints, and analyze three or more capacity improvement alternatives. The District retains a sewer modeling consultant, which an alternative may be hydraulically modeled to support the alternative analysis. The Consultant shall recommend an alternative to achieve the District's objective of capacity improvements.

Task 2.6.1 Draft Report. Consultant will develop a draft report in coordination with the District. The draft shall be provided in Word (.doc) format so District staff may provide comments and suggested edits via "track changes" as well as PDF. Consultant should anticipate a remote review meeting with the District to clarify comments per Task 1.3.

Task 2.6.2 Final Report. Consultant will provide a final report incorporating comments provided in the draft report. The report shall be provided in PDF format and signed by a Professional Civil Engineer registered in the State of California.

TASK 3: CONTRACT DOCUMENT PREPARATION

Based on the District's selected alternative, Consultant shall prepare construction ready plans, technical specifications, and cost estimate for the pipeline design project. Plans will incorporate the pipeline section plan and profile drawings, crossing utilities (from consultant performed utility research), the technical parameters related to the pipeline installation, access structures, etc. The District will supply the record drawings and GIS data of its existing infrastructure that can be used as a base map; however, it is expected that the design team will have the alignment (existing and proposed) surveyed by a licensed in the State of California land surveyor. Technical specifications will be in the District format (CSI format 6 digit).

Task 3.1 Draft Deliverable Preparation. Consultant will prepare plans, technical specifications, and cost estimate deliverables for District review at the 50% and 90% design stages. The draft deliverables shall be provided in Word (.doc) format so District staff may provide comments and suggested edits via "track changes" as well as PDF. Consultant should anticipate a remote review meeting with the District to clarify comments per Task 1.3. The Consultant shall anticipate two weeks for District review.

Task 3.2 Final Deliverable Preparation. Consultant will provide Final plans, technical specifications, and cost estimate deliverables in PDF format, which each shall be signed and stamped by a Professional Civil

Engineer registered in the State of California. These will be considered the Issued for Bid electronic set for the District.

III. RESPONSES

The response shall include at a minimum the information listed herein; incomplete or unclear information may be grounds for rejection. The response shall be organized as follows:

1. Letter Proposal

The Proposal may be submitted as a letter proposal addressed to:

Bryce Swetek, P.E.
Engineering Manager
Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108

The letter proposal shall be submitted electronically to Bryce Swetek, P.E. at bswetek@montsan.org. The email subject line shall say, "RFP: Olive Mill Road Pipeline Capacity Improvements". The proposal must be received by **4:00 PM Pacific Time, October 28, 2026.**

Late proposals will not be accepted. Any proposal received prior to the time and date specified above may be withdrawn or modified by written request of the proposer provided the modified proposal is received prior to the time and date specified above.

2. Experience and Qualifications

a. Provide a brief history of the firm, including name of the firm, the year the firm was established under the current name, and the closest office location to the project. Indicate any other previous names for the firm during the last five years and the year any name change was effective.
b. Provide general information concerning the Consultant's qualifications and descriptions of at least 3 relevant projects. Indicate who in the firm performed specific functions on the projects. For any incomplete projects, clearly indicate the status of the project. Inclusion of general information for any subconsultant qualifications and listing where Consultant and subconsultant have previously worked together is encouraged.
c. Identify firm personnel, including any subconsultants, that will be assigned to the key positions and show the relationships on an Organizational Chart and provide which office they are located.
d. Provide three clients as a reference, including at least two for whom services were rendered during the past two years, preferably for services similar to those outlined in this solicitation; include contact information for each reference.

3. Project Understanding and Approach

Provide a statement demonstrating the Consultant's understanding of the Project and proposed approach to the Project scope of work, broken down by tasks and subtasks. Proposals shall identify specific milestones and deliverables for each task. Consultant may revise the scope of services in this RFP, including considerations of additional capacity improvement alternatives, and should call out the proposed revisions/considerations in their proposal with any supporting context.

4. Estimated Schedule

The proposal must include an estimated schedule to complete the Project scope of work. Describe the Consultant's ability to meet the proposed schedule and timing of each task in the scope of work.

5. Estimated Level of Effort

The proposal shall include a table listing the personnel involved in the project and the anticipated hours associated with each individual's level of effort identified by task based on a Professional Rate Sheet listing the different classifications of labor. The Professional Rate Sheet shall be included in the proposal. The table is to be based on the Consultant's estimation for performing the services based on the Consultant's Project Understanding and Approach.

6. Conflicts

Identify any conflicts which could affect the ability to perform the work in a timely fashion over the duration of the contract.

7. Quality Assurance/Quality Control

Provide a brief description of in-place and proposed Quality Assurance & Quality Control practices applicable for this project.

8. Assumptions and Additional Comments

The proposal shall include any assumptions made, comments, suggestions, or additions for the District to consider in selecting the firm. Identify the potential benefit, value, or impact these may have to the District.

9. Contract Requirements

The District will be utilizing a Professional Services Agreement (PSA) included as Attachment B for review. The terms of Agreement are not subject to change. The Consultant must comply with applicable local, State, and Federal laws including prevailing wage rates and their payment in accordance with California Labor Code, Section 1775. Provide an affirmative statement indicating acceptance of the terms of the Agreement.

IV. SELECTION CRITERIA

From the proposals received, the District will select the most qualified firm for the project. Selection will be based on information provided in the proposal and will be based on the following criteria:

1. Qualifications: The Consultant's (including subconsultants, if any) firm as well as relevant experience and ability to perform the Scope of Works as outlined above, based on information provided by the Consultant and client references – **40%.**
2. Approach: The Consultant's understanding of the Project as demonstrated by their approach to completing the Scope of Work as outlined in this RFP – **20%**.
3. Schedule: The Consultant's availability and ability to perform the Scope of Work as outlined in this RFP – **10%**.
4. References: The Consultant's client references, the Consultant's performance on similar studies, and their knowledge of, and familiarity with, the District's geographic region – **15%**.
5. Level of Effort: The District is seeking a reasonable level of effort for the Scope of Work as outlined in this RFP and will consider the significance of staffing for the project as well as alignment to the proposed Approach/Scope of Work – **15%**.

V. RESERVATION OF RIGHTS

The following is a list of rights of the District:

1. The Montecito Sanitary District reserves the right to:
    a. Reject any and all responses received.
    b. Issue a subsequent RFP.
    c. Cancel the entire RFP.
    d. Remedy technical errors in the RFP process.
    e. Negotiate with any, all, or none of the Respondents to the RFP.
    f. Waive informalities and irregularities.
    g. Make multiple recommendation(s) to the MSD Board.
    h. Request additional information or clarification.
    i. All responses and their contents will become the property of MSD.
2. The District will not reimburse Consultants or sub-consultants for any costs associated with any travel and/or per diem incurred in any presentations or for any costs in preparing and submitting the responses.
3. The District reserves the right to end, in its sole discretion, negotiations at any time with any or all Consultants. This RFP does not commit the District to enter into a contract, nor does it obligate it to pay any costs incurred in the preparation and submission of responses or in anticipation of a contract.
4. Failure to respond to the requirements outlined in this RFP may result in the Consultant's disqualification as non-responsive to the RFP.

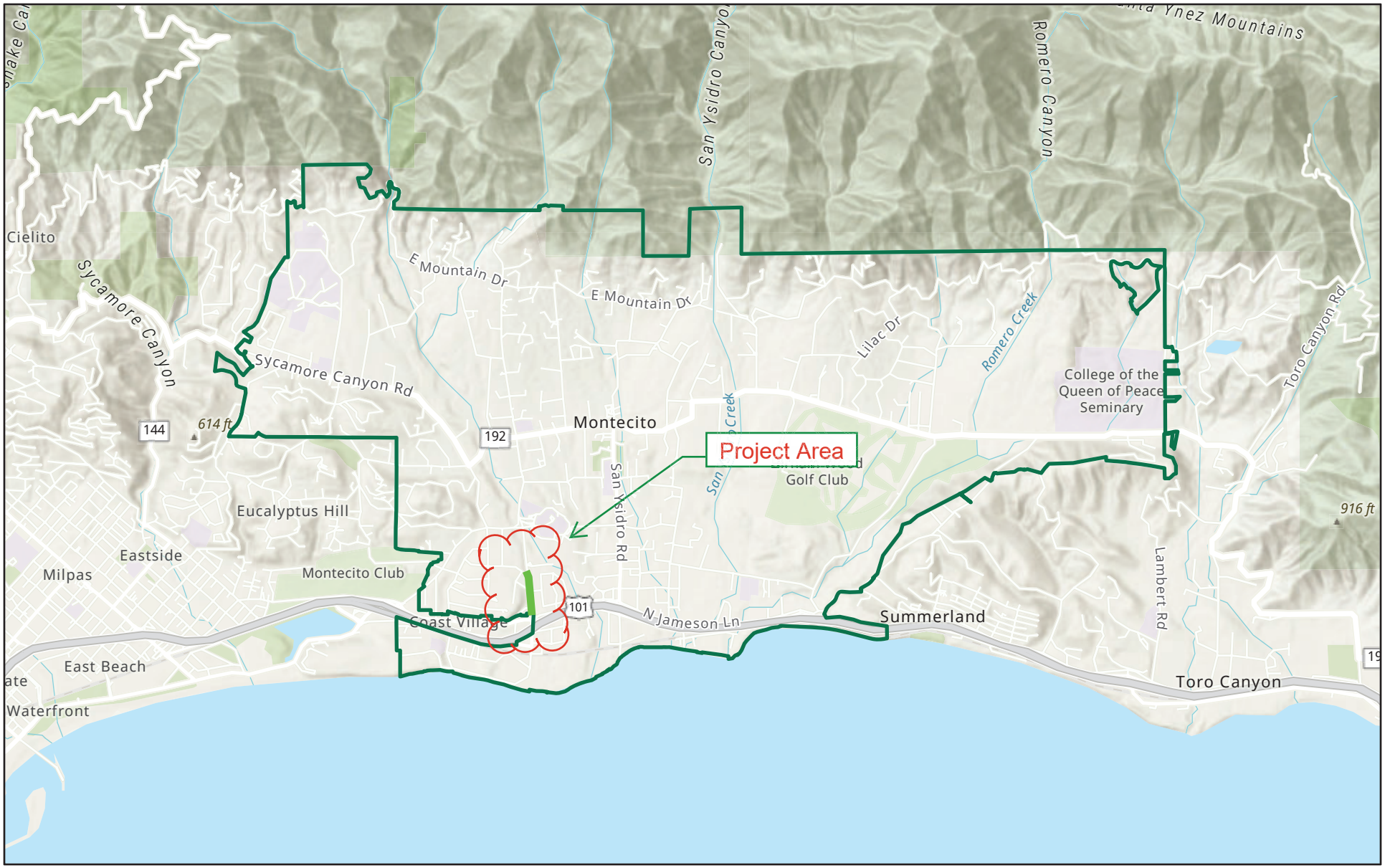
VI. INQUIRIES

All inquiries related to this RFP shall be sent to Bryce Swetek, P.E. at bswetek@montsan.org and Michael Pardo at mpardo@montsan.org no later than **4:00 PM Pacific Time, October 16, 2026.** Any clarifications or modifications to this RFP resulting from proposer inquiries shall be issued by the District through written addenda and distributed to all proposers no later than **4:00 PM Pacific Time, October 20, 2026.** If any addenda are issued, Consultant shall provide an affirmative statement indicating acknowledgement of the addenda.

VII. ATTACHMENTS

A. District GIS Atlas Maps
B. Sample Professional Services Agreement

Olive Mill Road Pipeline Capacity Improvements



8/31/2026, 1:53:35 PM

Montecito Sanitary District Boundary

SBC Assessor Parcels – Mailing Labels

1:57,851

0 0.4 0.8 1.6 mi

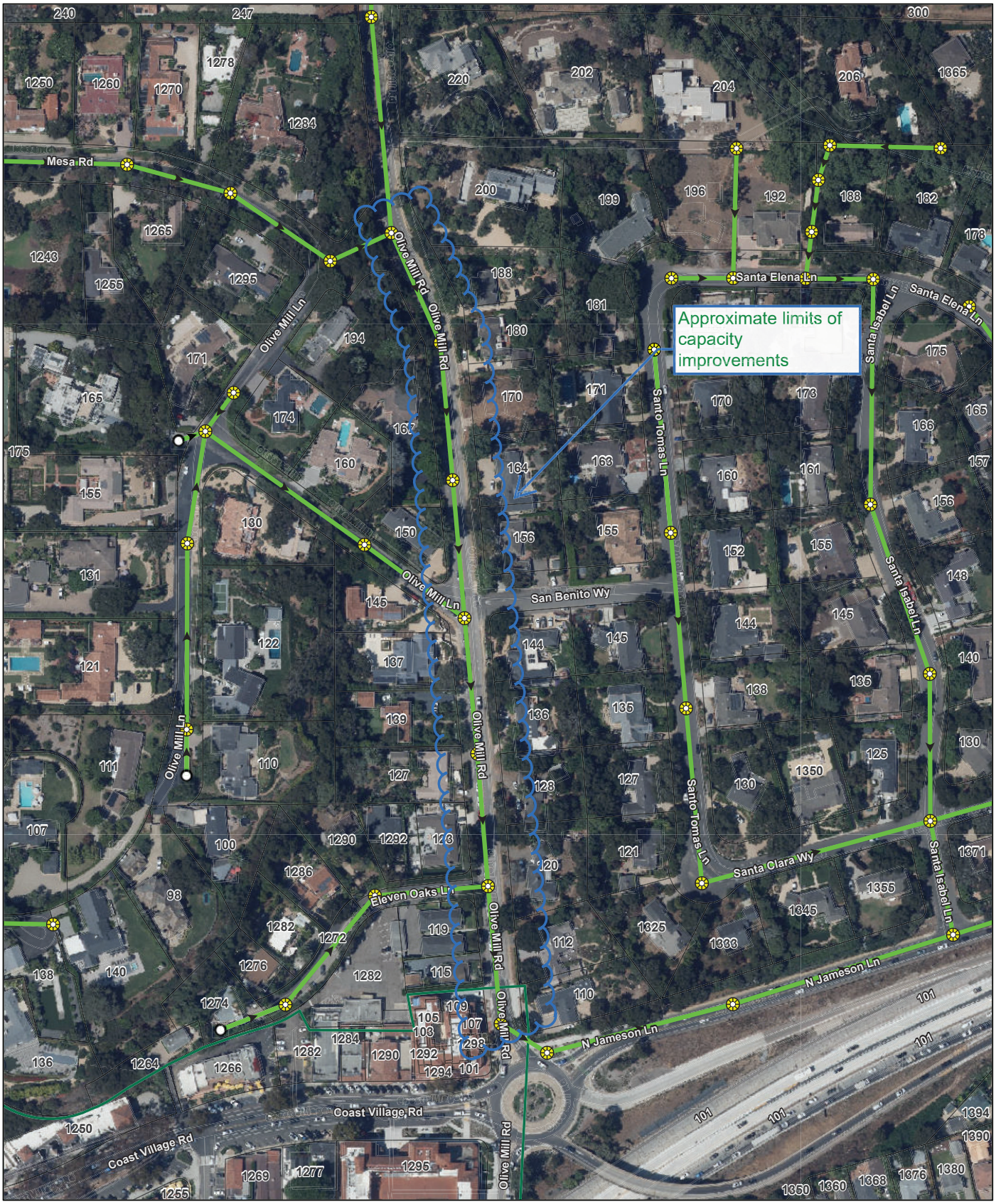
0 0.5 1 2 km

Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community, Esri, NASA, NGA, USGS, FEMA

Montecito Sanitary District

Special Board Meeting November 4, 2026

Olive Mill Road Pipeline Capacity Improvements



8/31/2026, 5:04:50 PM

- Cleanouts
- Maintenance Holes
  - Standard
- Pipes
  - GRAVITY MAIN
- Montecito Sanitary District Boundary
- Street Labels
- ZWG_Santa_Barbara_Southcoast_Region_3INCH_2024.sid
  - Red: Band_1
  - Green: Band_2
  - Blue: Band_3
- World_Hillshade

1:2,140

0 0.02 0.04 0.08 mi

0 0.03 0.07 0.13 km

Sources: Esri, TomTom, Garmin, FAO, NOAA, USGS, © OpenStreetMap contributors, and the GIS User Community, Sources: Esri, Vantor, Airbus DS, USGS, NGA, NASA, CGIAR, N Robinson, NCEAS, NLS, OS, NMA, Geodatastyrelsen, Rijkswaterstaat, GSA, Geoland, FEMA,

PROFESSIONAL SERVICES AGREEMENT
FOR DESIGN PROFESSIONALS

(Montecito Sanitary District / *[Company or Individual]*)

1. IDENTIFICATION

This PROFESSIONAL SERVICES AGREEMENT ("Agreement") is entered into by and between the Montecito Sanitary District, a California Special District ("District"), and _____, a _____ ("Consultant").

2. RECITALS

2.1. District has determined that it requires the following professional services from a consultant: **[enter description of consultant's services]**

2.2. Consultant represents that it is fully qualified to perform such professional services by virtue of its experience and the training, education and expertise of its principals and employees. Consultant further represents that it is willing to accept responsibility for performing such services in accordance with the terms and conditions set forth in this Agreement.

2.3. Consultant represents that it has no known relationships with third parties, District Board members, or employees of the District which would (1) present a conflict of interest with the rendering of services under this Agreement under Government Code Section 1090, the Political Reform Act (Government Code Section 81000 *et seq.*), or other applicable law, (2) prevent Consultant from performing the terms of this Agreement, or (3) present a significant opportunity for the disclosure of confidential information.

NOW, THEREFORE, for and in consideration of the mutual covenants and conditions herein contained, District and Consultant agree as follows:

3. DEFINITIONS

3.1. "Design Professional": A Design Professional is any individual satisfying one or more of the following: (1) licensed as an architect pursuant to Business and Professions Code 5500 et seq., (2) licensed as a landscape architect pursuant to Business and Professions Code 5615 et seq., (3) licensed as a professional land surveyor pursuant to Business and Professions Code 8700 et seq., or (4) registered as a professional engineer pursuant to Business and Professions Code 6700 et seq.

3.2. "Scope of Services": Such professional services as are set forth in Consultant's **[enter consultant's proposal date]** proposal to District attached hereto as Exhibit A and incorporated herein by this reference.

[CAUTION – avoid attaching Consultant's written proposal for the Scope of Work, as it may include provisions that conflict with the terms and conditions of this Agreement. It is best to draft a separate scope as Exhibit A.]

3.3. "Agreement Administrator": The Agreement Administrator for this project is [Name and title]. The Agreement Administrator shall be the principal point of contact at the District for this project. All services under this Agreement shall be performed at the request of the Agreement Administrator. The Agreement Administrator will establish the timetable for completion of services and any interim milestones. District reserves the right to change this designation upon written notice to Consultant

3.4. "Approved Fee Schedule": Consultant's compensation rates are set forth in the fee schedule attached hereto as Exhibit B and incorporated herein by this reference. This fee schedule shall remain in effect for the duration of this Agreement unless modified in writing by mutual agreement of the parties.

3.5. "Maximum Amount": The highest total compensation and costs payable to Consultant by District under this Agreement. The Maximum Amount under this Agreement is _____ Dollars ($_____).

3.6. "Commencement Date": [date].

3.7. "Termination Date": [date]

4. TERM

The term of this Agreement shall commence at 12:00 a.m. on the Commencement Date and shall expire at 11:59 p.m. on the Termination Date unless extended by written agreement of the parties or terminated earlier under Section 18 ("Termination") below. Consultant may request extensions of time to perform the services required hereunder. Such extensions shall be effective if authorized in advance by District in writing and incorporated in written amendments to this Agreement.

5. CONSULTANT'S DUTIES

5.1. **Services**. Consultant shall perform the services identified in the Scope of Services. District shall have the right to request, in writing, changes in the Scope of Services. Any such changes mutually agreed upon by the parties, and any corresponding increase or decrease in compensation, shall be incorporated by written amendment to this Agreement.

5.2. **Coordination with District**. In performing services under this Agreement, Consultant shall coordinate all contact with District through its Agreement Administrator.

5.3. **Budgetary Notification**. Consultant shall notify the Agreement Administrator, in writing, when fees and expenses incurred under this Agreement have reached

eighty percent (80%) of the Maximum Amount. Consultant shall concurrently inform the Agreement Administrator, in writing, of Consultant's estimate of total expenditures required to complete its current assignments before proceeding, when the remaining work on such assignments would exceed the Maximum Amount.

5.4. **Professional Standards.** Consultant shall perform all work consistent with the degree of care and skill ordinarily exercised by other similar professionals providing the same or similar services under the same or similar circumstances. Consultant shall keep itself fully informed of and in compliance with all local, state, and federal laws, rules, and regulations in any manner affecting the performance of this Agreement, including all Cal/OSHA requirements, the conflict of interest provisions of Government Code § 1090 and the Political Reform Act (Government Code § 81000 et seq.).

5.5. **Campaign Contributions.** This Agreement is subject to Government Code section 84308, as amended by Senate Bill 1439 (2022), Senate Bill 1181 (2024), and Senate Bill 1243 (2024). Consultant shall disclose any contribution to an elected or appointed District official's campaign or committee in an amount of more than five hundred dollars ($500) made within 12 months preceding the Commencement Date, by Consultant, its, her, or his agent, or another party affiliated with Consultant. Consultant shall provide a signed copy of the attached Campaign Contribution Disclosure Form to District prior to, or concurrent with, Consultant's execution of this Agreement and no later than the Commencement Date.

5.6. **Avoid Conflicts.** During the term of this Agreement, Consultant shall not perform any work for another person or entity for whom Consultant was not working at the Commencement Date if such work would present a conflict interfering with performance under this Agreement. However, District may consent in writing to Consultant's performance of such work.

5.7. **Appropriate Personnel.** Consultant has, or will secure at its own expense, all personnel required to perform the services identified in the Scope of Services. All such services shall be performed by Consultant or under its supervision, and all personnel engaged in the work shall be qualified to perform such services. [Name of Consultant's Project Manager] shall be Consultant's project administrator and shall have direct responsibility for management of Consultant's performance under this Agreement. No change shall be made in Consultant's project administrator without District's prior written consent.

5.8. **Substitution of Personnel.** Any persons named in the proposal or Scope of Services constitutes a promise to the District that those persons will perform and coordinate their respective services under this Agreement. Should one or more of such personnel become unavailable, Consultant may substitute other personnel of at least equal competence upon written approval of District. If District and

Consultant cannot agree as to the substitution of key personnel, District may terminate this Agreement for cause.

5.9. **Permits and Approvals.** Consultant shall be responsible for applying for, at its sole cost and expense, all permits and regulatory approvals necessary for Consultant's performance of this Agreement. This includes, but shall not be limited to, professional licenses, encroachment permits and building and safety permits and inspections.

5.10. **Notification of Organizational Changes.** Consultant shall notify the Agreement Administrator, in writing, of any change in name, ownership or control of Consultant's firm or of any subcontractor. Change of ownership or control of Consultant's firm may require an amendment to this Agreement.

5.11. **Records.** Consultant shall maintain any and all ledgers, books of account, invoices, vouchers, canceled checks, and other records or documents evidencing or relating to charges for services or expenditures and disbursements charged to District under this Agreement for a minimum of three (3) years, or for any longer period required by law, from the date of final payment to Consultant under this Agreement. All such documents shall be made available for inspection, audit, and/or copying at any time during regular business hours, upon oral or written request of District. In addition, pursuant to Government Code Section 8546.7, if the amount of public funds expended under this Agreement exceeds ten thousand dollars, all such documents and this Agreement shall be subject to the examination and audit of the State Auditor, at the request of District or as part of any audit of District, for a period of three (3) years after final payment under this Agreement.

6. SUBCONTRACTING

6.1. **General Prohibition.** This Agreement covers professional services of a specific and unique nature. Except as otherwise provided herein, Consultant shall not assign or transfer its interest in this Agreement or subcontract any services to be performed without amending this Agreement.

6.2. **Consultant Responsible.** Consultant shall be responsible to District for all services to be performed under this Agreement.

6.3. **Identification in Fee Schedule.** All subcontractors shall be specifically listed and their billing rates identified in the Approved Fee Schedule, Exhibit B. Any changes must be approved by the Agreement Administrator in writing as an amendment to this Agreement.

7. COMPENSATION

7.1. **General.** District agrees to compensate Consultant for the services provided under this Agreement, and Consultant agrees to accept payment in accordance with the Fee Schedule in full satisfaction for such services. Compensation shall

not exceed the Maximum Amount. Consultant shall not be reimbursed for any expenses unless provided for in this Agreement or authorized in writing by District in advance.

7.2. **Invoices.** Consultant shall submit to District an invoice, on a monthly basis or as otherwise agreed to by the Agreement Administrator, for services performed pursuant to this Agreement. Each invoice shall identify the Maximum Amount, the services rendered during the billing period, the amount due for the invoice, and the total amount previously invoiced. All labor charges shall be itemized by employee name and classification or position with the firm, the corresponding hourly rate, the hours worked, a description of each labor charge, and the total amount due for labor charges.

7.3. **Taxes.** District shall not withhold applicable taxes or other payroll deductions from payments made to Consultant except as otherwise required by law. Consultant shall be solely responsible for calculating, withholding, and paying all taxes.

7.4. **Disputes.** The parties agree to meet and confer at mutually agreeable times to resolve any disputed amounts contained in an invoice submitted by Consultant.

7.5. **Additional Work.** Consultant shall not be reimbursed for any expenses incurred for work performed outside the Scope of Services unless prior written approval is given by the District through a fully executed written amendment. Consultant shall not undertake any such work without prior written approval of the District.

8. PREVAILING WAGES

Consultant is aware of the requirements of California Labor Code Section 1720, et seq., and 1770, et seq., as well as California Code of Regulations, Title 8, Section 16000, et seq., ("Prevailing Wage Laws"), which require the payment of prevailing wage rates and the performance of other requirements on certain "public works" and "maintenance" projects including the design and preconstruction phases of a covered public works project. Consultant shall defend, indemnify, and hold the District, its elected officials, officers, employees, and agents free and harmless form any claim or liability arising out of any failure or alleged failure of Consultant to comply with the Prevailing Wage Laws.

9. OWNERSHIP OF WRITTEN PRODUCTS

All reports, documents or other written material, and all electronic files, including computer-aided design files, developed by Consultant in the performance of this Agreement (such written material and electronic files are collectively known as "written products") shall be and remain the property of District without restriction or limitation upon its use or dissemination by District except as provided by law. Consultant may take and retain copies of such written products as desired, but no such written products shall be the subject of a copyright application by Consultant.

10. RELATIONSHIP OF PARTIES

10.1. **General.** Consultant is, and shall at all times remain as to District, a wholly independent contractor.

10.2. **No Agent Authority.** Consultant shall have no power to incur any debt, obligation, or liability on behalf of District or otherwise to act on behalf of District as an agent. Neither District nor any of its agents shall have control over the conduct of Consultant or any of Consultant's employees, except as set forth in this Agreement. Consultant shall not represent that it is, or that any of its agents or employees are, in any manner employees of District.

