



Task Order No. 4 Under Professional Consultant Engineering Services Master Agreement for Services

This Task Order ("Task Order"), made as of the _____ day of _____, 20____, by and between Chatham County ("County") and HDR Engineering, Inc. of the Carolinas ("Contractor").

WITNESSETH

WHEREAS, County and Contractor entered into a Master Agreement for Services dated August 5, 2022 ("Agreement"); and

WHEREAS, County has determined it is in need of Services for On-Call Professional Consultant Engineering Services ("Project"), and Contractor desires to provide such Services; and

NOW THEREFORE, in consideration of the premises and for other good and valuable consideration, the receipt of which is acknowledged, the parties agree as follows.

1. Recitals, Purpose and Effective Date. The Recitals and the Agreement are incorporated into this Task Order. Each party represents and warrants that it has in its possession and is familiar with the Agreement, and agrees that such does not need to be attached to this Task Order. The purpose of this Task Order is to set forth specific terms and conditions pursuant to which Contractor shall provide Services for the Project. The Project is Lead and Copper Rule Revisions Compliance Assistance and is further identified on Attachment 1 Scope of Services attached hereto and incorporated herein by reference. The Effective Date of this Task Order is the date on which it is executed by the last to execute this Task Order.
2. Commencement and Termination.
 - A. Contractor's services on Project shall commence upon a Notice to Proceed issued by County or as otherwise provided in Attachment 1.
 - B. If the Master Agreement terminates before the Services provided hereunder are completed, then and in that event the Master Agreement shall continue as to Project until such time as Project is satisfactorily completed.
3. Schedule, Milestone Dates. Project schedule, including date by which Services shall be completed, and all deliverables to be delivered is provided in Attachment 1.
4. Fee for Services.
 - A. The total compensation for Basic Services is provided in Attachment 1.
 - B. The fee for Additional Services, if any, shall be determined as provided in Attachment 1, or, if not so provided, as provided in Agreement.
5. Key Personnel and Use of Subcontractors.
 - A. Contractor's key personnel are provided in Attachment 1.
 - B. If Contractor is to use subcontractors for a portion of its Services, then the following applies to such subcontractor(s):

No changes in Contractor's key personnel or subcontractors designated in this Task Order as those who will provide Services shall be permitted except with the prior written consent of County, which consent shall not be unreasonably withheld.
6. Insurance. Contractor represents and warrants that all insurance requirements set forth in Agreement continue to be met.
7. Amendment. This Task Order may be amended only by written amendment of the parties.



In witness thereof, the contracting parties, by their authorized agents, affix their signatures and seals
this

_____ day of _____, 20__.

HDR Engineering, Inc. of the Carolinas

Chatham County

Jonathan Henderson, Senior Vice President

Dan LaMontagne, County Manager

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

Roy Lynch, Finance Director



Attachment 1

Lead and Copper Rule Revisions Compliance Assistance

Scope of Services

Introduction

The Lead and Copper Rule (LCR) was first published by EPA in 1991 and has since undergone minor and short-term revisions, the last of which occurred in 2007. In December 2021, a comprehensive revision was finalized. The LCR Revisions (LCRR) include new sampling and testing requirements, treatment requirements, service line inventory and replacement, and public outreach and communication provisions.

Additionally, upcoming legislation has been announced by the EPA in the form of Lead and Copper Rule Improvements (LCRI). This upcoming legislation focuses on proactive and equitable lead service line replacement (LSLR), strengthening compliance tap sampling to better identify communities most at risk of lead in drinking water and to compel lead reduction actions, and reducing the complexity of the regulation through improvement of the action and trigger level construct. The EPA has been adamant that this upcoming rule will have no impact on Service Line Inventory (SLI) requirements. LCRI legislation is scheduled to be promulgated prior to October 16, 2024.

The County completed a *Lead and Copper Rule Revisions (LCRR) Compliance Strategy - Compliance Plan* (HDR, 2023) that presents a prioritized implementation plan for action along a critical path to achieve LCRR compliance. The following Scope of Services includes the first phase of a projected multi-year program of compliance activities described in this implementation plan, with selected priorities from the LCRR Compliance Strategy, with a focused on 'areas identified as most impacted' in the Compliance Strategy.

Task 1 – Project Initiation and Management

Task Objective: *Manage the overall project in an effective manner as it relates to scope, budget, and schedule. Engage in frequent communication with the County's Project Manager to keep the County informed of the study progress and any issues. Provide and manage Contractor quality control processes to provide a quality study.*

Project management is a continuous task and will occur over the time period the Project is being conducted. The Contractor will provide a monthly project status report to be included with the monthly invoice. The status report will summarize the work completed during the invoicing period, the overall status of the project, any issues identified during the invoicing period, and the Contractor's assessment of the overall Project in relation to deliverables, time schedule, and budget. The Contractor will implement and document quality control procedures. Overall project management and QA/QC will be provided based on Contractor's internal approach to provide the County with a quality rate study.



