

**NOTICE OF REGULAR MEETING
OF THE
SOUTH ORANGE COUNTY WASTEWATER AUTHORITY
ENGINEERING COMMITTEE**

September 17, 2026

8:30 a.m.

Physical Address	Remote Address
34156 Del Obispo Street Dana Point, CA 92629	El Toro Water District Office: 24251 Los Alisos Blvd. Lake Forest, CA 92630

NOTICE IS HEREBY GIVEN that a Regular Meeting of the South Orange County Wastewater Authority (SOCWA) Engineering Committee was called to be held on **September 17, 2026, at 8:30 a.m.** SOCWA staff will be present and conducting the meeting at the SOCWA Administrative Office located at 34156 Del Obispo Street, Dana Point, California.

THE SOCWA MEETING ROOM IS WHEELCHAIR ACCESSIBLE. IF YOU REQUIRE ANY SPECIAL DISABILITY RELATED ACCOMMODATIONS, PLEASE CONTACT THE SOUTH ORANGE COUNTY WASTEWATER AUTHORITY SECRETARY'S OFFICE AT (949) 234-5400 AT LEAST SEVENTY-TWO (72) HOURS PRIOR TO THE SCHEDULED MEETING TO REQUEST SUCH ACCOMMODATIONS. THIS AGENDA CAN BE OBTAINED IN ALTERNATE FORMAT UPON REQUEST TO THE SOUTH ORANGE COUNTY WASTEWATER AUTHORITY'S SECRETARY AT LEAST SEVENTY-TWO (72) HOURS PRIOR TO THE SCHEDULED MEETING. MEMBERS OF THE PUBLIC HAVE THE OPTION TO PARTICIPATE IN AND MAY JOIN THE MEETING REMOTELY VIA VIDEO CONFERENCE FOR VISUAL INFORMATION ONLY (USE ZOOM LINK BELOW) AND BY TELECONFERENCE FOR AUDIO PARTICIPATION (USE PHONE NUMBERS BELOW). THIS IS A PHONE-CALL MEETING AND NOT A WEB-CAST MEETING, SO PLEASE REFER TO AGENDA MATERIALS AS POSTED ON THE WEBSITE AT WWW.SOCWA.COM. ON YOUR REQUEST, EVERY EFFORT WILL BE MADE TO ACCOMMODATE PARTICIPATION. FOR PARTIES PARTICIPATING REMOTELY, PUBLIC COMMENTS WILL BE TAKEN DURING THE MEETING FOR ORAL COMMUNICATION IN ADDITION TO PUBLIC COMMENTS RECEIVED BY PARTIES PARTICIPATING IN PERSON. COMMENTS MAY BE SUBMITTED PRIOR TO THE MEETING VIA EMAIL TO ASSISTANT SECRETARY LYNDA MAY AT LMAY@SOCWA.COM WITH THE SUBJECT LINE "REQUEST TO PROVIDE PUBLIC COMMENT." IN THE EMAIL, PLEASE INCLUDE YOUR NAME, THE ITEM YOU WISH TO SPEAK ABOUT, AND THE TELEPHONE NUMBER YOU WILL BE CALLING FROM SO THAT THE COORDINATOR CAN UN-MUTE YOUR LINE WHEN YOU ARE CALLED UPON TO SPEAK. THOSE MAKING PUBLIC COMMENT REQUESTS REMOTELY VIA TELEPHONE IN REAL-TIME WILL BE ASKED TO PROVIDE YOUR NAME, THE ITEM YOU WISH TO SPEAK ABOUT, AND THE TELEPHONE NUMBER THAT YOU ARE CALLING FROM SO THE COORDINATOR CAN UN-MUTE YOUR LINE WHEN YOU ARE CALLED UPON TO SPEAK. ONCE THE MEETING HAS COMMENCED, THE CHAIR WILL INVITE YOU TO SPEAK AND ASK THE COORDINATOR TO UN-MUTE YOUR LINE AT THE APPROPRIATE TIME.

AGENDA ATTACHMENTS AND OTHER WRITINGS THAT ARE DISCLOSABLE PUBLIC RECORDS DISTRIBUTED TO ALL, OR A MAJORITY OF, THE MEMBERS OF THE SOUTH ORANGE COUNTY WASTEWATER AUTHORITY ENGINEERING COMMITTEE IN CONNECTION WITH A MATTER SUBJECT FOR DISCUSSION OR CONSIDERATION AT AN OPEN MEETING OF THE ENGINEERING COMMITTEE ARE AVAILABLE FOR PUBLIC INSPECTION IN THE AUTHORITY ADMINISTRATIVE OFFICE LOCATED AT 34156 DEL OBISPO STREET, DANA POINT, CA ("AUTHORITY OFFICE") OR BY PHONE REQUEST MADE TO THE AUTHORITY OFFICE AT 949-234-5400. IF SUCH WRITINGS ARE DISTRIBUTED TO MEMBERS OF THE ENGINEERING COMMITTEE LESS THAN SEVENTY-TWO (72) HOURS PRIOR TO THE MEETING, THEY WILL BE AVAILABLE IN THE RECEPTION AREA OF THE AUTHORITY OFFICE AT THE SAME TIME AS THEY ARE DISTRIBUTED TO THE ENGINEERING COMMITTEE AND SENT TO ANY REMOTE PARTICIPANTS REQUESTING EMAIL DELIVERY OR POSTED ON SOCWA'S WEBSITE. IF SUCH WRITINGS ARE DISTRIBUTED IMMEDIATELY PRIOR TO, OR DURING, THE MEETING, THEY WILL BE AVAILABLE IN THE MEETING ROOM OR IMMEDIATELY UPON VERBAL REQUEST TO BE DELIVERED VIA EMAIL TO REQUESTING PARTIES PARTICIPATING REMOTELY.

**THE PUBLIC MAY PARTICIPATE REMOTELY BY VIRTUAL MEANS. FOR AUDIO OF MEETING USE
THE CALL IN PHONE NUMBERS BELOW AND FOR VIDEO USE THE ZOOM LINK BELOW.**

Join Zoom Meeting
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AGENDA

1. Call Meeting to Order
2. Public Comments

THOSE WISHING TO ADDRESS THE ENGINEERING COMMITTEE ON ANY ITEM LISTED ON THE AGENDA WILL BE REQUESTED TO IDENTIFY AT THE OPENING OF THE MEETING AND PRIOR TO THE CLOSE OF THE MEETING. THE AUTHORITY REQUESTS THAT YOU STATE YOUR NAME WHEN MAKING THE REQUEST IN ORDER THAT YOUR NAME MAY BE CALLED TO SPEAK ON THE ITEM OF INTEREST. THE CHAIR OF THE MEETING WILL RECOGNIZE SPEAKERS FOR COMMENT AND GENERAL MEETING DECORUM SHOULD BE OBSERVED IN ORDER THAT SPEAKERS ARE NOT TALKING OVER EACH OTHER DURING THE CALL.

PAGE NO.

3. Approval of Minutes..... 1
 - Engineering Committee Minutes of June 18, 2026

Recommended Action: Staff requests that the Engineering Committee approve the subject Minutes as submitted.
4. General Manager's Report 4

Recommended Action: Committee Discussion, Direction, and Action.
5. Capital Asset Lifecycle Program..... 6

Recommended Action: Committee Discussion, Direction, and Action.
6. Flows and Solids Use Audit 24

Recommended Action: Staff requests that the Engineering Committee recommend to the Board of Directors the approval of the Use Audit calculated results for the close of the Use Audit for disbursement or collection of additional funds in FY 25-26.
7. Cost Allocation Policy 27

Recommended Action: Committee Discussion, Direction, and Action.
8. Operations Report
Recommended Action: Information Item.
9. Capital Improvement Workplan FY 26-27 (September) 28

Recommended Action: Information Item.

10. <u>Capital Improvement Construction Projects Progress and Change Order Report (September [Project Committees 2 and 15])</u>	30
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Recommended Action: Information Item.

11. <u>JBL Digester Underground Piping Construction Management Service</u>	38
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Recommended Action: Committee Discussion, Direction, and Action.

12. <u>CTP Channel Embankment Updates</u>	111
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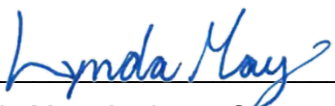
Recommended Action: Committee Discussion, Direction, and Action.

13. Adjournment

I hereby certify that the foregoing Notice was personally emailed or mailed to each member of the SOCWA Engineering Committee at least 72 hours prior to the scheduled time of the Regular Meeting referred to above.

I hereby certify that the foregoing Notice was posted at least 72 hours prior to the time of the above-referenced Engineering Committee meeting at the usual agenda posting location of the South Orange County Wastewater Authority and at www.socwa.com.

Dated this 11th day of September 2026.



Lynda May, Assistant Secretary
SOUTH ORANGE COUNTY WASTEWATER AUTHORITY

**MINUTES OF REGULAR MEETING
OF THE
SOUTH ORANGE COUNTY WASTEWATER AUTHORITY**

Engineering Committee

June 18, 2026

DRAFT

The Regular Meeting of the South Orange County Wastewater Authority (SOCWA) Engineering Committee was held on June 18, 2026, at 8:30 a.m. in-person and via teleconferencing from the Administrative Offices located at 34156 Del Obispo Street, Dana Point, California. The following members of the Engineering Committee were present:

MIKE DUNBAR
HANNAH FORD
MARK MCAVOY
ROBERT GRANTHAM
MARC SERNA

Emerald Bay Service District
El Toro Water District [Zoom]
City of Laguna Beach [Zoom]
Santa Margarita Water District
South Coast Water District

Absent:

DAVE REBENS DORF

City of San Clemente

Staff Present:

AMBER BOONE
RONI GRANT
JIM BURROR
MATT CLARKE
LYNDA MAY
BOB CULVER

General Manager
Capital Improvement Program (CIP) Manager
Deputy GM/ Chief Engineer
Chief Technology Officer
Administrative Assistant/Assistant Secretary
Environmental Service Manager

Also Present:

CHRIS NEWTON
TARYN KJOLSING

South Coast Water District
South Coast Water District

1. Call Meeting to Order

Ms. Roni Grant, Capital Improvement Program (CIP) Manager, called the meeting to order at 8:31 a.m.

2. Public Comments

None.

3. Approval of Minutes

- Engineering Committee Minutes of May 21, 2026.

ACTION TAKEN

A motion was made by Mr. Grantham and seconded by Mr. Dunbar to approve the Engineering Committee Minutes for May 21, 2026.

Motion carried:	Aye 5, Nay 0, Abstained 0, Absent 1
	Mr. Dunbar Aye
	Ms. Ford Aye
	Mr. McAvoy Aye
	Mr. Grantham Aye
	Mr. Serna Aye
	Mr. Rebensdorf Absent

4. General Manager's Report

Ms. Amber Boone, General Manager, provided a report on her upcoming presentation at the AWWA conference on the AI and machine learning product, VOICESOP.org for utility compliance. Ms. Boone noted the product's 12-week design schedule with a ready date planned for September.

This was an information item; no action was taken.

5. Operations Report

Mr. Jim Burror, Deputy GM/Chief Engineer, provided the operations report with an update on the effluent transmission main coupling repair kit that SOCWA purchased and stored at ETWD for emergency use. The Committee discussed creating a shared database of inventory for interagency use. Ms. Boone provided updates on the Crystal Canyon partnership, which is expected to generate \$40-50,000 in additional revenue, and on the data cleaning progress with software being used at SOCWA.

This was an information item; no action was taken.

6. Capital Improvements Workplan

Ms. Roni Grant, Capital Improvement Program Manager, provided an update on the workplan including four proposals received for the ETM Reach B Techite Pipe's CEQA compliance effort. Ms. Boone noted that the agency is also applying the CIP workplan format to small capital projects.

This was an information item; no action was taken.

7. Capital Improvement Construction Projects Progress and Change Order Report (May)
[Project Committees 2 and 15]

Ms. Grant briefed the Committee on the report, with projects moving forward as planned.

This was an information item; no action was taken.

8. JBL Digester Underground Piping Upgrades Contract Award [Project Committee 2]

An open discussion ensued on the summary of bids and each of the project options. After discussing the safety issues and value engineering opportunities, the Committee agreed to recommend Option 1 with SS Mechanical's bid.

ACTION TAKEN

A motion was made by Mr. Serna and seconded by Mr. Grantham to approve the Engineering Committee to present to the Project Committee 2 Board of Directors the following items: 1) Increase the budget of Task 32263S by \$820,000 from \$806,490 to \$1,626,490; 2) Authorize execution of a construction contract award to SS Mechanical in the amount of \$1,182,241, and 3) Approve a contract contingency of \$118,250 to address any unforeseen conditions encountered during the work.

Motion carried:	Aye 2, Nay 0, Abstained 0, Absent 0
	Mr. Grantham Aye
	Mr. Serna Aye

9. JBL and CTP Facility Planning Assessment Schedules

Ms. Boone updated the Committee on the FPA schedules, noting that there will be a final draft of the CTP Regional Flow study at the next Board meeting on July 9, 2026. The Project Committee members were invited to a detailed site walk at CTP on June 22 to understand the facility's current condition and operational challenges. Ms. Boone provided positive feedback from the recent tour to Laguna Beach residents.

This was an information item; no action was taken.

10. Project Management Support Services for FY 26-27

After an open discussion on the contract extension with the flexibility of using other firms for specific projects, the Committee agreed on the contract extension with Project Partners.

ACTION TAKEN

A motion was made by Mr. Dunbar and seconded by Mr. Grantham to approve the Engineering Committee to recommend that the Board of Directors: 1) Approve a contract with Project Partners for Project Management Support Services for Fiscal Year 2026-2027 in an amount not to exceed \$200,000.

Motion carried:	Aye 5, Nay 0, Abstained 0, Absent 1
Mr. Dunbar	Aye
Ms. Ford	Aye
Mr. McAvoy	Aye
Mr. Grantham	Aye
Mr. Serna	Aye
Mr. Rebensdorf	Absent

11. As-Needed General Contractors Services for Small Capital Improvement Projects

After a brief discussion on the benefits of having a pool of reliable contractors, the Committee agreed to proceed with the as-needed general contractors services, with Ms. Grant noting the development of the RFQ that will likely go out in the next 2 weeks.

This was an information item; no action was taken.

12. Adjournment

There being no further business, Ms. Grant adjourned the meeting at 9:23 a.m.

I HEREBY CERTIFY that the foregoing Minutes are a true and accurate copy of the Minutes of the Regular Meeting of the South Orange County Wastewater Authority Engineering Committee of June 18, 2026, and approved by the Engineering Committee and received and filed by the Board of Directors of the South Orange County Wastewater Authority.

Lynda May, Assistant Secretary
SOUTH ORANGE COUNTY WASTEWATER AUTHORITY

Agenda Item

4

Engineering Committee Meeting

Meeting Date: September 17, 2026

TO: Engineering Committee

FROM: Amber Boone, General Manager

SUBJECT: General Manager's Report

Master Schedule for CTP and JBL Master Planning Efforts

At the February 2026 SOCWA Board meeting, Board members requested that the master planning schedule be separated into respective facilities with a completion date added to the master planning schedule and Board related workshops. The following table represents activities planned and completed for the JB Latham (JBL) Facility Planning Assessment (FPA).

JBL Facility Planning Assessment

EVENTS	DATE	COMPLETION DATE
Kick-Off Meeting	14-Jan-26	14-Jan-26
Task 1 - Project Management	14-Jan-26	14-Jan-26
Staff Workshop 1	27-Jan-26	27-Jan-26
Task 2 - Existing Facility Evaluation	29-Jun-26 (project postponed 60 days)	29-Jun-26
Staff Workshop 2	17-Mar-26	17-Mar-26
PC2 Board Workshop	Not Previously Planned	3-Apr-26
Staff Workshop 3 - Condition Assessment	30-Jun-26	7-Jul-26
Task 3 - Wastewater Treatment Alternatives	17-Sep-26 (project postponed 60 days)	
PC2 Board Workshop – Criteria Setting	Date not set	
Task 4 - Effluent Utilization Evaluation	17-Sep-26 (project postponed 60 days)	
Staff Workshop 4	TBD 28-Jul-26	
PC2 Board Workshop	Date not set	
Task 5 - Develop Project Alternatives	10-Oct-26 (project postponed 60 days)	
Staff Workshop 5	26-Oct-26	
Task 6 - Facility Planning & Assessment	25-Nov-26 (project postponed 60 days)	
PC2 Board Workshop	Date not set	

The following tables represent activities planned and completed for the Coastal Treatment Plant (CTP) Facility Planning Assessment (FPA) and CTP Regional Flow Study.