10.3. **Independent Contractor Status.** Under no circumstances shall Consultant or its employees look to the District as an employer. Consultant shall not be entitled to any benefits. District makes no representation as to the effect of this independent contractor relationship on Consultant's previously earned California Public Employees Retirement System ("CalPERS") retirement benefits, if any, and Consultant specifically assumes the responsibility for making such a determination. Consultant shall be responsible for all reports and obligations including, but not limited to: social security taxes, income tax withholding, unemployment insurance, disability insurance, and workers' compensation, and other applicable federal and state taxes.

10.4. **Indemnification of CalPERS Determination.** In the event that Consultant or any employee, agent, or subcontractor of Consultant providing services under this Agreement claims or is determined by a court of competent jurisdiction or CalPERS to be eligible for enrollment in CalPERS as an employee of the District, Consultant shall indemnify, defend, and hold harmless District for the payment of any employee and/or employer contributions for CalPERS benefits on behalf of Consultant or its employees, agents, or subcontractors, as well as for the payment of any penalties and interest on such contributions, which would otherwise be the responsibility of District.

11. INDEMNIFICATION

11.1. **Definitions.** For purposes of this Section 11, "Consultant" shall include Consultant, its officers, employees, servants, agents, or subcontractors, or anyone directly or indirectly employed by either Consultant or its subcontractors, in the performance of this Agreement. "District" shall include District, its board, officials, officers, agents, employees and volunteers.

11.2. **Consultant to Indemnify District.** Where the services to be provided by Consultant under this Agreement are design professional services, as that term is defined under Civil Code Section 2782.8, Consultant agrees to indemnify, defend and hold harmless, the District, its officers, officials, employees and volunteers from any and all claims, demands, costs or liability that actually or allegedly arise out of, or pertain to, or relate to the negligence, recklessness or willful misconduct

of Consultant and its agents in the performance of services under this contract, but this indemnity does not apply to liability for damages for bodily injury, property damage or other loss, arising from the sole negligence, active negligence or willful misconduct by the District, its officers, official employees, and volunteers. If it is finally adjudicated that liability is caused by the comparative active negligence or willful misconduct of the District, then Consultant's indemnification and defense obligations shall be reduced in proportion to the established comparative liability of the District and shall not exceed Consultant's proportionate percentage of fault.

As respects all acts or omissions which do not arise directly out of the performance of design professional services, including but not limited to those acts or omissions normally covered by general and automobile liability insurance, and to the full extent permitted by law, Consultant agrees to indemnity, defend and hold harmless the District, its board, officers, officials, agents, employees, and volunteers from and against any claims, demands, losses, liability of any kind or nature (including liability for claims, suits, actions, arbitration proceedings, administrative proceedings, regulatory proceedings, losses, expenses or costs of any kind, whether actual, alleged or threatened, including attorney's fees and costs, court costs, interest, defense costs, and expert witness fees) where the same arise out of, are in connection with, are a consequence of, or are in any way attributable to, in whole or in part, the performance of this Agreement by Consultant or by any individual or entity for which Consultant is legally liable, including but not limited to officers, agents, employees or sub-contractors of Consultant, excepting those which arise out of the active negligence, sole negligence or willful misconduct of the District, its board, officers, officials, employees and volunteers.

11.3. **Scope of Indemnity.** Personal injury shall include injury or damage due to death or injury to any person, whether physical, emotional, consequential or otherwise, Property damage shall include injury to any personal or real property. Consultant shall not be required to indemnify District for such loss or damage as is caused by the sole active negligence or willful misconduct of the District. If it is finally adjudicated that liability is caused by the comparative negligence or willful misconduct of an indemnified party, then Consultant's indemnification obligation shall be reduced in proportion to the established comparative liability.

11.4. **Waiver of Statutory Immunity.** The obligations of Consultant under this Section 11 are not limited by the provisions of any workers' compensation act or similar act. Consultant expressly waives its statutory immunity under such statutes or laws as to District.

11.5. **Indemnification by Subcontractors.** Consultant agrees to obtain executed indemnity agreements with provisions identical to those set forth here in this Section 11 from each and every subcontractor or any other person or entity involved in the performance of this Agreement on Consultant's behalf.

11.6. **Insurance Not a Substitute.** District does not waive any indemnity rights by accepting any insurance policy or certificate required pursuant to this Agreement. Consultant's indemnification obligations apply regardless of whether or not any insurance policies are determined to be applicable to the claim, demand, damage, liability, loss, cost or expense.

11.7. **Civil Code.** The parties are aware of the provisions of Civil Code 2782.8 relating to the indemnification and the duty and the cost to defend a public agency by a Design Professional and agree that this Section 11 complies therewith.

12. INSURANCE

12.1. **Insurance Required.** Consultant shall maintain insurance as described in this section and shall require all of its subcontractors, consultants, and other agents to do the same. Approval of the insurance by the District shall not relieve or decrease any liability of Consultant Any requirement for insurance to be maintained after completion of the work shall survive this Agreement.

12.2. **Documentation of Insurance.** District will not execute this agreement until it has received a complete set of all required documentation of insurance coverage. However, failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them. Consultant shall file with District:

- Certificate of Insurance, indicating companies acceptable to District, with a Best's Rating of no less than A:VII showing. The Certificate of Insurance must show the Montecito Sanitary District, its board of directors, commissions, officers, and employees of Montecito Sanitary District as additional insured parties. The Certificate of Insurance must include the following reference: [insert project name]
- Documentation of Best's rating acceptable to the District.
- Original endorsements effecting coverage for all policies required by this Agreement.

12.3. **Coverage Amounts.** Insurance coverage shall be at least in the following minimum amounts:

- Professional Liability Insurance: $1,000,000 per claim
  $2,000,000 aggregate

- General Liability:
  - General Aggregate: $2,000,000
  - Products Comp/Op Aggregate $2,000,000
  - Personal & Advertising Injury $1,000,000

- Each Occurrence $1,000,000
- Fire Damage (any one fire) $ 50,000
- Medical Expense (any 1 person) $ 5,000

- Workers' Compensation:
  - Workers' Compensation Statutory Limits
  - EL Each Accident $1,000,000
  - EL Disease - Policy Limit $1,000,000
  - EL Disease - Each Employee $1,000,000

- Automobile Liability
  - Any vehicle, combined single limit $1,000,000

Any available insurance proceeds broader than or in excess of the specified minimum insurance coverage requirements or limits shall be available to the District as additional insured. Furthermore, the requirements for coverage and limits shall be the greater of (1) the minimum coverage and limits specified in this Agreement, or (2) the broader coverage and maximum limits of coverage of any insurance policy or proceeds available to the named insured

12.4. **General Liability Insurance.** Commercial General Liability Insurance shall be no less broad than ISO form CG 00 01. Coverage must be on a standard Occurrence form. Claims-Made, modified, limited or restricted Occurrence forms are not acceptable.

12.5. **Worker's Compensation Insurance.** Consultant is aware of the provisions of Section 3700 of the Labor Code which requires every employer to carry Workers' Compensation (or to undertake equivalent self-insurance), and Consultant will comply with such provisions before commencing the performance of the work of this Agreement. If such insurance is underwritten by any agency other than the State Compensation Fund, such agency shall be a company authorized to do business in the State of California.

12.6. **Automobile Liability Insurance.** Covered vehicles shall include owned if any, non-owned, and hired automobiles and, trucks.

12.7. **Professional Liability Insurance or Errors & Omissions Coverage.** The deductible or self-insured retention may not exceed $50,000. If the insurance is on a Claims-Made basis, the retroactive date shall be no later than the commencement of the work. Coverage shall be continued for two years after the completion of the work by one of the following: (1) renewal of the existing policy; (2) an extended reporting period endorsement; or (3) replacement

insurance with a retroactive date no later than the commencement of the work under this Agreement.

12.8. **Claims-Made Policies.** If any of the required policies provide coverage on a claims-made basis the Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work. Claims-Made Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract of work. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, the Consultant must purchase "extended reporting" coverage for a minimum of five (5) years after completion of contract work.

12.9. **Additional Insured Endorsements.** The District, its Board of Directors, Commissions, officers, and employees of the District must be endorsed as an additional insured for each policy required herein, other than Professional Errors and Omissions, for liability arising out of ongoing and completed operations by or on behalf of the Consultant. Consultant's insurance policies shall be primary as respects any claims related to or as the result of the Consultant's work. Any insurance, pooled coverage or self-insurance maintained by the District, its elected or appointed officials, directors, officers, agents, employees, volunteers, or consultants shall be non-contributory. All endorsements shall be signed by a person authorized by the insurer to bind coverage on its behalf. General liability coverage can be provided using an endorsement to the Consultant's insurance at least as broad as ISO Form CG 20 10 11 85 or both CG 20 10 and CG 20 37.

12.10. **Failure to Maintain Coverage.** In the event any policy is canceled prior to the completion of the project and the Consultant does not furnish a new certificate of insurance prior to cancellation, District has the right, but not the duty, to obtain the required insurance and deduct the premium(s) from any amounts due the Consultant under this Agreement. Failure of the Consultant to maintain the insurance required by this Agreement, or to comply with any of the requirements of this section, shall constitute a material breach of this Agreement.

12.11. **Notices.** Consultant shall provide immediate written notice if (1) any of the required insurance policies is terminated; (2) the limits of any of the required policies are reduced; (3) or the deductible or self-insured retention is increased. Consultant shall provide no less than 30 days' notice of any cancellation or material change to policies required by this Agreement. Consultant shall provide proof that cancelled or expired policies of insurance have been renewed or replaced with other policies providing at least the same coverage. Such proof will be furnished at least two weeks prior to the expiration of the coverages. The name and address for Additional Insured Endorsements, Certificates of Insurance and Notices of Cancellation is: Montecito Sanitary District, Attn: John Weigold, General Manager, 1042 Monte Cristo Lane, Santa Barbara, CA 93108.

12.12. **Consultant's Insurance Primary.** The insurance provided by Consultant, including all endorsements, shall be primary to any coverage available to District. Any insurance or self-insurance maintained by District and/or its officers, employees, agents or volunteers, shall be in excess of Consultant's insurance and shall not contribute with it.

12.13. **Waiver of Subrogation.** Consultant hereby waives all rights of subrogation against the District. Consultant shall additionally waive such rights either by endorsement to each policy or provide proof of such waiver in the policy itself.

12.14. **Report of Claims to District.** Consultant shall report to the District, in addition to the Consultant's insurer, any and all insurance claims submitted to Consultant's insurer in connection with the services under this Agreement.

12.15. **Premium Payments and Deductibles.** Consultant must disclose all deductibles and self-insured retention amounts to the District. The District may require the Consultant to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within retention amounts. Ultimately, District must approve all such amounts prior to execution of this Agreement.

District has no obligation to pay any premiums, assessments, or deductibles under any policy required in this Agreement. Consultant shall be responsible for all premiums and deductibles in all of Consultant's insurance policies. The amount of deductibles for insurance coverage required herein are subject to District's approval.

12.16. **Duty to Defend and Indemnify.** Consultant's duties to defend and indemnify District under this Agreement shall not be limited by the foregoing insurance requirements and shall survive the expiration or early termination of this Agreement.

13. MUTUAL COOPERATION

13.1. **District Cooperation in Performance.** District shall provide Consultant with all pertinent data, documents and other requested information as is reasonably available for the proper performance of Consultant's services under this Agreement.

13.2. **Consultant Cooperation in Defense of Claims.** If any claim or action is brought against District relating to Consultant's performance in connection with this Agreement, Consultant shall render any reasonable assistance that District may require in the defense of that claim or action.

14. NOTICES

Any notices, bills, invoices, or reports required by this Agreement shall be deemed received on: (i) the day of delivery if delivered by hand, electronic mail or overnight courier service during Consultant's and District's regular business hours; or (ii) on the third business day following

deposit in the United States mail if delivered by mail, postage prepaid, to the addresses listed below (or to such other addresses as the parties may, from time to time, designate in writing).

If to District
Montecito Sanitary District
Attn: John Weigold
General Manager
1042 Monte Cristo Lane
Santa Barbara, CA 93108

If to Consultant
[Name]
[Address]
[Address]
Telephone:
Email:

With courtesy copy to:

Aleks R. Giragosian, Esq.
Montecito Sanitary District General Counsel
Colantuono, Highsmith & Whatley, PC
790 E. Colorado Blvd.., Ste. 850
Pasadena, Angeles, CA 91101
Telephone: (213) 542-5700
Email: agiragosian@chwlaw.us

15. SURVIVING COVENANTS

The parties agree that the covenants contained in paragraph 5.11 (Records), paragraph 10.4 (Indemnification of CalPERS Determination), Section 11 (Indemnity), paragraph 12.8 (Claims-Made Policies), paragraph 13.2 (Consultant Cooperation in Defense of Claims), paragraph 12.13 (Waiver of Subrogation), paragraph 12.6 (Automobile Liability Insurance), Section 15 (Surviving Covenants), Section 17 (Interpretation of Agreement), and Section 18 (General Provisions) of this Agreement shall survive the expiration or termination of this Agreement, subject to the provisions and limitations of this Agreement and all otherwise applicable statutes of limitations and repose.

16. TERMINATION

16.1. **District Termination.** District may terminate this Agreement for any reason on five calendar days' written notice to Consultant. Consultant agrees to cease all work under this Agreement on or before the effective date of any notice of termination. All District data, documents, objects, materials or other tangible things shall be returned to District upon the termination or expiration of this Agreement.

16.2. **Consultant Termination.** Consultant may terminate this Agreement for a material breach by the District of this Agreement upon 30 days' notice.

16.3. **Compensation Following Termination.** Upon termination, Consultant shall be paid based on the work satisfactorily performed at the time of termination. In no event shall Consultant be entitled to receive more than the amount that would be paid to Consultant for the full performance of the services required by this Agreement. The District shall have the benefit of such work as may have been completed up to the time of such termination.

16.4. **Remedies.** District retains any and all available legal and equitable remedies for Consultant's breach of this Agreement.

17. INTERPRETATION OF AGREEMENT

17.1. **Governing Law.** This Agreement shall be governed and construed in accordance with the laws of the State of California.

17.2. **Integration of Exhibits.** All documents referenced as exhibits in this Agreement are hereby incorporated into this Agreement. In the event of any material discrepancy between the provisions of this Agreement and its exhibits, the provisions of this Agreement shall prevail. This instrument contains the entire Agreement between District and Consultant with respect to the transactions contemplated herein. No other prior oral or written agreements are binding upon the parties. Amendments hereto or deviations herefrom shall be effective and binding only if made in writing and executed on by District and Consultant.

17.3. **Headings.** The headings and captions appearing at the commencement of the sections hereof, and in any paragraph thereof, are descriptive only and for convenience in reference to this Agreement. Should there be any conflict between such heading, and the section or paragraph thereof at the head of which it appears, the language of the section or paragraph shall control and govern in the construction of this Agreement.

17.4. **Pronouns.** Masculine or feminine pronouns shall be substituted for the neuter form and vice versa, and the plural shall be substituted for the singular form and vice versa, in any place or places herein in which the context requires such substitution(s).

17.5. **Severability.** If any term or provision of this Agreement or the application thereof to any person or circumstance shall, to any extent, be invalid or unenforceable, then such term or provision shall be amended to, and solely to the extent necessary to, cure such invalidity or unenforceability, and shall be enforceable in its amended form. In such event, the remainder of this Agreement, or 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 each term and provision of this Agreement shall be valid and be enforced to the fullest extent permitted by law.

17.6. **No Presumption Against Drafter.** Each party had an opportunity to consult with an attorney in reviewing and drafting this agreement. Any uncertainty or

ambiguity shall not be construed for or against any party based on attribution of drafting to any party.

18. GENERAL PROVISIONS

18.1. **Confidentiality.** All data, documents, discussion, or other information developed or received by Consultant for performance of this Agreement are deemed confidential and Consultant shall not disclose it without prior written consent by District. District shall grant such consent if disclosure is legally required. All District data shall be returned to District upon the termination or expiration of this Agreement.

18.2. **Conflicts of Interest.** Consultant maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Consultant, to solicit or secure this Agreement. Further, Consultant warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Consultant, any fee, commission, percentage, brokerage fee, gift or other consideration contingent upon or resulting from the award or making of this Agreement. Consultant further agrees to file, or shall cause its employees or subcontractor to file, a Statement of Economic Interest with the District's Filing Officer if required under state law in the performance of the services. For breach or violation of this warranty, District shall have the right to rescind this Agreement without liability. For the term of this Agreement, no member, officer, or employee of District, during the term of his or her service with District, shall have any direct interest in this Agreement, or obtain any present or anticipated material benefit arising therefrom.

[Add the following paragraph 18.3, 18.3.1 and/or 18.3.2, as applicable, for consulting contracts with multiple phases, or contracts that relate to, or are prior to, subsequent phases of a larger project.]

18.3. **Conflict of Interest / Multiple Phase Projects** – This Agreement is subject to the requirements of Government Code § 1097.6 relating to consultants entering into subsequent or multiple contracts for the same project..

18.3.1 Engaging or Advising on Public Contracting on behalf of the District.

A. The scope of Consultant's work is limited to conceptual, preliminary, or initial plans or specifications for a prior stage of the project.

B. Consultant shall provide access to the work, such that all bidders or proposers for the subsequent stages shall have access to the same information as Consultant, including all conceptual, preliminary, or initial plans or specifications prepared by Consultant pursuant to this Agreement.

18.3.2 Multiple Project Phases.

A. Consultant's duties and services under this Agreement shall not include preparing or assisting the District with any portion of the District's preparation of a request for proposals, request for qualifications, or any other solicitation regarding a subsequent or additional contract with the District.

B. The District shall at all times retain responsibility for public contracting, including with respect to any subsequent phase of this project. Consultant's participation in the planning, discussions, or drawing of project plans or specifications shall be limited to conceptual, preliminary, or initial plans or specifications.

C. Consultant shall cooperate with the District to ensure that all bidders for a subsequent contract on any subsequent phase of this project have access to the same information, including all conceptual, preliminary, or initial plans or specifications prepared by Consultant pursuant to this Agreement.

18.4. **Non-assignment.** Consultant shall not delegate, transfer, subcontract or assign its duties or rights hereunder, either in whole or in part, without District's prior written consent, and any attempt to do so shall be void and of no effect. District shall not be obligated or liable under this Agreement to any party other than Consultant.

18.5. **Binding on Successors.** This Agreement shall be binding on the successors and assigns of the parties.

18.6. **No Third-Party Beneficiaries.** Except as expressly stated herein, there is no intended third-party beneficiary of any right or obligation assumed by the parties.

18.7. **Time of the Essence.** Time is of the essence for each and every provision of this Agreement.

18.8. **Non-Discrimination.** Consultant shall not discriminate against any employee or applicant for employment because of race, sex (including pregnancy, childbirth, or related medical condition), creed, national origin, color, disability as defined by law, disabled veteran status, Vietnam veteran status, religion, age (40 and above), medical condition (cancer-related), marital status, ancestry, or sexual orientation. Employment actions to which this provision applies shall include, but not be limited to, the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; or in terms, conditions or privileges of employment, and selection for training. Consultant agrees to post in conspicuous places, available to employees and applicants for employment, the provisions of this nondiscrimination clause.

18.9. **Waiver.** No provision, covenant, or condition of this Agreement shall be deemed to have been waived by District or Consultant unless in writing signed by one authorized to bind the party asserted to have consented to the waiver. The waiver by District or Consultant of any breach of any provision, covenant, or condition of

this Agreement shall not be deemed to be a waiver of any subsequent breach of the same or any other provision, covenant, or condition.

18.10. **Excused Failure to Perform.** Consultant shall not be liable for any failure to perform if Consultant presents acceptable evidence, in District's sole judgment, that such failure was due to causes beyond the control and without the fault or negligence of Consultant.

18.11. **Remedies Non-Exclusive.** Each right, power and remedy provided for herein or now or hereafter existing at law, in equity, by statute, or otherwise shall be cumulative and shall be in addition to every other right, power, or remedy provided for herein or now or hereafter existing at law, in equity, by statute, or otherwise. The exercise, the commencement of the exercise, or the forbearance from the exercise by any party of any one or more of such rights, powers or remedies shall not preclude the simultaneous or later exercise by such party of any or all of such other rights, powers or remedies.

18.12. **Attorneys' Fees.** If legal action shall be necessary to enforce any term, covenant or condition contained in this Agreement, the prevailing party shall be entitled to an award of reasonable attorneys' fees and costs expended in the action.

18.13. **Venue.** The venue for any litigation shall be Santa Barbara County, California and Consultant hereby consents to jurisdiction in Santa Barbara County for purposes of resolving any dispute or enforcing any obligation arising under this Agreement.

18.14. **Counterparts; Electronic Signatures.** This Agreement may be signed in one or more counterparts, each of which shall be deemed an original, but all of which together shall be deemed one and the same instrument. The parties acknowledge and agree that this Agreement may be executed by electronic signature, which shall be considered as an original signature for all purposes and shall have the same force and effect as an original signature. Without limitation, "electronic signature" shall include faxed or emailed versions of an original signature, electronically scanned and transmitted versions (e.g., via pdf) of an original signature, or a digital signature.

(Signature page follows)

TO EFFECTUATE THIS AGREEMENT, the parties have caused their duly authorized representatives to execute this Agreement on the dates set forth below.

"DISTRICT" Montecito Sanitary District **Authorized Signatories:**	"CONSULTANT" [Name of Company or Individual]
Signature:_____	Signature:_____
Printed:_____	Printed:_____
Title: _____	Title: _____
Date: _____	Date: _____

Attest:

Signature:_____

Printed:_____

Title: District Clerk

Date: _____

Approved as to Form:

Signature:_____

Printed:_____

Title: District Counsel

Date: _____

EXHIBIT A

SCOPE OF SERVICES

[Insert Scope of Work text here]
[Do not attach vendor's proposal]

EXHIBIT B

FEE SCHEDULE

[INSERT FEE SCHEDULE TEXT HERE]
[DO NOT ATTACH VENDOR'S PROPOSAL]

1. CAMPAIGN CONTRIBUTION DISCLOSURE PROVISIONS

Cities are subject to the campaign disclosure provisions detailed in Government Code Section 84308.

Please carefully read the following information to determine if the provisions apply to you. If you determine that the provisions are applicable, the Campaign Disclosure Form must be completed and returned to the District with your application.

1. No District board member shall accept, solicit, or direct a contribution of more than $500 from any party,[1] financially interested participant,[2] or agent[3] while a proceeding is pending or for 12 months subsequent to the date a final decision is rendered by the District. This prohibition commences when your application has been filed, or the proceeding is otherwise initiated.

2. A party to a District proceeding shall disclose on the record of the proceeding any contribution of more than $500 made to any board member by the party, or agent, during the preceding 12 months. No party to or participant in a District proceeding shall make a contribution of more than $500 to a board member during the proceeding and for 12 months following the date a final decision is rendered by the District. No agent to a party or participant shall make a contribution in any amount to a board member during the proceeding and for 12 months following the date a final decision is rendered by the District.

3. Prior to rendering a decision on a District proceeding, any board member who received contribution of more than $500 within the preceding 12 months from any party, or agent, to a proceeding shall disclose that fact on the record of the proceeding, and shall be disqualified from participating in the proceeding. However, if any board member receives a contribution that otherwise would require disqualification, and returns the contribution within 30 days of making the decision, or knowing about the contribution and the relevant proceeding, whichever comes last, that board member shall be permitted to participate in the proceeding.

[1] "Party" is defined as any person who files an application for, or is the subject of, a proceeding.[2] "Participant" is defined as any person who actively supports or opposes a particular decision in a proceeding.

[3] "Agent" is defined as a person who represents a party in connection with a proceeding for compensation who appears before or otherwise communicates with the District for the purpose of influencing the proceeding. If an individual acting as an agent also is acting as an employee or member of a law, architectural, engineering, or consulting firm, or a similar entity or corporation, both the individual and the entity or corporation are agents. When a closed corporation is a party to a proceeding, the majority shareholder is subject to these provisions.

To determine whether a campaign contribution of more than $500 has been made by you or your agent to a board member within the preceding 12 months, all contributions made by you or your agent during that period must be aggregated.

Names of current District board members available on the District's website. If you have questions about Government Code Section 84308, FPPC regulations, or the Campaign Disclosure Form, please contact the District Clerk.

2. CAMPAIGN CONTRIBUTION DISCLOSURE FORM

(a) Document:

- □ License
- □ Lease
- □ Permit
- □ Franchise
- □ Other Contract
- □ Other Entitlement

Name and address of any party, participant, or agent who has contributed more than $500 to any board member within the preceding 12 months:

1. _____
2. _____
3. _____

(b) Date and amount of contribution:

Date _____ Amount $ _____

Date _____ Amount $ _____

Date _____ Amount $ _____

(c) Name of board member to whom contribution was made:

1. _____
2. _____
3. _____

(d) I certify that the above information is provided to the best of my knowledge.

Printed Name _____

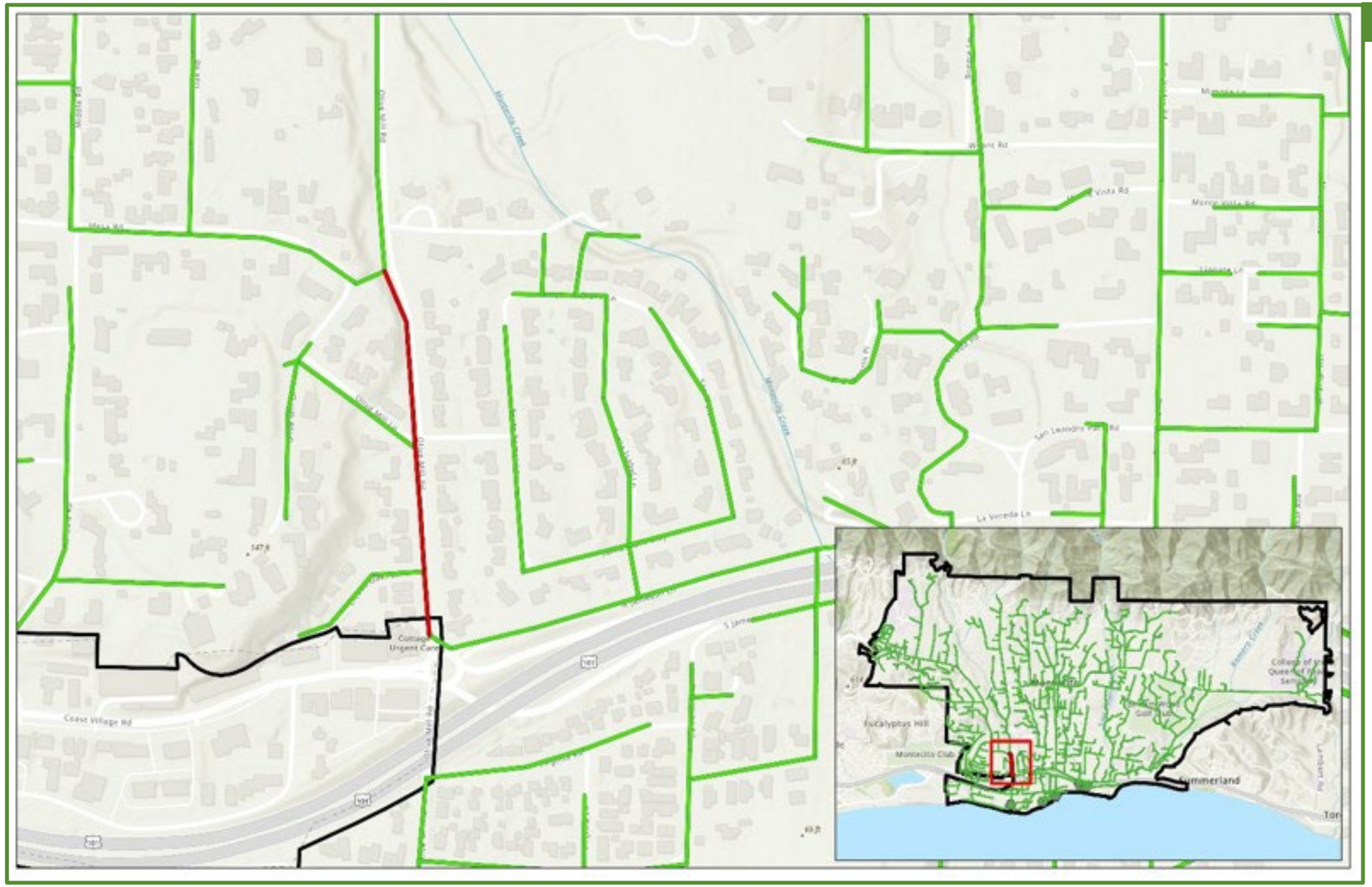
Signature _____

Date _____ Phone _____

To be completed by District:

Document No: _____

CIP #2: Gravity Main Upsizing & Replacement — Olive Mill Road



DRY-WEATHER CAPACITY DEFICIENCY

LOCATION

Olive Mill Road, from manhole N8M32 to manhole N8M39 near Eleven Oaks Lane

PURPOSE

Hydraulic model shows existing sewer mains flow about 50% full during dry-weather and 100% full during 10-year storm event. Project will increase system capacity.

