



Facility Master Plan RFP: Draft Scope of Services

J.B. Latham and Coastal Treatment Plants
Joint PC2 / PC15 Project Committee Meeting
July 10, 2025

Agenda

1. Goals for today's discussion.
2. Review Draft Scope of Services for the Facility Master Plan Request for Proposals.
3. Review of comments received to date.
4. Discuss Project Schedule.



Goals for Today's Discussion

- Discuss and obtain feedback on the draft scope of services for the Facility Master Plan efforts:
 - J.B. Latham Treatment Plant
 - Coastal Treatment Plant
- Review overall project schedule and milestone dates



Overall Project Goals

The following was established as foundational goals for the Facility Master Planning efforts and basis for the proposed Scope of Services:

- Establish an agreed-to Level of Service
- Perform long-term assessment with focus on capacity utilization, loading, and flow characteristics
- Optimize infrastructure capacity and potential future scaling
- Enhance biosolids treatment technologies
- Conduct an effluent utilization study to prioritize end uses
- Identify considerations for resource management and efficiency
- Develop overarching regulatory compliance strategy
- Enhance the overall readiness and resilience of the plants



Facility Master Plan RFP

Draft Scope of Services

Overview of Tasks

Task 1 Project Management

- Develop Project Control Plan and communications

Task 2 Existing Facilities Evaluation

- Review existing data and conduct flow and loading analysis
- Establish evaluation criteria and review Level of Service
- Perform conditional assessments

Task 3 Wastewater Treatment Master Plan

- Identify and develop liquid and solids treatment project alternatives
- Perform Risk and Resiliency Planning: Climate change, vulnerabilities, regulatory

Task 4** Effluent Utilization Evaluation (*Task 5 in CTP RFP*)

Task 5 Develop Recommended Master Plan Program (*Task 6 in CTP RFP*)

Task 6 Prepare Master Plan Documents (*Task 7 in CTP RFP*)



Task 4 in CTP RFP is Recycled Water Facilities Evaluation

Task 1. Project Management

Task 1.1 Project Control Plan

- Defines roles, responsibilities, decision-making process, coordination needs, project schedule, and milestones.
- Prepare comprehensive Table of Contents for FMP with deliverable schedule

Task 1.2 Project Meetings and Communications

- Develop and include project communication plan and approach for keeping SOCWA and the Member Agencies apprised of work efforts. Include as part of Project Control Plan.

Task 2. Existing Facilities Evaluation

Task 2.1 Description of Existing Facilities

- Develop descriptions, supporting figures and tables.

Task 2.2 Review Existing Reports and Models

- Review pertinent studies and summarize the relevance of each major past report/model and capital improvement to be incorporated as part of the FMP.

Task 2.3 Flow and Loading Analysis

- Review historical and projected flows and loading. Evaluate diurnal and seasonal variability, average flow and peaking factors.
 - Moulton Niguel Water District to provide future capacity needs by January 1, 2026.

Task 2. Existing Facilities Evaluation (Cont'd.)

Task 2.4 Existing Facilities Analysis

- Task 2.4.1 Establish Planning and Design Criteria
 - To evaluate capacity and functionality of facilities.
- Task 2.4.2 Review LOS and Evaluation Criteria
 - Review previously established LOS framework and determine updates prior to evaluation of project alternatives.
- Task 2.4.3 Hydraulic Capacity Evaluation
- Task 2.4.4 Process Model Configuration

Task 2.5 Condition Assessments

- Task 2.5.1 Identify Repair and Replacement (R&R) Needs
 - Perform onsite condition assessments to determine life expectancy and R&R needs by process.
- Task 2.5.2 Develop R&R Program and Projected Costs

- *Level of Service (LOS) criteria will be developed in advance through separate facilitated process with PC members.*
- *Effort will establish LOS standards to assist with selection of preferred projects and investments.*
- *Kickoff of facilitated LOS framework effort August 2025.*