CTP Facility Planning Assessment

EVENTS	DATE	COMPLETION DATE
Issue RFP	November 7, 2025	November 7, 2025
Mandatory Pre-Proposal Meeting	November 20, 2025	November 20, 2025
Deadline for Questions and Supplemental Information	December 11, 2025	December 11, 2025
Proposal Submission Deadline	January 15, 2026	January 15, 2026
Interviews	January 22, 2026	January 29, 2026
Contract Award	February 12, 2026	March 5, 2026
NTP	April 1, 2026	May 28, 2026 (w/ CTP Regional Flow Study PE4 workshop per PC15 Board)
Kick-Off Meeting	May 28, 2026	PM's on May 28, 2026 & Stakeholder Group on June 11, 2026
Task 1 - Project Management	May 28, 2026	May 28, 2026
Task 2 - Existing Facility Evaluation	July 13, 2026	Pending Biowin Model Calibration Water Quality Testing Results
Task 3 - Wastewater Treatment Alternatives	November 2, 2026	
Task 4 - Effluent Utilization Evaluation	November 2, 2026	
Task 5 - Develop Project Alternatives	January 12, 2026	
Task 6 - Facility Planning & Assessment, Admin Draft Report	February 16, 2027	
Project Final Report	February 28, 2027	

Recommended Action: Committee Discussion, Direction and Action

Agenda Item

5

Engineering Committee Meeting

Meeting Date: September 17, 2026

TO: Engineering Committee

FROM: Amber Boone, General Manager

SUBJECT: Capital Asset Lifecycle Program

Summary

At the August 20, 2026 Engineering Committee, staff indicated in the General Manager's report that staff is working on ways to improve the tracking of project expenses and is developing a project lifecycle procedure to help in overall management of the program and oversight by the SOCWA Board. These efforts aim to integrate the capital program project budget into the Financial System for tracking and cash flow management to better support staff oversight and management of capital projects. Staff also indicated that they would bring a draft capital asset lifecycle program back to the Committee for discussion. The attachment contains the draft program incorporating peer agency best practices from Encina Wastewater Authority, South Coast Water District, Irvine Ranch Water District, and Santa Margarita Water District.

Recommended Action: Committee Discussion, Direction, and Action

Attachment: Draft Capital Asset Lifecycle Program

SOUTH ORANGE COUNTY WASTEWATER AUTHORITY

CAPITAL ASSET LIFECYCLE PROGRAM

Cradle-to-Grave Management of Public Works Capital Assets

Capital Improvement Program (CIP)
10-Year Plan • Annual Budget Integration
Financial & Governance Framework • Standard Operating Procedures
Including Formal Board Acceptance of Notices of Completion & Release of Retention/Escrow

DRAFT

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1. Purpose and Scope

This Capital Asset Lifecycle Program establishes a consistent, transparent, and accountable framework for managing SOCWA's public-works capital assets from identification of need through planning, design, procurement, construction, operation, maintenance, capitalization, formal Board acceptance, and eventual retirement or replacement ("cradle to grave").

The Program applies to all capital projects funded through the Capital Improvement Plan (CIP), including:

- Large Capital projects (multi-year facility upgrades and major replacements)
- Small Capital projects and equipment
- Non-capital studies and assessments that may lead to capital construction
- Projects executed under any Project Committee (PC) agreement

Version 2.0 incorporates regional best practices observed at Encina Wastewater Authority (a comparable Joint Powers Authority with a mature Comprehensive Asset Management Plan and formal Board final-acceptance process), as well as the published capital-project lifecycle practices of SOCWA Member Agencies South Coast Water District, El Toro Water District, Irvine Ranch Water District, Moulton Niguel Water District, and Santa Margarita Water District. Particular emphasis is placed on governing-board authorization of Notices of Completion and the subsequent release of retention or escrow funds—practices that provide clear accountability, protect public funds, and satisfy California Public Contract Code and Civil Code requirements.

The Program is designed to align with the FY 2026-27 Annual Budget structure, the SOCWA Joint Powers Agreement (particularly Sections 6.2 and 6.3 regarding cost allocation), the Uniform Purchasing Policy, and the Capitalization & Depreciation Policy.

2. Governance Framework

2.1 Organizational Roles

Board of Directors – Ultimate authority for adoption of the annual O&M and CIP budgets, approval of contracts above delegated limits, policy adoption, and—critically—formal acceptance of completed capital projects via authorization to file a Notice of Completion and release of retention or escrow funds. Votes on CIP and O&M budgets are taken by Project Committee in accordance with JPA Section 6.3. This mirrors the practice at Encina Wastewater Authority (Board final acceptance of major projects) and the routine Board actions at SCWD, IRWD, and SMWD.

Engineering Committee (or Engineering & Operations Committee) – Primary review body for the capital portion of the budget, project prioritization, scope changes, progress reports, and recommendations for Board acceptance of completed work. Peer agencies (SCWD Engineering & Operations, SMWD Engineering/Operations, ETWD Engineering/FIC, IRWD Engineering & Operations) consistently route NOC and retention-release items through committee before full Board action.

Finance Committee – Reviews overall budget affordability, cash-flow requests, interfund transfers, UAL/OPEB impacts, and multi-year funding strategy. Aligns with ETWD and SMWD practice of Finance Committee oversight of capital reserves and fund transfers.

Project Committees (PCs) – Facility- or system-specific governing bodies (e.g., PC 2 – J.B. Latham Treatment Plant, PC 15 – Coastal Treatment Plant, PC 5 – San Juan Creek Ocean Outfall, PC 24 – Aliso Creek Ocean Outfall, PC 21 – Effluent Transmission Main). Participating Member Agencies approve PC-specific budgets, capital requests, and, where appropriate, project acceptance actions.

Staff Roles – Capital Improvement Program Manager leads project delivery, closeout documentation, and reporting; Deputy General Manager / Chief Engineer provides technical oversight and recommends acceptance; Finance/Accounting manages cash requests, interfund accounting, capitalization, and retention release; Procurement/Contracts Administrator administers solicitations and contract closeout.

2.2 Cost Allocation Principles (JPA § 6.3.1)

Capital costs “shall be paid by the Participating Member Agencies in proportion to their respective percentage share of the ownership of capacity in said Project facilities.” O&M costs are allocated primarily by actual use (or contractual formulas). Any change to the CIP cost-allocation methodology requires unanimous consent of all Participating Member Agencies. This capacity-based approach is consistent with the joint-facility cost-sharing used by Encina and the SOCWA-related capital line items carried in SCWD, MNWD, SMWD, and ETWD budgets.

2.3 Alignment with Peer Governance Practices

SOCWA's Project Committee structure is analogous to Encina's member-agency Board representation. Member and Participating Agencies themselves (SCWD, ETWD, IRWD, MNWD, SMWD) maintain robust Board-level oversight of capital closeout. The Program therefore establishes as SOCWA policy that final project acceptance, Notice of Completion, and retention/escrow release are formal Board (or Project Committee, as applicable) actions that provide enhanced governance oversight, accountability, and transparency.

2.4 Approval Authority Matrix

Action	Engineering Committee	Finance Committee	Project Committee (PC)	Board
CIP Prioritization	Review		Review	Approve
Annual CIP Budget	Recommend	Review	Review	Approve
Budget Amendments	Review	Review	Review	Approve

Contract Award (within delegated authority)	Review		As Required	GM/Board
Notice of Completion	Review		Recommend	Approve
Retention/Escrow Release with Contractor Waiver and Release from Liens	Review		Recommend	Approve
Project Closeout	Review		Recommend	Approve
Capitalization	Inform	Inform		Inform

3. Project Selection for the 10-Year CIP and Annual Budget

Projects enter the CIP through a structured, multi-year planning process that balances regulatory compliance, asset condition, operational reliability, capacity needs, and affordability for Member Agencies. The process draws on the formal asset-management frameworks used by Encina (E-CAMP), IRWD (CIP Asset Management risk model), ETWD (Asset Management Program + Master Plan), and the Infrastructure Master Plans of SCWD and SMWD.

3.1 Sources of Project Identification

- Facility Planning Assessments (FPAs) and Master Plans (e.g., CTP and JBL FPAs)
- Condition assessments, inspections, and risk rankings (Likelihood of Failure × Consequence of Failure, as practiced at IRWD and ETWD)
- Regulatory drivers (NPDES, AQMD, biosolids, PFAS, nutrient limits, etc.)
- Operational staff recommendations and near-miss / reliability issues / efficiencies / optimizations
- Regional flow studies and capacity analyses
- Member Agency requests coordinated through the relevant Project Committee
- Technology refresh cycles (SCADA, servers, network, lab equipment, obsolescence)
- Encina-style multi-criteria scoring (Safety, Regulatory Compliance, Reliability, Public/Agency Impacts, Energy, Organizational Efficiency)

3.2 Prioritization Criteria

Projects are ranked and scheduled using the following factors (aligned with Encina E-CAMP and IRWD risk-based models):

Safety & Regulatory Compliance: Immediate health/safety risks or permit-driven deadlines

Asset Criticality & Condition: Consequence of failure × probability/likelihood of failure

Operational Reliability: Impact on treatment capacity, energy, or chemical use

Lifecycle Cost Efficiency: Avoidance of higher future costs through timely intervention

Regional / Inter-Agency Coordination: Alignment with Member Agency capital programs

Funding Affordability & Cash Flow: Available reserves, cash-on-hand, and rate impacts

Constructability & Lead Times: Permitting complexity, long-lead equipment, site constraints

3.3 Development of the 10-Year CIP

Annually, Engineering staff update the Ten-Year Capital Improvement Plan tables (see Appendix A of the FY 2026-27 Budget Book). Each project is assigned a unique Project ID, category (Liquids / Solids / Common / AWT / Outfall), total estimated budget, expenditures to date, remaining budget, and cash-request phasing by fiscal year. In the FY 2026-27 cycle, the proposed CIP cash request was refined from an earlier estimate of approximately \$12.3 million down to \$8.45 million after staff reviewed internal resource capacity, cash on hand, and realistic project schedules. The multi-year CIP horizon exceeds \$160–170 million. This multi-year horizon and member-agency communication approach is consistent with Encina's E-CAMP and the published multi-year CIP budgets of SMWD, IRWD, and SCWD.

3.4 Annual Budget Integration

1. Engineering Committee reviews draft CIP list and multi-year cash-flow projections.
2. Finance Committee evaluates overall affordability and Member Agency impacts.
3. Project Committee Boards review and recommend PC-specific capital requests.
4. Full Board adopts the combined O&M + CIP budget (with accompanying CIP billing and spending plan) (typically in May/June).
5. Approved CIP projects are authorized for expenditure within the adopted cash request; any increase beyond contingency requires Board (or PC) action.

4. Financial Management & Interfund Transfers

4.1 Fund Structure

SOCWA maintains distinct accounting for Operations & Maintenance (by PC and Department), Administration / General Fund, UAL & OPEB obligations, Laboratory Services, and Capital project funds. Large Capital projects typically accumulate cash advances from Participating Member Agencies; expenditures are drawn against those balances. Peer practice (Encina restricted capital contributions with carryforward of appropriations; ETWD Capital Improvement Reserve and Board-authorized fund transfers within the Capital Budget; SMWD and MNWD multi-fund CIP tracking) reinforces the need for clear segregation and transparent reporting of capital cash movements.

4.2 Interfund Transfers & Transparency

Interfund activity occurs for fringe-benefit pool charges, IT allocations, administrative overhead, changes in project needs within PCs, and transfers of staff time charged to capital projects. All such transfers are documented in the budget book and monthly financial reports.

Transparency requirements:

- Every capital cash request appears in the annual Budget Book by Project Committee and Member Agency.
- Monthly or quarterly Capital Improvement Program Workplan / Progress Reports are presented to the Engineering Committee and Board, showing funds collected, funds spent, remaining balance, percent complete, and schedule status (consistent with IRWD, ETWD, and SCWD project-status reporting).
- Updates to quarterly billings amounts, based on actual project process, are communicated to the Member Agencies finance staff, reported in the annual audit/use audit, and reported in the annual Budget Book for continuing projects.
- Change-order reports are provided for active construction contracts.
- Any proposed interfund transfer that affects PC cost shares is disclosed to the relevant Project Committee and, where required, the full Board (aligning with ETWD Administrative Code practice) and reported in the annual Budget Book
- Unbudgeted capital expenditures $\geq$ \$100,000 require Board approval. Budget amendments shall identify the funding source, effect on project contingency, impacts to participating member agencies, and any changes to the approved CIP cash request.
- Final project acceptance, Notice of Completion, and retention/escrow release are Board (or PC Board) actions reported in the public record.

4.3 Cash-Flow Management

Staff monitor cash-on-hand for each large capital project. When existing funds are sufficient, new cash requests may be reduced or deferred (as occurred in the FY 2026-27 budget process). Multi-year projects are phased so that design, long-lead procurement, and construction cash needs are synchronized with Member Agency rate cycles.

5. Project Budget Composition

A complete capital project budget must capture every cost category necessary to deliver the asset ready for beneficial use. Under SOCWA's Capitalization Policy, the full cost of a construction project (upon completion and start-up) is capitalized and includes, but is not limited to, the categories shown below. Peer agencies (SCWD, IRWD, SMWD, ETWD, MNWD) likewise include design, construction management, staff charges, legal, and contingency in project budgets reported to their Boards.

Cost Category	Typical Inclusions / Notes
Planning & Studies	Facility planning assessments, condition assessments, feasibility studies, environmental review (CEQA/NEPA), hydraulic analyses. Studies expected to lead to construction within ~6 months are capitalized; otherwise expensed.
Design (Professional Services)	Preliminary design, final design, specifications, cost estimating, design-phase CM support. Procured via RFP/RFQ.
Permitting & Regulatory	AQMD, Coastal Commission, RWQCB, building permits, environmental mitigation.
Pre-Purchase / Long-Lead Equipment	MCC, generators, specialized process equipment, SCADA hardware. Ordered early under Board authorization to expedite schedule.
Construction Contract	Bid award amount for public-works construction (lowest responsive & responsible bidder or best-value as allowed).
Construction Management (CM)	In-house staff charges and/or external CM consultant; inspection, schedule control, RFI/submittal management.
Staff Charges (SOCWA Labor)	Engineering, operations, safety, and administrative time charged directly to the project (with fringe).
Legal & Administrative	Contract review, claims support, right-of-way, title, insurance-related costs.
Contingency	Typically 5–10 % of construction (or higher for complex/rehab work). Released only with proper change-order documentation.
Owner-Furnished Materials / Other	Any materials supplied by SOCWA, temporary facilities, startup chemicals, training.
Close-out & Commissioning	As-built documentation, O&M manuals, training, performance testing, punch-list completion, Notice of Completion preparation.

Project budgets are tracked by Project ID in the Large Capital Projects tables of the Budget Book. Remaining budget, expenditures to date, and future-year phasing are updated at least annually.

6. Standard Operating Procedures

6.1 CIP Budgeting SOP

Purpose: Ensure consistent, transparent development and Board adoption of the annual CIP cash request and multi-year plan.

Procedure:

Step 1: By January–February, CIP Manager and Engineering compile updated project list from condition assessments, FPAs, regulatory calendars, and staff input (incorporating risk-based prioritization consistent with Encina E-CAMP and IRWD/ETWD models).

