

King County Wastewater Treatment Division
 Evaluation of Inflow and Infiltration Reduction Concepts: Phase 2
Summary of Major Revisions to Scope of Work

The draft scope for the Evaluation of Inflow and Infiltration Reduction Concepts: Phase 2 project was provided to MWPAAC in February 2019. The draft scope was revised based on comments received from MWPAAC and the consultant, Brown & Caldwell, as well as to clarify the level of detail of tasks. The revised scope of work is attached. The scope of work is considered final and will be used to negotiate a contract with the consultant.

The table below is a summary of the major revisions made. It does not capture every revision.

Reference in Scope	Description of Revision
Pg. 2, Objective	Added sentence that this scope applies to the separated portion of the regional sewer system.
Pg. 8, Task 4100	<p>Added text to consider costs and benefits at the local agency type level, as feasible, when choosing a cost benefit evaluation method (e.g. district and city, or small, medium, and large utility).</p> <p>Added text to refine implications described in the decision criteria by local agency type (e.g. district and city, or small, medium, and large utility).</p>
Pg.8-9, Task 5000	Revised ESJ task to more closely align with our capital project process.
Pg. 8, Task 4100 Pg. 10, Task 6100 Pg. 11, Task 7100 Pg. 13, Task 8100	Added planning for targeted outreach interviews to support program development and added conducting interviews for each program as described in the interview plan.
Pg. 11, Task 7100	Added statement that WTD and local agencies would explore labor and bargaining unit issues without consultant support.
Pg. 12, Task 8000	Clarified that the cost benefit evaluation method chosen would be implemented during the private side sewer program development.

<p>Pg. 11, Task 7100 Pg. 12, Task 8100 Pg. 13, Task 8200</p>	<p>Clarified text in subtasks to ensure consultant describes financial impacts to WTD and to local agencies for the inspection training and certification program, and for the private side sewer program. This is in line with the task 7000 and 8000 introductions around key consideration/criteria.</p>
<p>Pg.13-14, Task 8200</p>	<p>Scaled back financial assistance task to focus on financial assumptions and not all program development needs.</p>
<p>Pg.14, Task 9000</p>	<p>Removed implementation plan for the private side sewer program.</p>
<p>Pg.14 -15, Task 9000</p>	<p>Added text to clarify assumptions around public outreach planning and implementation for each program.</p>

SCOPE OF WORK – VERSION 3, 3.22.2019

CONTRACT NO. P00208P16

PROFESSIONAL SERVICES FOR

EVALUATION OF INFLOW AND INFILTRATION REDUCTION CONCEPTS: PHASE 2

Introduction

This scope of work is to provide services to the King County Wastewater Treatment Division (WTD) to assist in exploration and planning of possible new elements for the Regional Inflow and Infiltration (I/I) Control Program. This scope of work shall build on the work that WTD completed previously as part of the I/I Control Program and explore more comprehensive and system wide I/I reduction. The products of this scope of work will inform the region about three program types, develop options for program components and related information. This scope may include implementation plans for the recommended programs.

Project Background

I/I is the excess flow of clear water, not wastewater, into sewer pipes from groundwater and illicit stormwater connections. I/I in the separated regional wastewater system impacts both capital and operational costs.

WTD's Conveyance System Improvement (CSI) Program assesses capacity in the regional wastewater system and plans future projects. Capacity is assessed against a 20-year peak flow. Findings from several sources around the country and from King County estimated that under peak wastewater flow conditions as much as 75% of the peak flow in the separated sewer system is I/I.¹ Based on national I/I surveys and historic King County I/I reports, a significant portion of that I/I originates on private property. The I/I results in higher CSI related capital program costs by accelerating the need for capacity improvement projects and increasing their size. Transporting and treating I/I increases operational costs related to pumping, treating, and disposing of the total wastewater volume. The extra cost to build additional capacity for I/I flows, convey flows through the system, and treat the excess flows are currently spread across all customers, through WTD's utility rates.