Task 3. Wastewater Treatment Master Plan

Task 3.1 Identify and Develop Project Alternatives

- Task 3.1.1 Liquid Treatment Alternatives
 - Analyze candidate technologies to establish range of conceptual alternatives.
- Task 3.1.2 Solids Treatment and Disposal Alternatives
 - Analyze candidate technologies to establish range of conceptual alternatives.
- Task 3.1.3 – 3.1.6 Evaluate Support Processes and Facilities
- Task 3.1.7 Evaluate Decommissioning of Coastal Treatment Plant (CTP RFP)

Task 3.2 Risk and Resilience Planning Elements

- Task 3.2.1 Resilience Adaptation Planning
 - Climate change, water levels, flooding, seismic, etc.
- Task 3.2.2 Vulnerability Planning
 - Assess security and operational vulnerabilities from supply chain, replacement parts, power outages, etc.
- Task 3.2.3 Evaluate Regulatory Scenarios
 - Develop regulatory compliance strategies to assess each project alternative.

Task 3.3 Identify Facility Improvements

RFP Specific Plant Evaluations

Task 4 Effluent Utilization Evaluation (JBL and CTP RFP)

- Evaluate effluent management options, focusing on either continued ocean discharge, or pursuing beneficial reuse alternatives.
- Evaluate technical feasibility, regulatory complexity, environmental impact, and cost-effectiveness of each option or combination of strategies.

Task 4 Recycled Water Facilities Evaluation (CTP RFP)

- Evaluate existing and future recycled water operations and develop a strategy for addressing changes in recycled water usage, water quality, and regulatory changes.

****Effluent Utilization Evaluation is Task 5 in CTP RFP****

Task 5. Develop Recommended Master Plan Program

Task 5.1 Select Master Plan Alternative

- Select top-ranked master planning alternatives using LOS standards and established evaluation criteria.

Task 5.2 Capital Improvement Plan

- Develop CIP showing the timing and phasing of all capital, repair, and replacement projects. Identify triggers to assist with achieving project milestone and implementation timing.
- Task 5.2.1 Identify Funding Opportunities
- Task 5.2.2 Environmental Compliance Strategy
 - Develop conceptual CEQA compliance strategy for the FMP CIP recommendations.

****Develop Recommended Master Plan Program is Task 6 in CTP RFP****

Task 6. Prepare Master Plan Documents

Prepare Master Plan Report

- Prepare technical memoranda and FMP Chapters through development of the master plan.
- Draft FMP Chapters and associated memoranda to be submitted based on Consultants deliverable schedule developed under Task 1.

Task 6.1 List of Deliverables

- See table on following slides

****Prepare Master Plan Documents is Task 7 in CTP RFP****

J.B. Latham Facility Master Plan RFP

Task No.	Task Description	Deliverable
1	Project Management	Project Control Plan
1	Project Management	Facility Master Plan Report Table of Contents and corresponding schedule of deliverables
1	Project Management	Monthly progress report
2	Existing Facilities Evaluation	Conditional Assessment Report
2	Existing Facilities Evaluation	Process Flow Diagram for Liquid and Solids
2	Existing Facilities Evaluation	Hydraulic model output files
2	Existing Facilities Evaluation	Hydraulic profile
2	Existing Facilities Evaluation	Process model output files
2	Existing Facilities Evaluation	Task 2 technical summary of findings. Material to be incorporated with the corresponding Chapter of the FMP Report.
3	Wastewater Treatment Master Plan	Task 3 technical summary of findings and project alternatives. Material to be incorporated with the corresponding Chapter of the FMP Report.
4	Effluent Utilization Evaluation	Task 4 technical summary of findings. Material to be incorporated with the corresponding Chapter of the FMP Report.
5	Develop Recommended Master Plan Program	Project alternative evaluation matrix
5	Develop Recommended Master Plan Program	Task 5 technical summary of findings. Material to be incorporated with the corresponding Chapter of the FMP Report.
6	Prepare Master Plan Documents	Administrative Draft, Draft, and Final version of each Chapter included in the Facility Master Plan Report. Each Chapter shall be developed and submitted according to the deliverable schedule under Task 1.
6	Prepare Master Plan Documents	Administrative Draft, Draft, and Final version of the Facility Master Plan Report with Exhibits
6	Prepare Master Plan Documents	Capital Improvement Plan and project summary sheets.
6	Prepare Master Plan Documents	Administrative Draft, Draft, and Final versions of the Executive Summary that succinctly presents key findings, conclusions, and recommendations.