Step 2: Estimate total project costs and multi-year cash-flow needs; identify long-lead items requiring pre-purchase authorization; update all project budgets for annual inflation (All project budgets are presented in current year dollars. Multi-year projects may include an annual inflation adjustment for future year dollars during the span of the project.)

Step 3: Reconcile proposed cash requests against available capital reserves and Member Agency feedback.

Step 4: Present draft CIP tables and cash-request summary to Engineering Committee (typically March–April), including allocations by Project, PC, and Member Agency.

Step 5: Incorporate Committee direction; prepare Finance Committee packet showing Member Agency impacts and total O&M + CIP request.

Step 6: Project Committee meetings review and recommend PC-specific capital budgets and proposed quarterly billings.

Step 7: Board of Directors adopts the combined budget (typically May). CIP cash requests become authorized expenditure authority.

Step 8: Throughout the year, CIP Manager maintains the CIP Workplan, tracks expenditures vs. budget, and reports progress and change orders monthly/quarterly.

Step 9: Mid-year or as needed, request budget amendments for scope changes or unforeseen conditions via the appropriate Committee and Board.

Step 10: Projects shall be reassessed annually using established risk and asset-condition criteria to confirm priority, timing, and funding requirements.

6.2 Bid Procedure Checklist (Public Works & Goods)

This checklist implements the SOCWA Uniform Purchasing Policy and Purchasing Guidelines. Thresholds (approximate; always confirm current policy):

Value	Method	Minimum Requirements
≤ \$25,000	Open Market / Informal	Reasonable effort; one written quote preferred
\$25,001 – \$100,000	Informal Quotes	Minimum three written quotes if practicable
> \$100,000 (Goods / Non-Prof. / Public Works)	Formal Competitive	Sealed IFB / RFB; public notice ≥ 10 days
> \$100,000 (Professional Services)	Formal RFP / RFQ	Qualifications + Best Value; negotiate top-ranked

Pre-Solicitation Checklist:

- Confirm project is in adopted CIP / budget (or obtain amendment authorization).
- Confirm funding source and account coding; obtain Finance concurrence.

- Determine procurement method (IFB for construction, RFP for design/CM, RFQ for qualifications-based).
- Prepare or update technical specifications / scope of work / drawings.
- Identify insurance, bonding, prevailing-wage, and any special requirements.
- Determine whether pre-qualification of bidders is appropriate (Public Contract Code § 20101).
- Decide if long-lead equipment will be pre-purchased (see 6.3).
- Obtain General Manager (or designee) approval of solicitation documents for formal procurements.
- Register solicitation on PlanetBids; publish public notice as required, or identify sole/single source purchases in the staff report(s) to the Board.

Solicitation & Award Checklist:

- Issue solicitation with clear bid opening date/time/place (or electronic deadline).
- Hold pre-bid / pre-proposal conference if warranted (mandatory or optional).
- Issue addenda as needed; post on PlanetBids.
- Receive sealed bids / proposals; reject late submissions.
- Publicly open bids (for IFB); tabulate results; post initial results.
- Evaluate responsiveness and responsibility (or Best Value / qualifications ranking for RFP).
- Conduct discussions / Best and Final Offers if provided for in the RFP.
- Prepare staff recommendation (award, reject all, or negotiate).
- Obtain required approvals (GM for delegated authority; Board/PC for larger awards).
- Issue Notice of Award and Notice to Proceed; execute contract; collect bonds, insurance certificates, and other required documents identified in the contract documents.
- Maintain complete Contract File.

Note: Design-Build is authorized under Public Contract Code § 22160 et seq. when appropriate. Cooperative / piggyback contracts may be used when economically advantageous and the original solicitation was competitive. Escrow agreements in lieu of retention may be used pursuant to Public Contract Code § 22300 (as practiced at IRWD and other peers).

6.3 Pre-Purchase of Long-Lead Items

Certain equipment (Motor Control Centers, standby generators, specialized process equipment, major pumps, SCADA hardware) has lead times that can exceed 12–18 months. To protect project schedules, SOCWA routinely authorizes pre-purchase of such items ahead of the construction contract.

SOP for Pre-Purchase:

- Identify long-lead items during preliminary or final design; document critical path impact.
- Obtain independent cost estimate and technical specifications suitable for competitive procurement.
- Request Board (or PC) authorization for pre-purchase, including budget and contingency.
- Conduct competitive solicitation (or use cooperative contract if advantageous).
- Award and issue purchase order / contract; arrange storage, insurance, and delivery coordination with future construction contractor.

- Track pre-purchased items as project costs; transfer ownership/responsibility to the construction contractor via Owner-Furnished Equipment provisions when the construction contract is awarded.
- Report status of pre-purchase activities in the regular CIP Progress Reports.

Example (FY 2025-26 / 2026-27): Pre-purchasing of MCC-M and Plant 1 Standby Generator for the J.B. Latham Electrical System Upgrades was underway while design and permitting (AQMD) progressed, protecting the overall completion target.

6.4 Project Closeout, Notice of Completion & Retention Release SOP

Purpose: Establish a uniform, Board-accountable process for accepting completed capital work, recording a Notice of Completion (NOC), releasing retention or escrow funds, and transferring the asset into the capitalized inventory. This SOP adopts the regional standard practiced by Encina Wastewater Authority (governing Board final acceptance), South Coast Water District (Board authorization of NOC filing and Retention Fund release), Irvine Ranch Water District (Board acceptance + GM authorization to file NOC and pay retention 35 days after recording), Santa Margarita Water District (Board acceptance, NOC filing, and retention release within 60 days contingent on no claims/punch-list completion), and the formal acceptance/bond-release processes of Moulton Niguel Water District and El Toro Water District.

Closeout Sequence (required):

Step 1 – Substantial Completion / Beneficial Use: Contractor requests inspection. CIP Manager / Chief Engineer confirms that the Work (or designated portion) can be utilized for its intended purpose. A Certificate of Substantial Completion (or equivalent) is issued listing remaining punch-list items.

Step 2 – Punch List Completion & Final Inspection: All punch-list items are completed to the satisfaction of SOCWA. Final inspection is performed. As-built / record drawings, acceptance of spare parts, O&M manuals, warranties, training records, Contractor Waiver and Release from liens, and any other required certifications are submitted and accepted.

Step 3 – Staff Recommendation Package: CIP Manager prepares a staff report containing: project description and history; final cost summary (original budget, change orders, final contract amount, soft costs); confirmation that all contractual and statutory requirements have been met; recommendation that the Board (or PC Board) accept the work as complete; authorization for the General Manager to file a Notice of Completion with the Orange County Recorder; and authorization to release retention (or escrow funds) after the statutory waiting period, contingent on no stop notices or claims.

Step 4 – Committee Review: Engineering Committee (or Engineering & Operations Committee) reviews the closeout package and forwards a recommendation to the full Board or relevant Project Committee, consistent with peer practice at SCWD, SMWD, ETWD, and IRWD.

Step 5 – Board (or Project Committee) Action – Acceptance & NOC Authorization: The governing body formally accepts the construction as complete and authorizes the General Manager (or designee) to execute and record the Notice of Completion. This action is recorded

in the official minutes and constitutes Final Acceptance for purposes of the Contract Documents and capitalization.

Step 6 – Recording of Notice of Completion: NOC is recorded with the Orange County Recorder. Recording starts the statutory period for mechanics' liens and stop notices (typically 30–60 days under Civil Code and Public Contract Code).

Step 7 – Retention / Escrow Release: After the statutory waiting period (commonly 35 days per IRWD practice or up to 60 days per SMWD practice) and confirmation that no claims, stop notices, or liens have been filed, the Board-authorized release of retention (or escrowed security under Public Contract Code § 22300) is processed. Final payment is made and the construction contract is closed.

Step 8 – Capitalization & Asset Transfer: Finance capitalizes the full project cost (studies + design + construction + CM + staff charges + legal + admin + contingency used) in accordance with the Capitalization Policy and transfers the asset into the fixed-asset register. Useful life is assigned by the Chief Engineer or designated Department Head.

Step 9 – Final Reporting & Lessons Learned: A final project closeout report (cost, schedule, change-order summary, lessons learned) is presented to the Engineering Committee and made available to Participating Member Agencies. The CIP Workplan is updated to reflect completed status.

Note: For developer-installed facilities that will be dedicated to SOCWA or a Member Agency, the formal acceptance, Bill of Sale / Dedication, and bond/security release processes of MNWD, SMWD, and ETWD provide additional models that may be adapted as needed.

7. Full Lifecycle Stages (Cradle to Grave)

Stage 1 – Needs Identification & Planning

Condition assessment, FPA, regulatory driver, or capacity study identifies a need. Project is entered into the 10-year CIP with a preliminary cost range and preferred year(s). High-priority items may receive early funding for studies. Prioritization incorporates Encina E-CAMP-style multi-criteria scoring and IRWD/ETWD risk models.

Stage 2 – Project Definition & Budget Authorization

Scope, budget, and schedule are refined. Project receives a Project ID and is included in the annual CIP cash request. Board/PC authorization provides spending authority.

Stage 3 – Design & Permitting

Professional design services procured (RFP). Environmental review and permits obtained. Long-lead equipment identified for pre-purchase. Final engineer's estimate prepared.

Stage 4 – Procurement & Award

Construction and/or equipment solicitations issued per Purchasing Policy. Award recommended to Board/PC. Contracts executed; bonds and insurance confirmed.

Stage 5 – Construction / Implementation

Notice to Proceed issued. Construction management, inspection, change-order control, and progress reporting occur. Staff charges and CM costs are booked to the project. Regular status reports are provided to the Engineering Committee and Board.

Stage 6 – Substantial Completion, Final Acceptance, Notice of Completion & Retention Release

This stage incorporates the formal Board-governed closeout process detailed in SOP 6.4. After punch-list completion and staff recommendation, the Board (or PC Board) accepts the work as complete, authorizes filing of the Notice of Completion with the Orange County Recorder, and authorizes release of retention or escrow funds after the statutory waiting period (typically 35–60 days) provided no claims or stop notices are outstanding. This step is mandatory under this Program and reflects governance practices observed among peer agencies including Encina Wastewater Authority, South Coast Water District, Irvine Ranch Water District, Santa Margarita Water District, and related processes at MNWD and ETWD.

Stage 7 – Capitalization & Commissioning Close-out

Upon beneficial use / start-up and Board acceptance, Finance capitalizes the full project cost and begins depreciation. O&M manuals, training, spare parts, warranties, and as-builts are finalized; the asset is transferred to the relevant Project Committee's operating inventory.

Stage 8 – Operation, Maintenance & Monitoring

Asset enters the O&M program of the relevant Project Committee. Preventive maintenance, condition monitoring, and performance tracking continue. Remaining useful life is periodically reassessed.

Stage 9 – Mid-Life Intervention or Replacement Planning

When condition, risk, or regulatory drivers indicate the need for major rehabilitation or replacement, the cycle returns to Stage 1. Residual book value and the potential for asset life extension are considered and may include assessments like a lifecycle-cost analysis.

Stage 10 – Retirement / Disposal

Asset is taken out of service. Surplus equipment is disposed of per surplus-property policy (auction, scrap, recycle). Book value is removed; gains/losses recognized per GASB. Environmental and safety obligations are closed out.

8. Capitalization, Depreciation & Asset Retirement

Per the SOCWA Capitalization and Depreciation Policy (aligned with GASB) and consistent with peer thresholds (e.g., SCWD \$5,000):

- Capitalization threshold: generally \$5,000 or more and useful life exceeding three years (one year for certain intangible software/licenses). Integrated systems may be grouped.

- Construction projects are capitalized upon completion, start-up, and formal Board (or PC) acceptance (Stage 6). Capitalized cost includes studies, design, construction, equipment, construction management, legal, and administration expenses related to the project.
- Project studies expected to lead to construction within approximately six months are treated as assets (three-year life); if construction begins earlier, the study cost is rolled into the construction asset.
- Depreciation is straight-line over the useful life determined by the Chief Engineer or designated Department Head.
- Repairs are expensed unless they extend useful life and meet the capitalization threshold.
- Physical inventory of capital assets is conducted at least every two years.
- Disposition follows California Government Code surplus-property rules; gains/losses are recognized in accordance with GASB.

9. Transparency, Reporting & Board Oversight

SOCWA's Member Agencies and the public are kept informed through the following mechanisms, which align with the transparency practices of Encina, SCWD, IRWD, ETWD, MNWD, and SMWD:

- Annual Budget Book (O&M by PC + Large Capital Projects tables + 10-Year CIP Appendix).
- Capital Improvement Program Workplan / Progress & Change Order Reports (Engineering Committee and Board).
- Finance Committee packets showing year-over-year comparisons and Member Agency impacts.
- Project Committee agendas and minutes documenting PC-specific budget and contract actions.
- Formal Board (or PC) actions accepting completed projects, authorizing Notice of Completion, and authorizing retention/escrow release—entered into the public record.
- Public posting of solicitations and results on PlanetBids and the SOCWA website.
- Audited financial statements that report capital assets, depreciation, and long-term obligations.
- Final project closeout reports summarizing cost, schedule, and lessons learned.

Any material deviation from the adopted CIP cash request, significant change orders, or proposed interfund transfers that alter cost shares are brought to the appropriate Committee and Board for discussion and action, preserving transparency and accountability.

10. Peer Agency Alignment & References

This Program deliberately incorporates published practices of the following agencies so that SOCWA's capital lifecycle management is consistent with regional expectations and Member Agency standards:

Encina Wastewater Authority (Encina JPA) – Comprehensive Asset Management Plan (E-CAMP) driving multi-year CIP prioritization (safety, regulatory compliance, reliability, etc.); Board

of Directors final acceptance of major capital projects; restricted capital contributions with appropriation carry-forward; progressive design-build delivery with defined Final Project Acceptance milestones. Encina's full capital program, in which the governing Board signs off on Notices of Completion and releases of escrow, is a primary model for SOCWA's Stage 6 and SOP 6.4.

South Coast Water District (SCWD) – Board of Directors authorizes filing of Notice of Completion and Release of Retention Fund for completed capital projects (explicit staff-report language and Board action). Engineering & Operations Committee review precedes Board action. Infrastructure Master Plan and Asset Management Program inform the CIP. Full project-cost transparency (design, construction, CM, staff charges) is provided to the Board.

Irvine Ranch Water District (IRWD) – Board accepts construction, authorizes the General Manager to file a Notice of Completion, and authorizes payment of retention 35 days after recording of the NOC. Formal definitions of Substantial Completion and Final Acceptance appear in Project Manuals. Risk-based CIP Asset Management (Likelihood of Failure × Consequence of Failure) prioritizes work. Escrow agreements in lieu of retention (Public Contract Code § 22300) are utilized.

Santa Margarita Water District (SMWD) – Board accepts work, files Notice of Completion, and releases retention within 60 days thereafter, contingent on no claims and punch-list completion. Structured Bond Exoneration / Tract Acceptance process routes through Engineering/Operations Committee then Board. Multi-year CIP Budget published with full lifecycle visibility.

Moulton Niguel Water District (MNWD) – Formal Notice of Acceptance / Certificate of Acceptance of facilities; one-year warranty period begins upon acceptance; subsequent bond/security release. CIP permanent files retain Notice of Award, Notice to Proceed, Notice of Completion, warranties, and as-builts. Board awards contracts and contingencies; Engineering/Operations Committee reviews.

El Toro Water District (ETWD) – Asset Management Program and Master Plan (with asset-management component) drive the 10-year CIP. Capital projects above a defined threshold carry an explicit Board Approval Schedule tracked by the Engineering & Finance Committee. Close-out includes final inspection, as-builts, Dedication of Facilities, and City notification. Board authorizes fund transfers within the Capital Budget under the Administrative Code.