PROJECT DESCRIPTION

Upsize six existing vitrified clay pipe (VCP) 8-inch gravity sewer main segments (1,131 feet, or 0.20 miles) to 12-inch polyvinyl chloride (PVC) piping.

PHASE	ESTIMATED COST	DURATION
Design/Planning	$130,000	9 months
Construction	$750,000	6 months

Figure 5.2. DWF d/D Capacity (Current Flows)

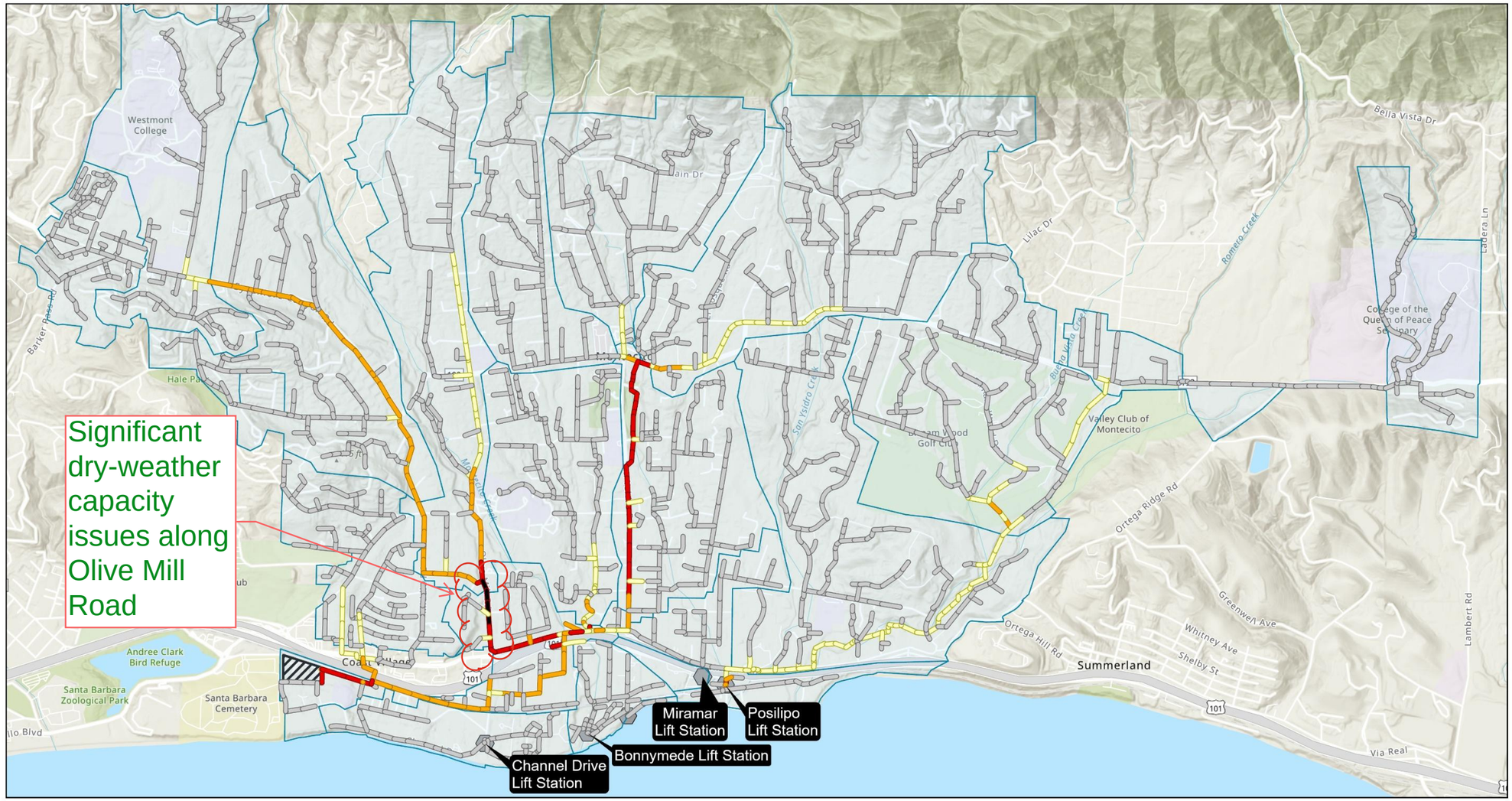


Figure 5.3. DWF d/D Capacity (Current Flows and Additional Septic-to-Sewer Conversion Flows)

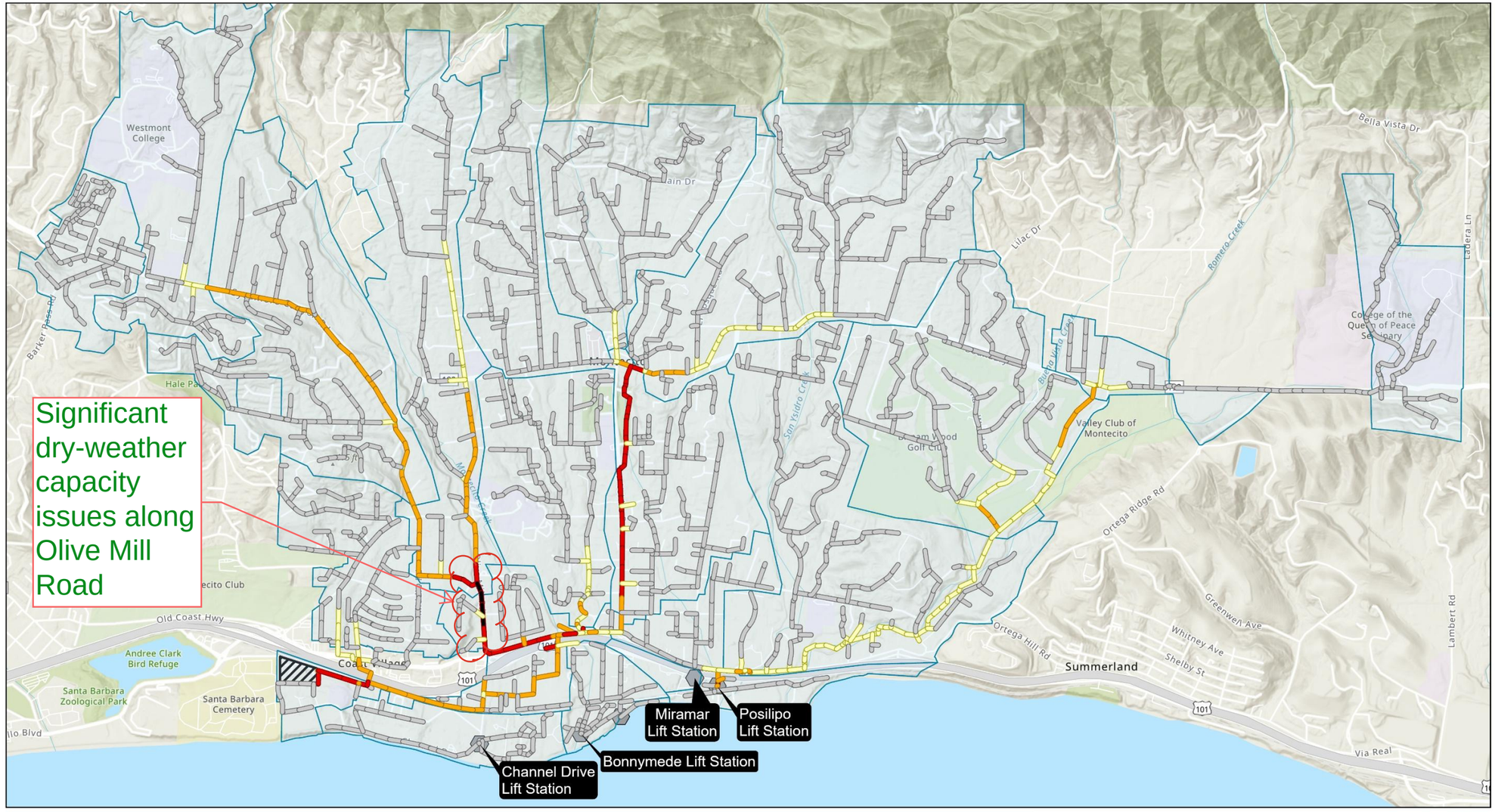
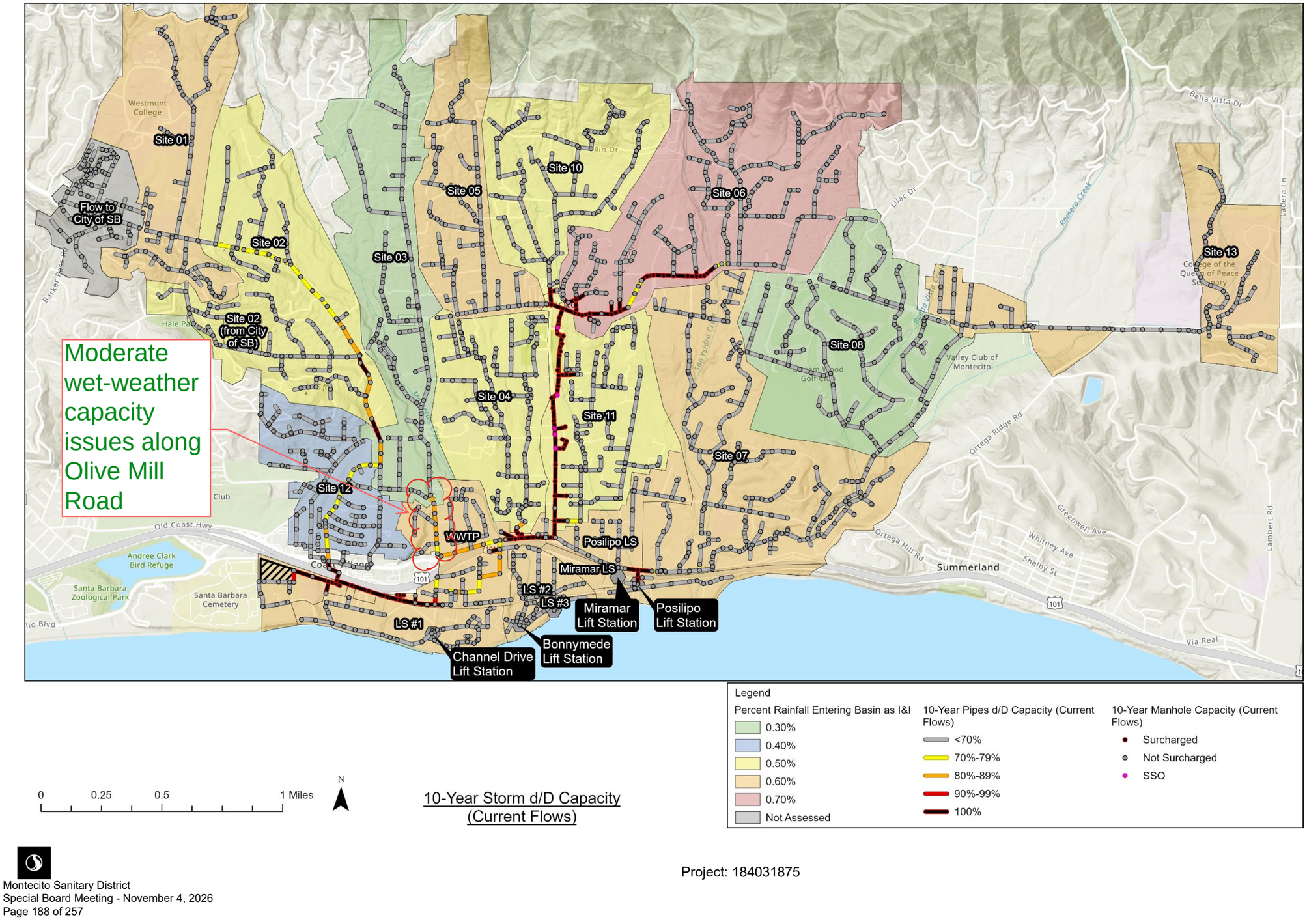
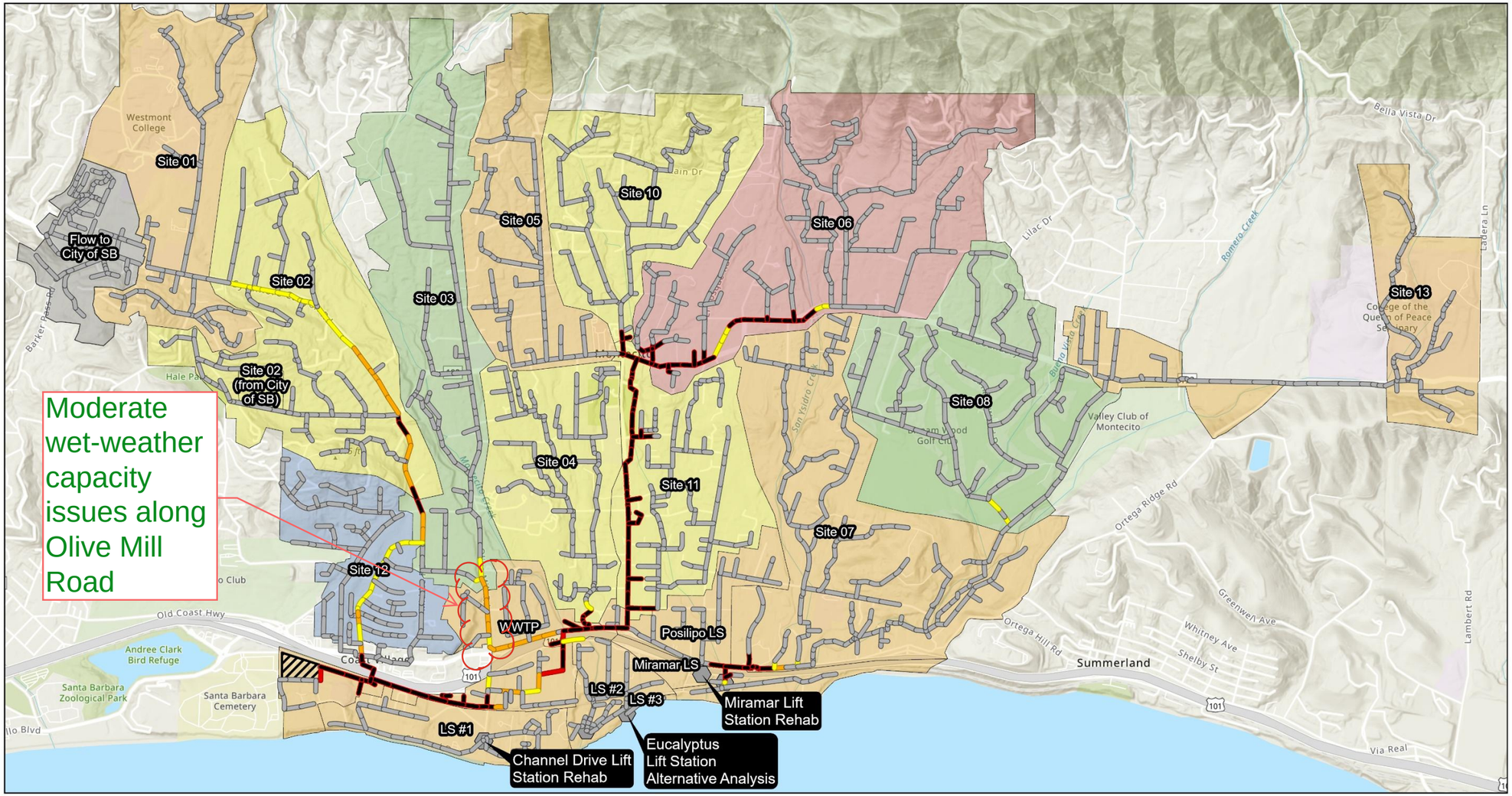


Figure 5.4. 10-Year Storm Flow d/D Capacity (Current Flows)



10-Year Storm d/D Capacity (Current Flows)

Figure 5.5. 10-Year Storm Flow d/D Capacity (Current and Additional Septic-to-Sewer Conversion Flows)



10-Year Storm d/D Capacity
(Current + Additional Septic-to-Sewer Conversion Flows)







PREPARED FOR THE

MONTECITO SANITARY DISTRICT

October 28, 2026

PROPOSAL FOR

Olive Mill Road Pipeline Capacity Improvements

Project No. C009

Proposal No. 26002639

201 N Calle Cesar Chavez,
Suite 300, Santa Barbara, CA 93103

805.692.6921 Office

www.bkf.com

October 28, 2026

Montecito Sanitary District
Attention: Bryce Swetek, PE, Engineering Manager
1042 Monte Cristo Lane
Santa Barbara, CA 93108

RE: Proposal for Olive Mill Road Pipeline Capacity Improvements

Dear Mr. Swetek,

BKF Engineers (BKF) appreciates the opportunity to submit this proposal for Olive Mill Road Pipeline Capacity Improvements (Project) for the Montecito Sanitary District (District). We understand the District desires construction-ready plans, specifications, and cost estimate (PS&Es) for the Project, which is intended to address current and future capacity constraints within the District's sanitary sewer collection system. The Project extends approximately 1,300 feet along Olive Mill Road, from the intersection of Olive Mill Road and Mesa Road to near the intersection of Olive Mill Road and North Jameson Lane. Potential alternatives for capacity improvements include, but are not limited to:

- Upsize approximately 1,300 feet of existing 8-inch and 10-inch diameter CIPP-lined VCP pipeline to 12-inch PVC pipe via trenchless technology or conventional construction.
- Install approximately 1,300 feet of new 12-inch PVC pipe and abandon the existing pipeline.
- Install approximately 1,300 feet of new 8-inch PVC pipe and maintain the existing pipeline.

We understand this proposal is for design services only.

Our Team's Core Benefits

PROFESSIONAL AND QUALIFIED TEAM

Leading the Project team is Project Manager, **Tyler Hunt, PE**. Tyler brings over 26 years of experience in water and wastewater engineering, specializing in wastewater conveyance, pipeline rehabilitation and replacement, and municipal infrastructure improvements. His qualifications are particularly relevant to this project, having previously served as Project Manager for the District's US 101 Sewer Crossing CIPP Rehabilitation and Roundabouts Sewer Relocations at San Ysidro Road and Olive Mill Road. Tyler has also managed numerous sewer main replacement and capacity improvement projects involving pipeline upsizing, trenchless construction, utility coordination, traffic control, and permitting. His familiarity with the District's infrastructure, combined with extensive experience in alternatives evaluation, engineering design, and construction support, positions him to deliver practical, cost-effective solutions that address the District's current and future wastewater conveyance needs.

We have also teamed with Yeh & Associates (YEH) for geotechnical engineering.

FIRM DETAILS

Legal Name
BKF Engineers

Firm Ownership Type
C-Corporation

Year Firm Established
1915

California Department of Industrial Relations (DIR)
No. 1000002096

Local Office
201 N. Calle Cesar Chavez
Suite 300
Santa Barbara, CA 93103
805.692.6921

Project Manager
Tyler Hunt, PE
805.592.2078 Mobile
tyler.hunt@bkf.com

Authorized Signature
Nick Panofsky, PE, QSD
Principal-in-Charge and Quality Assurance/Quality Control Manager
805.722.2734 Mobile
nick.panofsky@bkf.com

HEADQUARTERS OFFICE

2100 Franklin Street
Suite 4C
Oakland, CA 94612

510.899.7300 Office

www.bkf.com

PROJECT APPROACH

Our approach emphasizes early collaboration with the District, thorough investigation of existing conditions, and proactive identification of project challenges. BKF will evaluate pipeline capacity improvement alternatives, including conventional and trenchless construction methods, considering cost, constructability, utility conflicts, geotechnical conditions, environmental requirements, and impacts to surrounding residents and traffic. Leveraging our multidisciplinary expertise in wastewater engineering, surveying, environmental planning, permitting, and construction management, we will address potential risks early and streamline the design process. Through close coordination with the District and comprehensive quality reviews, we will deliver cost-effective, constructible, and bid-ready plans, specifications, and cost estimates that address current capacity deficiencies while accommodating future wastewater flows.

SIMILAR PROJECT EXPERIENCE

Our team's relevant experience, detailed in Section 1, includes:

- Pescadero Sewer Project, Carmel Area Wastewater District
- Sewer Crossing at US 101, Montecito Sanitary District
- Ventura Road and Rice Avenue Sewer Project, City of Oxnard
- North Rice Road Septic to Sewer Project, Ojai Valley Sanitary District

In summary, BKF is confident that our experienced team, technical expertise, and collaborative approach will provide exceptional service to the District. If you have any questions regarding our submittal, please contact Project Manager, **Tyler Hunt, PE** at 805.592.2078 or tyler.hunt@bkf.com. We look forward to the opportunity to continue supporting the District.

Sincerely,

BKF

Nick Panofsky, PE, QSD
Principal-in-Charge and QA/QC Manager

Tyler Hunt, PE
Project Manager



CONTENTS

SECTION 1. Experience and Qualifications 5

SECTION 2. Project Understanding and Approach 17

SECTION 3. Estimated Schedule 30

SECTION 4. Estimated Level of Effort 31

SECTION 5. Conflicts 34

SECTION 6. Quality Assurance/Quality Control 35

SECTION 7. Assumptions and Additional Comments 36

SECTION 8. Contract Requirements 37

APPENDIX A. Resumes A-1

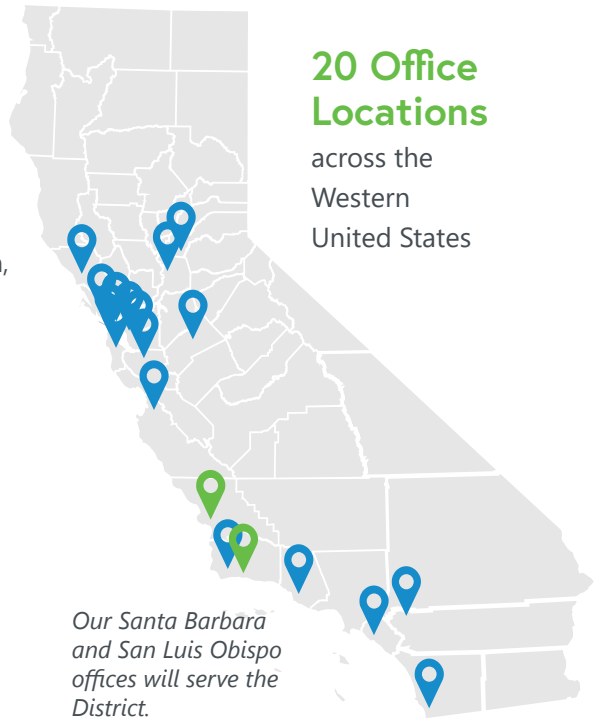
SECTION 1.

Experience and Qualifications

Since 1915, BKF has been a trusted leader in planning, engineering, surveying, and construction management services across the Western United States.

Our firm combines deep technical resources with a collaborative approach to deliver innovative, sustainable solutions that bring community visions to life.

BKF offers a diverse portfolio of services spanning the transportation, water, government, and land development markets. Guided by our mission to inspire our team, achieve our clients' vision, and positively impact communities, we integrate strategic planning, risk mitigation, and value engineering to ensure every project achieves its goals.



20 Office Locations across the Western United States

Our Santa Barbara and San Luis Obispo offices will serve the District.

BKF and MNS Engineers, Inc. are now merged and legally partnered to deliver your projects as one integrated team. This partnership brings together two trusted firms with complementary strengths, deeper agency experience, and a broader geographic reach. Clients benefit from enhanced capabilities, expanded resources, and the same reliable teams they already know. By uniting our expertise, we provide faster, smarter delivery and holistic solutions that create enduring value for the communities we serve.

BKF has operated under its current name since 2001.

SERVICES

- Engineering
- Construction Management
- Surveying
- Planning

MARKETS

- Water
- Transportation
- Government
- Land Development

REGIONS

- Central California
- Southern California
- Northern California
- Pacific Northwest

BKF STATISTICS

900+
EMPLOYEES

FOUNDED IN 1915

275
PROFESSIONAL ENGINEERS AND SURVEYORS

20
WEST COAST OFFICES

Wastewater

BKF provides innovative solutions for wastewater management, treatment, and infrastructure development for both public and private sector projects. Our team of experts collaborates closely with local service providers, utility providers, and regulatory agencies to assess site conditions, design effective systems, and promote compliance with environmental regulations and local standards. We focus on delivering sustainable, cost-effective wastewater solutions that protect public health, preserve infrastructure integrity, and promote long-term system reliability.

With extensive experience in designing wastewater systems for municipalities, industrial facilities, and private developments, we offer a broad range of services, including the design of wastewater collection and conveyance systems, pump stations, sewer rehabilitation, treatment facilities, and advanced treatment technologies. We also provide system assessments, capacity evaluations, and rehabilitation planning for existing infrastructure.

Civil Engineering Expertise

Our experienced licensed civil engineers and technical support staff are available for your project needs. Our engineers are experienced in water resources, wastewater, transportation, and public site improvement projects. We use the latest computer-aided design and drafting (CADD) equipment and technologies to prepare plans, specifications, and estimates (PS&Es). Our engineering and technical teams stay current with material and construction method developments as well as public agency specification and code requirements.