WTD has had an I/I Control Program since 1999. The program was established as part of the Regional Wastewater Services Plan. Currently, the I/I program focuses on portions of the system that have wastewater flow capacity shortages. Specifically, the I/I program has developed data to assess where localized I/I reduction might be a more cost effective solution than increasing pipe and/or pump station capacity. The program has been effective in some areas of the regional wastewater system. In 2015, a MWPAAC I/I Task Force was formed to brainstorm I/I programs that benefit the regional wastewater system as a whole by looking at long-term solutions to prevent and remove I/I from the entire sewer system. The Task Force recommended a list of items to be given further consideration as options for future Regional I/I Control Program actions. That list provided the framework for this contract. Currently,

¹ King County Metro. Wastewater 2020 Plus Infiltration/Inflow Existing Conditions. February 1994. pg. 13 and King County. Pilot Project Report. October 2004. Pg. 1-3.

there is no comprehensive program to address I/I throughout the regional wastewater system and for decades to come.

Objective of Scope of Work

Prepare program development plans and implementation plans for the I/I reduction program options as advised by Metropolitan Water Pollution Abatement Advisory Committee (MWPAAC) in December 2018. Development of implementation plans will be initiated only after MWPAAC has an opportunity to review and make recommendations regarding major program components to King County. This scope applies to the separated portion of the regional sewer system.

Estimated Project Schedule

Notice to Proceed	April 2019
1 Project Planning	April 2019 – May 2019
2 Program Goals, Methods, Background Information Development	April 2019 – September 2019
3 Regional BMP Development	October 2019 – December 2019
4 Inspection Training and Certification Program Development*	October 2019 – June 2020
5 Private Side Sewer Program Development*	October 2019 – June 2020
6 Implementation Plan(s)	July 2020 – December 2020

* A MWPAAC recommendation on whether to initiate implementation planning may occur in 2020 as program development is completed.

Reference Documents

1. King County in cooperation with cities and sewer districts developed proposed Engineering Standards/Procedures, Guidelines, and Standard Design Details for the design, construction, inspection and testing of sanitary sewers in 2004 (for a copy see Appendix B of the 2005 Executives Recommended Regional Infiltration and Inflow Control Program at: http://www.kingcounty.gov/~media/services/environment/wastewater/i-i/docs/Reports/0512_II_Control_Program_Recommendations.ashx?la=en)
2. [The County posted to the P00208P16 web site a summary of two 2015 MWPAAC I&I Task Force meetings under P00208P16 - Task Force Meeting Compilation.](#)
3. MWPAAC Recommendation on I/I Reduction Concepts for Further Evaluation; Letter dated November 28, 2018 and Recommendation dated October 11, 2018. Available upon request.

Scope of Work

Consultant Deliverable Standards

1. For all deliverables, the Consultant shall provide the following unless otherwise specified in a particular task:
 - A. Consultant is responsible for the quality of each deliverable (i.e., correct style, grammar, consistency, etc.).

- B. Draft documents should be labeled and watermarked as “DRAFT” until finalized in agreement with the County, and should use the appropriate WTD template, follow WTD and King County standards for grammar, formatting, and term consistency, and be consistent with the King County Style Guide.
- C. The County shall review draft deliverables and submit comments per the Review Process described below.
- D. Prior to submittal to the County, the Consultant shall review final documents for formatting, grammar, spelling, term consistency, and adherence to WTD and King County standards (i.e., documents should be “print ready”).
- E. Unless otherwise stated below, all deliverables will be submitted in electronic format and in both draft and final versions.
- F. Final documents will be delivered electronically in both Microsoft Word (and/or native file format) and PDF version, with all appendices, figures, and graphics in final form.

County Review Process

Unless otherwise stated below, each deliverable shall be submitted in draft and final versions. After receipt of each draft deliverable, the County shall review, discuss with Consultant as necessary, and provide comments to Consultant within 15 business days. The Consultant shall review and incorporate the County comments. Along with revised draft(s) and/or final documents, the Consultant shall submit to the County a version of the document with track changes that addresses all comments and identifies how a comment was addressed (or provide rationale for why it was not addressed). The Consultant shall identify comments resulting in changes that impact schedule and scope. Response to comments impacting scope or schedule shall be reviewed by the County to reach consensus on resolution.

PHASE 2 - Implementation Plan for Recommended I/I Program Concepts

The purpose of Phase 2 is to further define, analyze and evaluate the three recommended I/I reduction program options for the separated sewer system, and identify measures to overcome barriers to implementation. When and where recommended for implementation, these purposes include developing relevant implementation plans for program options elected to move forward. Local sewer agencies served by King County will be engaged in the planning process through the MWPAAC and the Engineering and Planning subcommittee.