Primary Governing Documents for SOCWA:

- SOCWA Joint Powers Agreement (especially §§ 6.2 and 6.3 on cost allocation)
- Past Annual Budget Books
- SOCWA Uniform Purchasing Policy / Purchasing Guidelines
- SOCWA Capitalization and Depreciation Policy
- SOCWA Investment Policy and related financial policies
- California Public Contract Code (competitive bidding, design-build, retention, escrow)
- California Civil Code (mechanics' liens, stop notices, Notice of Completion effects)
- GASB Statements Nos. 34, 42, 51 (capital assets, impairment, intangibles)
- Project Committee Agreements and most recent reorganization agreements setting capacity percentages

Appendix A – Illustrative FY 2026-27 CIP Snapshot

The following figures are drawn from the Draft / Approved FY 2026-27 Budget materials and are provided for illustration of the scale and structure of the Program. Exact numbers should be verified against the final adopted Budget Book.

Combined FY 2026-27 Budget (approximate)

- Total O&M + Admin + UAL/OPEB ≈ \$20.06 million
- CIP Cash Request (after refinement) ≈ \$8.45 million
- Combined O&M + CIP request ≈ \$28.5 million
- Ten-Year CIP horizon (all PCs) on the order of \$160–190 million (depending on final tables)

Major Project Committee CIP Activity (illustrative)

- PC 2 (J.B. Latham) – Electrical upgrades, headworks, digester/solids improvements, energy building, effluent pump station work
- PC 15 (Coastal Treatment Plant) – Aeration, odor control, export sludge, roof replacements, small-capital programs, facility planning
- PC 5 / PC 24 (Outfalls) – Monitoring, seal replacement, realignment studies, small capital
- PC 21 (Effluent Transmission Main) – Trail bridge protection and related work
- Laboratory / Common – Server replacements, SCADA integration, firewall upgrades, lab reconstruction feasibility

Cash requests are allocated to Participating Member Agencies according to ownership of capacity in each facility (liquids, solids, common, outfall). Detailed allocation tables appear in the Budget Book by Project Committee.

Appendix B – Sample Project Budget Cost Categories

When preparing a project budget request for inclusion in the CIP, staff should develop a line-item estimate that covers the full lifecycle cost of delivery. A typical template includes:

1. Planning / Studies / Environmental – \$
2. Design (Preliminary + Final) – \$
3. Permitting & Agency Fees – \$
4. Pre-Purchase Equipment (list each major item) – \$
5. Construction Contract (including retention, if needed) (Opinion of Probable Construction Cost (OPCC)) – \$
6. Construction Contingency (X %) – \$
7. Construction Management / Inspection (in-house + consultant) – \$
8. SOCWA Staff Charges (Engineering, Ops, Admin + Fringe) – \$
9. Legal / Specialty Consultants – \$
10. Startup, Testing, Training, O&M Manuals – \$ (JB COMMENT/QUESTION - Are we planning to include a line item in the bids to get these values? We won't get them without that.)

11. Other / Owner Costs – \$ (JB COMMENT/QUESTION – This appears to be something from a private construction project?)

TOTAL PROJECT BUDGET – \$

Phasing: FY XX – \$____ ; FY XX+1 – \$____ ; Thereafter – \$____

Planning/Design Recommended Contingency Release Authority: General Manager up to ____ % or \$____

Construction Recommended Contingency Release Authority: General Manager up to ____ % or \$____

Appendix C – Sample Board Action Language (NOC & Retention Release)

The following illustrative language is drawn from the published practices of South Coast Water District, Irvine Ranch Water District, and Santa Margarita Water District and may be adapted for SOCWA Board or Project Committee actions:

Illustrative Recommendation / Resolution Text:

“Staff recommends that the Board of Directors [or Project Committee Board] (1) accept the construction of the [Project Name] as complete in accordance with the Contract Documents; (2) authorize the General Manager to execute and cause to be recorded a Notice of Completion with the Orange County Recorder; and (3) authorize the release of retention [or escrowed funds] to the Contractor thirty-five (35) [or sixty (60)] days after the date of recording of the Notice of Completion, contingent upon confirmation that no stop notices, claims, or liens have been filed and that all punch-list items have been completed to the satisfaction of the Authority.”

Supporting staff reports should include a final cost summary, change-order history, confirmation of as-builts/warranties/O&M manuals, and a statement that the work is ready for beneficial use and capitalization.

Agenda Item

6

Engineering Committee Meeting

Meeting Date: September 17, 2026

TO: Engineering Committee

FROM: Amber Boone, General Manager

SUBJECT: Use Audit Flows and Solids FY 25-26

Summary

The Use Audit flow allocation methodology has relied on historical practice for allocation of costs. This agenda item reviews the methodology per project committee (PC), which is presented to the Engineering Committee and SOCWA Board members on an annual basis for review, comment, and use in the annual Use Audit for FY 25-26.

Results

Captured herein are the methodologies employed and the results by member agency based on the raw and calculated data, which have been distributed to Engineering Committee members for review and comment. Please note that PC 5 and PC 24 are attributed to fixed costs.

PC 2

Member agency average flows for the FY were used in the flow allocation and applied proportionally from the total combined flow from each tributary trunk line. The PC 2 uses FY flows and three-year FY average solid loadings to reconcile the budgeted amounts. Solids loadings are calculated by adding the average FY BOD and TSS and, dividing by 2 and then multiplying the result by the flow and the 8.34 pounds conversion factor. In March 2018, PC2 members Moulton Niguel Water District (MNWD) and Santa Margarita Water District (SMWD) came to an agreement on how to allocate solids for budgeting and use audit purposes. The new method captures the influent loading at Plant 3A as it was recognized that this allocation would isolate MNWD's solids contributions to JBL to a single variable. SMWD solids to JBL would then be the balance of solids contributed by the Oso Creek Water Reclamation Plant, 3A, and any other discharges to the Oso Trabuco line to JBL.

Summary results for PC2 are included in Table 1. The total sum of the metered flows on the line influent into the JB Latham facility was 9.82 mgd. The percentage difference between metered and billing flows was 13.6%.

September 17, 2026

Table 1: PC2 Liquids and Solids Summary Table

PC2 - JB Latham Plant**Liquids Summary (mgd)**

Member Agency	2025-2026 Budgeted Flow (mgd)	2025-2026 Budgeted Percent	2025-2026 Total Avg. Flow (mgd)	Total Percent To Date
MNWD	3.00	23.08 %	1.04	10.58 %
SCWD	3.75	28.85 %	1.57	15.99 %
SMWD	6.25	48.08 %	7.21	73.43 %
	13.00	100.00 %	9.82	100.00 %

Solids Summary Loading (mgd)

Member Agency	2025-2026 Budgeted (mgd) Flow	2025-2026 Budgeted (%) Percent	Total Avg. Loadings FY 2025-2026	Total Percent To Date
MNWD	8340	21.62 %	3502.209	15.22 %
SCWD	7715	20.00 %	2931.96	10.56 %
SMWD	22518	58.38 %	23220.34	49.53 %
	38573	100.0 %	29654.52	100.00 %

PC 12

The PC 12 method of production is detailed by member agency in the following narrative. San Juan Capistrano is the acre-foot sum of the Rosenbaum well, the Mission Street Well, and the total reclaimed water from the SMWD/CSJC intertie. For MNWD, it is the amount of reclaimed water produced from the Regional Treatment Plant (RTP) and the 3A Treatment Plant (split with SMWD). South Coast Water District (SCWD) is the total reclaimed water produced from the Coastal Treatment Plant (CTP). The Santa Margarita Water District (SMWD) is the combined sum of reclaimed water produced from the 3A Treatment Plant (split with MNWD), the Oso Creek Water Reclamation Plant (OCWRP), the Chiquita Water Reclamation Plant (CWRP), and the Nichols Water Reclamation Plant (NWRP). The Trabuco Canyon Water District (TCWD) is reclaimed water produced from the Robinson Ranch Water Reclamation Plant (RRWRP). Summary results for PC2 are included in Table 2.

Table 2: PC12 Liquids Summary Table

PC 12 Recycled Water

Master Recycled Water Permit 2025-2026		
Member Agency	Region 9 Recyled Production FY 2025-2026 acft	% RW Produced FY 2025-2026 %
CSJC	782.00	5.81
MNWD	5481.00	40.72
SCWD	681.00	5.06
SMWD	6095.00	45.29
TCWD	419.00	3.12
Total	13459.00	100.00

PC 15

Due to the lack of solids handling capacity at the Coastal Treatment Plant (CTP), allocation methodology is based on flows to the treatment plant. In addition, there are no current flow meters installed to account for any flow sent to CTP from MNWD, so no flow is being accounted for in this PC flow allocation methodology. The City of Laguna Beach (CLB) is the average annual flow into CTP (metered). The Emerald Bay Services District (EBSD) is the average annual flow into CTP (calculated from the monthly meter reads from the lift station divided by the days in the month). The South Coast Water District (SCWD) is the average annual flow into CTP (metered). The meter calibration is performed annually in June. Summary results for PC15 are included in Table 3.

Table 3: PC15 Liquids and Solids Summary Table

PC 15 Actual Flows

FY 2025-2026 Coastal Treatment Plant		
Member Agency	Plant Flows MGD	Plant Flow Percent
CLB	1.32	53.01
EBSD	.09	3.79
SCWD	1.08	43.20
MNWD	.00	.00
Total	2.49	100.00

Recommended Action: Staff requests that the Engineering Committee recommend to the Board of Directors the approval of the Use Audit calculated results for the close of the Use Audit for disbursement or collection of additional funds in FY 25-26.

Agenda Item

7

Engineering Committee Meeting

Legal Counsel Review: Yes

Meeting Date: September 17, 2026

TO: Engineering Committee

FROM: Amber Boone, General Manager

STAFF CONTACT: Jim Burror, Deputy General Manager/Chief Engineer

SUBJECT: Draft Cost Allocation Policy

Summary

At its May 14, 2026, meeting, the SOCWA Board of Directors directed staff to review the draft Cost Allocation Policy and update the document to ensure it aligns with the following:

- Updated Joint Powers Authority (JPA) Agreements adopted in December 2024.
- Current budgeting and cost allocation practices by budget line item.
- Current SOCWA operations and maintenance (O&M) and capital billing practices.
- Member agency requests related to billing for contracted O&M and capital services.

This item provides a status update to the Engineering Committee, based on direction from the SOCWA Board on July 9, 2026 based on staff's review of these four issue areas. Based on that review, staff have prepared a redlined draft of the revised Cost Allocation Policy attached to this agenda item. At the August 20, 2026 Engineering Committee meeting, SOCWA staff requested feedback on the cost allocation policy. One set of comments were received as detailed below:

On the CIP Budget, treat certain non-use-related capital and standby maintenance items as examples of "other category common costs," and the commenter asked staff to describe an approval process similar to the O&M budget instead of relying on the current unanimous-consent language. Under memberships, the comment is to include large-agency memberships (CASA, Clean Water SoCal, WERF, etc.), except WEROC, consistent with FY 2024/25 Board direction. On PC-15, the incomplete chlorine/sodium hypochlorite split (1% Liquids and 99% with no second category) is flagged for correction. The Use Audit section is marked only to call attention to Table 9 as the summary of methodology by project committee.

This policy is also moving parallel for review at the Finance Committee meeting in September.

Recommended Action: Committee Discussion, Direction, and Action

Attachment: Draft Cost Allocation Policy

Agenda Item

9

Engineering Committee Meeting

Meeting Date: September 17, 2026

TO: Engineering Committee

FROM: Roni Grant, Capital Improvement Program Manager

SUBJECT: SOCWA Capital Improvement Program Workplan FY 26-27 (September)
[All Project Committees]

Staff is providing this update on the status of the Capital Improvement Program (CIP), including project budgets, expenditures, progress, upcoming FY 26-27 funding requests, and key risks. The majority of active projects are progressing as planned, with several nearing completion. A portion of the CIP remains deferred pending the outcome of the master planning effort to ensure infrastructure investments are strategically aligned. Primary challenges affecting schedule and delivery include regulatory permitting, long equipment lead times, and coordination with external agencies.

Recommended Action: Information only.

Attachment: CIP Workplan FY 26-27

SOCWA CIP Workplan												Jul - Sep	Oct - Dec	Jan - Mar	Apr - Jun
												FY 26/27			
Project Number	Project Name	Ten Year CIP Project Budget	Funds Collected as of FY 26/27 Q1*	Funds Spent as of September 2026**	Funds Remaining	Percent Spent	FY 26-27 Funds Request	Projects Approved by the Board	Status	Anticipated Completion	Challenges/Delays	Q1	Q2	Q3	Q4
PC 2 - J.B. Latham Treatment Plant															
3252	MCC M and Plant 1 Generator Replacement	\$ 4,232,843	\$ 1,759,881	\$ 1,017,291	\$ 742,590	58%	\$ 500,000	January 2025	Pre-procurement and design underway	July 2027	Pending AQMD permit on the generator	D	B&A	C	C
3285	Main Plant Drain Line Reconstruction	\$ 1,000,000	\$ 573,375	\$ 110,311	\$ 463,064	19%	\$ 568,833	October 2024	Design underway	July 2027	Will combine with the Plant 1 Blower Building HVAC Upgrades	B&A	C	C	C
32232S/32234S /32244S	Buried Digester Piping Reconstruction	\$ 2,001,490	\$ 678,171	\$ 419,615	\$ 258,555	62%	\$ 1,500,000	July 2026	Contract awarded	July 2027		B&A	C	C	C
32275S	Digester 3 and 4 Upgrades and Coating	\$ 1,000,000	\$ 50,000	\$ -	\$ 50,000	0%	\$ 200,000							P	D
PC 15 - Coastal Treatment Plant															
3541	Export Sludge Environmental Mitigation	\$ 1,392,000	\$ 189,750	\$ 63,852	\$ 125,898	34%	\$ 291,900	Feb 2022	Mitigation work/permitting ongoing	July 2027	Pending regulatory agencies approval	ENV	ENV	ENV	ENV
35229L/35235L	Odor Control Scrubber/Foul Air System Reconstruction	\$ 1,500,000	\$ 719,308	\$ 418,833	\$ 300,475	58%	\$ 222,323	November 2024	Final design underway	September 2027	Long equipment lead time	B&A	C	C	C
3522AL	Drainage Pump Station/ Storm Drain Improvement	\$ 4,200,000	\$ 1,286,085	\$ 617,144	\$ 668,941	48%	\$ 279,980	September 2024/March 2026	Final design underway	October 2026	Will address more pressing issues until the master planning effort is done.	D	D	B&A	C
35248L	Access Road Repaving	\$ 1,199,999	\$ 1,199,999	\$ 71,703	\$ 1,128,296	6%		July 2026	Contract awarded	October 2026	Will address more pressing issues, looking for partnership with OC Parks.	C	C		
PC 21 - Effluent Transmission Main															
3105/3106 /3107/3108	Air Valve Replacement	\$ 784,000	\$ 619,742	\$ 294,214	\$ 325,528	47%	\$ 229,132	November 2020	Design/permitting underway	July 2027	Pending amended permit	D	ENV	ENV	ENV
31222B	Reach B Techite Pipe Replacement	\$ 7,891,000	\$ 297,500	\$ 164,862	\$ 132,638	55%	\$ 1,190,000	February 2026	Design underway	December 2026	City of Laguna Woods requested street alignment construction to be complete by October 2027	D	D	B&A	C
3101/31221B	Trail Bridge Crossing	\$ 1,241,771	\$ 480,438	\$ 444,771	\$ 35,667	93%	\$ 14,000	March 2018	Planning/design underway		Seeking FEMA grant funding	P	P	P	P
PC 24 - Aliso Creek Ocean Outfall															
34222O	Golf Course Road	\$ 45,000	\$ 22,588	\$ 88	\$ 22,500	0%	\$ 45,000		Planning underway		Coordination with OC Parks	P	D	B&A	C
All Project Committees															
37271C	Lab Reconstruction Feasibility Phase II	\$ 100,000	\$ 25,000	\$ -	\$ 25,000	0%	\$ 100,000		Scope preparation	June 2027		P	P	P	P
32271C	SCADA Integration Upgrade Project	\$ 175,000	\$ 6,750	\$ -	\$ 6,750	0%	\$ 175,000		Scope preparation	June 2027		P	P	B&A	C
32272C	Business Network Server Replacement Project	\$ 175,000	\$ -	\$ -	\$ -	0%	\$ 175,000		Scope preparation	March 2027		B&A	C	C	
32273C	Firewall Reliability Upgrades	\$ 9,000	\$ -	\$ -	\$ -	0%	\$ 9,000		Equipment Requisition Process Underway	September 2026		B&A	C	C	
32274C	WIMS Server Replacement	\$ 20,000	\$ -	\$ -	\$ -	0%	\$ 20,000		Attaining Quotes	December 2026		B&A	C		

P	Planning
CA	Condition Assessment
ENV	Environmental/Permitting
D	Design
B&A	Bidding and Award
C	Construction

* Based on member agencies quarterly billing
 ** Based on invoices received and approved

Agenda Item

10

Engineering Committee Meeting

Meeting Date: September 17, 2026

TO: Engineering Committee

FROM: Roni Grant, Capital Improvement Program Manager

SUBJECT: Capital Improvement Construction Projects Progress and Change Order Report (September) [Project Committees 2 and 15]

Overview

This agenda item provides a status update on active construction projects, including any associated change orders. Updated Capital Improvement Program (CIP) reports are attached for reference.