We offer the District our in-depth project experience and a high level of engineering design skill for all project phases:

- Detailed design, specifications, and Engineer's Cost Opinions
- Preparation of contract documents—PS&Es
- Preliminary feasibility studies
- Engineering reports
- Stormwater Pollution Prevention Plan (SWPPP) preparation
- Permitting with counties, cities, and other regulatory agencies
- Pre-bid and bid phase assistance
- Coordination with project stakeholders and utilities



WASTEWATER SERVICES

- **Lift Station Design and Rehabilitation**
- **Sewer System Rehabilitation and Replacement**
- **Collection System Design**
- **Treatment Plant Design**
- **Treatment Process Optimization**
- **System Capacity Assessments**
- **Infiltration and Inflow (I&I) Analysis**
- **Advanced Treatment Technology Design**

- Requirements for funding from federal, state, and local resources
- Constructability review
- Construction administration
- Cost estimates
- Project commissioning and decommissioning
- Plan check and peer review

Permitting and Coordination

Most of our projects require extensive coordination with permitting agencies. We have proven and recognized experience in coordinating projects that involve communication with multiple agencies, utilities, and permitting for encroachment and environmental protection. Many of our projects are constructed within waterways and environmentally sensitive areas.

Construction Management

A leader in construction management (CM) and inspection services, we offer a depth of staff resources and a reputation for success in meeting project quality, budget, and schedule goals. BKF focuses on providing quality CM and inspection services for transportation infrastructure projects, including roads, bridges, utilities, drainage, and bicycle and pedestrian pathways. Many of our projects involve various types of funding, which requires detailed record keeping and administration; therefore, we have modeled our construction administration procedures to meet federal and state funding requirements.

BKF's CM division has hands-on experience, including several projects within Santa Barbara County. Throughout the past decade alone, BKF has successfully managed over $2B of capital improvement projects.

Land Surveying

Our land surveying department is comprised of municipal surveying, right-of-way (R/W) engineering, design surveying, and construction staking services.

R/W Engineering Services. Our R/W Engineering Division has excellent working knowledge of policies and procedures regarding R/W acquisition and tailors our products to match local agency requirements. We also have experience in providing early project support preparing R/W datasheets and associated cost estimates. We also provide monument preservation services typical for roadway construction projects.

Design Surveying Services. Our Design Surveying Division has extensive experience in R/W, boundary and easement retracement, ground, aerial and bathymetric topographic mapping, utility mapping, as-builts, and three-dimensional (3D) scanning survey data collection. Typical projects encompass roadways, bridges, pipelines, and municipal projects including water, recycled water, and wastewater processing and treatment plants.

Construction Surveying Services. Our Construction Surveying division provides construction surveying for water treatment facilities, pipelines, roadways, bridges, retaining walls, and multiple-story buildings. We provide stability monitoring for projects requiring excavation near adjacent structures and monument preservation services as needed.



Subconsultant Qualifications

BKF has supplemented our in-house expertise with the addition of the following highly qualified consultant.

Role: Geotechnical Engineering

Address: 632 East Thompson Boulevard, Ventura, CA 93001

DIR Number: 1000030005

Yeh and Associates, Inc. (YEH) is focused on providing solutions for geotechnical services for the design and construction of public infrastructure including roads, utilities, reservoirs, bridges, and structures. YEH operates two offices in California (Ventura, Grover Beach) and six offices in Colorado. YEH's California offices are staffed with 14 geo-professionals to service projects for local, state and federal clients. YEH's geotechnical engineering group have been working on projects throughout the coast of California for over 25 years and focus specifically on geotechnical engineering, and engineering geology.

Contact: Loree Berry, PE • 805.481.9590, ext. 271 • Lberry@yeh-eng.com

BKF and YEH Collaboration

YEH has provided geotechnical engineering on projects as a subconsultant to BKF since 2015. A few projects include:

Agency	Project Name
Goleta Sanitary District	Robin Hill Road Sewerline Replacement
City of Goleta	Ellwood Beach Drive Drainage Repair
Los Alamos Community Services District	WWTP Upgrade Preliminary Engineering Report
La Cumbre Mutual Water Company	Preliminary Engineering for Reservoir No. 3 Rehabilitation
Casitas Municipal Water District	Matilija Conduit Emergency Repair
	Lake Casitas Wastewater System
	2023 Robles Diversion Emergency Repair
City of Santa Paula	Mesa Tank Replacements
County of San Luis Obispo	Lopez Terminal Reservoir Storm Damage Repair
	Oak Shores Sewer Interceptor Bypass
Camrosa Water District	CM and Inspection for Fan Press Dewatering Facility
United Water Conservation District	Well 14 Upgrade Project
Vandenberg Space Force Base	Oak Mountain Landslide Repair and Redesign
	Mobile Optics Facility at Santa Ynez Peak
	Water Tank Replacement at Building 1974
Ojai Valley Sanitary District	North Rice Road Septic to Sewer
Calleguas Municipal Water District	East Portal Isolation Enhancements-Construction Phase Services
City of Atascadero	Traffic Way Sewer Improvements
Castroville Community Services District	Emergency Well No. 6 and Reservoir
	Moss Landing Sewer Improvement Project
Santa Clarita Valley Water District	Market Place Pipeline
County of Monterey	US 101 Calle de Quien Sabe Slope Evaluation

RELEVANT PROJECT EXAMPLE AND REFERENCE



KEY SIMILARITIES

- Gravity sewer replacement and upsizing
- Pipeline alternatives and existing infrastructure
- 8,000 LF of pipe bursting
- Engineering design, permitting, and easement constraints

Carmel Area Wastewater District

Pescadero Road Sewer Main Replacement

Description

BKF is providing planning, design, permitting, and public outreach services for the replacement of an existing gravity sewer near Pescadero Road, within the city limits of Carmel-by-the-Sea, and unincorporated Monterey County. The existing pipeline and associated manholes were installed 80-90 years ago and cross several properties along the existing alignment including private residential properties and property owned by the Del Monte Forest Conservancy. The ground surface in this area is steeply sloped, unstable, and currently inhabited by a variety of plant and animal species, including Monterey pines and coast live oaks.

The existing 6-inch diameter vitrified clay pipe (VCP) sewer main has been damaged by tree falls and is in poor condition. These condition issues have caused several sanitary sewer overflows. Frequent maintenance is required, and maintenance crews have had difficulty accessing the sewer main for maintenance. The sewer main conveys wastewater from an estimated 275 parcels, primarily residential, within the district's service area. Of these parcels, 19 are located along Pescadero Road and have service laterals directly connected to the existing sewer main.

The gravity sewer is expected to be replaced with 8-inch polyvinyl chloride (PVC) pipe in the Pescadero Road right-of-way (R/W). The existing sewer will be abandoned in place. Residences currently connected to the sewer will be required to install pumped lateral connections to convey wastewater to the new main within Pescadero Road.

The project is currently being circulated for public bids. The gravity sewer is expected to be replaced with 8-inch PVC pipe in the Pescadero Road R/W, including 8,000 feet of pipe bursting, and the existing sewer slip lined with 4-inch HDPE pipe.

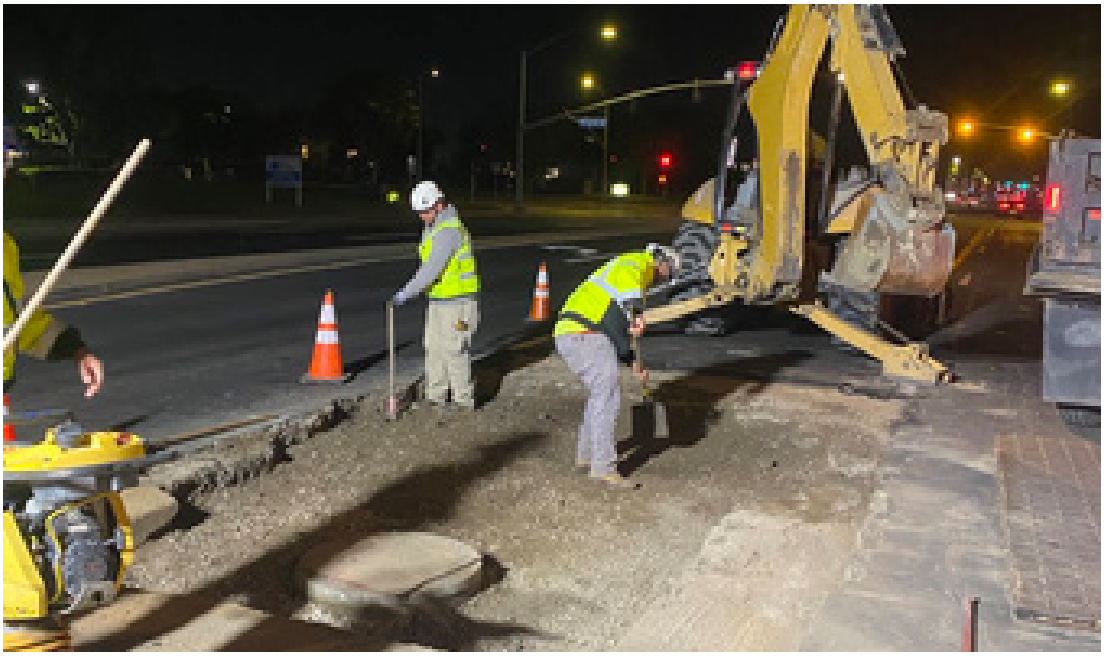
DATES
2021 - 2026

PROJECT OUTCOME
In progress

KEY TEAM MEMBERS
Nick Panofsky, Principal-in-Charge
Tyler Hunt, Project Manager

REFERENCE
Jeff Bandy, Principal Engineer
831.257.0436
bandy@cawd.org

RELEVANT PROJECT EXAMPLE AND REFERENCE



City of Oxnard

Ventura Road and Rice Avenue Sewer Project

Description

The City of Oxnard owns, operates, and maintains over 400 miles of sanitary sewer mains within its collection system. To improve system capacity and reliability, the City identified two locations requiring sewer main replacement and upsizing. Improvements along Rice Avenue, between Latigo Avenue and Camino Del Sol, included the installation of approximately 1,900 linear feet of new 24-inch sewer main and seven polymer concrete manholes to replace the existing 18-inch sewer main. Along Ventura Road, between Doris Avenue and Little Farms Road, improvements included approximately 3,082 linear feet of new 15-inch sewer main and 15 polymer concrete manholes to replace the existing 10-inch sewer main. Both locations required abandonment of existing sewer mains and manholes, connections to the existing sewer system, and reconnection of existing laterals. The project scope included topographic surveying, preparation of plans, specifications, and contract documents for competitive bidding, permitting support, and engineering services during bidding and construction.

DATES
2021 - 2024

PROJECT OUTCOME
Completed on schedule and budget

KEY TEAM MEMBERS
Tyler Hunt, Project Manager

REFERENCE
Jorge Espinoza,
Project Manager
805.200.5415
jorge.espinoza@oxnard.org

KEY SIMILARITIES

- Sewer main replacement and upsizing
- Existing sewer infrastructure
- Engineering design and permitting

RELEVANT PROJECT EXAMPLE AND REFERENCE



Ojai Valley Sanitary District

North Rice Road Septic to Sewer Project

Description

The Ojai Valley Sanitary District is undertaking a septic-to-sewer conversion project for the North Rice Road community in the Meiners Oaks area of Ventura County. The project aims to connect 48 currently unsewered residential parcels to the District's existing wastewater collection system, reducing reliance on onsite septic systems and improving groundwater and surface water quality. Preliminary improvements include approximately 6,100 linear feet of gravity sewer, a new wastewater lift station, 2,500 linear feet of force main, and residential service laterals, including individual pumping systems where necessary. BKF's proposed responsibilities include preparing a Project Engineering Report, evaluating sewer alignments and hydraulic capacity, developing cost-effective design alternatives, and preparing 30% and 60% plans, specifications, and construction cost opinions. Additional services include topographic and boundary surveying, easement documentation, environmental assessments and CEQA compliance, geotechnical investigations, utility potholing, and preparation of the Clean Water State Revolving Fund (CWSRF) environmental package. BKF will also provide agency and stakeholder coordination, quality assurance/quality control, and constructability reviews to support the project's successful implementation.

DATES
2026 - current

PROJECT OUTCOME
Currently on schedule and budget

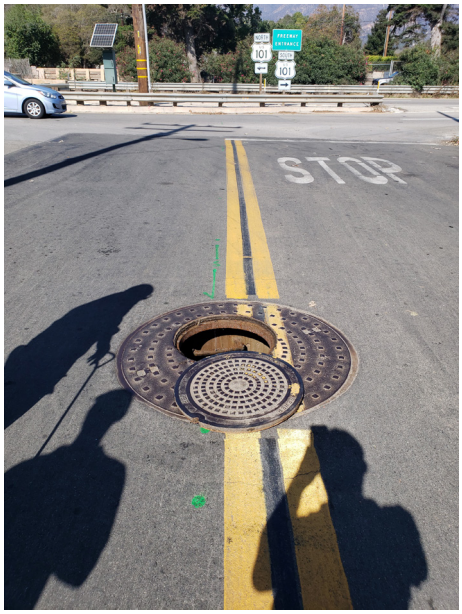
KEY TEAM MEMBERS
Tyler Hunt, Project Manager
Loree Berry, YEH

REFERENCE
Liz Dubrin, Project Manager
805.646.5548
liz.dubrin@ojaisan.org

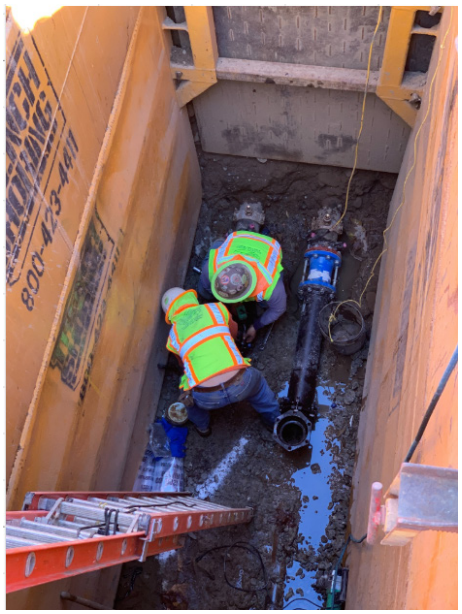
KEY SIMILARITIES

- Gravity sewer pipeline design
- Alternatives analysis and trenchless construction
- Multidisciplinary engineering and design

ADDITIONAL PROJECT EXPERIENCE







Montecito Sanitary District

US 101 Sewer Crossing CIPP Rehabilitation

Description

This project was part of the US 101 Freeway widening effort in Montecito. The project included the realignment of an existing 12-inch gravity sewer which redirects wastewater from the eastern portion of the district to the recently constructed Miramar Lift Station. The new crossing design included a 12-inch polyvinyl chloride (PVC) gravity sewer extending from manhole MH 1279-B on North Jameson Lane west to a new manhole adjacent to MH 1026-5B at Hixon Road. Wastewater then extends south across US 101 and installed within a 24-inch steel casing to the Miramar Lift Station. The existing sewer would then be abandoned in compliance with Caltrans standards and portions removed as needed to construct the new sewer and freeway widening.

Upon completion of the contract documents and the bidding phase, it was determined an alternative was preferred due to the high cost of construction for the trenchless freeway crossing.

After completion of an alternative analysis, it was determined instead to protect the existing facilities in place via cured in place pipe (CIPP) within the gravity sewer and force main pipelines.

BKF completed the contract documents for the lining project. Construction was completed in 2023 and included the relocation of one above-ground force mains across Oak Creek and the realignment of the existing force mains around an existing manhole. BKF provided design and construction support.

DATES
2022 - 2023

KEY TEAM MEMBERS
Tyler Hunt, Project Manager

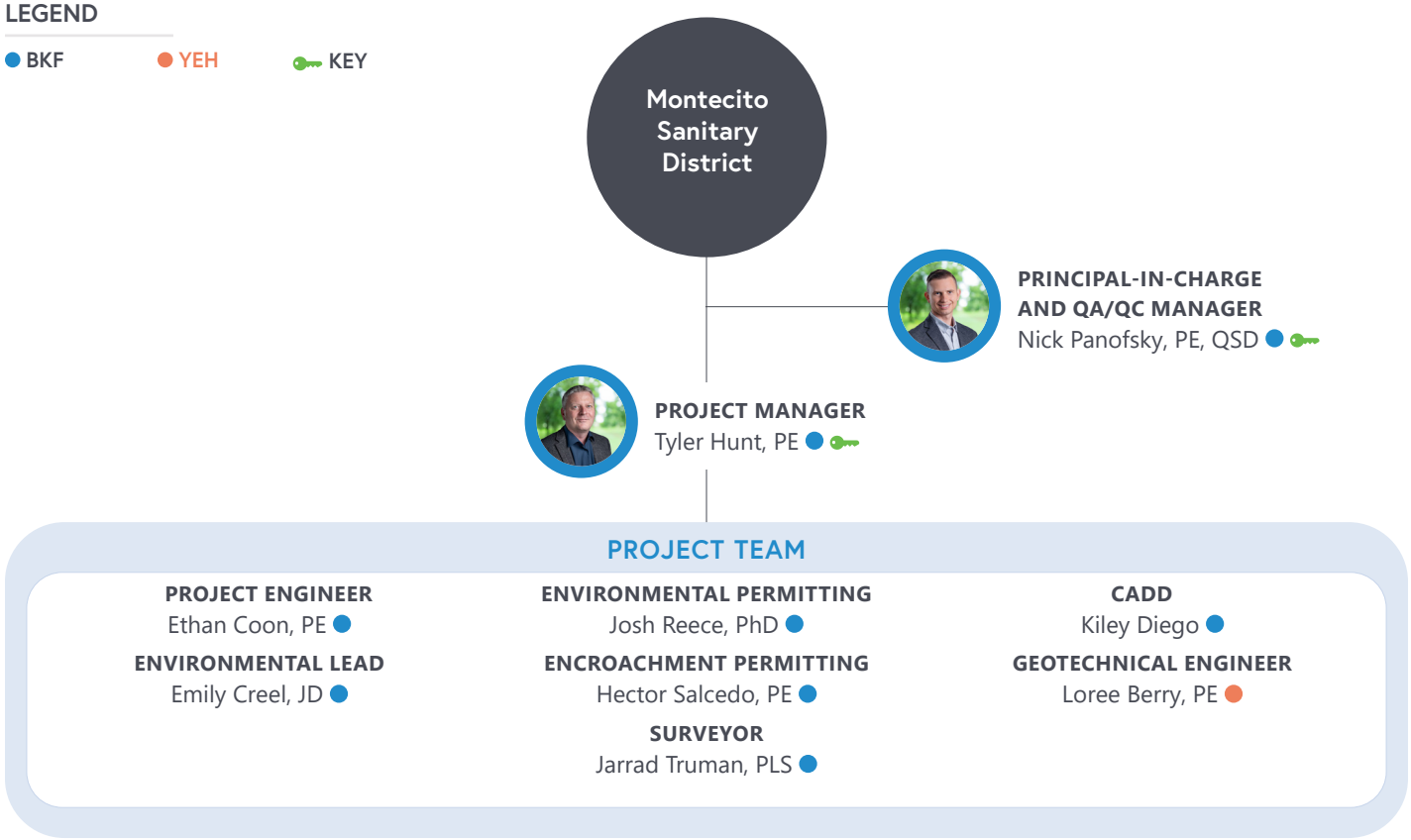
PROJECT OUTCOME
Completed on budget and schedule

RELEVANCE

- Local sewer infrastructure experience
- Alternatives analysis and trenchless rehabilitation
- Engineering design and agency coordination

Organizational Chart

>> *DETAILED RESUMES can be found in **Appendix A**.*



Staff Qualifications

Name, Role, and Office	Credentials and Education	Responsibilities
Tyler Hunt, PE *Project Manager* BKF Office: San Luis Obispo	» Professional Civil Engineer, CA No. 74580 » BS, Agricultural Systems Management, California Polytechnic State University, San Luis Obispo, CA	Tyler will serve as the Project Manager and lead the team to ensure work is progressing, resources are allocated, communication with the District is maintained, the review of alternatives is comprehensive, and the Project completed on schedule and budget. He has over 26 years of experience in the water resources industry.

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 202 of 257

Name, Role, and Office	Credentials and Education	Responsibilities
Nick Panofsky, PE, QSD *Principal-in-Charge and QA/QC Manager* BKF Office: San Luis Obispo	» Professional Civil Engineer, CA No. 75006 » Qualified SWPPP Developer, CA No. 75006 » MBA, Shidler College of Business, University of Hawaii, HI » BS, Environmental Engineering, California Polytechnic State University, San Luis Obispo, CA	Nick brings over 20 years of water resources engineering experience, including sewer pipeline replacement and rehabilitation. He will provide executive oversight, technical guidance, and QA/QC reviews of design alternatives, plans, specifications, and cost estimates to ensure technical accuracy, constructability, and compliance with District standards. His previous experience with the District will help minimize design risks and deliver high-quality, construction-ready documents.
Ethan Coon, PE *Project Engineer* BKF Office: San Luis Obispo	» Professional Civil Engineer, CA No. 99535 » MS, Civil and Environmental Engineering, California Polytechnic State University, San Luis Obispo, CA » BS, Environmental Engineering, California Polytechnic State University, San Luis Obispo, CA	Ethan will be responsible for compiling and analyzing data and documentation, field reviews, document production, and other technical tasks. Ethan specializes in water resources/wastewater engineering design for various projects such as pipelines, storage tanks, well improvements, and pressure-reducing stations. He is knowledgeable with AutoCAD Civil 3D, InfoWater, GIS and various other software packages.
Emily Creel, JD *Environmental Lead* BKF Office: San Luis Obispo	» California State Bar License, No. 243387 » JD, Indiana University School of Law, Bloomington, IN » BA, Political Science, Arizona State University, Tempe, AZ	Emily brings over 20 years of environmental planning and CEQA/NEPA compliance experience, including wastewater infrastructure projects. She will lead environmental review and documentation, identify potential environmental constraints early, and coordinate with regulatory agencies to streamline approvals, minimize project risks, and maintain the District's project schedule.

Name, Role, and Office	Credentials and Education	Responsibilities
Joshua Reece, PhD *Environmental Permitting* BKF Office: Pleasanton	» PhD, Ecology and Evolutionary Biology, Washington University in Saint Louis, MO » MS, Biology University of Central Florida, Orlando, FL » BS, Biology, University of Central Florida, Orlando, FL	Joshua brings over 22 years of experience in biological resources, environmental permitting, and regulatory compliance. He will support permitting efforts by identifying sensitive biological resources, evaluating potential environmental impacts, and coordinating with regulatory agencies to develop effective mitigation strategies, avoid permitting delays, and facilitate timely project implementation.
Hector Salcedo, PE *Encroachment Permitting* BKF Office: Riverside	» Professional Civil Engineer, CA No. 90382 » BS, Civil Engineering/Transportation, California State Polytechnic University, Pomona, CA	Hector brings 11 years of civil engineering experience, including extensive Caltrans project delivery, agency coordination, and PS&E development. He will support City and County encroachment permitting, coordinate agency reviews, and help ensure compliance with applicable design standards. His familiarity with agency procedures will help streamline approvals, resolve permitting issues early, and minimize potential project delays.
Jarrad Truman, PLS *Surveyor* BKF Office: Thousand Oaks	» Professional Land Surveyor, CA No. 9546 » Certified Party Chief » Trimble Geospatial GPS/RTK Processing and Planning, Sunnyvale, CA » Coursework, GPS Planning/ Processing, California State Polytechnic University, Pomona, CA » Coursework, Mapping, California State Polytechnic University, Pomona, CA » Coursework, Surveying Technology 119, Santiago Canyon College, Orange, CA	Jarrad brings over 30 years of land surveying experience, specializing in topographic surveys, right-of-way mapping, and utility infrastructure projects. He will lead surveying and base mapping efforts, providing accurate existing conditions data to inform pipeline alignments, identify potential utility conflicts, and minimize design revisions and construction risks.

Name, Role, and Office	Credentials and Education	Responsibilities
Loree Berry, PE *Geotechnical Engineer* YEH Office: Ventura	» Professional Civil Engineer, CA No. 73221 » Ventura County Registered Well Inspector » BS, Geological Engineering, University of Wisconsin, Madison, WI	Loree has more than 24 years of professional engineering experience with 17 of those living in Ventura and working along the Southern California coast. She is familiar with the geology and geotechnical challenges within the County of Santa Barbara and has previous geotechnical engineering experience supporting infrastructure improvement projects for the agencies in the area. Loree will lead the geotechnical investigation.



SECTION 2.

Project Understanding and Approach

Project Understanding

Based on the District's Request for Proposal and information obtained from an October 1 site visit we understand the District's needs as follows:

The Montecito Sanitary District (District or MSD) provides wastewater collection and treatment for approximately 10,000 residents in Santa Barbara County in the unincorporated community of Montecito. The District's Master Plan identified areas of their system which are undersized and require improvements. The gravity sewer located in Olive Mill Road between Mesa Road south to North Jameson Lane (see Figure 1) was identified as one such area.



Figure 1. *Project Area*

The existing sewer section begins at Olive Mill Road just east of Mesa Road and travels south approximately 1,300 feet to the intersection with North Jameson Lane before continuing to the wastewater treatment plant.

Per District records, the south end of the existing sewer line described above may experience flows exceeding the planned capacity of the pipes as shown in Figure 2 below, from the District's Sewer Management Plan. The condition is exacerbated during wet weather and could hinder potential future connections upstream of the system.

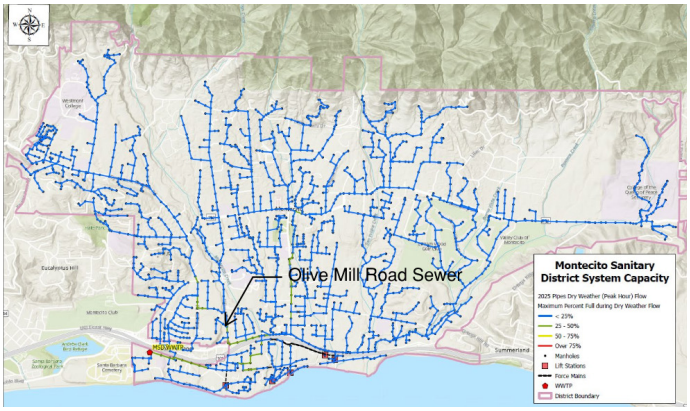


Figure 2. *System Capacity Map*

The District has developed alternatives to alleviate the capacity constrictions including:

1. Increase the size of the 8- and 10-inch vitrified clay pipe (VCP) sewer to 12-inch diameter via trenchless technology from the manhole at Olive Mill Road and Mesa Road to the manhole just north of the intersection of Olive Mill Road and North Jameson Lane.
2. Construct a new 12-inch diameter sewer from the manhole at Olive Mill Road and Mesa Road to the manhole just north of the intersection of Olive Mill Road and North Jameson Lane and abandon the existing sewer line.
3. Construct a parallel 8-inch sewer from the manhole at Olive Mill Road and Mesa Road to the manhole just north of the intersection of Olive Mill Road and North Jameson Lane and maintain the existing sewer line to provide additional capacity.
4. One additional alternative, if identified during the preliminary design phase, will also be considered.

MSD has requested proposals for professional engineering services to evaluate alternatives and develop bid-ready construction documents to relieve the sewer restriction for both current and future flows.