Task 1000 - Project Management

This task includes all work related to the management, administration, and coordination of Consultant activities in accordance with the Project Management Institute’s standards.

Subtask 1100 – Project Management Plan Revision

Revise the Project Management Plan addressing this Scope of Work.

1. Revise the Project Management Plan (“PMP”) within 30 working days of the Notice to Proceed (“NTP”) that documents the Project Management Institute method that shall be used for managing the project. The PMP revision will be limited to additions or changes that reflect Phase 2. The PMP shall include:

- a. A work breakdown structure (“WBS”) that identifies resources and responsibilities necessary to respond to WTD-approved work scope.
 - b. A project schedule.
 - c. A quality assurance program, communication protocols, invoicing requirements, and project procedures, such as filing systems, charge numbers, change management, and document format.
2. Following review by WTD of the draft revised PMP and within 10 working days of receipt of WTD’s review comments, prepare and submit a final revised PMP to WTD for review and approval.
 3. Distribute final WTD-approved PMP to all subconsultants.
 4. Update the PMP and submit to WTD if required by changes in project schedule, budget, or scope of work, or as requested by WTD.

Deliverables:

1. Draft and final revised PMP.
2. One (1) update of the PMP, if needed.

Assumptions:

1. Consultant will rely on the County’s legal counsel for the legal-related aspects of this scope. The Project Management Plan will assume that the participation of the County’s legal council is available.

Subtask 1200 – Progress Reports

Prepare monthly progress reports to document project progress.

1. Submit a monthly progress report to WTD by the 10th of each month, or other mutually agreed-upon date in advance of the monthly meetings called for in Subtask 1300.
2. Progress reports shall be one (1) to two (2) pages in length and include:
 - a. Work completed for prior month, schedule of work for the next month, any changes in staffing, schedule updates, identification of issues that impact schedule, and proposed means to address critical issues.
 - b. A listing of all costs to date and a revised cost-to-complete estimate tracked at task level (not subtask level).

Deliverables

1. Up to 24 monthly progress reports over two years.

Subtask 1300 – Monthly Progress Meetings

The Consultant shall hold monthly meetings with WTD PM to discuss project progress, activities may include the following:

1. Conduct monthly one-hour progress meetings with WTD PR and/or WTD PM and members of the County’s Project Team, as necessary and appropriate, to review:

- a. Project tasks underway.
 - b. Time and budget tracking.
 - c. Work elements accomplished.
 - d. Work items planned for the next period.
 - e. Scope changes.
 - f. A log of decisions, time, and budget needed to complete specified portions of the project.
2. At least three (3) working days prior to each meeting, prepare and distribute draft meeting agenda (one-hour effort for one person per meeting).
 3. Within three (3) working days following each meeting, prepare brief meeting notes with decision log and action items list (two-hour effort for one person per meeting).
Meeting notes shall include:
 - a. Summary of each agenda item discussed.
 - b. Action items that have been resolved.
 - c. Items which require a response by a specific Consultant or subconsultant team member, King County, or others.
 - d. Changes to deliverables or schedules.
 - e. Updates to decision log.
 - f. Updates to action items list.

Deliverables:

1. Meeting agenda
2. Meeting notes

Assumptions:

1. Two Consultant staff will attend each meeting
2. One-hour of travel time was included for each meeting.
3. One hour of meeting preparation were included for Consultant PM to develop materials and two hours for meeting notes and action item updates were allocated for each meeting

Subtask 1400 – Coordination and Monitoring

The Consultant shall implement project management tasks not captured in other project management subtasks. Activities may include the following:

1. Communicate with subconsultants.
2. Monitor the scope, schedule and budget activities of the project.

Deliverables:

1. None

Task 2000 – MWPAAC Involvement Support

The Consultant shall work with WTD and MWPAAC to develop a plan for collecting and sharing information as this scope of work is completed. MWPAAC engagement is a necessary and integral part to developing program options further.

MWPAAC and King County are in agreement to move forward with this scope to further define and analyze the program options. Actions beyond this scope have not been agreed to at this time. Implementation is not assumed.