Coastal Facility Master Plan RFP

Task No.	Task Description	Deliverable
1	Project Management	Project Control Plan
1	Project Management	Facility Master Plan Report Table of Contents and corresponding schedule of deliverables
1	Project Management	Monthly progress report
2	Existing Facilities Evaluation	Conditional Assessment Report
2	Existing Facilities Evaluation	Process Flow Diagram for Liquid and Solids
2	Existing Facilities Evaluation	Hydraulic model output files
2	Existing Facilities Evaluation	Hydraulic profile
2	Existing Facilities Evaluation	Process model output files
2	Existing Facilities Evaluation	Task 2 technical summary of findings. Material to be incorporated with the corresponding Chapter of the FMP Report.
3	Wastewater Treatment Master Plan	Task 3 technical summary of findings and project alternatives. Material to be incorporated with the corresponding Chapter of the FMP report.
4	Recycled Water Facilities Evaluation	Task 4 technical summary of findings. Material to be incorporated with the corresponding Chapter of the FMP report.
5	Effluent Utilization Evaluation	Task 5 technical summary of findings. Material to be incorporated with the corresponding Chapter of the FMP Report.
6	Develop Recommended Master Plan Program	Project alternative evaluation matrix
6	Develop Recommended Master Plan Program	Task 6 technical summary of findings. Material to be incorporated with the corresponding Chapter of the FMP Report.
7	Prepare Master Plan Documents	Administrative Draft, Draft, and Final version of each Chapter included in the Facility Master Plan Report. Each Chapter shall be developed and submitted according to the deliverable schedule under Task 1.
7	Prepare Master Plan Documents	Administrative Draft, Draft, and Final versions of the Facility Master Plan Report with Exhibits
7	Prepare Master Plan Documents	Capital Improvement Plan and project summary sheets.
7	Prepare Master Plan Documents	Administrative Draft, Draft, and Final versions of the Executive Summary that succinctly presents key findings, conclusions, and recommendations.

RFP Feedback - Coastal Treatment Plant

Comment Area	Summary of Feedback	Action
Overall Scope and Budget	Appears to be extensive and potentially costly (estimated at over \$1M). Suggest considering a reduced scope focused on feasibility and alternative analysis.	
Facility Inclusion	Recommend expanding scope to include the Advance Water Treatment (AWT) and Aliso Creek Water Reclamation Facility (ACWRF), effectively addressing all three plants.	
Condition Assessment	The proposed full-plant-wide condition assessment is too extensive. Suggest scaling back to a cursory-level assessment focused on major unit processes to estimate useful life.	
Energy Recovery	Clarify whether the scope refers to biogas utilization or other energy recovery strategies. Suggest relocating this discussion to the Solids Handling section.	
Educational Centers	Question the inclusion of regional educational centers at the Coastal Treatment Plant. Recommend removing this responsibility from the consultant's scope.	
Plant Decommission	Express concern over including plant decommissioning as a scope item, especially redirecting flows to the Regional Treatment Plant. Suggest reconsidering its inclusion.	
Resilience Planning	The proposed resilience and vulnerability analysis is too complex. Recommend simplifying it to a floodplain analysis only, excluding sea level rise and seismic events.	