Project Approach

BKF will take a collaborative approach to this project. We will be available throughout the Project duration to discuss the Project as both a technical and administrative resource for MSD. Our internal wastewater design experts will lead technical aspects of the Project with input from our subconsultant. Our internal planning team is available to guide the environmental compliance process and required permits, leveraging recent experience and relationships with regulatory agencies. Our specialty water/wastewater construction management team is available to provide constructability expertise. Finally, our existing relationships with County of Santa Barbara staff will help expedite obtaining relevant information from the County and to coordinate the work.

Initial Groundwork

Defining expectations and guardrails early in a project lifecycle are one of the keys to success. While this proposal presents our current understanding of the District's expectations, it is no substitute for face-to-face interactions and on the ground observations. Therefore, the Project Kickoff Meeting and Site Visit are considered critical to successful execution of the subsequent tasks. We have included additional time in the project schedule to fully develop the Kickoff Meeting agenda and have allocated a half-day for the meeting and site visit. Spending the extra time early in the project will reduce efforts later in the project related to missed considerations and rework.

Following the Project Kick-off meeting, BKF will establish a deep understanding of District-provided data regarding the District's system and perform a comprehensive field investigation. BKF will review the District's planning documents and other pertinent studies. Understanding the existing system and its deficiencies is critical to ensure the overall strategy for system operation is feasible. Careful review of these documents will allow BKF to develop a roadmap for the field investigation and ensure holes in the data can be filled in during the investigation. Observations regarding the feasibility of constructing facilities within the public R/W versus easements on private property will be noted. Additional features such as drainage channels, bridges, and culverts will also be noted.

Development of Project Parameters

Developing and establishing the Project parameters is critical to evaluating alternatives and development of the preliminary design. Our review of District planning documents, sewer flow parameters, and District staff consultations will assist in evaluating alternatives and developing preferred layouts. Sizing of pipes and other appurtenances as well as determining connection points for the various alternatives will provide a basis of design.

Develop Preliminary Design Alternatives Report

BKF will prepare a Preliminary Design Alternatives Report (PDAR) to document technical design requirements and standards, design, construction costs, total implementation costs, implementation schedule, and permitting requirements. We will perform the topographic survey to allow the development of conceptual level plans. The report will provide concept level construction cost opinions for construction of all sewer assets and required improvements. These costs will be shared with the MSD as a basis for evaluating alignment and construction alternatives.

BKF will utilize the information collected and developed during the preliminary investigation as the basis for a PDAR. The PDAR will provide the District with an easy reference guide for discussions with stakeholders and decision makers.

Alternative Evaluation

As part of the PDAR, BKF will evaluate alternatives and develop a conceptual design for the sewer collection system in accordance with District engineering standards and standard engineering practice. Concept level designs will be based on the BKF topographic survey. The design will focus on minimizing construction costs as well as utility separation, constructability, lateral connections, and geotechnical conditions. We will include considerations for trenchless installation of gravity sewer mains where appropriate to minimize environmental effects and community disruptions. A concept-level construction cost opinion (American Association of Cost Engineers [AACE] Level 3) will be provided to accompany the PDAR.

To provide an understanding of total project implementation costs, BKF will include typical costs associated with permitting, environmental compliance, administration, construction management, and other pertinent costs.

Design Development

Following approval of the District on the preliminary design, BKF will develop the 50% and subsequent 90% and Final design packages based on the conclusions of the PDAR. The design phase will start with completion of necessary field work including requested potholing which will be used to inform the design. Additional fieldwork will further refine the conceptual design into a 50% design package. Following review, comment, and discussion, the 50% design will be further refined into a 90% design package. After review, comment and discussion, the design package will be finalized. The cost opinion will be further refined to an AACE Class 2 level during the design phase.

Geotechnical Consultant Coordination

Due to location of the Project, BKF will work with our geotechnical consultant (YEH). YEH is familiar with and has direct experience performing subsurface exploration and preparing geotechnical reports for several infrastructure improvements in the Montecito and Santa Barbara areas.

Environmental Documentation

Concurrently with design development, environmental documents will be developed. The level of environmental documentation is assumed to be a Notice of Exemption (NOE) and a California Environmental Quality Act (CEQA) exemption will be documented with a technical memorandum. Biological and cultural surveys will be performed to inform the environmental document and comply with CWSRF requirements.

The level of environmental documentation may be revised following the biological and cultural assessments and PDAR.

Permitting

BKF's experienced transportation team will assist with applying for encroachment permits from both the City and County of Santa Barbara Public Works Departments. The process is expected to require one round of application and revision. We expect to initiate the process during the 90% design effort. This will provide time for completion of the review so comments can be incorporated prior to completion of the final plans.

Constructability Review

BKF construction management personnel will work hand-in-hand with the design team and will be intimately involved in design development. Their role during the design phase will be to perform various reviews to ensure constructability concerns are identified and addressed during alternative evaluation and through the design phase to minimize and/or eliminate modifications during the construction phase. Additionally, constructability reviews will reduce the potential for delays and rework, which could negatively impact the Project schedule and budget, while ensuring constructability standards are met. These reviews include plans and specifications review and will consider, but are not limited to, the following:

- Materials selection
- Best construction methods or best practices
- Site access including ingress/egress routes
- Site logistics/constraints including limited workspace
- Suitability for use (i.e., construction materials and design intent)
- Clarity and completeness of documents
- Long-lead item material and equipment procurement impacts
- Environmental impacts
- Utility issues/clearances
- Utility service customer outage impacts
- Public and traffic impacts

BKF will perform constructability reviews prior to the 90% design milestone. We will incorporate lessons learned from previous projects to streamline these reviews to meet design timelines. This approach allows us to identify construction obstacles early and develop effective solutions before issues arise. We have previously utilized this approach on multiple similar projects.

Critical Issues Overview



Critical Issues

BKF has performed a preliminary evaluation of the Project and identified the following critical issues and recommended mitigations to address the identified issues:

Roundabout at North Jameson Lane and Olive Mill Road. BKF (as MNS Engineers) designed sewer improvements at the southern end of the Project as part of the Roundabout construction. This previous work gives BKF a unique perspective regarding the challenges near the intersection. This includes topographic survey, record drawings of the improvements (Figure 3), and pothole data in the area (Figure 4). Challenges here include obtaining an additional encroachment permit from the City of Santa Barbara, proximity of the existing sewer to the existing waterline, and traffic control. BKF has included or will implement or consider the following mitigations:

- Additional effort has been included in the permitting subtask for an application and coordination with the City to obtain an encroachment permit in addition to the County of Santa Barbara encroachment permit.
- Per the pothole data, based on the difference in depth between the sewer and water lines, pipe bursting may still be feasible but will be determined based on geotechnical data.
- During the design phase, we will discuss and consider specifying work near the intersection must take place as "night work" during construction.

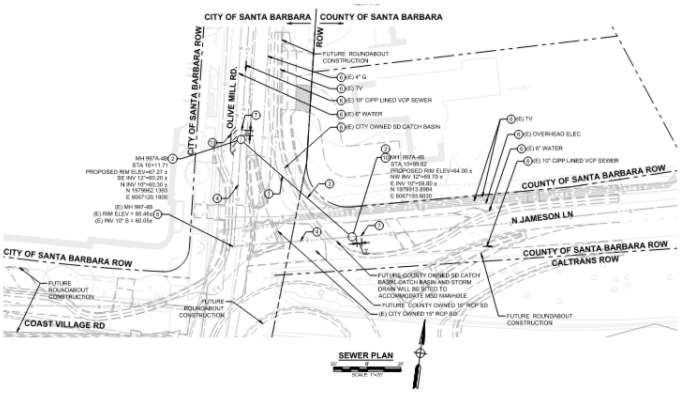


Figure 3. *Roundabout Sewer Improvements North Jameson Lane and Olive Mill Road*

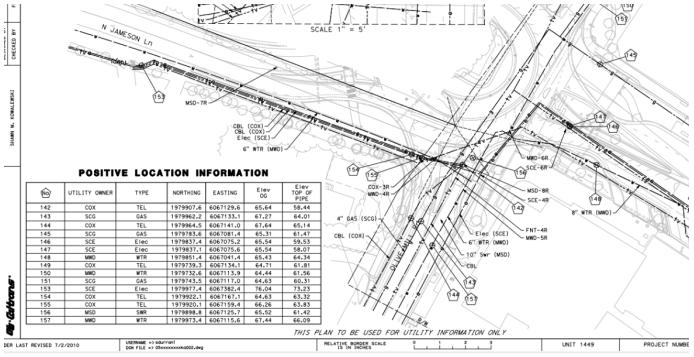


Figure 4. *Roundabout Pothole Data (north down)*

Areas Susceptible to Flooding. The location of sewer facilities within federally designated flood areas can present design challenges and increase construction costs. BKF performed a preliminary review of Federal Emergency Management Agency (FEMA) flood maps (see Figure 5) showing the entire Project area is located within a federally designated flood way. This can present challenges when designing sewer infrastructure to minimize inflow and infiltration (I&I).

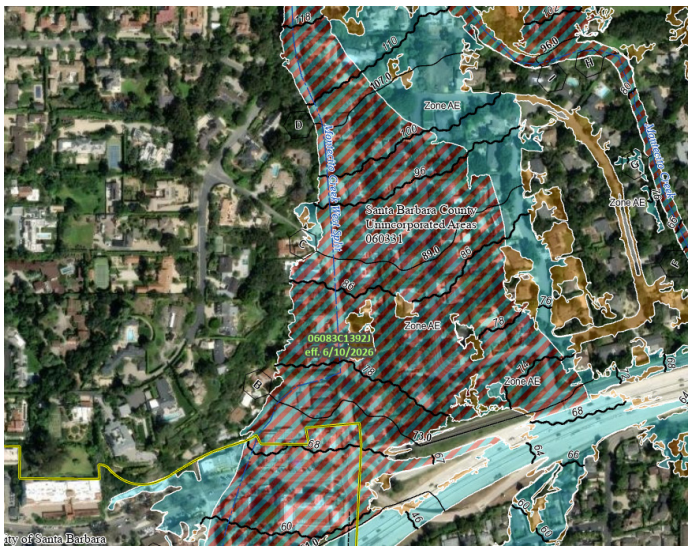


Figure 5. *Project Area FEMA Map*

Based on the FEMA map and area topography, consideration will need to be given to the design of sewer collection facilities in these areas. The BKF team has experience with designing facilities in similar circumstances and is familiar with the use of gasketed, sealed manhole covers featuring recessed lifting handles in lieu of pick holes to minimize I&I. The contract documents will also provide direction to the contractor to "winterize" the site should construction occur during the rainy season.

Due to their age, the District may also want to consider replacing the covers and frames of the existing Project manholes (Figure 6) as part of this Project to help reduce the known I&I problems in the collection system. BKF can include this work for a minor, additional fee.



Figure 6. *Existing Manhole in the Project Area*

Trenchless Construction. One of the alternatives requested by the District for evaluation is a trenchless construction technique called pipe bursting. This method allows the contractor to replace long sections of pipe between access points with minimal surface disruption. Typically, a trenchless construction technique can provide multiple benefits to a project. Utilizing this method can avoid expensive and time-consuming regulatory agency permitting and reduce the potential for environmental damage. It also significantly reduces trench repair and traffic control. These benefits can result in potential cost savings and reductions in construction duration.

We believe this Project is a good candidate for pipe bursting due to the greater than 2 percent slope along the existing alignment which will minimize risks for creating pipe sags during pipe bursting. BKF will work with our geotechnical engineer to characterize the existing soils to ensure they are a good fit for this technique and can handle the upsizing with a low risk of damaging surface paving (upheaval) or adjacent underground utilities. If surface disruption is identified as a risk, we recommend including an additive bid item for pavement repair to minimize change orders associated with unanticipated repairs. Where potential impacts to adjacent utilities are identified, we will require the contractor to expose at-risk utilities at critical crossings to avoid damage.

BKF has extensive experience on recent projects utilizing trenchless construction techniques under waterways, state highways, railroads, and drainage culverts. Figure 7 shows excavation for pipe bursting in Carmel-by-the-Sea which is an environmentally sensitive location with highly engaged residents with strong stakeholder interest residents, similar to Montecito. Figure 8 shows a pipe bursting operation in a residential neighborhood in the City of Sunnyvale.



Figure 7. *Pipe Bursting in Carmel*



Figure 8. *Pipe Bursting in Sunnyvale*

Geotechnical Conditions. Due to the possibility of trenchless construction and potential for challenging subsurface conditions, the geotechnical investigation will play a critical part in determining the construction techniques and feasibility of installing chosen facilities in the roadway. YEH has reviewed available published geological data and California Geologic Survey (CGS) seismic hazard zone maps as preliminary input to develop their scope of services. The area of the Olive Mill Road Pipeline Capacity Improvements is underlain by alluvium and colluvium consisting of poorly consolidated sand and gravel deposits and intermediate alluvium consisting of weakly consolidated sand and gravels.

The Lagoon Fault crosses just north of the proposed alignment, and the Mission Hills Fault Zone crosses Olive Mill Road to the north (between East Valley Road and School House Road). Recent groundwater monitoring data along this portion of Olive Mill Road and vicinity indicate that groundwater levels vary from approximately 30 to greater than 50 feet below the ground surface.

BKF subconsultant, YEH, will perform a geotechnical evaluation which will consist of field exploration and laboratory testing to characterize subsurface conditions along proposed pipeline routes, analyses to evaluate the support of pipeline components, suitability of methods of construction including trenchless (pipe bursting) and conventional cut and cover, and geotechnical considerations for design and construction of the Project elements.

An optional day to perform a bucket auger excavation has been included in the proposal. The excavation will be performed in nearby Manning Park to minimize damage to the roadway. This excavation will provide additional data to characterize the subsurface conditions in the Project area.

Traffic Control During Construction. Olive Mill Road is a two-lane road carrying a significant traffic load for this area. To permit construction activities and maintain good relations with residents, traffic control will be a critical issue during construction.

The District has requested proposing consultants not prepare traffic control plans during design; the construction contractor will be expected to be responsible for traffic control plan preparation. Therefore, it will be imperative for the contract documents to provide strict guardrails for how the contractor can develop traffic control plans. The contract documents will be developed to provide allowable hours of traffic control with considerations made for high-traffic volume times of day, potential detour routes, and maintenance of access to both residential homes and commercial operations for vehicular traffic and pedestrians.

Scope of Services

BKF proposes to perform the following tasks to complete the Project.

TASK 1 *PROJECT MANAGEMENT, QUALITY ASSURANCE/QUALITY CONTROL, MEETINGS, AND SITE VISITS*

This task includes Project Management, Quality Assurance/Quality Control (QA/QC), and meetings associated with the Project.

SUBTASK 1.1 *Project Management*

The Project Manager, Tyler Hunt, PE, will provide ongoing coordination between the District, other Project stakeholders, and the internal Project team. Tyler will monitor the budget and serve as the main point of contact with the District. Regular phone calls and e-mail updates will be sent from Tyler to the District's Project Manager to keep lines of communication open and up to date. He will submit monthly invoices with supporting documentation in a format acceptable to MSD and manage contract terms. He will also provide updated project schedules as requested by the District. Tyler will also be responsible for ensuring deliverable deadlines are met, all internal quality control reviews are completed, and the final products meet the expectations of MSD.

SUBTASK 1.2 *Quality Assurance/Quality Control (QA/QC)*

In accordance with BKF company policy for QA/QC, all deliverables, calculations, recommendations, and other documentation will be reviewed by an experienced engineer, not otherwise associated with the project, prior to submittal to MSD. Documents will be reviewed to ensure technical excellence, the goals, and expectations of the District are being met, and conformance with applicable design checklists and standards. Both drafts of the PDAR and other items requiring QA/QC reviews will be reviewed by Nick Panofsky, PE.

SUBTASK 1.3 *Project Coordination*

Over the duration of the Project, BKF will lead meetings and conference calls as required to move the Project forward and ensure the District is informed and in concurrence with the progress of the Project. Meetings with staff and other stakeholders will be held at key times of the task to obtain data and to develop design details as needed for progress updates, discussion, clarifications, and direction.

We have budgeted for the following meetings over the course of the Project:

- Project Kick-off Meeting and Site Visit (in-person)
- Draft Geotechnical Report Review Meeting (video)
- Draft Preliminary Design Alternatives Report Review Meeting (video)
- 50% Design Deliverables Review Meeting (video)
- 90% Design Deliverables Review Meeting (video)

The Project Manager and one support staff will attend all meetings. We assume one in-person meeting with the remainder held virtually. For the kick off and review meetings, BKF will develop a meeting agenda and submit meeting minutes to the District within five business days to document decision making milestones.

Deliverables:

- Meeting Agendas and Minutes
- Invoices
- Schedule Updates

TASK 2 *REVIEW EXISTING INFORMATION & PRELIMINARY DESIGN*

SUBTASK 2.1 *Existing Documents*

As part of the kick-off meeting, BKF will submit a request for information to MSD and other applicable Project stakeholders including requests for previous studies, Geographic Information System (GIS) information, usage information, and record drawings of existing facilities. Once obtained, BKF will review the information and incorporate relevant items into the PDAR. Wastewater flow rates will be estimated based on consultation with the District and incorporated into the report and used for flow and hydraulic evaluations to be performed by the District's modeling consultant. We assume no flow monitoring will be required as part of the Project.

SUBTASK 2.2 *Utility Research*

BKF will submit requests for utility location information from utility providers with buried facilities in the Project area. Once obtained, BKF will review the information and incorporate relevant items including type, size, location, material, and depth into the Project base map. The utility data will be compared against field data obtained during the field visit and topographic survey to confirm accuracy.

SUBTASK 2.3 *Topographic Survey*

SURVEY CONTROL AND TOPOGRAPHIC SURVEY

BKF will perform a detailed topographic survey of the Project corridor and adjacent areas necessary to support the proposed sewer improvements. BKF will establish horizontal and vertical survey control to support conventional mapping and pipeline design. The survey will be referenced to NAD 83 and NAVD 88 horizontal and vertical datums using local benchmarks, with the coordinate system and epoch confirmed by the District before fieldwork begins. BKF will establish and survey ground-control points and perform supplemental ground topographic surveying cross section every 50 feet from right-of-way (R/W) to R/W along the approximately Project corridor from Mesa Road to near North Jameson Lane. BKF will collect features needed to support the existing and proposed pipeline alignments. Survey work and signed survey deliverables will be provided under the responsible charge of a California-licensed Professional Land Surveyor.

SURVEY BASE MAPPING

BKF will prepare a coordinated survey base map incorporating field survey and available record information incorporating supplemental ground survey sections of existing improvements, access structures, utility information, and available record R/W and easement limits. We will provide CAD mapping and a digital terrain model to support the design team's preparation of pipeline plan and profile drawings. The survey team will support the 50%, 90%, and Final design submittals by addressing survey-related comments and updating mapping within the agreed survey limits.

SUBTASK 2.4 *Geotechnical Investigation*

BKF subconsultant, YEH, will perform a geotechnical investigation and provide a geotechnical report defining the Project area subsurface conditions and design recommendations per the following:

PROJECT INITIATION

YEH will consult BKF and the District to initiate the geotechnical work, collect proposed Project layout and topographic maps, coordinate site access, and review the scope and schedule for geotechnical services.

COORDINATION, HEALTH AND SAFETY, AND PERMITS

YEH will prepare a health and safety plan for the proposed field work and visit the site to identify and mark the boring locations for utility clearance and review boring locations with District personnel. They will contact Underground Service Alert (USA) to mark utilities and procure encroachment permits for borings from County of Santa Barbara Public Works and drilling/well permits from the County of Santa Barbara Environmental Health. Site access outside of permits specifically described, any environmental permits, documents, or monitoring will be provided to YEH.

SUBSURFACE EXPLORATION

YEH will perform up to a one-day field exploration program to drill six borings to depths of 20 feet or to refusal. Borings will be drilled using a truck-mounted rig equipped for hollow stem auger drilling. The borings will be sampled at typical 5-foot intervals by driving 2-inch or 3-inch split barrel samplers using Standard Penetration Test protocols, pushing thin-walled tube samples and by taking cuttings from the auger flights. The borings will be backfilled in accordance with permit requirements after drilling.

The majority of this section of Olive Mill Road consists of two traffic lanes with improved shoulders with the street lined by mature trees. Traffic control will be provided during drilling as required by the applicable permits and may require a single lane closure with flaggers depending on conflicts with overhead and underground obstructions. Boring locations will be selected to minimize disturbance and maintain access. It is anticipated that tree branches up to approximately 2-inches in length may need to be trimmed to allow access for equipment.

LABORATORY TESTING

YEH will review samples and field data, schedule and conduct laboratory tests on selected samples recovered from the borings for compaction, unit weight, moisture content, soil classification, grain size, expansion, strength, R-value and corrosivity. The types and numbers of tests will be assigned based on the subsurface conditions encountered.

DRAFT GEOTECHNICAL REPORT

YEH will compile and organize the data collected, perform calculations and geotechnical analyses, and prepare a Geotechnical Report for design of the improvements. A draft of the report will be submitted in Adobe PDF format for review by the design team. The report will provide a discussion of the subsurface conditions encountered, maps showing the site location and boring locations, boring logs, and laboratory test results. The report will provide a discussion of the subsurface conditions encountered, and geotechnical considerations and recommendations regarding:

- Geologic setting;
- Soil and groundwater conditions encountered;
- Potential for geologic hazards to impact the site from: seismicity, fault rupture, liquefaction, lateral spreading, seismic slope displacement, and landsliding; and considerations for emergency response measures;
- Seismic data for use with California Building Code/ AWWA standards based on estimated Vs30 and site classification;
- Site preparation and grading, overexcavation, and subgrade stabilization for the new pipeline;
- Compaction and material requirements for imported fill and re-use of onsite soil;
- Pipeline recommendations and a trench detail for use with MSD or County Standards;
- Material specifications for compacted fill, trench backfill, imported fill, geosynthetics and other materials that may be recommended in the report;
- Subsurface conditions and suitability of using pipe bursting to install the new pipes;
- Ground conditions relative to groundwater, hard rock, presence of cobbles or boulders, heading stability, caving or running ground;
- Monitoring recommendations for settlement or heave based on subsurface conditions;

- Existing pavement thicknesses encountered and a pavement structural section for trench patching;
- Passive and at-rest pressures, soil unit weight, and friction coefficients for estimating frictional resistance along the pipe;
- Corrosion test data; and
- Construction considerations regarding excavation characteristics of soil encountered, temporary excavations, shoring requirements, groundwater and pipe bursting.

FINAL – GEOTECHNICAL REPORT

YEH will incorporate review comments from the draft report submittal and prepare the final Geotechnical Report for the Project. The final report will be submitted in Adobe PDF format. It is not anticipated that the final report would incorporate evaluating additional field exploration, alternatives, information, or recommendations for improvements that are not described in this proposal.

OPTIONAL EXPLORATION

YEH will provide an additional 1-day effort to drill one, 30-inch diameter bucket auger boring to 20 feet below the ground surface within the Project area. Bucket augering is beneficial over hollow stem drilling for more accurately estimating the quantity and size of gravel, cobble and boulder in the excavated material and in the borehole sidewall. The larger diameter borehole will also provide a better understanding of the excavation characteristics of the subsurface, the susceptibility for caving, and other important construction considerations. A bucket auger boring will likely need to be terminated if groundwater is encountered prior to the proposed depth. YEH will collect bulk and grab samples from the auger cuttings and select depth intervals to attempt driving thick-walled tube samples. The hole will be backfilled with excavated cuttings, tamped with the rig's Kelly bar and patched at the surface according to permit requirements. Excess cuttings will be containerized and hauled from site.

SUBTASK 2.5 *Environmental Document Preparation and Permitting*

BKF will provide an initial biological resources assessment and cultural resources assessment to determine the potential for the Project to impact protected biological, archaeological, paleontological, or sensitive tribal resources. Based on the results of these assessments, BKF will advise on the need for cultural, tribal, and/or biological monitors and/or any regulatory permits that might be needed for the Project. The BKF planning team will develop the Project Notice of Exemption for CEQA compliance and documentation per the following tasks:

BIOLOGICAL RESOURCE ASSESSMENT

BKF will conduct a database search of the California Department of Fish and Wildlife's (CDFW) California Natural Diversity Database (CNDDB), the California Native Plant Society (CNPS) Electronic Inventory of Rare and Endangered Vascular Plants of California listings, and the US Fish and Wildlife Service (USFWS) Information for Planning and Consultation online system and Critical Habitat mapper to preliminarily identify any special-status biological resources known to occur within the general vicinity of the Project site. This will allow BKF to focus their field investigation on federally and State listed species known to occur within the vicinity of the Project site. In addition, BKF will review US Department of Agriculture soil data, historic/current aerial photographs, and US Geological Survey topographic maps to further assess the ecological conditions within the Project site.

Following the literature review, BKF will systematically survey the Project site to document baseline biological conditions and evaluate the site's potential to support special-status plant and wildlife species. Special-status species refer to those plant and wildlife species that are federally or State listed, proposed, or candidates, plant species that have been designated a California Rare Plant Rank by the California Native Plant Society; species that are designated as Fully Protected; Species of Special Concern, or Watch List species by the California Department of Fish and Wildlife. The field survey will be conducted by a qualified biologist(s) to determine the potential for occurrence of such resources identified during the literature review. Notes will be taken on all plant and wildlife species observed onsite during the field survey. In addition, the location of any special-status plant and wildlife species and vegetation communities will be mapped, if detected on-site. Vegetation communities occurring within the project site will be classified in accordance with the vegetation descriptions provided in A Manual of California Vegetation (Sawyer et al. 2009). Data collected during the field survey will provide an overall understanding of the Project setting and biological resources potentially occurring in the area. Any potentially jurisdictional features will be preliminarily identified.

BKF will then prepare a technical report to summarize the information and results obtained during the literature review and field survey, document plant, wildlife, and vegetation communities observed, and determine the potential for any special-status species to occur on or within the vicinity of the project site. In addition, the report will provide an analysis of anticipated Project-related impacts to biological resources and identify any additional biological surveys, mitigation measures, and/or permit requirements that may be required prior to implementation of the proposed project. Site photographs taken during the field survey, plant and wildlife compendiums, special-status potential to occur tables, and figures will be included in the report.

CULTURAL RESOURCE ASSESSMENT

BKF will conduct a Cultural Resources Review. The Cultural Resources Review will include a records search at the South Central California Information Center (SCCIC); review of archival maps and historic aerial photography archived at the University of California, Santa Barbara library; a Sacred Lands File Search with the California Native American Heritage Commission (NAHC or Commission); and procurement of a contact list of identified tribal stakeholders to consult with on behalf of the Project. The results of the Cultural Resources Review will be summarized in a Cultural Resources Review memo.

Assumptions:

- BKF assumes that no Cultural Resources will be located within the Project area.
- This scope of work and cost estimate do not include costs for a pedestrian survey.
- Depending on the results of the Cultural Resources Review, BKF may recommend the Project complete a Phase I Cultural Resources Inventory, including an archaeological pedestrian survey of the Project area.