The WTD Project Manager will be the point person to initiate communication and foster the cooperation of MWPAAC members. The Consultant will be responsible for completing work tasks in close coordination with WTD and MWPAAC.

Subtask 2100 – MWPAAC Involvement Plan

The Consultant shall revise the MWPAAC Involvement Plan for Phase 2 to include engagement strategies, and the input process and schedule for involving MWPAAC in the Evaluation of Inflow and Infiltration Reduction Concepts. The MWPAAC Involvement Plan shall describe a process for MWPAAC to advise the WTD Director on which types of I/I programs to implement.

Deliverables:

1. Draft and Final MWPAAC Involvement Plan
2. One (1) update of the Involvement Plan, if needed.

Assumptions:

1. MWPAAC Engineering and Planning Subcommittee is likely to be the venue for involvement, however, an alternate venue such as a specifically formed task force is possible.
2. This project is expected to be an agenda item at monthly meetings of the E&P Subcommittee for the duration of the scope (up to 8 times per year).
3. The MWPAAC Involvement Plan shall define roles and responsibilities of the Consultant, King County and MWPAAC, key messages to communicate to agency staff, councils and boards, engagement schedule and other items that support involvement of local agencies.

Subtask 2200 – Support to King County Staff during MWPAAC Meetings

WTD will meet with MWPAAC regularly to provide project briefings and engage with local component agencies. The Consultant shall provide facilitation services and support to WTD during these meetings. Facilitation services shall include meeting preparation and materials development, meeting facilitation, and support to meeting follow-up/ action items.

Deliverables:

1. Presentation materials for meetings.

Assumptions:

1. Attendance at up to 8 MWPAAC meetings per year, for a total of 16 meetings.
2. A total of 8 individual trips for out of town experts have been budgeted for attending MWPAAC meetings. More than one individual trip could occur for the same meeting.
3. Each meeting is expected to be 2 hours long.
4. One-hour of travel time was included for each MWPAAC meeting.
5. Two hours of meeting preparation were included for Consultant PM and Leads to develop materials and one hour for meeting notes were allocated for each meeting.
6. MWPAAC meetings will be attended by an average of three Consultant staff.
7. Preparation of materials will be limited to 64 hours of labor as indicated in the level of effort.

Task 3000 Meeting and Briefings Participation

The Consultant shall attend and participate in meeting and briefings with WTD staff and management on an as needed basis.

Subtask 3100 – Meeting and Briefings Participation**Deliverables:**

1. Presentation materials for meetings and briefings.

Assumptions:

1. Attendance at up to a total of 5 meetings or briefings
2. Each meeting is expected to be 2 hours long.
3. One-hour of travel time was included for each meeting.
4. One hour of preparation was included for Consultant PM and Leads.
5. Meetings will be attended by one Consultant staff
6. Consultant will not prepare meeting notes or update the action item log for these meetings

Task 4000 Program Development Plan

The Consultant shall develop a plan for the overall approach in developing both I/I programs and program implementation plans.

Subtask 4100 – Develop Program Goals, Methods and Background Information

The Consultant shall initiate program development tasks in collaboration with MWPAAC; specifically developing the following:

- overview graphic of the Phase 2 planning process
- goals, objectives and critical success factors for each program concept including voluntary versus mandatory implementation

- description of each program's risks and barriers to implementation, and mitigation approaches to manage, lessen or remove risks and barriers (e.g. existing state or local laws and regulation, agency staff capacity and funding) based on Phase 1 findings
- method(s) to evaluate costs and benefits of private side sewer program options at the regional level and, as feasible, with consideration of costs and benefits at the local agency type level (e.g. district and city, or small, medium, large utility)
- refinement of decision criteria from Phase 1 based on cost benefit method chosen, implication to local agency type (e.g. district and city, or small, medium, and large utility), if differentiating, and expected additional information to be described in subsequent tasks
- description of process to reach agreement on major program components for each program, and on implementation plans to develop
- compile information from at least three existing side sewer inspection programs on key decisions that set the framework of the program, how the program was implemented, and subsequent lessons learned by the utility

In addition, the Consultant shall develop the following items:

- a plan to conduct targeted interviews or outreach with interested or affected parties on each program concept, e.g. utilities across the nation, real estate agents, trade associations or others, to inform program development. This will be included in the subtask 4100 deliverable.
- draft outlines for each program development memorandum e.g. regional BMPs, inspection training program and private side sewer inspection program with a financial assistance component
- draft outlines for each possible implementation plan

Deliverables:

1. Draft and Final Memorandum that presents the options explored, planning process and outcomes of Subtask 4100

Assumptions:

1. Regional cost benefit evaluation will not be undertaken for the Regional BMPs or the Inspection Training Programs as these do not lend themselves to a cost benefit evaluation.
2. Task 4000 will inform tasks 5000, 6000, 7000, and 8000.
3. The Memorandum will be 20 pages or less in length.

Task 5000 – Equity and Social Justice (ESJ) Assessment Review

The Consultant shall perform a demographic review and assessment of equity determinants. The Consultant shall review the King County equity impact review process and recommend additions to the assessment based on the review. The assessment will consider each of the program concepts independently as well as concurrently (cumulatively). Depending on the result of the assessment, an

ESJ Action Plan may be required, and would be developed concurrently to implementation planning tasks.

Deliverables:

1. Draft and Final ESJ Assessment Review
2. Draft and Final ESJ Action Plan, if recommended by the assessment.

Assumptions:

1. The ESJ Assessment will encompass the portion of the King County service area in the separated sewer system.
2. An ESJ Action Plan, if needed, would be completed for the regional BMPs and/or the inspection training and certification program if recommended by MWPAAC for implementation planning. An ESJ Action Plan for the private side sewer program would be developed as part of implementation planning, which is not part of this scope of work.

Task 6000 – Regional BMP Development

The Consultant shall build upon the Phase 1 technical memorandums and outcomes of Task 4000 to develop major components of a common regional BMP approach that would have the greatest possible benefit of I/I reduction. This task will consider different configuration of program components through collaborative discussion with MWPAAC. The task will provide additional detail around key considerations/criteria e.g. regional effectiveness of I/I reduction, legal and political implications, property owner impacts, local agency impacts, WTD impacts, and equity and social justice.

This task shall result in enough detail to support a recommendation on whether to implement the program, and, if recommended, to support adoption and/or implementation by local agencies and/or WTD with minimal or no further planning.

The relevant Phase 1 technical memorandum are:

- Verify 2004 King County Final Draft Regional I/I Control Standards, Procedures and Policies (subtask 410)
- Assessment of Existing Local Agency Sewer and Side Sewer Standards (subtask 420)
- Approach to Achieve Common Sewer and Side Sewer/Lateral Standards (subtask 430)

Subtask 6100 – Regional BMP Development

The Consultant shall evaluate existing BMPs and determine the best 3-5 practices for implementation at a regional scale. The Consultant will develop information on other major program components, e.g. implications of voluntary versus mandatory implementation, and subsequent actions recommended/needed by individual cities or districts.

At a minimum, activities will include:

1. Identification of BMPs for a sewer and side sewer standards and policies with the greatest regional benefit.
2. Evaluation of the identified BMPs for regional use.
3. Further development of mitigation measures for identified barriers to implementation.
4. Describing the process to agree to or adopt BMPs at the regional level
5. Cost to implement BMPs
6. If BMPs are mandatory, describe consequences if local agencies does not adopt BMPs
7. Describing opportunities for applying the findings of the ESJ Assessment to the program
8. As appropriate and in accordance with the interview plan, complete targeted interviews or outreach, and summarize results

Deliverables:

1. Outline will be provided in Task 4000.
2. Draft and Final Technical memorandum that presents the options explored, evaluation process, the agreed upon regional BMPs, and next steps for implementation.

Assumptions:

1. Regional cost benefit evaluation will not be undertaken for the Regional BMPs.
2. No further implementation planning is expected.

Task 7000 – Inspection Training and Certification Program Development

The Consultant shall build upon the Phase 1 technical memorandums to develop a comprehensive training and certification program for the region that addresses new construction and rehabilitation/repairs for three key components of the sanitary sewer system: mains, laterals, and private side sewers.