Project Updates

JBL Electrical Upgrades

Pre-purchasing activities for the Motor Control Center (MCC) and Plant 1 Generator are currently underway. Construction is anticipated to be completed by July 2027, contingent upon the issuance of the AQMD permit to construct for the generator.

JBL Buried Digester Piping Reconstruction

The construction contract has been approved; construction is anticipated to be completed by July 2027.

CTP Storm Drain Improvements

Construction is currently in progress. Construction is anticipated to be completed by October 2026.

CTP Access Road Repaving

The construction contract has been approved; construction is anticipated to be completed by October 2026.

SAQMD Permit Status Updates for CIP Projects

JBL Plant 1 Generator (A/N 654624)				
Application Date	Communication Dates from SCAQMD	Information requested from SCAQMD	Information provided to SCAQMD	Response Dates from SOCWA
08/01/24	9/11/24	CG18 gas engine technical data	Provided technical data	9/25/24
	10/8/24	Serial number and model year	Serial number and model year not available, confirmed flapper type rain cap	10/9/24
	10/17/24	Maintenance and testing requirements	Confirmed requirements	10/18/24
	1/15/25	Confirmed receipt of serial number and model year	Provided serial number and model year	1/13/25
	4/25/25	Requested to confirm EPA family code	Confirmed EPA family code and provided EPA certificate	4/25/25
	6/3/26	Permit still under review	SOCWA requested permit status	6/1/26

JBL Boiler (A/N 610090)				
Application Date	Communication Dates from SCAQMD	Information requested from SCAQMD	Information provided to SCAQMD	Response Dates from SOCWA
	9/23/2021	Permit to Construct extension issued		
	12/14/2021	Questions regarding construction timeline	Timeline and construction status provided	12/15/2021
	12/17/2021	Additional information requested regarding the boiler model and type	Information provided	12/17/2021
	3/4/2022	Requested for the specification on the boiler	Specification provided	3/4/2022
	3/8/2022	Requested information on the exhaust stack parameters	Information provided	3/8/2022
	3/11/2022	Requested information about the height of the building	Information provided	3/14/2022
	3/17/2022	Confirmed the permit to construct is valid for the boiler model change		
	1/5/2023		Functional testing and third-party source testing completed	
	2/17/2023	Source test report status check	Re-submitted electronically	2/17/2023
	11/7/2023	Under review, Permit to Construct serves as the temporary Permit to Operate	Requested status on the Permit to Operate	11/7/2023
	8/28/2026	Tuning records and data requested		

JBL Flare System (A/N 657267)				
Application Date	Communication Dates from SCAQMD	Information requested from SCAQMD	Information provided to SCAQMD	Response Dates from SOCWA
12/13/24	1/8/25	Requested additional fee	Paid online	1/21/25
	1/24/25	Requested voucher or receipt from the online payment	Provided voucher payment and receipt number	1/24/25
	4/1/25 and 4/18/25	Requested clarification on facility ownership	Clarified the facility ownership	4/23/25
	5/14/25	Additional information needed on the flare Varec 244E unit	Provided additional information	5/19/25
	5/21/25	Requested specifications on the flare retention time and temperature	Provided additional information	5/22/25
	8/7/25	Additional questions regarding the existing flare and proposed flare system	Responses provided	8/14/25
	8/4/26	Requested if the current proposed flare model number will remain the same	Responses provided	8/10/2026
CTP Odor Scrubber System (A/N 656320)				
Application Date	Communication Dates from SCAQMD	Information requested from SCAQMD	Information provided to SCAQMD	Response Dates from SOCWA
10/2/24	11/8/24	Additional information needed	Design intent clarified	11/19/24
	7/15/25	Additional information needed	Additional information provided	7/18/25
	1/28/2026	Permit to Construct issued		

Recommended Action: Information only.

Project Financial Status

Project Committee	2
Project Name	Digester Underground Piping - 32232S/32234S/32244S
Project Description	Digester underground piping improvements

Data Last Updated

September 8, 2026

Cash Flow



Contingency

Contingency
Remaining,
\$118,250.00



Project Budget

\$2,001,490	Budget
includes below	Design Phase Costs
\$ 419,615.13	Constr Costs to Date
\$ 1,442,699.87	Constr Encumbered
\$ 118,250.00	Construction Contingency
\$ 20,925.00	\$'s Remaining
1.05%	% Remaining

Cash Flow

Collected	\$ 678,170.50
Expenses	\$ 419,615.13

Project Completion

Schedule	20%
Contract Payments	22.53%

Construction Contracts and Related Expenses

Company	PO No.	Original	Change Orders	Amendments	Total	Costs to Date
SS Mechanical	22187	\$ 1,182,241.00			\$ 1,182,241.00	
Ardurra	21242	\$ 286,902.00			\$ 286,902.00	\$ 230,651.60
Carollo	21494	\$ 57,168.00			\$ 57,168.00	\$ 57,168.00
Lee & Ro	21766	\$ 81,544.00			\$ 81,544.00	\$ 77,528.90
Project Partners	20739	\$ 16,960.00			\$ 16,960.00	\$ 16,960.00
Pending CM Services		\$ 192,500.00			\$ 192,500.00	
SOCWA Staff Time	32232S/32234S/32244S	\$ 45,000.00			\$ 45,000.00	\$ 37,306.63
		\$ 1,862,315.00	\$ -	\$ -	\$ 1,862,315.00	\$ 419,615.13

Construction Contingency

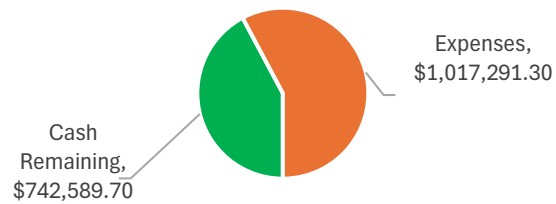
Area	Project Code	Amount	Change Orders	Total Remaining	Percent Used
Solids	32232S/32234S/32244S	\$ 118,250.00	\$ -	\$ 118,250.00	0.0%
		\$ 118,250.00	\$ -	\$ 118,250.00	0.0%

Project Financial Status

Project Committee	2
Project Name	Electrical System Upgrades - 3252
Project Description	Electrical System upgrades including MCC and Plant 1 Generator

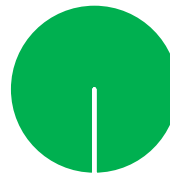
Data Last Updated

September 8, 2026

Cash Flow

Cash Flow

Collected	\$ 1,759,881.00
Expenses	\$ 1,017,291.30

Contingency

 Contingency
Remaining,
\$56,658.10

Project Budget

\$ 4,232,843.12	Budget
\$ 174,059.88	Design Phase Costs
\$ 843,231.42	Constr Costs to Date
\$ 58,821.98	Constr Encumbered
\$ 3,330,789.72	\$'s Remaining
78.69%	% Remaining

Project Completion

Schedule	40%
Contract Payments	48% (includes prepurchases)

Construction Contracts and Related Expenses

Company	PO No.	Original	Change Orders	Amendments	Total	Costs to Date
Quinn Power	20975	\$ 414,940.00	\$ 8,738.40		\$ 423,678.40	\$ 423,678.40
Pacific Parts	20561	\$ 239,025.00			\$ 239,025.00	\$ 211,975.25
Hazen	14331	\$ 164,350.00			\$ 164,350.00	\$ 149,354.49
SOCWA Staff Time	3252	\$ 75,000.00			\$ 75,000.00	\$ 58,223.28
		\$ 893,315.00	\$ 8,738.40	\$ -	\$ 902,053.40	\$ 843,231.42

Construction Contingency

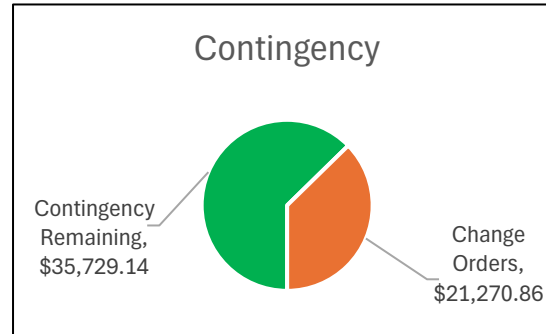
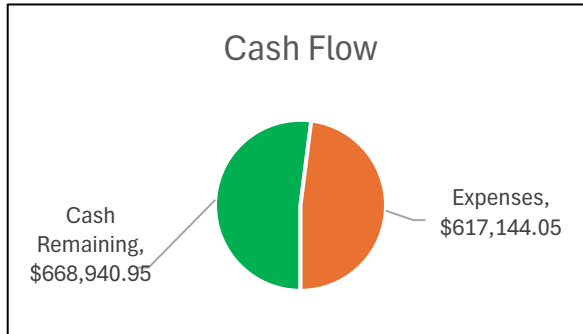
Area	Project Code	Amount	Change Orders	Total Remaining	Percent Used
Liquids	3252	\$ 65,396.50	\$ 8,738.40	\$ 56,658.10	13.4%
		\$ 65,396.50	\$ 8,738.40	\$ 56,658.10	13.4%

Project Financial Status

Project Committee	15
Project Name	Drainage Pump Station/ Storm Drain System Improvements - 3522AL
Project Description	Modification to the storm drainage system

Data Last Updated

September 8, 2026



Project Budget

\$ 4,200,000.00	Budget
\$ 285,381.94	Design Phase Costs
\$ 331,762.11	Constr Costs to Date
\$ 445,647.75	Constr Encumbered
\$ 3,137,208.20	\$'s Remaining
74.70%	% Remaining

Cash Flow

Collected	\$ 1,286,085.00
Expenses	\$ 617,144.05

Project Completion

Schedule	40%
Budget	26%

Construction Contracts

Company	PO No.	Original	Change Orders	Amendments	Total	Costs to Date
T.E. Roberts	21809	\$ 570,059.00	\$ 21,270.86		\$ 591,329.86	\$ 251,243.61
Project Partners	21451	\$ 15,000.00			\$ 15,000.00	\$ 12,077.00
Tetra Tech	21845	\$ 57,000.00			\$ 57,000.00	\$ 12,240.00
AKM	21972	\$ 46,000.00			\$ 46,000.00	\$ 34,825.00
Ninyo & Moore	22031	\$ 28,080.00			\$ 28,080.00	\$ 2,273.50
SOCWA Staff Time	3522AL	\$ 40,000.00			\$ 40,000.00	\$ 19,103.00
		\$ 756,139.00	\$ 21,270.86	\$ -	\$ 777,409.86	\$ 331,762.11

Construction Contingency

Area	Project Code	Amount	Change Orders	Total Remaining	Percent Used
Liquids	3522AL	\$ 57,000.00	\$ 21,270.86	\$ 35,729.14	37.3%
		\$ 57,000.00	\$ 21,270.86	\$ 35,729.14	37.3%

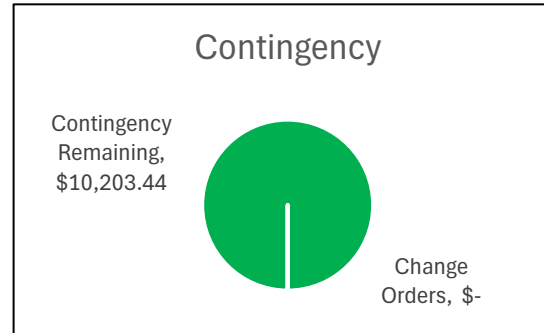
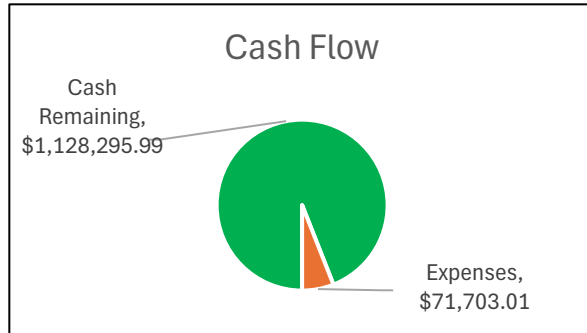
Change Order No.	Vendor Name	Project ID	Description	Status Date	Days	Amount
1	T.E. Roberts	3522AL	Replacement of Corrugated Steel Drain Pipe Section by the VSB	7/23/2026		\$ 21,270.86
						\$ 21,270.86

Project Financial Status

Project Committee	15
Project Name	Access Road Repaving - 35248L
Project Description	Spot repair on the AWMA Road

Data Last Updated

September 8, 2026



Project Budget

\$1,199,999	Budget
included below	Design Phase Costs
\$ 71,703.01	Constr Costs to Date
\$ 231,615.75	Constr Encumbered
\$ 896,680.24	\$'s Remaining
74.72%	% Remaining

Cash Flow

Collected	\$ 1,199,999.00
Expenses	\$ 71,703.01

Project Completion

Schedule	40%
Contract Payments	6%

Construction Contracts and Related Expenses

Company	PO No.	Original	Change Orders	Amendments	Total	Costs to Date
T.E. Roberts	22117	\$ 204,068.76			\$ 204,068.76	
Arduarra	20960	\$ 63,250.00			\$ 63,250.00	\$ 63,250.00
La Salle Solutions		\$ 21,000.00			\$ 21,000.00	
SOCWA Staff Time	35248L	\$ 15,000.00			\$ 15,000.00	\$ 8,453.01
		\$ 303,318.76	\$ -	\$ -	\$ 303,318.76	\$ 71,703.01

Construction Contingency

Area	Project Code	Amount	Change Orders	Total Remaining	Percent Used
Liquids	35248L	\$ 10,203.44		\$ 10,203.44	0.0%
		\$ 10,203.44	\$ -	\$ 10,203.44	0.0%

Agenda Item

11

Engineering Committee Meeting

Meeting Date: September 17, 2026

TO: Engineering Committee

FROM: Roni Grant, Capital Improvement Program Manager

SUBJECT: J. B. Latham Treatment Plant Digester Underground Piping Replacement Construction Management Services [Project Committee 2]

Overview

On July 9, 2026, Project Committee 2 (PC 2) Board of Directors awarded the construction contract for the Digester Underground Piping Replacement Project to SS Mechanical in the amount of \$1,182,241.

Additionally, the SOCWA Board of Directors awarded contracts to AKM Consulting Engineers (AKM), Ardurra, Dudek, and La Salle Solutions to provide as-needed construction management services. The scope of construction management services includes, but is not limited to, the following:

- Pre-construction meeting facilitation
- Progress meeting coordination and documentation
- Construction inspection services
- Schedule review and monitoring
- Safety monitoring and compliance oversight
- Review of contractor payment applications
- Review and evaluation of change order requests
- Coordination of specialty inspections
- Operations and maintenance coordination
- Project closeout and documentation

Proposals

SOCWA solicited proposals from AKM, Dudek, and La Salle Solutions to provide construction management services for the Digester Underground Piping Replacement Project. Three proposals were received and are summarized in Table 1.