Expected County Staff Support for Task 1:

- Work closely with Contractor's Project Manager to provide overall communication

Contractor Activities and Deliverables Under Task 1:

- Conducting a kickoff meeting with County and Contractor staff to establish a schedule, milestones, deliverables, duties/roles, and County expectations for the project
- Data request and tracking log: Developing a detailed data request for LCR sampling data, water distribution system asset inventories, standard operating procedures (SOPs), and other data relating to LCR compliance
- Reviewing, organizing, and evaluating all provided LCR data
- Overall project management to provide adequate resources and leadership to successfully complete the study on time and within budget
- Kickoff meeting summary
- Monthly written status reports and invoices
- Undertake a quality control process in compliance with Contractor's standards and policy

Task 2 – Establish a Reliable Service Line Inventory (SLI)

Task Objective: *Establish a reliable service line inventory to achieve LCR compliance and provide a basis for managing on-going compliance activities and documenting the reduction in unknowns within distribution systems.*

The largest variable in developing a path to LCRR compliance is understanding the impact of identifying and mitigating lead service lines (LSLs) and galvanized iron service lines (GISLs) downstream of lead. Under this Task, the Contractor will assess existing records to identify a strategy to generate and complete a service line inventory in compliance with LCRR. The Contractor will complete the County's service line inventory through assessment of existing and historical data, and Visual inspection through normal operation, partner organizations, and customers (including meter reading, replacement, building inspectors, plumbers, etc.) and quantify known, likely, and unknown LSL and GISL infrastructure.

In this task, Contractor will also perform a predictive modeling analysis using a representative set of known data to target visual inspection via potholing or other excavation.

Sub-Task 2.1 – Establish Foundational Service Line Inventory (SLI)

- Establish and document SLI methodology
- Establish a compliant, reliable Service Line Inventory (SLI) to allow for the population of additional system data as collected

Sub-Task 2.2 – Predictive Model of Service Line Characteristics

- Establish a strategy to enhance existing SLI through field inspections
- Identify service locations most likely to have lead and/or non-lead services
- Establish the final predictive output to update SLI data

Expected County Staff Support for Task 2:

- Assist in clarifying the data and assumptions of the draft analysis



- Attend a virtual project meeting to review and provide comments on the draft analyses
- Review and comment on the draft written report

Contractor Activities and Deliverables Under Task 2:

- Up to three two-hour in-person meetings/presentations to validate and review SLI methodology, findings, and data
- Draft Service Line Inventory TM
- Final Service Line Inventory TM

Task 3 – Lead Service Line Replacement (LSLR) Plan

Task Objective: *Establish a compliant, multi-year LSLR plan for replacing identified lead services lines.*

A second compliance requirement of LCRR is the development of a Lead Service Line Replacement (LSLR) plan to identify a compliance strategy to replace lead service lines within the distribution system in the event of an action level exceedance. This includes developing processes for initiating and recording lead service line replacements completed by the County, responding to customer-side replacements, and identifying resources to execute replacement. This task includes the planning of activities and programs to replace lead service lines and effort to assist the County with identifying opportunities for, and application for obtaining, financial assistance from state and federal programs for LSL replacement.

Expected County Staff Support for Task 3:

- Review and comment on the draft written report
- Identify County resources available for incorporation for LSLR

Contractor Activities and Deliverables Under Task 3:

- One two-hour in-person meeting/presentation to establish key utility resources and future processes to maintain LCRR compliance and document in LSLR Plan.
- Draft LSLR Plan
- Final LSLR Plan

Task 4 – Update the Lead & Copper Sampling Program

Task Objective: *Document the future site selection, sampling process, and reporting protocol for LCRR sampling under the new rule.*

LCRR regulations establish new criteria for sample site selections including identifying areas most impacted by lead and focusing compliance sampling at these locations, updating sampling processes to increase sampling reliability, and improving communication about sampling results. By updating sampling program components, the results of SLI efforts and LSLR Plan can be leveraged by field-facing compliance activity.

Expected County Staff Support for Task 4:

- Collaborate with Consultant team to establish updated sampling sites, sampling protocol, and communication processes



- Conduct any/all field sampling if necessary

Contractor Activities and Deliverables Under Task 4:

- Updated List of Sampling Site locations
- Update the Lead & Copper Sampling Program
- Identify updated LCRR sampling sites and budget for a return to standard monitoring frequency.
- Develop a LCRR Sampling Protocol so County can begin LCRR sampling per updated LCRR rules.

Task 5 – Improving Risk Communication

Task Objective: *Provide public access to the County's LSI in compliance with LCRR requirements.*

LCRR requirements for Improving Risk Communication aim to enhance transparency and public awareness regarding lead and copper levels in drinking water. The rule mandates water utilities to provide timely and accurate information to consumers about lead and copper testing results and potential health risks. This includes key decisions around making the SLI public, developing communication strategies for public engagement, and beginning outreach to schools and childcare facilities.