The inspection training program will focus on practices that help ensure inspection of private side sewer construction is performed at a standard that reduces I/I as much as possible. This task will consider major program components and different configuration of those components through collaborative discussion with MWPAAC. The Consultant will coordinate with existing trade associations to determine possible partnerships and, as needed, conduct targeted interviews in accordance with the plan developed in Task 4000. This task will provide additional detail around key considerations/criteria e.g. regional effectiveness of I/I reduction, legal and political implications, community/ratepayer/homeowner impacts, local agency impacts, WTD impacts, and equity and social justice.

This task will result in enough detail to support a recommendation on whether and how to implement the program.

The relevant Phase 1 technical memorandum are:

- Outline for a Standardized Regional Inspection Training Program (subtask 520)
- Evaluation of Current Inspection Programs at Cities and Sewer Districts (subtask 510)

Subtask 7100 – Inspection Training and Certification Program Development

The Consultant shall develop a comprehensive training and certification program for the region. Labor and bargaining unit issues around inspectors participating in a training and certification program will be explored by WTD and local agencies early in this task.

At a minimum, the training program shall include:

1. Roles and responsibilities for WTD, local agencies, potential third-party contractor and potential other interested parties in job training
2. Cost estimates for running the program
3. Program funding options and impacts to WTD and to local agencies
4. Methods for inspection training
5. Requirements to complete training
6. Certification/recertification requirements including a testing-out option or alternate, equivalent certification
7. Consequences if agency does not use certified inspectors
8. Content for inspection training modules
9. Implementation schedule options

Also, the consultant shall:

- Develop a description of opportunities for applying the findings of the ESJ Assessment to the program
- As appropriate and in accordance with the interview plan, complete targeted interviews and summarize results
- As needed, further develop mitigation measures for identified barriers to implementation.

Deliverables:

1. Outline will be provided in Task 4000.
2. Draft and Final Technical memorandum that presents the options explored, evaluation process and major components of the comprehensive training and certification program.

Assumptions:

1. Regional cost benefit evaluation will not be undertaken for the Inspection Training Program.
2. Information developed will directly support development of an implementation plan in Task 9000.

Task 8000 – Private Side Sewer Inspection Program Development

The Consultant shall build upon the Phase 1 technical memorandums to develop options for a private side sewer inspection program that includes a financial assistance component. For scoping purposes these are broken into two subtasks.

This task will consider major program components and different configuration of those components through collaborative discussion with MWPAAC. This task will provide additional detail around key considerations/criteria e.g. regional effectiveness of I/I reduction, legal and political implications, property owner impacts, local agency impacts, WTD impacts, and equity and social justice. The Consultant will conduct targeted interviews to better inform an understanding of barriers and implications of the program. The consultant will implement the cost benefit evaluation method chosen in task 4000. This task will be set in the context of an understanding of the regional contracts that component agencies have with WTD to determine viable options for further implementation in Task 8000.

This task will result in enough detail to support a recommendation on whether to develop an implementation plan.

The relevant Phase 1 technical memorandum are:

- Private Side Sewer Program Evaluation Process and Private Side Sewer Identification and Relevance to the King County Wastewater Service Area (Task 600)

Subtask 8100 – Private Side Sewer Inspection Program Development

The Consultant shall develop up to five options (configurations) of major program components for a private side sewer inspection program. Consideration of the costs and benefits of investing in I/I reduction to potentially reduce capital project costs for conveyance will be described for each option/configuration.

At minimum, the following will be described to support development of the program:

1. Inspection trigger options (i.e., point of sale, time-based, dollar amount or scope of remodel or others)
2. Inspection criteria; Pass/fail, partial pass, partial fail
3. Repair/replacement criteria and methods
4. Process for inspection certification including actions taken if side sewer does not pass inspection
5. Enforcement triggers and actions
6. Program costs including the financial assistance component
7. Program funding options including the financial assistance component
8. Financial implications to WTD and to local agencies
9. Financial implications to property owners and buyers
10. Regional costs and benefits of investing in I/I reduction
11. Impacts to sewer providers and WTD

12. Impacts to real estate transaction process
13. Roles and responsibilities for all affected parties
14. Legal implications of program options

Also, the consultant shall:

- Develop a description of opportunities for applying the findings of the ESJ Assessment to the program
- As appropriate and in accordance with the interview plan, complete targeted interviews or outreach and summarize results

Also, the Consultant shall, as needed, further develop mitigation measures for identified barriers to implementation.