SOCWA did not request a proposal from Ardurra, as the firm served as the design engineer of record for the project through its predecessor firm, MKN & Associates/Ardurra, and therefore was not considered for construction management services on this project.

Table 1 – Summary of Proposals

Firm	AKM	Dudek	La Salle Solutions
Project Manager	Emin Kayiran	George Litzinger	Christine Waters
Total Labor Hours	1,136	1,120	1,145
Total Fee	\$249,964	\$192,500	\$262,225

Cost Allocation

A summary of the cost allocation by member agency is presented Table 2.

Table 2: Cost Allocation by Member Agency (32244S)

Agency	PC 2 Solids (S) Ownership %	Cost Allocation AKM	Cost Allocation Dudek	Cost Allocation La Salle Solutions
Santa Margarita Water District	58.38	\$145,928.98	\$112,381.50	\$153,086.96
South Coast Water District	41.62	\$104,035.02	\$80,118.50	\$109,138.05
Total	100.00	\$249,964.00	\$192,500	\$262,225.00

Budget

The total approved budget for the JBLTP Digester Underground Piping Replacement Project (32244S) was \$1,823,893.

Recommended Action: Committee Discussion/Direction/Action

Attachments:

- AKM Proposal and Fee
- Dudek Proposal and Fee
- La Salle Solutions Proposal and Fee



Water Resources | Infrastructure | Construction Management

553 Wald, Irvine, CA 92618
Telephone: 949.753.7333 | Fax: 949.753.7320
www.akmce.com

August 27, 2026

Mr. Roni Young, Project Manager

South Orange County Wastewater Authority
34156 Del Obispo Street
Dana Point, CA 92629

Subject: Task Order Proposal – Construction Management and Inspection Services, J. B. Latham Treatment Plant Digester Underground Piping Upgrades Project (As-Needed Construction Management Services Contract)

Dear Mr. Young:

AKM Consulting Engineers (AKM) is pleased to submit this task order proposal to the South Orange County Wastewater Authority (SOCWA) for Construction Management and Inspection Services for the J. B. Latham Treatment Plant (JBLTP) Digester Underground Piping Upgrades Project, in accordance with our existing As-Needed Construction Management Services contract with the Authority and the Request for Task Order Proposal (RFTOP) dated July 27, 2026. This proposal presents our understanding of the project, our proposed scope of services, project team, hours breakdown approach, list of deliverables, and cost proposal, prepared in accordance with the requirements of Attachment A and the rates and fees established under our on-call contract.

AKM's construction management and inspection staff bring direct, relevant experience with treatment plant construction, including buried utility replacement, process piping work, and coordination with plant operations. We are confident in our team's ability to provide responsive, hands-on construction management and inspection services that protect SOCWA's interests and keep this project on schedule and within budget.

PROJECT UNDERSTANDING

The Digester Underground Piping Upgrades Project addresses corrosion and failure of two buried piping systems located within the anaerobic digester complex at JBLTP. The project, designed by MKN and Associates (now an Ardurra Company), will replace and relocate these systems above ground. Following a competitive bid process, the SOCWA Board of Directors awarded the construction contract to the apparent low bidder, SS Mechanical, on July 9, 2026, in the amount of \$1,182,241.

MKN will remain engaged during construction to provide engineering support, including shop drawing review and response to requests for information, while SOCOTEC will be retained directly by SOCWA to provide materials testing services. Per the Contractor's preliminary schedule, potholing and other preliminary activities are anticipated in late August and September 2026, with primary field work occurring from December 28, 2026 through May 27, 2027.

AKM understands that the underground and buried nature of this work combined with its location within an active, operating treatment plant, presents unique coordination challenges, including differing site conditions, tie-ins and shutdowns coordinated with SOCWA Operations staff, and close attention to safety in confined and below-grade work areas. Our proposed approach is built around these conditions, with an emphasis on proactive coordination, thorough documentation, and constructability oversight from pre-construction through project close-out.

SCOPE OF SERVICES

AKM proposes to provide the following construction management and inspection services in accordance with the tasks identified in Attachment A of the RFTOP:

Pre-Construction Meeting - Assist SOCWA in conducting a pre-construction meeting with the Design Engineer, Contractor, and stakeholders to establish project objectives, schedule, schedule of values, contractual roles, and coordination protocols.

Progress Meetings - Schedule and chair weekly progress meetings covering safety, progress, job problems, and design or contract clarifications, and maintain an action item log.

Inspection - Provide comprehensive civil/mechanical, structural, coatings, and electrical inspection by appropriately certified inspectors to confirm construction conforms to the plans and specifications.

- Prepare and submit weekly daily inspection reports documenting site activity, personnel, equipment, deliveries, visitors, deficiencies, and delays.
- Maintain a daily digital photographic library documenting construction progress, differing site conditions, and change order or claim items, to be turned over to SOCWA at completion.
- Support the Resident Engineer with schedule and payment request review, record drawing review, RFI coordination, and submittal review.

Schedule Review - Review and comment on the Contractor's initial construction schedule, and evaluate and monitor schedule and progress on a weekly basis.

Safety Monitoring - Monitor the Contractor's Cal/OSHA safety program, including traffic control, haul routes, confined space, trench safety, fall protection, hot work, and hazardous materials handling.

Payment Request Reviews - Receive, check, and verify monthly progress payment requests and related invoices against the approved schedule of values and in-place quantities.

Change Order Reviews - Track, document, and support negotiation of proposed changes, evaluate schedule impacts, and advise SOCWA on equitable cost and time adjustments.

Specialty Inspection Coordination - Coordinate specialty inspection and testing services (soils, concrete, welding) provided under separate contract to SOCWA.

Operations Coordination - Coordinate ongoing activities, temporary shutdowns, and training with SOCWA Operations staff, and work with the Contractor to resolve potential conflicts.

Project Close-Out - Prepare detailed punch lists at substantial completion, and coordinate testing, start-up, and final walk-through with the Design Engineer and SOCWA staff.

- Review the Contractor's record drawings for accuracy and completeness.
- Coordinate assembly of O&M manuals and prepare a warranty expiration worksheet by equipment item, process area, and warranty period.
- Furnish all original project documents and final reports to SOCWA within 60 calendar days of the Notice of Completion, delivered in the format required by the Authority.

PROJECT TEAM

AKM's experienced construction management and inspection team drawn from staff with direct wastewater treatment plant construction experience, including work on buried piping, digester, and process piping projects for Southern California public agency clients. Our proposed Construction Manager and inspection staff will serve as SOCWA's on-site representatives throughout the project, supported by AKM's bench of back-up resources to ensure continuous coverage for the duration of construction.

**PROJECT MANAGER****Emin Kayiran, CII***Vice President / Director of Construction Management / Project Manager*

🏆 APWA CII 🕒 **21 yrs experience** 📄 Education: Civil Engineering Studies (CSU Long Beach); B.S. Business Administration (University of Arizona)

Mr. Kayiran, CII, has worked on a wide range of projects, including treatment facilities, pipelines, reservoirs, electrical systems, and hazardous materials removal, among others. His expertise includes construction management, inspection, scheduling, claims management, cost control, and utility coordination. He is skilled in Primavera P6 and trained in schedule and delay analysis. Additionally, Mr. Kayiran has contributed as a Subject Matter Expert for the American Public Works Association, helping update public infrastructure inspection training. He has co-authored a training module on inspecting pumping and treatment facilities and has co-presented a webinar for Engineering News Record. As Project Manager, he will develop construction management and inspection procedures and ensure fieldwork aligns with project goals.

**CONSTRUCTION MANAGER****Steve Patterson***Senior Construction Manager / 🕒 41 yrs experience*

Mr. Patterson has been with AKM since 2008 as a Construction Manager/Senior Resident Engineer, bringing extensive experience in public infrastructure construction, operation, maintenance, and design. He has expertise in managing and inspecting construction projects, particularly public works capital improvement projects. Mr. Patterson has also served as a Utilities Operations Supervisor for a municipally owned water/wastewater utility in a coastal community – where he was responsible for overseeing operation of their wastewater treatment plant. He is highly knowledgeable about occupational hazards and safety requirements related to the construction, operation, and repair of public works infrastructure, and is well-versed in the regulations of Caltrans and the U.S. Army Corps of Engineers for state and federally funded local projects.

CONSTRUCTION INSPECTOR**Garrick Frost | Senior Inspector**

🏆 Grade 3 Operator Distribution Operator 🕒 **29 yrs experience** 📄 Education: B.S. Business Administration / Operations Management (CSU Long Beach)

Mr. Frost has over 29 years of experience in construction inspection and supervision, with a strong background in capital improvement and subdivision projects. His experience includes inspection of water, reclaimed water, and sewer pipelines, as well as pumping stations, pressure reducing stations, water reclamation facilities, and sewage lift stations. **Mr. Frost is currently providing inspection services for SOCWA on the Coastal Treatment Plant Building and Drainage Projects, giving him current, firsthand familiarity with SOCWA's facilities, procedures, and project requirements.** In addition to his inspection experience, Garrick has held supervisory roles overseeing field crews and has been responsible for the maintenance and installation of civil and mechanical systems.

RELATED PROJECT EXPERIENCE

**MICROFILTRATION STEEL FILTRATE (BREAK) TANK REPLACEMENT PROJECT****West Basin Municipal Water District:** 7140 S. Avalon Blvd., Suite 210, Carson, CA 90746**Contact:** Veronica Govea, Engineering Supervisor (310) 660-6269 veronicag@westbasinca.org

AKM completed Construction Management and Inspection Services for the project which consisted of the following work at the Juanita Millender- McDonald Carson Regional Water Recycling Plant, demolition of an existing 194,000-gallon welded steel tank, tank foundation, and appurtenances; installation of temporary above-ground bolted steel storage tank and process piping; design and installation of pressure grout soils stabilization for the area underneath the proposed replacement tank; construction of a new 194,000-gallon welded steel tank, foundation, and appurtenances; cathodic protection; connection of tank piping; and site grading and drainage improvements.

**TORRANCE REFINERY WATER RECYCLING PLANT, SURGE ARREST SYSTEM PIPE MODIFICATIONS****West Basin Municipal Water District:** 7140 S. Avalon Blvd., Suite 210, Carson, CA 90746**Contact:** Mario Bautista, Engineer (562) 921-5521 mariob@westbasinca.org

AKM provided construction management and inspection services for the project which consisted of removing existing 12-inch temporary rental piping, installing new 18-inch standard weight fusion bonded epoxy lined and coated pipe, pressure testing the installed pipe section, and removing temporary blind flanges and tie-in new pipe to the existing pipe. The work was completed during a coordinated shutdown with the Plant's operations staff.

**EDWARD C. LITTLE WATER RECYCLING FACILITY R.O. CLEAN IN PLACE WASTE DISCHARGE****West Basin MWD:** 17140 S. Avalon Blvd., Suite 210, Carson, CA 90746**Contact:** Rajen Budhia, Currently Program Management Unit Water Facilities Engineer for Metropolitan Water District (213) 217-6766 rbudhia@mwdh20.com

AKM provided construction management and inspection services for the project. Which was within an existing water treatment plant. AKM's team was stationed on-site on a construction trailer to support the project which involved sequestering and then neutralizing the clean-in-place solution waste for the existing reverse osmosis (RO) system in order to discharge to the local sewer system as opposed to the treatment facility's brine line, which it discharges to. Specific project work elements included demolition of an existing solids contact clarifier and construction of two cast-in-place reinforced concrete neutralization tanks for the RO clean-in-place waste, including a corrosion resistant coating, discharge and recirculation pumps, associated valves and piping; construction of a new RO clean-in-place waste sump for the collection of RO clean-in-place discharge from the RO trains including new pumps, piping and instrumentation; rehabilitation of the existing RO waste sumps 1, 2, and 3 including a new coating system, pumps, instrumentation and



controls; new sodium hydroxide transfer feed pump including new piping and instrumentation; and a new sodium hydroxide day tank and modifications to the existing sulfuric acid tank farm including 2 new metering pumps.

Mitigated Issues: The project required over 23 system shutdowns within the plant which had to be carefully planned and coordinated with both West Basin as well as their contracted Plant operator Suez. Not completing work within predetermined shutdown durations was not an option as the District faced large financial fees from their large use customers if recycled water service is delayed any longer than the shutdown duration. AKM was instrumental in coordinating all necessary parties to discuss and perform field walk-throughs of the shutdowns.

Several unforeseen conditions, like subsurface facility conflicts, were encountered onsite. As a result, the AKM field team worked cooperatively with the Contractor, West Basin, and the design engineer of record to find alternate routes for the installation of several large electrical duct banks, as well as other underground utilities.

The final result was a properly constructed project that was tested and is currently operating as designed.

LEO. VANDER LANS WATER TREATMENT FACILITY INLAND INJECTION WELL PROJECT PIPELINE AND APPURTENANCES
Water Replenishment District: 4040 Paramount Blvd., Lakewood, CA 90712
Contact: Jessica Koop (562) 275-4219 jkoop@wrld.org

AKM is providing construction management and inspection services for the LVL Treatment Facility Inland Injection Well Project Pipeline and Appurtenances. The work includes, potholing to verify utility locations, installation and maintenance of BMPs for compliance with storm water pollution prevention plan, installation of approximately 280-linear feet of 12-inch diameter 304L stainless steel feed pipeline, 225-linear feet of 16-inch diameter 304L stainless steel discharge pipeline, associated piping supports, flow control valving, motor actuated butterfly isolation valves, magnetic flow meters, pressure and level transmitters, and water quality analyzers; furnishing and installing well backflush submersible pump and 3R injection control valve configured for energy recovery; wellhead connections; well vault installation; asphalt concrete paving; electrical improvements; and programming.



TITLE 22 FILTER 8 AND 9 REPAIR PROJECT
West Basin MWD: 17140 S. Avalon Blvd., Suite 210, Carson, CA 90746
Contact: Mario Bautista, Engineer (562) 921-5521 mariob@westbasinca.org

AKM Consulting Engineers provided construction management and inspection for the project which entailed the removal and repair of the existing underdrain system for Title 22 Filter 9 and Filter 8; addition of a concrete end plug on each side of the Filter gullets; removal, repair, cleaning and reinstallation of the filter underdrain system. The AKM team worked closely with West Basin and Suez staff to coordinate the Contractors work efforts and ensure that the Contractor's work did not disrupt plant operations. AKM partnered with AWI to inspect the condition of the existing components once each filter was drained. After noticing that the existing floor within Filter 8 sloped away from the underdrain system, AKM recommended that the laterals be re-adjusted to sit level. Both filters were operated prior to reloading the media to verify even airflow disbursement. After final adjustments, AKM observed loading of the anthracite media.

WRCRWA PIPELINE PROJECT
City of Corona: 400 S Vicentia Avenue, Corona, CA 92882
Contact: Nathan Armendariz (951) 736-2264 nathan.armendariz@coronaca.gov

AKM Consulting Engineers provided construction management and inspection services for the Project which involved installation of approximately 3900LF of 20" DIP and 100LF of 12" PVC pipe. The pipeline extends through three jurisdictions (City of Norco, City of Eastvale, and USACE). Challenges to the project included work within an existing and operable treatment plant and within public right-of-way.



HOURS BREAKDOWN

AKM has developed a labor hours estimate for this task order based on the scope of services described above and the anticipated construction duration, preliminary field activities beginning in late August/September 2026 through substantial completion following primary field work concluding May 27, 2027. Hours are tabulated by task and labor category, consistent with the scope of work, and reflect the level of effort anticipated for weekly progress meetings, full-time inspection coverage during active construction, and periodic effort for schedule, payment request, and change order review, and close-out activities.