RFP Feedback - J.B. Latham Treatment Plant

Comment Area	Summary of Feedback	Action
Background	The description omits the two separate treatment trains at J.B. Latham (9-side and 4-side). Should this be clarified for the consultant? Should combining the two influent streams into a consolidated headworks be considered?	
Overall Project Goals	Clarify if peaking analysis is intended for the plant as a whole or for each individual agency. Will different peaking factors be applied to the two sides of the plant?	
Site Planning Evaluation	Request clarification on the purpose of regional educational centers and what is expected of the consultant in this task.	
Resilience Planning	Suggest including prolonged utility power outages as a potential resilience planning scenario.	
Funding Opportunities	This task appears similar to work already being done by Hazen. Clarify how this differs from Hazen's existing scope.	

Additional Feedback or Questions?

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[illegible]



Project Schedule

Project Schedule and Key Milestones

Facilities Master Plan RFP Process

Activities	Duration (weeks)	Projected Date
Submit Draft RFP to SOCWA and PC members for review	-	6/18/2025
Incorporate comments/Finalize RFP	4	7/17/2025
Issue RFP for Solicitation	1	7/21/2025
Proposal Submittal Deadline	7	9/18/2025
Selection and Eng. Committee Recommendation	4	10/9/2025
Level of Service (LOS) Framework Finalized	See Table below	11/7/2025
SOCWA BOD Approvals	6	11/6/2025
Issue FMP Notice to Proceed ^(1,2)	2	11/13/2025

Notes:

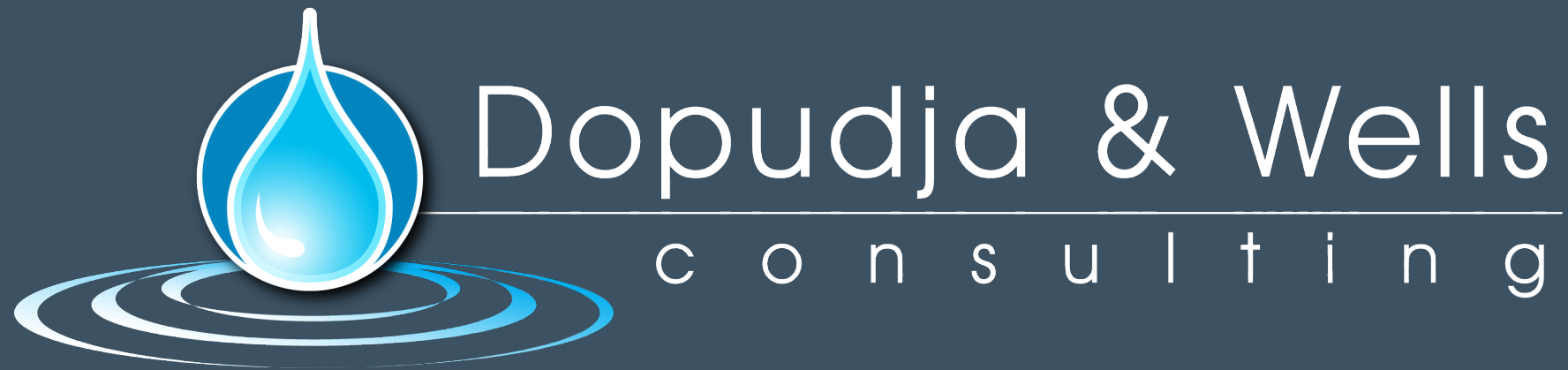
- (1) Notice to Proceed deadline January 1, 2026, per PC 2 Assignment and Assumption Agreement
- (2) MNWD provide future capacity needs for JBL by January 1, 2026, per PC 2 Assignment and Assumption Agreement

Wastewater Level of Service (LOS) Framework ⁽¹⁾

Activities	Duration (weeks)	Projected Date
Kickoff	-	8/4/2025
Data Review and Survey	4	9/5/2025
LOS Workshop	1	9/16/2025
Draft LOS Framework	3	10/7/2025
Final LOS Framework	4	11/7/2025

Notes:

- (1) LOS Framework includes development of desired Level of Service standards and metrics for treatment plant performance, and evaluative criteria and weighting for selecting a preferred project from alternatives developed through Master Plan process.



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