NOTICE OF EXEMPTION

We understand the District anticipates the Project will qualify for a categorical exemption for CEQA compliance. BKF will prepare a Notice of Exemption (NOE), anticpated through use of categorical exemptions Class 2 (Replacement or Reconstruction) for the replacement of existing sewer and Class 3 (New Construction or Conversion of Small Structures) for installation of new sewer or a statutory exemption consistent with CEQA Section 15282(k) for pipeline segments of less than one mile, for District review and approval. The NOE will be supported by brief information in a technical memorandum to establish that none of the categorical exceptions to an exemption in State CEQA Guidelines Section 15300.2 are applicable. BKF will facilitate filing of the NOE with the State Clearinghouse and appropriate noticing to complete the CEQA process upon approval to upload the document on the District's behalf. Should information become available that indicates a different level of CEQA document should be prepared, BKF can prepare a supplemental scope and fee.

PERMITTING

The BKF Transportation team will support the Project to obtain encroachment permits from City and County of Santa Barbara.

BKF will follow both the City and County standard encroachment application processes and will provide the plans and cost opinion with the application. We assume one meeting with each entity to discuss comments prior to finalizing the application.

SUBTASK 2.6 *Preliminary Design Alternatives Report*

BKF will prepare a comprehensive, concise Preliminary Design Alternatives Report. The PDAR will summarize background information research and results of the alternative investigations, including a recommended project.

The PDAR will include the following sections:

1. Executive Summary
2. Project Background and Objectives
3. Existing Facilities
   a. Existing Facilities
   b. Sources and Flow Rates
   c. Existing Operation
   d. I&I Evaluation
4. Project Alternatives Analysis
   a. Design Criteria
   b. Alternatives Description
   c. Alternatives Analysis
      - Alternatives Description
      - Alternatives Pros and Cons
      - Capital Cost Comparison
      - Alternatives Evaluation Conclusion
5. Selected Project
   a. Project Description
   b. Design Criteria

c. Project Implementation Costs
d. Implementation Schedule
e. Permit Evaluation
f. Key Issues

SUBTASK 2.7 *Draft Preliminary Design Alternatives Report*

The PDAR will include descriptions, figures, AACE Level 3 cost opinions, evaluations, and analysis of each construction alternative, culminating in a recommended Project implementation strategy and basis of design. The PDAR will address construction alternatives and requirements for work adjacent to residential structures and property. The report will also evaluate the system hydraulics to provide sizing recommendations based on modeling provided by the District's consultant.

SUBTASK 2.8 *Final Preliminary Design Alternatives Report*

Following submittal of the Draft PDAR, BKF will lead a meeting with District staff to review the implications of each potential site layout and alternatives and to receive feedback and comments from District staff. Following the workshop, BKF will finalize the PDAR with consensus from the District. The Final PDAR will be stamped and signed by a Professional Civil Engineer, licensed in California. A matrix summarizing District comments and BKF's response to the comments on the draft will be included with the Final PDAR.

Deliverables:

- Draft and Final Geotechnical Report
- Draft and Final Biological Resource Assessment
- Draft and Final Cultural Resource Assessment
- Draft and Final Notice of Exemption and CEQA Technical Memorandum
- Draft and Final Preliminary Design Alternatives Report
- Draft PDAR Comment Response Matrix

TASK 3 *CONTRACT DOCUMENT PREPARATION*

Upon approval from the District of the PDAR, BKF will develop the Project design documents up to the Final design level per the following tasks:

SUBTASK 3.1 *Draft Deliverables Preparation*

BKF will develop a 50% and 90% set of plans, specifications, and construction cost opinion (PS&E) for the Project. We will provide electronic documents upon completion of the work. Electronic formats will include images prepared in Adobe PDF format and electronic files compatible with Microsoft Word and Excel, and AutoCAD, if requested.

BKF will develop plans and specifications using the District's standard title block. Design specifications will be in conformance with applicable jurisdictional entities including the District and other entities as required. Technical specifications will be developed in accordance with standard engineering practice; District engineering standards will be referenced along with American Society for Testing and Materials (ASTM), and other standards as appropriate.

Plans: We will prepare the following drawings assuming Alternative No. 1 is selected:

No.	Name
1	Title Sheet
2	Notes, Legend, and Abbreviations
3	Sheet Location Map and Survey Data
4	Olive Mill Sewer Plan & Profile STA 0+00 to 6+00
5	Olive Mill Sewer Plan & Profile STA 6+00 to 12+00
6	Olive Mill Sewer Plan & Profile STA 12+00 to 13+00
7	Sewer Details
8	Utility Relocation Details (if required)
9	Trenchless Construction Details (if required)
10	Civil Details

SPECIFICATIONS

We will prepare 50% and 90% specifications using the District's boilerplate Special Provisions template. BKF will develop technical specifications for this Project based on the District's Engineering Standards and Construction Specifications in CSI format. Design specifications will be in conformance with the applicable jurisdictional entities for the project. We have assumed the District will provide front-end documents which we will revise with project specific information.

CONSTRUCTION COST OPINION

BKF will prepare an 50% and 90% engineer's opinion of probable construction cost. We will base the opinion on recent projects of similar size and scope upon which we have worked, as well as cost estimating manuals, equipment and materials quotes, communications with contractors, input from our internal construction managers, and other resources.

CONSTRUCTABILITY REVIEW

An experienced member of the BKF Construction Management team will perform a constructibility review of the 90% design prior to delivery to the District.

DELIVERABLE

BKF will prepare 50% and 90% PS&Es sufficiently complete to provide for District review. We will assemble a review package in PDF format and transmit electronically. Following receipt of the District's consolidated design comments for each deliverable, we will hold a design review meeting with District staff to discuss the District's comments and revise the subsequent deliverable. We will prepare a response matrix summarizing each District comment on the 50% design, identifying how each comment is addressed in the 90% submittal. We anticipate all comments will be generally within the scope of this proposal.

SUBTASK 3.2 *Final Deliverable Preparation*

BKF will develop a Final set of PS&E for the Project, signed by a civil engineer licensed in the state of California. We will provide electronic documents upon completion of the work. Electronic formats will include images prepared in Adobe PDF format and electronic files compatible with Microsoft Word and Excel, and AutoCAD, if requested.

PLANS

We will prepare the Final drawings incorporating District review comments and revisions from the 90 PS&E.

SPECIFICATIONS

BKF will prepare Final specifications incorporating District review comments and revisions from the 90% PS&E. The specification package will include both technical specifications and the District's front-end contract documents revised specifically for this Project.

CONSTRUCTION COST OPINION

BKF will prepare a Final engineer's opinion of probable construction cost incorporating client comments and revisions from the 90% PS&E.

DELIVERABLE

BKF will prepare Final PS&E to provide the District a bid ready set of contract documents. We will assemble the Final package in PDF format and transmit electronically. We will prepare a response matrix summarizing each District comment on the 90% design, identifying how each comment is addressed in the Final submittal. We anticipate all comments will be generally within the scope of this proposal.

Deliverables:

- 50%, 90%, and Final PS&E
- 50% and 90% Comment Response Matrices

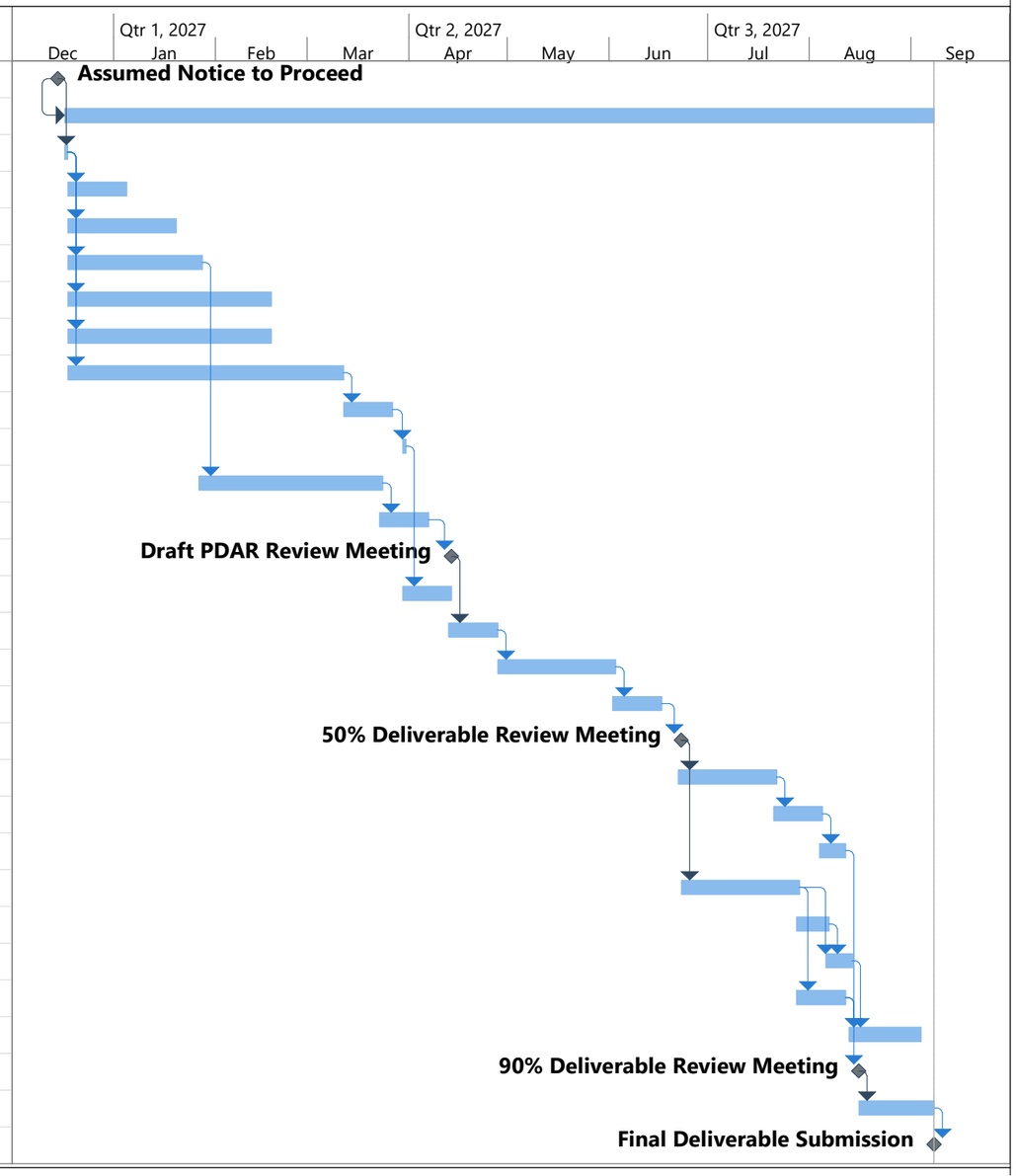
SECTION 3.

Estimated Schedule

BKF recognizes that successful project delivery requires both a clear schedule and the flexibility to respond to District priorities. We will coordinate closely with District staff to confirm milestones and adjust sequencing as necessary to keep the project moving.

Montecito Sanitary District -Olive Mill Road Pipeline Capacity Improvements Project
Project Implementation Schedule

ID	Task Name	Duration	Start	Finish
1	Assumed Notice to Proceed	0 days	Tue 12/15/26	Tue 12/15/26
2	Project Management	258 days	Thu 12/17/26	Tue 9/7/27
3	Kickoff Meeting and Site Visit	1 day	Thu 12/17/26	Thu 12/17/26
4	Existing Documents Review	16 days	Fri 12/18/26	Mon 1/4/27
5	Utility Research	30 days	Fri 12/18/26	Tue 1/19/27
6	Topographic Survey	38 days	Fri 12/18/26	Wed 1/27/27
7	Biological Resource Assessment	58 days	Fri 12/18/26	Wed 2/17/27
8	Cultural Resource Assessement	58 days	Fri 12/18/26	Wed 2/17/27
9	Draft Geotech Report	80 days	Fri 12/18/26	Thu 3/11/27
10	BKF and District Geotech Report Review	15 days	Fri 3/12/27	Fri 3/26/27
11	Draft Geotech Report Review Meeting	1 day	Tue 3/30/27	Tue 3/30/27
12	Draft PDAR	55 days	Wed 1/27/27	Tue 3/23/27
13	District Draft PDAR Review	15 days	Tue 3/23/27	Tue 4/6/27
14	Draft PDAR Review Meeting	0 days	Tue 4/13/27	Tue 4/13/27
15	Final Geotech Report	15 days	Tue 3/30/27	Tue 4/13/27
16	Final PDAR	15 days	Tue 4/13/27	Tue 4/27/27
17	50% Deliverable Preparation	35 days	Wed 4/28/27	Wed 6/2/27
18	District 50% Deliverable Review	15 days	Wed 6/2/27	Wed 6/16/27
19	50% Deliverable Review Meeting	0 days	Tue 6/22/27	Tue 6/22/27
20	Draft CEQA NOE	29 days	Tue 6/22/27	Wed 7/21/27
21	District CEQA NOE Review	15 days	Wed 7/21/27	Wed 8/4/27
22	Final CEQA NOE	8 days	Wed 8/4/27	Wed 8/11/27
23	90% Deliverable Preparation	35 days	Wed 6/23/27	Wed 7/28/27
24	Santa Barbara County Encroachment Permit Application	10 days	Wed 7/28/27	Fri 8/6/27
25	District Enroachment Permits Review	8 days	Fri 8/6/27	Fri 8/13/27
26	District 90% Deliverable Review	15 days	Wed 7/28/27	Wed 8/11/27
27	Encroachment Permit Submittal and Agency Review	22 days	Fri 8/13/27	Fri 9/3/27
28	90% Deliverable Review Meeting	0 days	Mon 8/16/27	Mon 8/16/27
29	Final Deliverable Preparation	22 days	Mon 8/16/27	Tue 9/7/27
30	Final Deliverable Submission	0 days	Tue 9/7/27	Tue 9/7/27



SECTION 4.

Estimated Level of Effort

BKF has developed the following level of effort to align the right technical resources with each project task. Our proposed hours reflect a multidisciplinary approach to support the District through each phase of the project.

		PM		ENGINEERING					SURVEYING				CEQA			BIOLOGY			CULTURAL			SUPPORT	GEOTECHNICAL (YEH)								
		Principal-in-Charge - NP	Manager V - TNH	Manager II - HS	Designer IV - EC	Engineer II - Encroachment Permitting	Designer I - Encroachment Permitting	Technician I - CAD	Manager III - JT	Survey Technician III	Survey Party Chief I	Survey Chainperson I	Manager III	Planner/Scientist III	Planner/Scientist I	Manger III - JR	Technical Specialist IV	Project Assistant II	Manger III - JR	Planner/Scientist III	Project Assistant II	Constrtuction Manager V	Principal Engineer or Geologist	Senior Project Manager, Engineering or Geologist	Project Manager-Associate Engineer or Geologist	Senior Project Engineer or Geologist	Project Engineer or Geologist	Senior Staff Engineer or Geologist	Staff Engineer or Geologist	Engineer Intern	**Total Resource Hours**
1 – Project Management, QA/QC, Meetings, and Site Visits	**Task 1**																														
1.1 Project Management	**Task 1.1**		28																												28
1.2 QA/QC	**Task 1.2**	10																													10
1.3 Meetings	**Task 1.2**		12		12																										24
Task 1 Subtotal		**10**	**40**	**0**	**12**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**				**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**62**
2 – Review Existing Information & Preliminary Design	**Task 2**																														
2.1 Existing Documents	**Task 2.1**		2		12																										14
2.2 Utility Research	**Task 2.2**				12																										12
2.3 Topographic Survey	**Task 2.3**		2		6				20	36	32	32																			128
2.4 Geotechnical Investigation and Report	**Task 2.4**																														0
2.4.1 Draft Geotech Report	**Task 2.4.1**		2		4																		5	23	4		6	54	14	27	139
2.4.2 Final Geotech Report	**Task 2.4.2**		1		2																		2	4		2		6			17
2.4.3 Optional Bucket Auger Boring	**Task 2.5**		1																					4				10	2	12	29
2.5 Enviromental Document Preparation and Permitting	**Task 2.5**		6	12		20	40						8	16	20	4	32	16	4	32	4										214
2.6 Preliminary Design Alternatives Report	**Task 2.6**																														0
2.6.1 Draft PDAR Report	**Task 2.6.1**		20		100	6		16																							142
2.6.2 Final PDAR Report	**Task 2.6.2**		8		24	2		4																							38
Task 2 Subtotal		**0**	**42**	**12**	**160**	**28**	**40**	**20**	**20**	**36**	**32**	**32**	**8**	**16**	**20**	**4**	**32**	**16**	**4**	**32**	**4**	**0**	**7**	**31**	**4**	**2**	**6**	**70**	**16**	**39**	**733**
3 – Contract Document Preparation	**Task 3**																														
3.1 Draft Deliverable Preparation	**Task 3.1**		32		124			124														6									286
3.2 Final Deliverable Preparation	**Task 3.2**		12		24			32																							68
Task 3 Subtotal		**0**	**44**	**0**	**148**	**0**	**0**	**156**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**6**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**354**
Sub-Total	**Hours**	10	126	12	320	28	40	176	20	36	32	32	8	16	20	4	32	16	4	32	4	6	7	31	4	2	6	70	16	39	**1,149**

BKF
2026 STANDARD SCHEDULE OF FEES

PROJECT MANAGEMENT

Principal-in-Charge	$395.00
Manager VI*	$365.00
Manager V*	$335.00
Manager IV*	$315.00
Manager III*	$300.00
Manager II*	$285.00
Manager I*	$265.00
Project Coordinator III	$220.00
Project Coordinator II	$190.00
Project Coordinator I	$165.00
Project Assistant II	$140.00
Project Assistant I	$120.00

CONSTRUCTION MANAGEMENT

Principal Construction Manager	$375.00
Construction Manager V	$345.00
Construction Manager IV	$305.00
Construction Manager III	$285.00
Construction Manager II	$250.00
Construction Manager I	$225.00
Resident Engineer IV	$315.00
Resident Engineer III	$295.00
Resident Engineer II	$265.00
Resident Engineer I	$245.00
Assistant Resident Engineer	$230.00
Office Engineer II	$165.00
Office Engineer I	$140.00
Structure Representative IV	$310.00
Structure Representative III	$295.00
Structure Representative II	$265.00
Structure Representative I	$240.00
Construction Inspector III	$220.00
Construction Inspector II	$210.00
Construction Inspector I	$195.00

FIELD SURVEYING

Utility Locator IV	$245.00
Utility Locator III	$215.00
Utility Locator II	$180.00
Utility Locator I	$130.00
Survey Party Chief II	$255.00
Survey Party Chief I	$245.00
Survey Chainperson II	$170.00
Survey Chainperson I	$160.00
Survey Apprentice IV	$155.00
Survey Apprentice III	$145.00
Survey Apprentice II	$130.00
Survey Apprentice I	$100.00

DESIGN & TECHNICAL SERVICES

Principal Engineer	$310.00
Engineer V	$290.00
Engineer IV	$265.00
Engineer III	$245.00
Engineer II	$215.00
Engineer I	$190.00
Designer V	$245.00
Designer IV	$215.00
Designer III	$190.00
Designer II	$175.00
Designer I	$160.00
Design Assistant	$115.00
Principal Surveyor	$310.00
Surveyor V	$290.00
Surveyor IV	$265.00
Surveyor III	$245.00
Surveyor II	$215.00
Surveyor I	$190.00
Survey Technician V	$245.00
Survey Technician IV	$215.00
Survey Technician III	$190.00
Survey Technician II	$175.00
Survey Technician I	$160.00
Survey Assistant	$115.00
BIM Specialist III	$245.00
BIM Specialist II	$215.00
BIM Specialist I	$190.00
Technician Manager	$245.00
Technician IV	$215.00
Technician III	$190.00
Technician II	$175.00
Technician I	$160.00
Technical Analyst	$160.00

ADMINISTRATIVE SUPPORT

Graphics/Visualization Specialist	$165.00
Office Administrator II	$135.00
Office Administrator I	$110.00

PLANNING

Lead Technical Specialist	$310.00
Technical Specialist V	$275.00
Technical Specialist IV	$240.00
Technical Specialist III	$205.00
Technical Specialist II	$170.00
Technical Specialist I	$135.00
Planner/Scientist V	$215.00
Planner/Scientist IV	$200.00
Planner/Scientist III	$185.00
Planner/Scientist II	$165.00
Planner/Scientist I	$140.00
Technician/Field Monitor V	$175.00
Technician/Field Monitor IV	$160.00
Technician/Field Monitor III	$145.00
Technician/Field Monitor II	$130.00
Technician/Field Monitor I	$115.00

GOVERNMENT SERVICES

City Engineer	$295.00
Deputy City Engineer	$250.00
Plan Check Engineer	$205.00
Permit Engineer	$195.00
Senior City Inspector	$215.00
City Inspector	$200.00
Inspector	$185.00
Stormwater Specialist V	$250.00
Stormwater Specialist IV	$220.00
Stormwater Specialist III	$190.00
Stormwater Specialist II	$160.00
Stormwater Specialist I	$130.00
Building Official	$285.00
Senior Building Inspector	$220.00
Building Inspector	$195.00
Grant Writer/Specialist IV	$220.00
Grant Writer/Specialist III	$190.00
Grant Writer/Specialist II	$160.00
Grant Writer/Specialist I	$130.00

DIRECT EXPENSES Use of outside consultants and vendors as well as copies, blueprints, survey stakes, monuments, computer plots, telephone, travel (out of area) and all similar charges directly connected with the work will be charged at cost plus fifteen percent (15%). Mileage will be charged at the prevailing IRS mileage reimbursement rate.

PREVAILING WAGE RATES Several categories above are used for field work on projects and subject to federal or state prevailing wage law and are subject to increases per DIR.

ANNUAL ESCALATION The rates shown are subject to periodic increases, including January 1st of each year.

OVERTIME for non-exempt employees will be charged at 1.5 times the hourly rate shown above; overtime for exempt employees and other classifications will be charged at 1.0 times the hourly rate shown above.

LATE FEE *Monthly invoices are due within 30 days from invoice date. A late fee will be charged at 1.5% per month on past due accounts.*

MANAGER CLASSIFICATIONS include Program Manager, Project Manager, and Technical Manager.

July 1, 2026

Yeh and Associates, Inc.
Geotechnical • Geological • Construction Services

STANDARD FEE SCHEDULE
CALIFORNIA
EFFECTIVE JANUARY 2026

Professional Services:

Classification	Rate
Principal	$ 250/hr
Senior Project Manager, Engineer or Geologist	$ 235/hr
Senior Project Specialist	$ 220/hr
Project Manager, Associate Engineer or Geologist	$ 210/hr
Senior Project Engineer or Geologist	$ 175/hr
Project Engineer or Geologist	$ 150/hr
Senior Staff Engineer or Geologist	$ 140/hr
Staff Engineer or Geologist	$ 125/hr
Engineer or Geologist Intern	$ 90/hr
Resident Construction Engineer	$ 225/hr
Construction Manager	$ 205/hr
Construction Observer	$ 165/hr
Laboratory Supervisor	$ 155/hr
CAD Designer	$ 170/hr
Project Controller	$ 170/hr
Administrative Assistant	$ 105/hr

Overtime rates for Construction Observation and Office Staff are 1.5 x rates shown.

Laboratory tests are quoted on separate schedule or cost-plus 10 percent for outside laboratory testing when applicable.

Fees for expert witness preparation, testimony, court appearances, or depositions will be billed at the rate of $400 per hour.

Rates do not include prevailing wages for field services. Prevailing wages will be determined on a project-by-project basis.

Rate escalations are updates will be effective January 1 of each year.

Other Direct Charges:

Subcontracted services, copying and rented equipment	Cost Plus 10%
Travel, subsistence, and expenses	Cost Plus 10%
Field Vehicle, sampling gear and equipment	$ 200/day
Automobile Mileage	Current IRS Rate
Hand Auger Kit	$ 300/day
Slope Inclinometer and readout	$ 250/day

SECTION 5.

Conflicts

BKF has no known conflicts which could affect the ability to perform the work in a timely fashion over the duration of the contract.

SECTION 6.

Quality Assurance/Quality Control

In accordance with BKF company policy for QA/QC, all deliverables, calculations, recommendations, and other documentation will be reviewed by an experienced engineer, not otherwise associated with the project, prior to submittal to MSD. Documents will be reviewed to ensure technical excellence, the goals, and expectations of the District are being met, and conformance with applicable design checklists and standards. Both drafts of the PDAR and other items requiring QA/QC reviews will be reviewed by Nick Panofsky, PE.

SECTION 7.

Assumptions and Additional Comments

BKF's services are limited to those expressly set forth in the scope. We understand BKF will have no other obligations or responsibilities for the project except as provided in this proposal letter, or as otherwise agreed to in writing. BKF will provide the scope of services consistent with, and limited to, the standard of care applicable to such services. Any participation in non-adversarial procedures, or other right to repair items, is considered as additional services. For the scope of work identified, we have assumed the following:

1. Obtaining Rights of Entry as well as temporary and permanent easements, is excluded from this scope of work.
2. District will provide encroachment permits for BKF's work in the public R/W.
3. District will pay fees associated with obtaining permits or CEQA document posting and distribution.
4. Traffic control plans are excluded from the project work.
5. Easements depicted are limited to those shown on the records provided or readily available public documents.
6. Boundary resolution, title research, and preparation of easement legal descriptions or plats are excluded unless separately authorized.

SECTION 8.

Contract Requirements

BKF has reviewed the Professional Services Agreement (PSA) and agrees to the terms. We understand the terms are not subject to change. Additionally, BKF complies with applicable local, State, and Federal laws including prevailing wage rates and their payment in accordance with California Labor, Code Section 1775.

APPENDIX A.

Resumes

NAME	FIRM	ROLE	PAGE
Tyler Hunt, PE	BKF	Project Manager	**A-2**
Nick Panofsky, PE, QSD	BKF	Principal-in-Charge and QA/QC Manager	**A-4**
Ethan Coon, PE	BKF	Project Engineer	**A-6**
Emily Creel, JD	BKF	Environmental Lead	**A-8**
Josh Reece, PhD	BKF	Environmental Permitting	**A-10**
Hector Salcedo, PE	BKF	Encroachment Permitting	**A-12**
Jarrad Truman, PLS	BKF	Surveyor	**A-14**
Loree Berry, PE	YEH	Geotechnical Engineer	**A-16**



BKF

27 years of experience

Office Location

» San Luis Obispo, CA

Areas of Expertise

» Project management
» Wastewater treatment
» Wastewater reclamation
» Irrigation and water delivery design
» Low-impact development (LID)
» Stormwater Pollution Prevention Plans (SWPPPs)
» Water system consolidation

Licenses/Certifications

» Professional Civil Engineer, CA No. 74580

Education

» BS, Agricultural Systems Management, California Polytechnic State University, San Luis Obispo, CA

Affiliations

» American Public Works Association
» American Society of Civil Engineers

Tyler Hunt, PE

Project Manager

Tyler Hunt, PE, has over 27 years of experience in the water resources/ wastewater industry. Tyler's expertise includes project management, water/ wastewater conveyance, site improvements, wastewater treatment, wastewater reclamation, irrigation and water delivery, stormwater pollution prevention, low-impact development (LID), water system consolidation, and municipal infrastructure projects. In addition to engineering design, he is experienced with providing construction management and inspection services such as public utility coordination, inspection, estimating, and client support. Tyler's experience includes:

RELEVANT PROJECTS

» **US 101 Sewer Crossing Cast-in-Place Pipe (CIPP),** *Montecito Sanitary District, CA.* Project Manager. This project rehabilitated both the gravity sewer and two force mains from the eastern portion of the district to the Posilipo Lift Station. The design included a cast-in-place pipe (CIPP) lining of a 12-inch VCP gravity sewer main and two, 6-inch CI force mains in compliance with Caltrans requirements to reinforce the pipelines prior to construction of the US 101 widening.