SOCWA					
Construction Management and Inspection Services for the					
JBL Treatment Plant Digester Underground Piping Upgrades Proejct					
Proposal - August 27, 2026					
Task No.	Description	Hours			
		Project Manager	Construction Manager	Inspector	Total Hours
Task 1 - Project Control					
1	Pre-Construction Meeting	2	6		8
2	Progress Meetings	10	80		90
3	Inspection			820	820
4	Schedule Review	4	64		68
5	Safety Monitoring	2	16		18
6	Payment Request Reviews		16		16
7	Change Order Review	16	60		76
8	Specialty Inspection Coordination	2	8		10
9	Operations Coordination		20		20
10	Project Close-Out	2	8		10
Subtotal Hours		38	278	820	1136

LIST OF DELIVERABLES

- Pre-construction meeting support and coordination
- Weekly progress meeting action item logs
- Weekly daily inspection reports
- Daily digital photographic library, delivered to SOCWA at project completion
- Schedule review comments and weekly schedule/progress monitoring updates
- Reviewed and verified monthly progress payment requests
- Change order tracking log and supporting cost/time impact evaluations
- Detailed project punch list
- Record drawing review comments
- Assembled O&M manuals and warranty expiration worksheet
- Final project documents and reports, delivered within 60 calendar days of the Notice of Completion

COST PROPOSAL

AKM's Cost Breakdown of Total Fee for this task order is submitted as a separate PDF file concurrent with this proposal, in accordance with the RFTOP requirements. The cost proposal is tabulated by task, consistent with the scope of work above, and by labor category, and reflects the billing rates and fee provisions established under AKM's existing As-Needed Construction Management Services contract with SOCWA.

AKM appreciates the opportunity to continue supporting SOCWA on this important project and looks forward to the Authority's consideration of our proposal. Please contact us with any questions regarding this submittal.

Sincerely,

AKM CONSULTING ENGINEERS

A handwritten signature in black ink, appearing to read 'Emin Kayiran', with a stylized, cursive script.

Emin Kayiran, CPE
Vice President / Director of Construction Management Services
AKM Consulting Engineers



EMIN KAYIRAN, CPii



Project Manager

TITLE

Vice President
Director of Construction
Management

REGISTRATION

APWA – Certified Public
Infrastructure Inspector

YEARS OF EXPERIENCE

22 years (22 with AKM)

EDUCATION

Civil Engineering Studies –
CSU Long Beach
B.S. Business Administration
– University of Arizona

CAREER HIGHLIGHTS

Subject Matter Expert for the
American Public Works
Association

Co-Author of a new training
module on the inspection of
pumping and treatment
facilities – Published in 2019

Authored “CPii as a standard
of practice” – Published
September 2014

Co-presenter and speaker for
“De-mystifying Risk” and ENR
webinar

Mr. Emin Kayiran, CPii, is the Director of Construction Management Services with AKM. He has over 22 years of responsible experience in the inspection and construction management of pump stations; pipelines, treatment facilities; forcemains; complex reinforced concrete structures including concrete tanks within treatment facilities, sumps, wet wells and valve vaults; sheet piling; deep excavations; ground remediation; dewatering; shut-downs; tie-ins; commissioning and testing; installation of emergency power generators and transfer switches; electrical and control systems for water resource facilities; as well as special protective linings and coatings. Mr. Kayiran also possesses a wealth of experience in managing, coordinating and overseeing materials testing and special inspection during the construction of water resources facilities. Several of the Mr. Kayiran’s completed projects involved close coordination amongst the project owner, their operations staff, outside stakeholders and the Contractor in order to achieve varying project objectives within constrained project sites and scheduling timeframes.

Additionally, Mr. Kayiran has provided claims management, cost control, change order preparation, change order negotiation, warrantee inspections, schedule review and analysis, warrantee work coordination with contractors and constructability review services to special districts and municipal agencies. He is trained in schedule and delay analysis including Primavera P6.

Torrance Refinery Water Recycling Plant, Surge Arrest System Pipe Modifications

West Basin Municipal Water District | Role: Construction Manager

AKM provided construction management and inspection for the project which consisted of removing existing 12-inch temporary rental piping, installing new 18-inch standard weight fusion bonded epoxy lined and coated pipe, pressure testing installed pipe section, and removing temporary blind flanges and tie-in new pipe to existing pipe. The work was completed during a coordinated shutdown with the Plant’s operations staff.

Edward C. Little Water Recycling Facility Clean-in-Place Waste Discharge Project

West Basin Municipal Water District | Role: Project Manager

AKM provided construction management and inspection services for the project which involved sequestering and then neutralizing the clean-in-place solution waste for the existing reverse osmosis (RO) system in order to discharge to the local sewer system as opposed to the treatment facilities brine line. Specific project work elements included demolition of an existing solids contact clarifier and construction of two cast-in-place reinforced concrete neutralization tanks for the RO clean-in-place waste, including a corrosion resistant coating, discharge and recirculation pumps, associated valves and piping; construction of a new RO clean-in-place waste sump for the collection of RO clean-in-place discharge from the RO trains including new pumps, piping and instrumentation; rehabilitation of the existing RO waste sumps 1, 2, and 3 including a new coating system, pumps, instrumentation and controls; new sodium hydroxide transfer feed pump including new piping and instrumentation; and a new sodium hydroxide day tank and modifications to the existing sulfuric acid tank farm including 2 new metering pumps.

Leo J Vander Lands Water Treatment Facility Inland Injection Well Project Pipeline and Appurtenances

Water Replenishment District | Role: Project Manager

AKM is providing construction management and inspection services for the LVL Treatment Facility Inland Injection Well Project Pipeline and Appurtenances. The work includes, potholing to verify utility locations, installation and maintenance of BMPs for compliance with storm water pollution prevention plan, installation of approximately 280-linear feet of 12- inch diameter 304L stainless steel feed pipeline, 225-linear feet of 16-inch diameter 304L stainless steel discharge pipeline, associated piping supports, flow control valving, motor actuated butterfly isolation valves, magnetic flow meters, pressure and level transmitters, and water



EMIN KAYIRAN, CPII

Project Manager

quality analyzers; furnishing and installing well backflush submersible pump and 3R injection control valve configured for energy recovery; wellhead connections; well vault installation; asphalt concrete paving; electrical improvements; and programming.

Title 22 Filter 9 and 8 Repair

West Basin Municipal Water District | Role: Project Manager

AKM Consulting Engineers provided construction management and inspection for the project which entailed the removal and repair of the existing underdrain system for Title 22 Filter 9 and Filter 8; addition of a concrete end plug on each side of the Filter gullets; removal, repair, cleaning and reinstallation of the filter underdrain system. The AKM team worked closely with West Basin and Suez staff to coordinate the Contractors work efforts and ensure that the Contractor's work did not disrupt plant operations. AKM partnered with AWI to inspect the condition of the existing components once each filter was drained. After noticing that the existing floor within Filter 8 sloped away from the underdrain system, AKM recommended that the laterals be re-adjusted to sit level. Both filters were operated prior to reloading the media to verify even airflow disbursement. After final adjustments, AKM observed loading of the anthracite media.

WRCRWA Reclaimed Waterline Improvements

City of Corona | Role: Project Manager

AKM Consulting Engineers provided construction management and inspection services for the Project which involved installation of approximately 3900LF of 20" DIP and 100LF of 12" PVC pipe. The pipeline extends through three jurisdictions (City of Norco, City of Eastvale, and USACE). Challenges to the project included work within an existing and operable treatment plant and within public right-of-way.

Microfiltration Steel Break (Filtrate) Tank Replacement at the Carson Reclamation Facility

West Basin Municipal Water District | Role: Project Manager

AKM provided construction management and inspection services for the project which consisted of the following work at the Juanita Millender- McDonald Carson Regional Water Recycling Plant, demolition of an existing 194,000-gallon welded steel tank, tank foundation, and appurtenances; installation of temporary above-ground bolted steel storage tank and process piping; design and installation of pressure grout soils stabilization for the area underneath the proposed replacement tank; construction of a new 194,000-gallon welded steel tank, foundation, and appurtenances; cathodic protection; connection of tank piping; and site grading and drainage improvements.

Edward C. Little Water Recycling Facility Solids Handling Improvements

West Basin Municipal Water District | Role: Project Manager

The Solids Handling Improvement Project is located in the City of El Segundo. The work includes construction of two sludge conditioning tanks, installation of four filter press feed pumps, rehabilitation of the existing plate-and-frame filter presses, installation of a wash water pump, and installation and operation of a temporary dewatering system to maintain continuous facility operations during construction. The project also includes all required electrical, instrumentation, and control system improvements necessary to support the new and rehabilitated solids handling equipment and to ensure proper integration with existing facilities.

Long Beach Municipal Stormwater Treatment Facility (LB-MUST)

City of Long Beach | Role: Project Manager

AKM provided quality control and constructability review of the proposed treatment plant and conveyance system design of the 90 percent design package and provided construction management and inspection during construction. The treatment is designed with the ability to treat both brackish and non-brackish influent flows through separate treatment trains. The treatment process train consists of influent strainers, ceramic membrane ultra-filtration (UF), and an advanced oxidation process (UV/AOP). The ancillary processes include process pumping, process storage tanks, chemical feeding, and air supply. An RO system can be added to the treatment train in the future, downstream of the UV/AOP, to reduce TDS of the effluent and/or provide additional barriers for potential potable reuse. The ceramic membrane system, which consists of two (2) 1 million gallon per day (MGD) units as well as the UV/AOP were pre-purchased by the City. The treatment facility will be housed within a 9,000 square foot cement masonry unit building with electrical, chemical and control rooms, and will include an HVAC system. Also being constructed is a wetlands and walking path.



STEVE PATTERSON

Senior Construction Manager



TITLE

Senior Construction Manager
Senior Inspector

YEARS OF EXPERIENCE

41 years (18 with AKM)

Certifications / Affiliations

AWWA Cross Connection
Control Specialist
NPDES Storm Water Quality
Training for Construction Site
Activities
California Department of
Public Health Water Treatment
Operator
California Department of
Public Health Water
Distribution Operator
Orange County Health
Department Backflow Device
Tester
Cla-Val, Engineering,
Maintenance and Design
California Rural Water
Distribution System
Maintenance and Design
OSHA HAZWOPER
NIMS 700
CJPIA
Management Academy
Haestad Methods
Water System Design and
Hydraulic Modeling
First Aide & CPR

Mr. Patterson is a Construction Manager with AKM Consulting Engineers, and has over 40 years experience in the Water/Wastewater Utilities field, during which time water distribution system design, construction, operations, maintenance, and repair, of water and wastewater infrastructure have been the emphasis of his career. He has numerous certifications, training and knowledge pertaining to the safe and reliable construction, operation and maintenance of water and wastewater infrastructure. Mr. Patterson served for 18 years with a municipally owned water and wastewater utilities department as an Operations Supervisor, responsible for the supervision and operations of a comprehensive repair, inspection and monitoring program. Mr. Patterson has participated in the design, construction, inspection, implementation and management of numerous operational, rehabilitation, and capital improvement projects. Examples of these projects are as follows:

Microfiltration Steel Break (Filtrate) Tank Replacement at the Carson Reclamation Facility

West Basin Municipal Water District | Role: Construction Manager

AKM was responsible for the construction management and inspection of the complete replacement of the plants existing welded steel break water tank with a welded steel knuckle tank. The project included an extensive bypass system, chemical feed system, piping (FRP, HDPE, DI, CPVC, PVC, Welded Steel, and Copper), tank demolition, existing ground remediation (36 pressure grouted columns), Steel Tank Welding, and Coating.

Edward C. Little Water Recycling Facility Solids Handling Improvements

West Basin Municipal Water District | Role: Construction Manager

The Solids Handling Improvement Project is located in the City of El Segundo. The work includes construction of two sludge conditioning tanks, installation of four filter press feed pumps, rehabilitation of the existing plate-and-frame filter presses, installation of a wash water pump, and installation and operation of a temporary dewatering system to maintain continuous facility operations during construction. The project also includes all required electrical, instrumentation, and control system improvements necessary to support the new and rehabilitated solids handling equipment and to ensure proper integration with existing facilities.

Leo J Vander Lands Water Treatment Facility Inland Injection Well Project Pipeline and Appurtenances

Water Replenishment District | Role: Construction Manager

AKM provided construction management and inspection services for the LVL Treatment Facility Inland Injection Well Project Pipeline and Appurtenances. The work included utility location verification, installation and maintenance of BMPs for compliance with stormwater pollution prevention, installation of approximately 280 linear feet of 12-inch diameter 304L stainless steel feed pipeline, 225 linear feet of 16-inch diameter 304L stainless steel discharge pipeline, associated piping supports, flow control valving, motor-actuated butterfly isolation valves, magnetic flow meters, pressure and level transmitters, and water quality analyzers; furnishing and installing a well backflush submersible pump and 3R injection control valve configured for energy recovery; wellhead connections; well vault installation; asphalt concrete paving; electrical improvements; and programming. AKM worked collaboratively with the plant's operational staff to ensure that all activities aligned with the facility's operational requirements, conducting regular coordination meetings to discuss project progress and address any concerns, thereby fostering effective communication and ensuring the successful integration of project activities with ongoing operations at the treatment facility.

Long Beach Municipal Stormwater Treatment Facility (LB-MUST)

City of Long Beach | Role: Project Manager

AKM provided quality control and constructability review of the proposed treatment plant and conveyance system design of the 90 percent design package and is currently providing construction management and inspection during construction. The treatment is designed with



STEVE PATTERSON

Senior Construction Manager

the ability to treat both brackish and non-brackish influent flows through separate treatment trains. The treatment process train consists of influent strainers, ceramic membrane ultra-filtration (UF), and an advanced oxidation process (UV/AOP). The ancillary processes include process pumping, process storage tanks, chemical feeding, and air supply. An RO system can be added to the treatment train in the future, downstream of the UV/AOP, to reduce TDS of the effluent and/or provide additional barriers for potential potable reuse. The ceramic membrane system, which consists of two (2) 1 million gallon per day (MGD) units as well as the UV/AOP were pre-purchased by the City. The treatment facility will be housed within a 9,000 square foot cement masonry unit building with electrical, chemical and control rooms, and will include an HVAC system. Also being constructed is a wetlands and walking path.

LVL Calcium Chloride Tank Replacement Project

Water Replenishment District of Southern California | Role: Construction Manager / Inspector

AKM provided construction management and inspection services for the project which included furnishing and installing a Calcium Chloride bulk storage containment area, 5,000 gallon bulk storage tank, mechanical piping and trenches, associated electrical and instrumentation.

Imperial Headgates and Weir Pond Project

Orange County Water District | Role: Inspector

AKM provided construction management and inspection services for the removal and installation of a new Trash Rack and Monorail Gripper system of river debris; Electrical improvements; removal and replacement of (3) 54-inch Sluice Gates and Electric Actuators; demolition and construction of a 500 CFS Concrete Flume Structure; construction of (2) 100-foot long concrete Weir structures.

Edward C. Little Water Recycling Facility Clean-in-Place Waste Discharge Project

West Basin Municipal Water District | Role: Inspector

AKM provided construction management and inspection services for the project which involved sequestering and then neutralizing the clean-in-place solution waste for the existing reverse osmosis (RO) system in order to discharge to the local sewer system as opposed to the treatment facilities brine line, which it currently discharges to. Specific project work elements included demolition of an existing solids contact clarifier and construction of two cast-in-place reinforced concrete neutralization tanks for the RO clean-in-place waste, including a corrosion resistant coating, discharge and recirculation pumps, associated valves and piping; construction of a new RO clean-in-place waste sump for the collection of RO clean-in-place discharge from the RO trains including new pumps, piping and instrumentation; rehabilitation of the existing RO waste sumps 1, 2, and 3 including a new coating system, pumps, instrumentation and controls; installation of a new brine line flow meter which required interception of the line, 2 shutdowns and construction of above ground piping; new sodium hydroxide transfer feed pump including new piping and instrumentation; and a new sodium hydroxide day tank and modifications to the existing sulfuric acid tank farm including 2 new metering pumps.