Expected County Staff Support for Task 5:

- Coordinate across County departments to identify and leverage internal resources to support utility communication needs.
- Review and comment on the draft written report

Contractor Activities and Deliverables Under Task 5:

- One two-hour in-person meetings/presentations to identify a public communication strategy to communicate lead risks and identify a methodology for making SLI data publicly available.
- Draft Strategic Communication TM
- Final Strategic Communication TM

Scope of Services Assumptions

- The kickoff meeting will be in-person at County offices.
- The County will provide requested data in an electronic format (e.g., .xlsx for data, GIS files, PDF for documents).
- Deliverables will be submitted electronically and revised one time to incorporate County review comments. Approximately 2-3 weeks is anticipated for review of draft deliverables by the County. The County will consolidate its comments on draft deliverables into a single comment document for transmittal to Contractor.
- The kickoff meeting and --- meetings will be in-person at County offices with virtual participation by Contractor technical lead and financial analyst.
- The County will provide requested data in an electronic format (e.g., .xlsx for data, GIS files, PDF for documents).



- Have appropriate County staff attend and participate in each meeting/presentation
- Deliverables will be submitted electronically and revised one time to incorporate County review comments. Approximately 2-3 weeks is anticipated for review of draft deliverables by the County. The County will consolidate its comments on draft deliverables into a single comment document for transmittal to Contractor.
- Capital cost estimate ranges developed as part of this study will be a Class 5 – Planning Level estimates, as defined by the Estimate Classification Systems from the Association for the Advancement of Cost Engineering International (AACEI) 17r-97 and as designated in American Society for Testing and Materials (ASTM) E 2516-06.

Key Personnel

- Steve Brown, PE – Senior Project Manager, Senior Utility Management Consultant
- Jacob Mueller, PE – Utility Management Consultant
- Katie Walker, PE – Water Treatment Specialist
- Kim Colson, PE – Regulatory and Funding Strategy Lead
- Umang Chauhan, EI – Project Engineer
- Chris Neil, Strategic Communication

Project Schedule

The project milestones by key deliverable are presented in Table 1. The project term is approximately 12 months from the execution of this contract.

TABLE 1 Project Schedule

| Key Milestone | Time from Notice to Proceed |
|--|------------------------------------|
| Project Kickoff Workshop | 3 weeks |
| Deliver Task 2 Service Line Inventory (LSI) | 3 months |
| Deliver Task 3 Lead Service Line Replacement Plan (LSLRP) | 10 months |
| Deliver Task 4 Updated the Lead & Copper Sampling Program (LCSP) | 12 months |
| Deliver Task 5 communication materials for public access to LSI | 14 months |

Project Compensation

Compensation by the County to Contractor for the herein described scope of services shall be for a lump sum total of \$159,500, for base services; a breakdown of fees by task is presented in Table 2. Compensation for all tasks will be on a lump sum basis. Fees presented in Table 2 can be moved between tasks based on agreement of the County and Contractor.



TABLE 2 Compensation by Project Phase

| Phase/Task | Total (\$) |
|--|------------------|
| Task 1 - Project Initiation and Management | \$12,000 |
| Task 2 - Establish Reliable Service Line Inventory | \$111,200 |
| Task 3 - Lead Service Line Replacement Plan | \$21,300 |
| Task 4 - Update Lead and Copper Sampling Program | \$9,600 |
| Task 5 - Improving Risk Communications | \$5,400 |
| Project Total – Base Services | \$159,500 |

INVOICING

For the lump sum portion of the project, the amount invoiced each month will be based on estimate of percentage of completion multiplied times the lump sum amount.

Hourly Rates Schedule

In cases where additional services on this project are authorized beyond the lump sum services described in Table 2, they will be performed on an hourly rate basis, billing will be based on the hourly rates shown in Table 3, plus reimbursable direct expenses.

TABLE 3 HDR Engineering, Inc. of the Carolinas 2023 Standard Hourly Rate Schedule

| Job Title/Classification | 2023 Hourly Rate* |
|---|-------------------|
| Project Principal | \$320 |
| Senior Project Manager | \$275 |
| Lead Technical Consultant | \$300 |
| Senior Technical Consultant | \$250 |
| Senior Utility Management Consultant | \$275 |
| Project Manager / Senior Project Engineer | \$206 |
| Design Manager | \$201 |
| Project Engineer (2) | \$189 |
| Project Engineer (1) | \$152 |
| Staff Engineer (2) | \$125 |
| Staff Engineer (1) | \$114 |
| Senior Process / Technical Specialist | \$225 |
| Process / Technical Specialist | \$201 |
| Cost Estimator | \$201 |



| | |
|--|-------|
| Utility Management Consultant/ Senior Communications Specialist | \$174 |
| Junior Utility Management Consultant/ Communications Specialist | \$120 |
| Accountant | \$120 |
| Administrative/Clerical | \$108 |

The labor schedule for the job classifications of personnel required to perform the work on a Fixed Unit Rate (Cost Reimbursable/Time & Expense) basis is provided above. The codes and classifications are a representative sample of potential categories that may be utilized in the implementation of the services if authorized by the Town.

*Hourly rates will escalate 4% on an annual basis, based on calendar year, but will be held constant for the first 12 months from the date of this agreement.