» **Robin Hill Road Sewer Main Replacement,** *Goleta Sanitary District, CA.* QA/QC Manager. This project provided planning and design services for the replacement of 1,250 linear feet of 10-inch-diameter vitrified clay sewer pipe located in Robin Hill Road in Goleta, CA. Construction for the project included ground dewatering and sewer bypassing. The preliminary design effort included field survey, sewer flow monitoring, desktop review of geotechnical studies within the project area, and preparation of Basis of Design report for sewer replacement. Field survey determined the sewer includes a vertical sag in profile resulting in loss of hydraulic capacity. Based on findings, final design for replacement sewer is ongoing. Final design includes additional geotechnical investigations and preparation of final contract documents for construction including traffic control plans. BKF will lead the effort to obtain encroachment permits from the Cities of Goleta and Santa Barbara for project construction.

» **Ventura Road and Rice Avenue Sewer Main Replacements,** *City of Oxnard, CA.* Project Manager. This project replaces approximately 5,000 linear feet of existing 18-inch and 10-inch gravity sewer mains with new 24-inch and 15-inch sewer mains. It also replaces 22 traditional manholes with polymer concrete manholes. Construction elements include trenchless pipe installation and traffic control plans. BKF provided land surveying and civil engineering services, including engineered construction plans, site verification, and agency coordination support.

- **Carmel Valley Manor Sewer Main Extension,** *Carmel Valley Manor, Carmel Valley, CA.* QA/QC Manager. This $6M project included predesign, detailed design, permit acquisition, and construction support services. A feasibility study was developed to abandon the existing septic system at the Carmel Valley Manor (CVM) and to connect the CVM sewer service to the district's collection system at a connection point located approximately 10,000 feet from the Manor. The project design included an 8- and 10-inch-diameter gravity sewer pipeline with associated manholes to convey flow from the CVM to a new pump lift station located on Valley Greens Drive. The design included site development and construction of a new 250 gallons-per-minute (GPM) submersible wastewater lift station with emergency natural gas generator and 1,000 liner feet of 6-inch force main pipeline to convey sewage from the new lift station across County Bridge 500 for discharge to the collection system at Valley Greens Drive. The project included preparation of construction bid documents, geotechnical evaluation, environmental studies, California Environmental Quality Act (CEQA) processing, and land acquisition for the new submersible pump station site. BKF supported the acquisition of permits needed for construction including septic abandonment, building, right-of-way (R/W), and bridge crossing permits from the County of Monterey.

- **Vista del Mar Drive Water Main Replacement,** *City of Santa Barbara, CA.* QA/QC Engineer. This $1M project was created to replace approximately 1,800 linear feet of existing 6- and 8-inch asbestos concrete (AC) water main in Vista Del Mar Drive and Alan Road. A failure of the water main in this area resulted in damage to the road surface. The roadway repair was on hold until the water main was replaced. The existing pipeline was abandoned in place and a new 8-inch polyvinyl chloride (PVC) C900 DR14 pipe was installed within the public right-of-way. The project included preparation of complete design documents suitable for soliciting public bids for construction. BKF performed the topographic field surveying, preparation of the base map, and the complete design documents, including 60 percent, 90 percent, and final plans, specifications, and cost opinions. Responsibilities include providing quality assurance/quality control reviews.

- **2020 Traffic Way Sanitary Sewer Improvements,** *City of Atascadero, CA.* Lead Engineer. This project replaces approximately 5,400 linear feet of 8- and 10-inch gravity sanitary sewer main with 15- and 18-inch gravity sewer mains. It also replaces approximately 5,400 linear feet of 8- and 10-inch gravity sanitary sewer main with 15-,18-, and 21-inch gravity sewer mains. As part of the Wastewater Collection System Master Plan Update, completed by BKF, this segment was identified as hydraulically deficient under existing peak-hour flows. The project includes replacing two sections of existing sewer main.

- **Sewer Main Replacements,** *City of Lompoc, CA.* Project Manager. This multiphase infrastructure project replaced over 5,000 linear feet of existing gravity sewer mains. Construction elements include trenchless pipe installation, traffic control plans, overlapping easements, Caltrans right-of-way (R/W) for encroachment on State Route 1, and multiple Union Pacific Railroad (UPRR) crossings. BKF provided land surveying and civil engineering services, including engineered construction plans, site verification, and agency coordination support.

- **Moss Landing Wastewater System Rehabilitation,** *Castroville Community Services District, CA.* Lead Engineer. Replace or reconstruct four lift stations. Remove approximately 2,700-linear feet of 4-inch force main to Lift Station No. 2, including one bridge crossing. Remove and replace seven manholes and 1,600-linear feet of 8-inch gravity sewer main and line 11 manholes. BKF will prepare design plans for lift station improvements, sewer main replacement, and a construction cost estimate for the work.



BKF

20 years of experience

Office Location

- San Luis Obispo, CA

Areas of Expertise

- Water/wastewater infrastructure rehabilitation and improvements
- Water resources planning

Licenses/Certifications

- Professional Civil Engineer, CA No. 75006
- Qualified SWPPP Developer, CA No. 75006

Education

- MBA, Shidler College of Business, University of Hawaii, HI
- BS, Environmental Engineering, California Polytechnic State University, San Luis Obispo, CA

Affiliations

- American Public Works Association
- American Society of Civil Engineers
- American Council of Engineering Companies

Nick Panofsky, PE, QSD

Principal-in-Charge and Quality Assurance/Quality Control Manager

Nick Panofsky, PE, QSD, has over 20 years of professional consulting experience in the water resources industry. Nick has advanced his expertise through a variety of municipal infrastructure design projects including potable water, recycled water, wastewater, and stormwater. He has been involved in every stage of the design process, including planning, analysis, design, construction management, and operational assistance. He actively manages projects to meet or exceed client expectations while also achieving technical and financial goals. His experience includes:

RELEVANT PROJECTS

- **US 101 Sewer Main Crossing,** *Montecito Sanitary District, CA.* QA/QC Manager. The district's collection system includes a 12-inch diameter VCP sewer main which crosses US 101 north to south from North Jameson Lane to Posilipo Road, terminating at the Posilipo lift station. The 12-inch VCP gravity sewer main conveys all wastewater collected from the eastern portion of the District. Planned construction for the US 101 High Occupancy Vehicle Lanes project requires the relocation of the existing sewer pipe. BKF designed a new replacement pipeline across US 101 to be installed within a casing pipe installed by auger boring.

- **Pescadero Road Sewer Replacement,** *Carmel Area Wastewater District, CA.* Lead Project Engineer. The project involved planning services for the replacement of approximately 2,250 linear feet of gravity sanitary sewer main. The existing sewer main was recommended to be replaced along an alternative alignment, within the public right-of-way (R/W). The existing sewer was failing as a result of earth movement and several trees which fell, impacting the grade of the sewer. Development of the multi-phase planning process involved public outreach, tree removal surveys, and coordination with multiple agencies and private property owners.

- **Robin Hill Road Sewer Main Replacement,** *Goleta Sanitary District, CA.* Project Manager. This project provided planning and design services for the replacement of 1,250 linear feet of 10-inch-diameter vitrified clay sewer pipe located in Robin Hill Road in Goleta, CA. Construction for the project included ground dewatering and sewer bypassing. The preliminary design effort included field survey, sewer flow monitoring, desktop review of geotechnical studies within the project area, and preparation of Basis of Design report for sewer replacement. Field survey determined the sewer includes a vertical sag in profile resulting in loss of hydraulic capacity. Based on findings, final design for replacement sewer is ongoing. Final design includes additional geotechnical investigations and preparation of final contract documents for construction including traffic control plans. BKF led the effort to obtain encroachment permits from the Cities of Goleta and Santa Barbara for project construction.

» **2019 Sanitary Sewer Main Replacement,** *City of Sunnyvale, CA.* Project Manager. This $3.5M project involves predesign, detailed design and construction support services. The project designs sewer mains to replace approximately 9,900 linear feet of aging vitrified clay pipe and polyvinyl sanitary sewer pipes located in 17 different areas in the Cities of Sunnyvale, Cupertino and San Jose with segment lengths ranging from 14 to 1,150 linear feet. Replacement is needed for pipes segments identified by closed circuit television (CCTV) inspection as cracked, partially collapsed, and/or including vertical sags. Design for the sewer mains replacements and associated appurtenances includes surface restoration, rehabilitation or replacement of manholes and lateral reconnections. Certain locations required increasing pipe sizes. New sewers were constructed by a combination of open cut, pipe bursting (trenchless) and cured in place plastic pipe (CIPP) lining construction methods including CIPP lining repair of a 750-foot-long sewer crossing Interstate 280 within Caltrans right of way. Work included coordinated acquisition of the needed construction permits including right of way permits from Valley Water, Valley Transit Authority, City of Cupertino, and Caltrans.

» **Traffic Way Sewer Main Replacements,** *City of Atascadero, CA.* Principal-in-Charge/Project Manager. The project included replacement of two sections of existing sewer main including approximately 1,400 feet of 8-inch polyvinyl chloride (PVC) pipeline, upgraded to 15-inch PVC from San Jacinto Avenue to Lift Station No. 6, and approximately 2,500 feet of 10-inch VCP pipeline, upgraded to 15-inch PVC, and 1,500 feet of 12-inch PVC pipeline upgraded to 18- and 21-inch PVC. The project included modifications to Lift Station No. 6, and other miscellaneous repairs.

» **Conejo Road Sewer Main Extension,** *City of Santa Barbara, CA.* Lead Project Engineer. In 2012, the City installed a new sewer main on residential properties between Conejo Road and Conejo Lane in the Sycamore Canyon neighborhood known as the Riviera. The 8-inch high-density polyethylene (HDPE) pipeline crossed a geologically active area. Due to the instability of soils and high frequency of ground movement, maintaining gravity sewer mains was challenging. The new 200-linear-foot sewer extension featured 6-inch and 8-inch HDPE gravity sewers, specifically designed with expansion joints to accommodate movement in a geologically active area. The new gravity mains were installed using a combination of horizontal directional drilling (HDD) and open trench installation methods. The existing HDPE sewer line was abandoned or removed. Project challenges included designing and constructing below-grade utilities in unstable soil conditions; coordinating and communicating with homeowners; and working in a high-fire-danger area, which required maintaining roadway access and halting work during red-flag-danger days. BKF worked closely with the City and provided civil engineering, including preliminary and final plans, specifications, and estimates (PS&Es) as well as technical specifications based on the City's special provisions for sewer construction per Greenbook standards. Responsibilities included managing a team of engineers, drafters, and other staff; and preparing the preliminary and final plans, specifications, and estimates at the 30%, 65%, and 90% submittals.



BKF

7 years of experience

Office Location

- San Luis Obispo, CA

Areas of Expertise

- Water and wastewater projects
- AutoCAD
- R/Studio

Licenses/Certifications

- Professional Engineer, CA No. 99535
- Cal/OSHA 10-hour training
- Cal/OSHA Fall Prevention Awareness Training

Education

- MS, Civil and Environmental Engineering, California Polytechnic State University, San Luis Obispo, CA
- BS, Environmental Engineering, California Polytechnic State University, San Luis Obispo, CA

Affiliations

- American Society of Civil Engineers, San Luis Obispo Chapter

Ethan Coon, PE

Project Engineer

Ethan Coon has 7 years of civil engineering experience, specializing in water and wastewater infrastructure. His experience includes supporting water and wastewater projects and applying technical tools including AutoCAD, ArcGIS, and RStudio. A licensed Professional Engineer in California, Ethan brings a strong technical foundation in civil and environmental engineering to his work.

RELEVANT PROJECTS

- **Carmel Valley Manor Sewer Extension Project,** *Carmel Area Wastewater District, Carmel Valley, CA.* Assistant Engineer. This $6M project included predesign, detailed design, permit acquisition, and construction support services. A feasibility study was developed to abandon the existing septic system at the Carmel Valley Manor (CVM) and to connect the CVM sewer service to the district's collection system at a connection point located approximately 10,000 feet from the Manor. The project design included 8- and 10-inch-diameter gravity sewer pipeline with associated manholes to convey flow from the CVM to a new pump lift station located on Valley Greens Drive. The design included site development and construction of a new 250 gallons-per-minute (GPM) submersible wastewater lift station with emergency natural gas generator and 1,000 liner feet of 6-inch force main pipeline to convey sewage from the new lift station across County Bridge 500 for discharge to the collection system at Valley Greens Drive. The project also included preparation of construction bid documents, geotechnical evaluation, environmental studies, California Environmental Quality Act (CEQA) processing, and land acquisition for the new submersible pump station site. MNS supported the acquisition of permits needed for construction including septic abandonment, building, right-of-way (R/W), and bridge crossing permits from the County of Monterey.

- **Sanitary Sewer Main Replacement,** *City of Sunnyvale, CA.* Assistant Engineer. This $3.5M project involved predesign, detailed design and construction support services. The project designs sewer mains to replace approximately 9,900 linear feet of aging vitrified clay pipe and polyvinyl sanitary sewer pipes located in 17 different areas in the Cities of Sunnyvale, Cupertino and San Jose CA with segment lengths ranging from 14 to 1,150 linear feet. Replacement was needed for pipes segments that were identified by closed circuit television (CCTV) inspection as cracked, partially collapsed, and/or including vertical sags. Design for the sewer mains replacements and associated appurtenances included surface restoration, rehabilitation of or replacement manholes and lateral reconnections. Certain locations required increasing pipe sizes. New sewer were constructed by a combination of open cut, pipe bursting (trenchless) and cured in place plastic pipe (CIPP) lining construction methods including CIPP lining repair of a 750-foot-

long sewer crossing Interstate 280 and replacement within Caltrans right-of-way. MNS coordinated acquisition of the needed construction permits including right of way (R/W) permits from Valley Water, Valley Transit Authority, City of Cupertino, and Caltrans.

» **Force Main Management Technical Memorandum,** *Goleta West Sanitary District, Goleta, CA.* Project Engineer. The District owns and operates one 18-inch-diameter asbestos cement sewer force main and one 24-inch-diameter ductile iron force main. Each force main measures approximately 9,300 linear feet in length. Following the advanced electromagnetic and acoustic analysis performed by Pure Technologies on the District's two existing sewer force mains. BKF developed a comprehensive technical memorandum analyzing the results of Pure's inspection report and providing recommendations for long-term management of the District's aging force mains. BKF's technical memorandum included preliminary design alternatives and cost estimates for eight different force main re-alignment options, including options for trenchless installation underneath the environmentally sensitive Goleta Slough.

» **Water Mainline Replacements,** *City of Thousand Oaks Public Works Department, Thousand Oaks, CA.* Project Engineer. The Public Works Department owns and operates public water storage and distribution mains within the City of Thousand Oaks. The Project includes final design and construction support for replacing approximately 600 linear feet (LF) of existing 16-inch-diameter welded steel water main with new ductile iron pipe and re-aligning / replacing approximately 260 LF of existing 12-inch-diameter welded steel pipe with new PVC water main. A portion of the 12-inch pipe installation is located within an existing utility cavity in the Caltrans Avenida de las Flores Bridge and requires close collaboration with Caltrans. Other project aspects include rehabilitating approximately 1,080 LF of 16-inch steel water main using cured-in-place pipe liner or flexible-fabric reinforced pipe liner, and replacing pipes, valves, and appurtenances within the existing Meadows Reservoir valve vault.

» **Long-Term Wastewater Solutions for Johnson, McGinnis, Live Oak Road (JML) Area, Community Water Center (CWC).** Associate Engineer. The properties within the JML area currently rely on septic systems for treatment and disposal of domestic wastewater. Over many years, high concentrations of septic systems can cause or contribute to groundwater quality issues, specifically nitrate contamination and other emerging contaminants. Improperly maintained or failing septic systems can further contribute to water quality issues. The JML area has documented groundwater quality issues, with area wells exceeding primary, health-based drinking water standards for nitrate, hexavalent chromium, and/or 1,2,3-TCP. It is likely that septic systems in the area are contributing to nitrate concentrations in the area's groundwater. CWC is seeking support to identify and evaluate alternative methods to address the high concentration of septic systems in the JML area. The project includes a Wastewater Management Alternatives Assessment Report, which will be used as the basis for a grant application to obtain a planning grant to fund detailed design and permitting associated with the recommended alternative.

» **Moss Landing Wastewater System Rehabilitation Project,** *Castroville Community Services District, CA.* Assistant Engineer. This grant funded project included preparation of a preliminary design report and 60% design plans for a project to rehabilitate the Moss Landing wastewater system. The project scope included replacement of three lift stations, rehabilitation of one pump station, Preplacement and rehabilitation of approximately 2,700-linear feet of 4-inch force main, including one bridge crossing within State Route 1 (Highway 1), rehabilitation of 11 manholes and replacement of 1,600-linear feet of 8-inch gravity sewer main.



BKF

20 years of experience

Office Location

» San Luis Obispo, CA

Areas of Expertise

» CEQA/NEPA
» Complex mitigation formula
» Quality Assurance/ Quality Control (QA/QC)
» Public hearing and speaking

Licenses/Certifications

» California State Bar License, No. 243387

Education

» JD, Indiana University School of Law, Bloomington, IN
» BA, Political Science, Arizona State University, Tempe, AZ

Emily Creel, JD

Environmental Lead

Emily Creel, JD, has over 20 years of experience in environmental law and planning, delivering CEQA/NEPA support and environmental planning services, and specializing in controversial and litigious projects. With a unique blend of environmental planning and legal experience, Emily excels in partnering closely with city attorneys, county counsel, and outside CEQA counsel to manage risk, strengthen defensibility, and guide clients through challenging public processes. She has led multidisciplinary teams through the environmental planning of a wide range of projects, including a focus on infrastructure, land development, and transportation projects. She is a proficient project manager, providing client engagement, schedule and budget control, public outreach and hearings, and QA/QC. Emily's experience includes:

RELEVANT PROJECTS

» **Blacklake Sewer System Consolidation Project Technical Studies and Initial Study/ Mitigated Negative Declaration (IS/MND),** *Nipomo Community Services District, CA.* Environmental Project Manager. This project proposed major wastewater system upgrades at the Blacklake Water Reclamation Facility (WRF), including the decommissioning of an existing wastewater treatment facility, addition of a new lift station, and placement of 4.15 miles of new force main. This required the preparation of technical studies and an IS/MND to support the environmental review of the proposed project. Emily's responsibilities included overall management and QA/ QC of the environmental process, coordinating closely with the district and permitting agencies, including through issuance of an Incidental Take Permit for California red-legged frog.

» **Recycled Water Distribution System Environmental Review,** *City of Paso Robles, CA.* Environmental Planning Specialist. This project supported the environmental review of upgrades to the El Paso de Robles Wastewater Treatment Plant (WWTP). The planning work included preparation and QA/ QC of CEQA technical documents, including an Air Conformity Analysis, Biological Resources Survey Report, and Cultural Resources Assessment, to evaluate the potential environmental impacts associated with the upgrades and support the preparation of an Initial Study/Mitigated Negative Declaration (IS/MND). The effort also included regulatory support for the Wastewater Change Petition process to address the decrease in effluent discharges to the Salinas River. The project expanded to include CEQA and NEPA compliance support for the city's tertiary-treated wastewater distribution system. Emily's responsibilities included assisting with the preparation of the IS/MNDs for both the WWTP upgrades and tertiary-treated distribution system

by providing QA/QC and senior technical oversight. She also coordinated closely with city staff and involved agencies.

» **Oak Shores Wastewater Treatment Plant (WWTP) Upgrade Supplemental Environmental Impact Report (EIR) Project,** *County of San Luis Obispo, CA.* Environmental Project Manager. This project included preparation of a Supplemental EIR for the expansion of a wastewater treatment facility serving the Oak Shores community. The proposed expansion included approximately 2 miles of new force main, development of 10 acres of additional spray fields, and construction of new sludge ponds. The Supplemental EIR addressed key concerns, including archaeological and biological constraints as well as visual impacts. Emily's responsibilities included management of the EIR process, preparation of the Project Description, Aesthetics and Alternatives sections, QA/QC, and directing the technical team through completion of the Supplemental EIR.

» **Dana Reserve Specific Plan Environmental Impact Review (EIR),** *County of San Luis Obispo, CA.* Environmental Project Manager, Contract Planner/ Project Manager. The Dana Reserve Specific Plan is the largest land development project ever processed by San Luis Obispo County. The Specific Plan establishes a framework for future developments on a 288-acre site, identifying designated land uses, including residential, commercial, and open space; standards for development; circulation; parks and trails; and supporting infrastructure, along with phasing, implementation procedures, and public facility financing strategies. Entitlements included a Specific Plan, a Conditional Use Permit for grading and oak tree removal, a General Plan Amendment, a Vesting Tentative Tract Map, a Development Agreement, and annexation. Serving as an extension of county staff, Emily assumed management of the project during the environmental review and oversaw the preparation of the EIR. Her responsibilities included providing contract and project administration, coordinating the full planning and CEQA effort through annexation approvals, and supporting subsequent litigation-related needs.

» **State Route 1/State Route 41/Main Street Intersection Improvement Project Environmental Services,** *City of Morro Bay, CA.* Environmental Project Manager. This project required integrated CEQA and NEPA compliance for the installation of a modern roundabout at the State Route 1/State Route 41 (Atascadero Road) and Main Street intersection in the city of Morro Bay. The environmental work included preparing all required technical studies, including Air Quality, Climate Change, Energy, Natural Environment Study, Community Impact Assessment, Section 106 Cultural Studies, Noise, Paleontological Resources, and Water Quality. Close coordination with Caltrans, the city, and San Luis Obispo Council of Governments (SLOCOG) was required to facilitate the review and finalization of technical report content. A combined Environmental Assessment/Mitigated Negative Declaration (EA/MND) was also prepared to satisfy both federal and state requirements. Emily managed all aspects of the environmental documentation process and provided substantial contributions to numerous public hearings.

» **US 101/State Route 46 West Environmental Refresh,** *City of Paso Robles, CA.* Environmental Project Manager. This project required updating the previously-approved environmental documentation for the US 101/ State Route 46 West interchange, which proposed to convert the northbound and southbound US 101 ramp intersections to roundabouts. The updates, or environmental refresh, revisited prior analyses and completed additional technical studies to confirm the project's environmental record remained current, accurate, and relevant. The work included a refresh and update of the Visual Impact Assessment (VIA); Air Quality; Climate Change, Energy Analysis Report; Natural Environment Study (Minimal Impacts) (NESMI); National Historic Preservation Act (NHPA) Section 106 compliance reports; Paleontological Identification Report; Phase I Initial Site Assessment (ISA);and Noise Study Report. The effort culminated in the re-validation of the existing Initial Study/Mitigated Negative Declaration (IS/MND) and Environmental Assessment (EA) for the roundabout project. Emily oversaw and managed all environmental aspects of the re-validation process.



BKF

22 years of experience

Office Location

» Pleasanton, CA

Areas of Expertise

» Special-status species
» CEQA/NEPA
» Wetland delineation
» Permitting compliance
» Environmental regulations and compliance
» Wildlife agency coordination

Education

» PhD, Ecology and Evolutionary Biology, Washington University in Saint Louis, MO
» MS, Biology University of Central Florida, Orlando, FL
» BS, Biology, University of Central Florida, Orlando, FL

Affiliations

» The Wildlife Society

Joshua Reece, PhD

Regulatory Permitting

Joshua Reece, PhD is an accomplished natural resource professional with over 22 years of experience in biology and project management. Joshua has published over 20 peer-reviewed scientific papers and is well-versed in studying the needs and habitats of special-status species. His experience includes various investigations, surveys, vulnerability assessments, excavations, and analyses related to species such as Yosemite toads, California tiger salamanders, San Joaquin kit foxes, and special-status plants. Additionally, Joshua is knowledgeable on local, state, and federal environmental regulations and specializes in preparing CEQA and NEPA documents, coordinating wetland delineations, and ensuring environmental compliance. To maintain consistent survey and mitigation standards, he effectively collaborates with local and national wildlife agencies.

RELEVANT PROJECTS

» **Newell Creek Pipeline Felton/ Graham Hill Project,** *City of Santa Cruz, CA.* Principal-in-Charge. This $21M project includes installation of approximately 23,400 linear feet of 24-inch ductile iron pipe (DIP), a 100-foot crossing over a river, 90-foot trenchless railroad crossing, existing pipeline and facility abandonment, cathodic protection system, and pavement improvements in environmentally sensitive habitats and high traffic areas. Additionally, the project alignment crosses Zayante Creek, a perennial, cold-water stream, and its associated forested riparian zone, which may harbor special status species such as coho salmon and steelhead trout. Construction activities are regulated by permits from the US Army Corps of Engineers (USACE), California Department of Fish and Wildlife (CDFW), National Marine Fisheries Service, and Central Coast Regional Water Quality Control Board (RWQCB). Activities include riparian tree removal, open-cut trenching, drilled concrete piers, and a new free-span pipeline crossing above Zayante Creek.

As a prime consultant, for the On-Call Biological and Environmental Consulting Services project, Josh supported environmental compliance through coordination with the city and a subconsultant. This project involves potential impacts to nesting birds, rare plants, and special-status species such as the dusky-footed woodrat.

» **Arterial Pavement Repair Project,** *City of Goleta, CA.* Environmental Compliance Manager. Joshua was responsible for arborist survey coordination, nesting bird surveys and monitoring, and overall environmental permit compliance for several miles of residential street repair.

» **Montara Force Main Cultural and Biological Support,** *Sewer Authority Mid-Coastside, Montara, CA.* Sewer Authority Mid-Coastside is building a new force main along State Route 1 (within Caltrans R/W) between California Avenue in Moss Beach and Sonora Avenue in El Granada. The BKF team is supporting the project by ensuring permit documents are submitted on time, coordinating with permitting agencies, and minimizing any delays related to permits.

- **Sea Wall Revetment Restoration Project,** *Pajaro Dunes Geologic Hazard Abatement District, Watsonville, CA.* Environmental Lead. This project rehabilitated approximately 2,240 square feet of impacted seawall revetment along the western Pajaro Dunes South community. In the rehabilitation phase, BKF conducted rare plant surveys, provided Worker's Environmental Awareness Training to all active personnel, and biological monitoring during all construction activities for special-status plants and wildlife. Communication with the California Coastal Commission and County were a crucial part of the monitoring due to presence of protected species during construction activities. Because this project impacted sensitive coastal dune habitat, a habitat restoration plan was implemented through close coordination with Santa Cruz County and included dune restoration with native plant re-vegetation. BKF is currently managing the five-year restoration of the impacted area through monthly site visits, annual reporting to the County, and continuous coordination with the Pajaro Dunes Homeowners Association (HOA) for site maintenance. The restoration will be completed in December 2030.

- **Road Improvement Project in Panoche Hills,** *Fresno County, CA.* Environmental Compliance Manager. Prior to and during construction, Joshua was responsible for coordinating biological reconnaissance and special-status species surveys. Species observed and documented included giant kangaroo rats, blunt-nosed leopard lizards, Mohave ground squirrels, and local plants.