Deliverables:

1. Outline will be provided in Task 4000.
2. Draft and Final Technical memorandum that presents options explored, evaluation process and major components of a private side sewer inspection program including assumptions related to a complementary financial assistance program.

Assumptions:

1. It is anticipated that a private side sewer program could apply within all separated sewer basins of the County's service area.
2. Information developed will directly support development of an implementation plan, outside of this scope of work.

Subtask 8200 – Financial Assistance Program Development

The Consultant shall develop financial assumptions and basis for a financial assistance program to complement the private side sewer program. This work may be informed by the WTD's Capacity Charge Affordability and Low Income Customer Assistance Program Development Project.

The following will be described to support development of the program:

1. Program costs
2. Funding source
3. Financial implications to WTD, to local agencies and to rate payers

Additional planning to develop a full Financial Assistance Program will need to be developed outside of this scope. The need for this additional work shall be mentioned in the deliverables for Subtask 8200. That work may include the following:

- a. Options for grants (i.e. need based grants, grants not based on need)
- b. Options for loans (i.e. need based loans, loans not based on need)
- c. Options for other types of financial support

- d. Qualifications and exclusions for applicants and project types for all types of financial assistance
- e. Legal implications of property liens, in the event of non-payment
- f. Method of fund distribution
- g. Possible additional financial planning
- h. Roles and responsibilities for all affect parties
- i. Outreach plan

Assumptions:

1. Outcomes of this subtask will be included in the subtask 8100 deliverable.
2. Information developed will directly support development of an implementation plan, outside of this scope of work.

Task 9000 – Implementation Planning

Implementation planning applies to the inspection training and certification program and the private side sewer program. The regional BMPs are not expected to need an implementation plan.

The Consultant shall prepare an implementation plan for the inspection training and certification program, as directed by WTD. Due to the complexity of the private side sewer program, implementation planning for this program will be part of later work.

Implementation plans will be “how to” guides to set up, implement and manage the selected programs based on well-defined program development plans completed. Implementation plans will focus on recording results developed in earlier tasks, and providing items such as draft ordinance language for WTD and local agencies, a plan to set legal authorities if needed, public outreach plans, supporting materials and other items necessary to implement the program.

The implementation plans shall at a minimum include:

1. Refined program vision, mission statement, goals, and scope
2. Roles and responsibilities for WTD and the MWPAAC agencies
3. Legal implications and authorities to put in place, if any
4. ESJ Action Plan, if applicable
5. Outreach plan and materials e.g. public outreach to property owners
6. Financial plan including program costs
7. Implementation schedule
8. All supporting materials e.g. application forms, certificate, etc.
9. Performance monitoring recommendations
10. Tracking software recommendations
11. Process checklist for each program

Public outreach will be an integral component of implementation planning for some of the programs. Public outreach is expected as follows:

- Regional BMPs – Public outreach is not expected for this program.

- Inspection Training and Certification Program – Public outreach is not expected for this program, but may be needed based on Task 4000 and 7000 outcomes. Outreach planning is part of this scope of work. Conducting outreach is not a part of this scope of work.
- Private Side Sewer Inspection Program – Public outreach is expected for this program. Outreach planning and conducting outreach will be part of later work outside this scope.

Subtask 9200 – Inspection Training and Certification Implementation Plan

The Consultant shall develop an implementation plan specific to the inspection training and certification program. The outline of the plan will be developed during Task 4000 and will guide the content.

Deliverables:

1. Outline will be provided during Task 4000
2. Draft and Final Implementation Plans

Task 10,000 – Unplanned, Urgent and/or Critical Work

The Consultant shall provide services which are unplanned, urgent and/or critical to maintaining the project schedule and progress of the work. The work of this task must be specifically scoped, agreed to, and authorized in writing by the County prior to performing the work. Work areas may include but not be limited to supplemental:

1. Technical;
2. Policy;
3. Financial; and
4. Legal Research.

Subtask 10,100 – Unplanned, Urgent and/or Critical Work

Deliverables:

1. No deliverables are defined at this time. Deliverables associated with the respective additional activities that arise will be defined for each respective subtask.