- **Routine Maintenance Activities,** *Fresno Metropolitan Flood Control District, CA.* Environmental Compliance Manager. Joshua was responsible for conducting surveys and writing reports in compliance with Lake and Streambed Alteration Agreements.

- **Heritage Park Pedestrian Bridge Repair,** *City of Rancho Cucamonga, CA.* Environmental Compliance Manager. Joshua was responsible for wetland delineations, biological habitat assessments, and coordination with USACE and CDFW for project repairing two pedestrian bridges.

- **South Bay Bridge Replacement Project,** *County of San Luis Obispo, CA.* Environmental Coordinator. BKF is providing construction management, cultural resource monitoring, and biological resource monitoring services to replace the existing seismically deficient bridge with a longer, wider two-span cast-in-place (CIP) pre-stressed concrete box girder bridge over Los Osos Creek. The project area contains two archaeological sites as well as sensitive habitats for biological resources. Environmental compliance for this project involves archaeological monitoring, tribal monitoring and coordination, pre-construction and biological clearance surveys, biological monitors with special-status species permits, and nesting bird deterrents and monitoring. Josh is coordinating required surveys, environmental and cultural monitoring, and reporting. The project, which is funded by both federal and state sources, started construction in January 2026.



BKF

13 years of experience

Office Location

» Riverside, CA

Areas of Expertise

» Caltrans
» Transportation design
» Design-build projects
» Local street/active transportation projects
» PS&E
» AutoCAD/Civil 3D
» MicroStation/Inroads

Licenses/Certifications

» Professional Civil Engineer, CA No. 90382

Education

» BS, Civil Engineering/ Transportation, California State Polytechnic University, Pomona, CA

Hector Salcedo, PE

Encroachment Permitting

Hector Salcedo, PE, is a well-rounded engineer who understands the key aspects of all Caltrans project phases. He has experience working on all three phases of Caltrans project delivery phases which include the Project Initiation Documents (PID), Project Approval/Environmental Document (PA/ED), and PS&E. His vast project experience includes review and preparation of technical reports and preliminary geometric designs in the planning and development of major interchanges throughout Southern California, environmental technical studies, utility coordination, and project coordination. His recent project experience includes design on the Interstate 10 Design-Build Project where he was responsible for a three-mile segment of roadway modeling and preparation of over 100 roadway plans complying with the Caltrans Highway Design Manual, Standard Plans, and Plan Preparation Manual. Hector draws on his experience and knowledge of the Caltrans delivery process to guide the development of practical, safe, and constructible designs.

RELEVANT PROJECTS

» **US 101 High-Occupancy Vehicle (HOV) Widening and Rehabilitation,** *Segments 4D and 4E, Santa Barbara County Association of Governments (SBCAG), CA.* Roadway Modeler. This collaboration between SBCAG and Caltrans is the last phase of a four-phase strategy for providing HOV lane continuity in northern Ventura and southern Santa Barbara counties. With the completion of this project, 30 lane-miles of new HOV lanes will be added on the US 101, which will be crucial in relieving the congested conditions this portion of the highway experiences as a critical connection for travel and goods movement between San Jose and Los Angeles. Regionally, the US 101 is the only viable route for travel between Santa Barbara and Ventura counties. It also serves as an alternative route to Interstate 5 when it is closed by weather or emergencies.

The Segment 4D/4E Project (Southbound 101-PM 9.1/12.3) will complete the gap on US 101 by adding a HOV lane in each direction, replace bridges over three creeks, and add 40-year long-life pavement. BKF provides design engineering and surveying services. Design tasks include preparing final design documents (PS&E) on construction area signs, motorist information sheets, and signage and striping. Hector's responsibilities included creating roadway cross sections and developing slope staking notes for the contractor.

» **Multimodal Infrastructure Improvements,** *Twentynine Palms, San Bernardino County Transportation Authority (SBCTA), CA.* Project Manager. The project entails multimodal infrastructure improvements along Adobe Road near City Hall and Oasis Elementary School to connect future affordable housing developments with nearby transit, public amenities, and pedestrian and bicyclist infrastructure. BKF is providing comprehensive design services to assist SBCTA and the city in completing all necessary pre-construction activities including

concept development for a proposed cross-section; environmental studies and permitting, including a fully approved CEQA document; a feasibility study to assess bicycle and pedestrian facilities along North Allyn Avenue and Bon View Avenue; and final PS&E. Hector's responsibilities include managing the project schedule and deliverables and overseeing the design.

» **Multimodal Infrastructure Improvements,** *Ontario, San Bernardino County Transportation Authority (SBCTA), CA.* Project Manager. The project entails multimodal infrastructure improvements along Mission Boulevard and Bon View Avenue to connect future affordable housing developments with nearby transit, public amenities, and pedestrian and bicyclist infrastructure. BKF is providing comprehensive design services to assist SBCTA and the city in completing all necessary pre-construction activities including concept development for a proposed cross-section that will show bicycle and sidewalk enhancements that are most feasible for the existing conditions and right-of-way (R/W). The scope includes planning and final design of sidewalks, curb ramps, landscaping, striping, signage and electrical for several PS&E packages for construction. Hector's responsibilities include managing the project schedule and deliverables and overseeing the design.

» **Interstate 10/Cherry Valley Boulevard,** *City of Calimesa, CA.* Assistant Project Manager. This project develops PS&Es for the upgrade and reconfiguration of the existing diamond interchange to a diverging diamond interchange (DDI) at the Interstate 10/Cherry Valley Interchange, which is a major thoroughfare of the south end of the City of Calimesa and the City of Beaumont. The traffic volume in the intersection has increased in the surrounding area due to the combination of newer and established residential/housing, the Marketplace at Calimesa, and the Cherry Valley Logistics Center. The interchange was recently upgraded with traffic signals and minor turning lane additions. These additions have provided some relief but will not support long-term regional growth. Hector's responsibilities include assisting in project coordination with the city and subconsultants. He is also overseeing the design and providing Quality Control/Quality Assurance (QA/QC) on the roadway deliverables.

» **State Route 132—Dakota Avenue to Gates Road Phase 2: PS&E,** *Stanislaus County Council of Governments (StanCOG), Modesto, CA.* Roadway Modeler. This project will complete the PS&Es, right-of-way (R/W) engineering, and supplemental project approvals for the State Route 132 Phase 2 project. This project widens State Route 132 from two to four lanes from Dakota Avenue to State Route 99 in the City of Modesto. The improvements include braided ramps at State Route 132/State Route 99 interchange, partial interchange at State Route 132/Carpenter Road, and the replacement of Kansas Avenue overcrossing (OC). As a subconsultant to the prime, BKF is supporting all major design submittals and performs periodic checks of the deliverables against the project schedule and scope. The project scope of work includes technical reports and design submittals required to deliver the final PS&E. The project team also provides project management, topographic surveying and base mapping, supplemental environmental and project approvals, R/W engineering, bidding, and construction services. This project requires coordination between the consulting team, StanCOG, Caltrans District 10, City of Modesto and Stanislaus County representatives, and other regulatory agencies. BKF implemented the established Quality Assurance (QA) procedures, which included performing Quality Control (QC) and QA audits for the project. BKF is also conducting QA/QC reviews for all the design submittals. Hector's responsibilities include roadway modeling and coordination with structures and drainage in developing proposed design surfaces.

» **Hollis Street Transit and Pedestrian Improvements,** *City of Emeryville, CA.* Assistant Project Manager. BKF is actively providing land surveying and design services along the Hollis Street corridor between 40th and Powell Street. Project improvements include bicycle and pedestrian improvements, such as bulb-out sidewalks, bus pads, and dedicated loading areas to improve transit safety and efficiency. Pavement and utility upgrades are also key design elements of the corridor improvement project. Hector's responsibilities included design oversight and reviews.



BKF

30 years of experience

Office Location

» Thousand Oaks, CA

Areas of Expertise

» Land surveying
» Construction surveying
» Topographic survey and mapping
» Boundary surveys
» ALTA/NSPS surveys
» R/W engineering

Licenses/Certifications

» Professional Land Surveyor, CA No. 9546
» Certified Party Chief
» Trimble Geospatial GPS/RTK Processing and Planning, Sunnyvale, CA

Education

» Coursework, GPS Planning/Processing, California State Polytechnic University, Pomona, CA
» Coursework, Mapping, California State Polytechnic University, Pomona, CA
» Coursework, Surveying Technology 119, Santiago Canyon College, Orange, CA

Jarrad Truman, PLS

Survey Lead

Jarrad Truman, PLS has over 30 years of significant experience in land surveying. Jarrad is a proven leader, innovator, and project manager. His responsibilities include managing large complex surveying projects, creating innovative solutions by building teams of experts from multiple office locations to solve clients' needs.

RELEVANT PROJECTS

» **Elsinore Valley Municipal Water District Construction Management and Inspection Services of Five Capital Improvement Projects,** *Elsinore Valley Municipal Water District, Lake Elsinore, CA.* Task Manager. Responsible for surveying. Construction management and inspection for five water resources capital improvement projects were performed. The projects consisted of the replacement of 15,600 feet of water mains and new water lines at 25 locations within the client's boundaries, an approximately 1,350-foot extension of lines for recycled water to the five project sites, replacement of broken or inoperative gate valves in four intersections, replacement of approximately 1,500 water meters with new automatic-reading meters, and installation of new water lines and valves at five locations to interconnect two water pressure zones.

» **Colorado River Aqueduct As-Needed Survey Services,** *Metropolitan Water District Southern California, CA.* Task Manager. Responsible for surveying. Thirty task orders were completed under an on-call agreement with the Metropolitan Water District (MWD) for boundary surveys along the Colorado River aqueduct. Boundary surveys were needed to support perfection of the rights-of-way granted to MWD under Act of Congress in 1932. Each survey retraces portions of the 230-mile aqueduct and the adjoining government sections.

» **Multimodal Infrastructure Improvements,** *Twentynine Palms, San Bernardino County Transportation Authority (SBCTA), CA.* Survey Project Manager. The project entails multimodal infrastructure improvements at multiple sites to connect future affordable housing developments with nearby transit, public amenities, and pedestrian and bicyclist infrastructure. BKF is providing comprehensive design services to assist SBCTA and the city in completing all necessary pre-construction activities including concept development for a proposed cross-section, environmental studies and permitting including a fully approved CEQA document, a feasibility study to assess bicycle and pedestrian facilities along North Allyn Avenue and Bon View Avenue, and final PS&E. Jarrad's responsibilities included R/W mapping, geomatic control, field staff coordination, terrestrial topographic survey, GIS coordination, UAV coordination, and survey project reporting.

» **On-Call Surveying Services,** *City of Palmdale, CA.* Survey Project Manager. BKF has provided comprehensive design-level survey services for multiple infrastructure and facilities projects for the city. Jarrad managed all survey-related work for various task orders. Representative projects include:

- **DryTown Water Slide Design-Build Project.** BKF provided fast-tracked topographic survey and civil support services to support ride integration, site planning, and construction coordination within an active recreational facility. Survey services included establishment of horizontal and vertical control tied to existing city benchmarks, detailed mapping of hardscape, equipment pads, access routes, visible utilities, and critical elevations for the ride and pump house areas. Deliverables included AutoCAD base files, point files, and exhibit mapping developed to city standards and coordinated with the ride manufacturer to support final design and construction planning.
- **Palmdale Boulevard Rehabilitation.** BKF performed roadway control and detailed topographic surveying to support pavement rehabilitation design, including collection of roadway cross-sections, pavement features, drainage facilities, utilities, and roadside improvements to design-level accuracy for final PS&E development.

» **Multimodal Infrastructure Improvements,** *Twentynine Palms, San Bernardino County Transportation Authority (SBCTA), CA.* Survey Project Manager. The project entails multimodal infrastructure improvements at multiple sites to connect future affordable housing developments with nearby transit, public amenities, and pedestrian and bicyclist infrastructure. MNS is providing comprehensive design services to assist SBCTA and the city in completing all necessary pre-construction activities including concept development for a proposed cross-section, environmental studies and permitting including a fully approved CEQA document, a feasibility study to assess bicycle and pedestrian facilities along North Allyn Avenue and Bon View Avenue, and final PS&E. Jarrad's responsibilities included right-of-way (R/W) mapping, geomatic control, field staff coordination, terrestrial topographic survey, GIS coordination, UAV coordination, and survey project reporting.



YEH

22 years of experience

Office Location

» Ventura, CA

Areas of Expertise

» Geotechnical engineering
» Geology

Licenses/Certifications

» Professional Civil Engineer, CA No. 73221
» Applied Project Management Professional, APMP
» Ventura County Registered Well Inspector
» City of Oxnard Registered Well Inspector

Education

» BS, Geological Engineering, University of Wisconsin, Madison, WI

Loree Berry, PE

Geotechnical Engineer

Loree Berry has more than 22 years of professional engineering experience along the Southern California coast providing geotechnical engineering and geology services for a wide range of private and public agency clients, utility districts, transportation departments, special geologic hazard districts, and construction services. She is proficient in AWWA and building code design for water infrastructure to complete reporting to characterize site and subsurface conditions, manage geologic hazards, and provide geotechnical parameters for the design of public improvements, structures, roadways and bridges, and utility infrastructure. She is familiar with the geology and geotechnical challenges and is highly experienced in evaluating subsurface conditions to develop design recommendations for water treatment, storage, and delivery.

RELEVANT PROJECTS

» **Ventura Water Reclamation Facility Membrane Bioreactor and Ultraviolet Disinfection Project,** *Ventura, CA.* Geotechnical Project Manager. This project designed advanced treatment and disinfection to replace the existing equipment at the WRF. YEH provided a Geotechnical Report to support the Basis of Design Report for the project. Loree managed a field exploration program of Cone Penetration Test soundings, drilled borings, and installation of temporary monitoring wells to evaluate the subsurface conditions and prepare recommendations for design of the new facilities. The project design utilizes cement deep soil mixing ground improvement to overcome difficult geotechnical conditions including shallow groundwater, soft ground, and potential for strong ground shaking during an earthquake.

» **Civic Center Wastewater Treatment Plant Phase 2,** *City of Malibu, CA.* Geotechnical Project Manager. YEH provided geotechnical services supporting the design of the next phase of the City's wastewater project. Services include geotechnical field investigation within private and public residential streets, which requires community coordination and advanced scheduling. YEH is performing soil borings, rock coring, cone penetration testing, and geophysical surveys to explore the project as well as laboratory testing, engineering analsyes and report preparation for approximately 3 miles of new pipeline, 5 sewer lift stations, an HDD segment through bedrock along Malibu Canyon Road, a jack and bore installation across Pacific Coast Highway, and new partially buried equipment installation at the Treatment Plant.

» **City of Camarillo Daily Drive Sewer Connection Phase 2,** *Camarillo, CA.* Geotechnical Project Manager. YEH is providing geotechnical recommendations for the design of the Camarillo Sanitary District Daily Drive/101 Freeway Sewer Improvements project in Camarillo, CA. The project consisted of replacing a 2,200 linear foot segment of sewer pipeline within Daily Drive using open trench methods. A second segment of the project involved an approximately

400-foot-long trenchless crossing below Highway 101 to connect the new sewer to the existing sewer on the south side of the highway. The geotechnical evaluation consisted of data review, project coordination and permitting, field exploration with drilling, installation of a temporary groundwater monitoring well, laboratory testing, engineering analyses as a basis for providing the preliminary recommendations in this report. YEH provided groundwater conditions, seismic data, liquefaction potential, and recommendations for pipeline installation.

» **Laguna Road 24-inch Diameter Recycled Water Pipeline,** *United Water Conservation District, Ventura County, CA.* Geotechnical Project Manager. This project was for an important access connection of recycled water to agricultural users along Laguna Road. The new 24-inch diameter pipeline will need to cross a rectangular concrete lined flood control channel called the "Revlon Slough". YEH provided geotechnical exploration and laboratory testing services along the alignment and is preparing geotechnical report documents with considerations for a pipe bridge or a trenchless crossing. YEH will provide a design-level Geotechnical Report for final design alternative.

» **Morro Bay Lift Station and Pipelines,** *Morro Bay, CA.* Geotechnical Engineer and Report Peer Reviewer. YEH prepared the Geotechnical Report for the design of two pump stations and approximately 3 miles of new pipeline that will convey raw wastewater to a new reclamation facility. Return pipelines will transport treated water to an existing ocean outfall and be injected for underground storage and reuse for landscape irrigation. YEH performed exploratory borings and geotechnical analyses to prepare reports with recommendations for design and construction of multiple pipeline routes, creek crossings using microtunnel and bore and jack trenchless technologies, and assessed constructability issues for the new lift station and pipelines.

» **Paso Robles Recycled Water Distribution System,** *City of Paso Robles, CA.* Geotechnical Engineer and Report Peer Review. YEH provided a geotechnical investigation for this project that will convey recycled water from the City's Water Reclamation Facility to water users in the eastern portion of the City. The approximate 5-mile route will include crossings of the Salinas River, HuerHuero Creek and Highway 46 using trenchless technologies including horizontal directional drilling and bore and jack. A welded-steel water reservoir will also be constructed near the end of the pipeline to serve nearby users.

» **Santa Paula Water Recycling Facility Advanced Treatment System, Odor Control Unit, and Bypass Basin**, *City of Santa Paula, CA.* Geotechnical Project Manager. YEH provided geotechnical services for a new Advanced Treatment System at the existing Water Recycling Facility to reduce chloride concentrations in the treated water. The equipment will be housed in an at-grade structure constructed on a 17,000 square foot building pad. Up to 7 feet of fill will need to be placed within an existing basin to raise the site grades of the proposed structure. YEH performed data review, drilling, laboratory testing, and prepared a Geotechnical Report for the project that included recommendations for shallow foundation design, seismic considerations, grading and material specifications. YEH used existing geotechnical data to provide micropile recommendations for an adjacent odor control unit and also provided recommendations for grading an exiting percolation basin to be a lined effluent bypass basin.

» **CA FTBL Dumont Dunes Road,** *San Bernardino County, CA.* Geotechnical Project Manager and Geotechnical Lead. This project was for the design of Bureau of Land Management roadway improvements to the Dumont Dunes Recreation Area. The project improved access on 3.8 miles of aggregate surfaced road leading to the Dumont Dunes off-highway vehicle (OHV) area and 0.1 miles of aggregate surfaced road accessing the Little Dumont Dunes area by replacing the existing surfaces with hot mix asphalt over full depth reclamation of the existing road and adjacent berm material. The project also included review of staging areas, drainage control, safety and signage, and replacing a low water crossing of the Amargosa River. Loree participated in the scoping meeting, kick-off meeting, supervised a program of geotechncial pavement borings, laboratory testing, and provided pavement alternatives and recommended design sections for the improvements.



CONTACT

Tyler Hunt, PE
805.592.2078 Mobile
tyler.hunt@bkf.com

201 N. Calle Cesar Chavez, Suite 300
Santa Barbara, CA 93103

805.692.6921 Office

www.bkf.com

Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108
A Public Service Agency
Phone: (805) 969-4200
www.montsan.org

MONTECITO SANITARY DISTRICT

STAFF REPORT – 6C

DATE: November 4, 2026

TO: Board of Directors

FROM: John Weigold, General Manager

SUBJECT: Wastewater Treatment Plant Improvements Project Ad Hoc Committee Report and Discussion

RECOMMENDATION

It is recommended that the Board receive a report from the Wastewater Treatment Plant Improvements Project Ad Hoc Committee and discuss the report content as necessary.

DISCUSSION

The Montecito Sanitary District Wastewater Treatment Plant Upgrade Project Ad Hoc Committee met on October 29, 2026 to further discuss planning, design and engineering for the District's wastewater treatment plant. Staff recommends that the Board receive a report from the ad hoc committee and discuss the content of that report.

FISCAL IMPACT

None.

ATTACHMENTS

1. Montecito Sanitary District Wastewater Treatment Plant Upgrade Project Ad Hoc Committee report

Montecito Sanitary District

Connecting to Santa Barbara: Preliminary Cost Summary

Summary of a preliminary cost opinion memo

by Southland Industries and Ardurra, dated October 23, 2026

What Was Studied

For screening and comparing options only. Not for setting budgets, appropriating funds or applying for grants.

- Sending all District wastewater, including storm flows, to the City of Santa Barbara's El Estero plant
- Typical wastewater flow equalized at District site and pumped to City at night. Storm flows pumped to City as they come.
- A concept-level screening estimate (AACE Class 5): not a design, a bid or a budget
- Figures include engineering, permitting, contractor markups, escalation and contingency

Class 5

Concept screening. Actual costs may fall outside the stated ranges.

More Than a Pipe

At the District plant

- New influent lift station, screening and grit removal
- 2-million-gallon covered equalization tank, holding daytime and a portion of storm flows for night pumping to the City
- Odor control
- Pump station with two pump sets
- New electrical service and standby generator

Between the District and the City

- Two 18-inch force mains
- Directional drilling at three locations: under the creek near the Zoo, beside the Andree Clark Bird Refuge, and under the Cabrillo and Channel Drive roundabout
- Railroad crossing (Option 2)

Two Connection Options

Option 1

City sewer near Por La Mar Dr and Niños Dr About 1.3 miles

$99M

Estimated connection cost

Option 2

Extend the line to the El Estero plant
About 2.5 miles

$120M

Estimated connection cost

Public City data suggest the sewer at the Option 1 connection point may be too small to take District flows. If the City confirms that, Option 2 applies.

Keeping the Current Plant Running Meanwhile

The existing plant must stay safe and in permit compliance for about six years, until flow reaches the City.

- Electrical rehabilitation
- New dewatering system
- Replacement of one aeration blower
- Critical repairs from the 2023 Carollo capital list

$6.8M
Estimated interim stabilization

Total with connection: Option 1, $106M Option 2, $126M.

Decommissioning the Existing Plant

- Demolish the treatment structures
- Clean and cap abandoned piping
- Abandon the ocean outfall
- Administrative buildings, shop and lab would remain

$14.3M
Same under either option

Cost in addition to the connection totals
This puts Option 1 at $120M and Option 2 at $140M

Timing

About 6 years

from a Board decision to first flow (range five to seven)

1. Agreement with the City
2. Design
3. Environmental review and permits
4. Construction and startup

Permits include the Coastal Commission, state and federal agencies, and the railroad. The City agreement and permitting beside the Bird Refuge are expected to control the schedule.

Montecito Sanitary District
Special Board Meeting - November 4, 2026
Page 252 of 257

Not Yet Counted

These costs/time are not included in any of the previous discussion.

City charges

Capacity buy-in, connection fees, effluent value (MSD addition), and annual treatment charges

City-side work

Any work needed inside El Estero or in the City's sewer system

District costs

Easements, District staff, legal and financing costs, and ongoing operations

Permitting

Permitting and environmental costs beyond the allowance carried; CEQA document preparation

Unknowns (MSD additions)

Litigation, acts of God, etc.

Montecito Sanitary District
1042 Monte Cristo Lane
Santa Barbara, CA 93108
A Public Service Agency
Phone: (805) 969-4200
www.montsan.org

MONTECITO SANITARY DISTRICT

STAFF REPORT – 6D

DATE: November 4, 2026

TO: Board of Directors

FROM: John Weigold, General Manager

SUBJECT: Discussion of Director Johnson's Letter to the Board

RECOMMENDATION

It is recommended that the Board discuss Director Johnson's October 27, 2026 letter to the Board regarding "Requested Board Review of Capital Project Options, Alternatives, and Funding Compliance" and provide direction to Staff as required.

DISCUSSION

On Wednesday, October 28, 2026 Director Johnson emailed a letter to the Board titled "Requested Board Review of Capital Project Options, Alternatives, and Funding Compliance" to the General Manager requesting that he forward the letter to all directors of the Board.

On Thursday, October 29, 2026, following discussion of this request with the District's general counsel, it was determined that this request would result in a violation of the Brown Act. The District general counsel then contacted Director Johnson and recommended that this letter be agendized for discussion by the Board at its November 4, 2026 meeting, to which Director Johnson agreed.

Also on Thursday, October 29, 2026, the same letter was published in the Montecito Journal which set conditions for a possible violation of the Brown Act. Later that day, District counsel contacted all directors to urge directors to refrain from interacting with this Montecito Journal article on social media or online.

Staff and District counsel recommend that the Board discuss this letter and provide any necessary direction to Staff.

FISCAL IMPACT

None.

ATTACHMENTS

None.

Date: October 27, 2026

To: President and Board of Directors, Montecito Sanitary District (MSD)
Cc: General Manager; District Counsel; Clerk of the Board

Subject: Requested Board Review of Capital Project Options, Alternatives, and Funding Compliance

Dear President and Fellow Directors:

In carrying out my responsibilities as an MSD District director and Board Treasurer, I request a separately agendized Board review of the current alternatives-evaluation process, specifically regarding how different wastewater management strategies are being prioritized.

To ensure protection of public funds and maintain full transparency for our ratepayers, it is important to provide a documented, balanced explanation of all long-term options. To help clarify our path forward, I would like the Board to address the following structural concerns regarding the 2-person Wastewater Treatment Plant Improvement Project ad hoc, which has sole and exclusive access and control over both Southland negotiations and contract decisions, and later, exclusivity over negotiations and contracts with the City of Santa Barbara. This ad hoc concentration of power raises a barrier to full Board transparency.

Prioritization of options: The ad hoc's primary focus has remained heavily centered on the option to rebuild the wastewater treatment plant, rather than evaluating multiple pathways concurrently. Please detail all contacts made with the City of Santa Barbara for regional treatment with dates, attendees, subjects, intentions and outcomes in the last 3-years.

Status of the regional alternative: The viable alternative to deliver the District's wastewater to the City of Santa Barbara appears to have been placed on the back burner, delaying a comprehensive, side-by-side comparison of both options.

Review of proposals: The Finance Oversight Committee was provided with the Southland agreement in 2025 without a comparative review of other available proposals, such as the alternatives developed by ENGIE in 2023 to 2025. Did the District receive written or oral proposals from both Southland and ENGIE (or other potential bidders)? Why was the Finance Oversight Committee provided only the unsigned Southland agreement in 2025, without information on ENGIE's negotiations, proposal or alternatives?

Timeline of alternative assessments: The evaluation of the Santa Barbara alternative option was delayed for more than six months, and it remains unclear what specific project scopes, authorization dates, or additional costs influenced this timeline.

Deliverables and expenditure tracking: With approximately $1.7 million allocated to the Southland study agreement, the District needs a clear summary of amounts paid, outstanding engineering drawings, and finalized deadlines to ensure a comprehensive presentation can be made to the full Board.

The Southland agreement commencement/start date was September 10, 2025. The Board received draft materials of Southland's agreement shortly before its April 22, 2026 meeting—nearly seven months after the start time of the agreement. The expiration date of the Southland contract date is July 31, 2027. At that time, is it the intention of MSD management and/or the ad hoc to add a new build, no bid extension to the Southland agreement to construct whatever specs Southland has developed in its first twenty-two months (a seeming conflict of interest)?

This request seeks clarification of procurement, compliance, transparency, and any potential ethical or conflict-of-interest concerns. A thorough review of these points will help ensure the District chooses the most fiscally responsible and operationally sound strategy for our community. Thank you for your time and collaboration on this matter.

Sincerely,

Dorinne Lee Johnson
Montecito Sanitary District
Board of Directors and Treasurer
SB LAFCO Commissioner