R.O. Train 5 Low Fouling Membrane Test Equipment

West Basin Municipal Water District | Role: Inspector

AKM provided construction management and inspection services for modifications to the existing Train 5 reverse osmosis system at West Basin's ECLWRF to support low-fouling membrane testing. The project included fabrication and installation of Type 316 stainless steel and PVC piping, instrumentation and an instrument panel. AKM performed offsite fabrication inspection, onsite inspection, and commissioning of the completed system.

Phase IV Optimization and Mobile Microfiltration Trailer Project

West Basin Municipal Water District | Role: Inspector

AKM provided construction management and inspection services for the Phase IV Optimization and Mobile Microfiltration Trailer Project. The Phase IV work consisted of the installation of equipment to add sodium hypochlorite to the clean-in-place process for all six filter basins in the phase IV MF system. The Pall Trailers Mobile Microfiltration work consisted of construction of utilities and infrastructure required to support the installation of 2 Pall Microfiltration Trailers at the ECLWRF, north of the Phase II microfiltration including clearing and grubbing of an existing area within the plans, construction of reinforced concrete pads for the trailers, installation of chemical systems, equipment and piping for sodium hypochlorite and ferric chloride. Setting of the trailer units, hot tapping existing piping, electrical work including new conduit and wire as well as coordination with the Plant's integrator for development of control screens for the plant SCADA system.



GARRICK FROST

Senior Construction Inspector

YEARS OF EXPERIENCE

29 years (1 with AKM)

REGISTRATION

Grade 3 Water Distribution
Operator Certification

EDUCATION

Bachelor of Science/ Business
Administration / Management
and Operations Management
– CSU Long Beach

HIGHLIGHTS

Experience in construction
inspection and supervision,
with a strong background in
both capital improvement and
subdivision projects.

Experience includes
inspections of water,
reclaimed water, and sewer
pipelines, as well as pumping
stations, pressure reducing
stations, water reclamation
facilities, and sewage lift
stations.

Supervisory rolls were with the
field crews and was
responsible for maintenance
and installation of domestic
water, reclaimed water, and
wastewater collection
systems.

Mr. Frost has over 29 years of experience in construction inspection and supervision. He has a strong background in capital improvement and subdivision projects. His experience includes inspections of water, reclaimed water, and sewer pipelines, as well as pumping stations, pressure reducing stations, water reclamation facilities, and sewage lift stations. In addition to inspection experience, Supervisory rolls were with the field crews and was responsible for maintenance and installation of civil and mechanical systems.

Coastal Treatment Plant Personnel Building Upgrades Phase II and CTP Storm Drainage Improvements Project

South Orange County Wastewater Authority | Role: Senior Inspector

AKM is currently providing construction management and inspection services for the Coastal Treatment Plant Personnel Building Upgrades Phase II. Work includes demolition and reconstruction of interior building systems, including plumbing, electrical, and architectural improvements within an active treatment plant environment. AKM is also providing construction management and inspection services for the CTP Storm Drainage Improvements Projects. Work for this project includes reviewing plans and preliminary contractor schedule. Scope also includes installation of new storm drainage infrastructure, including piping, catch basins, trench drains, structural concrete improvements, and associated site restoration within an active treatment plant.

Water Reclamation Plant No.7 Aeration Improvements

Coachella Valley Water District | Role: Senior Inspector

Aeration Improvements including new Blower Building, Electric Building, blowers, process air piping and fine bubble diffuser system, submersible mixers, mixed liquor return pumps and piping, instrumentation, valves, modifications to the existing secondary splitter box, replacement of gates, and all corresponding site civil, yard piping, electrical, and controls upgrades.

Solids Handling Facility Improvements

MWH | Role: Senior Inspector

Renovation in an operating industrial facility and included demolition, structural, architectural, mechanical, electrical, instrumentation, and controls upgrades for the Sludge Dewater System, multiple Hearth Furnaces, Wet Scrubber and Air Pollution Control, Seismic Strengthening, and related facilities.

San Joaquin Reservoir Recycled Filtration

IRWD | Role: Inspector

New recycled filtration facility inside a new building, replacement of a backwash waste return basin, vault, and pipeline, replacement of the existing sodium hypochlorite tanks, pumps, and piping; replacement of existing reservoir booster pumps, new flow control valve, expansion to the existing electrical control room, replacement of the existing PLC, MCC, and UPS and replacement of existing SCE service and transformer.

Camel Point Waterline Project

South Coast Water District | Role: Inspector

AKM is providing construction management and inspection services for the installation of a new 6-inch PVC waterline, water service reconnections, and roadway and hardscape restoration along a narrow private residential street serving eleven homes. AKM is overseeing contractor activities, quality assurance, contract compliance, construction documentation, and material tracking while maintaining resident access and minimizing impacts within a highly constrained and community-sensitive environment. AKM is coordinating closely with South Coast Water District, residents, contractors, and project stakeholders to facilitate effective communication, address field issues, and ensure timely project delivery. Leveraged concurrent field presence on



GARRICK FROST

Senior Construction Inspector

nearby District infrastructure projects to provide efficient oversight, responsiveness, and continuity throughout construction.

Mission Hospital Pipeline Replacement

South Coast Water District | Role: Inspector

AKM is providing construction management and inspection services for the installation of approximately 12-inch Class 305 PVC waterline, including fittings, joint restraints, isolation valves, water service connections, and related appurtenances in Laguna Beach, California. AKM is overseeing contractor operations, quality assurance, utility protection, contract compliance, and construction documentation while coordinating work within a challenging corridor with elevations ranging from approximately 170 to 250 feet. AKM is providing field inspection activities to ensure compliance with plans and specifications, accurate quantity tracking, and timely project delivery. Coordinated utility protection, trenching operations, water service tie-ins, and roadway restoration, including pavement replacement and site restoration, while minimizing impacts to surrounding properties and maintaining public safety throughout construction.

54" Baker Pipeline Realignment Through Santiago Creek

IRWD | Role: Inspector

Removal of approx. 300 linear feet of 54-inch CML&C pipe within the Santiago Creek in Irvine Park and the construction of approximately 300 linear feet of 54" CML&C pipe with an additional 10 feet of cover. Scope includes open trench construction with dewatering of the pipeline, dewatering of the groundwater, filtering of all dewatering flows, slurry fill in the pipe zone, backfill, and restoring the creek to per-construction conditions. All work was performed in the 25-foot easement.

Woodbridge Recycled Water Pipeline Replacement

IRWD | Role: Inspector

Replacement of approx. 50,000 linear feet of recycled water piping in the Woodbridge Community. Existing asbestos cement pipe will be replaced with PVC piping.

Sewer Siphon Improvements

IRWD | Role: Inspector

Sewer siphon and sewer cleaning and CCTV, CIPP lining of sewer siphon barrels, site improvements, sewer siphon vault rehabilitation improvements, air jumper repairs, air jumper construction, construction of a chemical dosing facility, two grit traps and two odor control vents.

Rehabilitation of Wells Commission 15 and 18

Long Beach Public Utilities Department | Role: Inspector

AKM prepared plans, specifications and estimates, and provided construction management and inspection services for equipping of the two wells based upon the step drawdown and constant rate pumping tests following their rehabilitation. The design included providing new motor control centers and PLC panels to accommodate operation with variable frequency drives AKM recommended, which is necessary for the well pumps to operate within their preferred operating ranges. Electrical and controls plans were based on the standards AKM developed in cooperation with LBWD Engineering and Operations Staff.

Wells 9A and 14

Long Beach Public Utilities Department | Role: Inspector

AKM Consulting Engineers managed construction and inspection for multiple water infrastructure projects, including drilling and equipping Wells Alamitos 9A and 14, rehabilitating the Stearns-Champion Park parking lot, and demolishing or destroying several existing wells (Alamitos 9, Commission 13, Annex 203, and Annex 201). The scope of work spanned installation of pumps, piping, electrical systems, and site improvements; phased demolition and replacement of pavements, curbs, gutters, and landscaping; well destruction with downhole surveys, debris removal, and slurry backfilling; and coordination with Southern California Edison (SCE) for electrical service upgrades or removal. Across all projects, AKM ensured testing, disinfection, restoration of damaged areas, and delivery of O&M manuals with training, culminating in fully rehabilitated, compliant, and landscaped facilities.



*Water Resources
Infrastructure
Construction Management*

AKM Consulting Engineers

553 Wald

Irvine, CA 92618

Telephone: 949.753.7333 Facsimile: 949.753.7320

www.akmce.com

Mr. Roni Young, Project Manager

South Orange County Wastewater Authority

34156 Del Obispo Street

Dana Point, CA 92629

Subject: Task Order Proposal – Construction Management and Inspection Services, J. B. Latham Treatment Plant Digester Underground Piping Upgrades Project (As-Needed Construction Management Services Contract)

Dear Mr. Young:

In response to your Request for Proposal, AKM Consulting Engineers, an SBA Certified Small Business Enterprise, is pleased to submit this fee proposal to provide construction management and inspection services for SOCWA's JB Latham Treatment Plant Digester Underground Piping Upgrades Project. All charges for AKM's services are a not-to-exceed fee and are in accordance with SOCWA's RFP. Our fee proposal is based upon the level of effort anticipated to implement the work plan contained in AKM's technical proposal.

We appreciate the opportunity to submit this fee proposal and look forward to working with SOCWA on this most important and challenging project. If you have any questions or require any additional information, please do not hesitate to contact the undersigned.

Very truly yours,

AKM Consulting Engineers

A handwritten signature in black ink, appearing to read 'Emin Kayiran', written over a white background.

Emin Kayiran, CPII

Vice President/Director of Construction Management

**AKM CONSULTING ENGINEERS
RATE SCHEDULE**

Labor Classification	Hourly Rate 2026
Principal	\$269
Principal Engineer	\$269
Project Manager	\$261
Project Engineer	\$248
Senior Construction Manager	\$247
Construction Manager	\$212
QA/QC Manager	\$247
Senior Engineer	\$228
Senior Field Engineer / Inspector	\$209
Field Engineer / Inspector	\$184
Associate Engineer	\$177
Staff Engineer	\$157
Financial Analyst	\$144
Senior Designer / Senior CADD Technician	\$124
Designer / CADD Technician	\$115
Assistant Engineer	\$114
Engineering Technician	\$105
Engineering Aide	\$89
Office Support	\$89
Data or Word Processing	\$86

Out of pocket expenses (blueprinting, reproduction and printing, delivery, etc.) will be invoiced at cost plus 10%. Subcontracted services will be marked up 10% in order to cover costs associated with administration, coordination and management of subcontractors. Mileage will be invoiced at current IRS rate. This schedule of rates is in effect until December 31, 2027, at which time it may be adjusted.

SCOWA
Construction Management and Inspection Services for the
JBL Treatment Plant Digester Underground Piping Upgrades Project
Proposal - August 27, 2026

Task No.	Description	Labor Hours and Rates by Classification				Fees
		Project Manager	Construction Manager	Inspector	Total Hours	Labor Total
		\$261	\$247	\$209		
Task 1 - Project Control						
1	Pre-Construction Meeting	2	6		8	\$ 2,004.00
2	Progress Meetings	10	80		90	\$ 22,370.00
3	Inspection			820	820	\$ 171,380.00
4	Schedule Review	4	64		68	\$ 16,852.00
5	Safety Monitoring	2	16		18	\$ 4,474.00
6	Payment Request Reviews		16		16	\$ 3,952.00
7	Change Order Review	16	60		76	\$ 18,996.00
8	Specialty Inspection Coordination	2	8		10	\$ 2,498.00
9	Operations Coordination		20		20	\$ 4,940.00
10	Project Close-Out	2	8		10	\$ 2,498.00
Subtotal Hours		38	278	820	1136	
TOTAL FEE		\$9,918	\$68,666	\$171,380		\$ 249,964.00

Cover Letter

August 27, 2026

Brian Peck, Project Manager
South Orange County Wastewater Authority
34156 Del Obispo Street
Dana Point, California 92629

Subject: J. B. Latham Treatment Plant Digester Underground Piping Upgrades Project - Construction Management

Dear Brian Peck:

Dudek is pleased to submit our Statement of Qualifications for the J. B. Latham Treatment Plant Digester Underground Piping Upgrades Project. We appreciate the opportunity to continue supporting the South Orange County Wastewater Authority (SOCWA) and its six member agencies with responsive, experienced construction management services for wastewater and recycled water infrastructure.

SOCWA's Capital Improvement Program (CIP) requires a flexible construction management partner capable of supporting work across treatment facilities, ocean outfalls, effluent transmission mains, and buried utilities. Dudek brings extensive on-call construction management experience throughout southern Orange County, including long-standing assignments for the City of Laguna Beach, City of San Clemente, and South Coast Water District. This experience has prepared our team to efficiently manage multiple task orders, coordinate with multiple agencies, and respond quickly to evolving priorities. SOCWA will be supported by a seasoned team led by George Litzinger, who brings 41 years' experience in public-sector construction management in Southern California. George has successfully led numerous long-term, as-needed contracts for water and wastewater agencies, and is known for providing steady leadership and serving as a trusted extension of SOCWA staff.

We appreciate the opportunity to be considered and look forward to continue supporting SOCWA and its member agencies. If you have any questions, please contact George at 619.980.7048 or email at glitzinger@dudek.com.

Sincerely,


Joseph Monaco
President and CEO


George Litzinger, PE
Project Manager

Joseph Monaco is authorized to sign on behalf of Dudek. The fee estimate is valid for 90 days from the date of this proposal; after 90 days, Dudek reserves the right to reassess the fee estimate, if necessary.

DUDEK
AT A GLANCE

Multidisciplinary environmental
and engineering services

21
OFFICES

46
YEARS IN
BUSINESS

TOP 140
U.S. ENVIRONMENTAL FIRMS
Engineering News-Record 2025

1,000+
EMPLOYEES

100%
EMPLOYEE-
OWNED

TOP 54
CA DESIGN FIRM
Engineering
News-Record
2023

TOP 51
TRENCHLESS
DESIGN FIRM

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APPENDIX

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Scope of Services

Dudek's approach to this project is to work collaboratively—as a team member—with the South Orange County Wastewater Authority (SOCWA) and engineer throughout the project to produce a quality project that is completed on time and within budget. This process starts with a kickoff meeting to review the project, confirm the goals, and identify the major issues. There will be two phases to our services for this project: a Pre-construction/ Administrative phase that includes all pre-construction activities required to produce a complete, concise, and thorough work plan, and a Construction Phase when the project is managed and constructed on time and within budget.

Pre-Construction/Administrative Phase

Task 1: Kickoff Meeting

After selection, Dudek will meet with SOCWA and discuss the following tasks with the team:

- Introduce the team and discuss roles and responsibilities.
- Obtain copies of all project documents, reports, permits, plans, and specifications.
- Establish SOCWA's goals for the project.
- Discuss the sequence of work.
- Review the operational issues.
- Discuss the document control program.
- Prepare an action item list.

Task 2: Determine Construction Sequences and Phases

Discuss the contractor's staging plans, sequence of work, and how best to keep the project operational. Discuss the dewatering program for the bridge piers and the potholing program for existing utilities within the excavations. Discuss scaffolding and the installation of pipe supports on the existing concrete walls. Typically, the contractor has suggestions that may vary from the contract documents. However, the contractor has already indicated no changes, but we'll review one more time to confirm.

Task 3: Utility Coordination Meeting

Prior to the start of construction, Dudek will meet on the site with the contractor and operation staff to review potential conflicts and confirm pothole locations. We understand that potholing is to take place in September.

Construction Phase

Dudek's approach during construction includes the following components:

Task 1: Pre-Construction Meeting

Dudek will work with SOCWA to conduct the pre-construction meeting and outline the contractual requirements, particularly the special requirements. We will prepare an agenda for review and comment by SOCWA prior to the meeting. Comments will be incorporated, and agendas will be distributed to all meeting attendees. Dudek will be prepared to review the contractor's schedule and approach to the project. Following the meeting, we will prepare meeting minutes for review and comment by SOCWA staff. After incorporating comments, if any, we will distribute meeting minutes to all attendees.

Task 2: Construction Services

Dudek will coordinate closely with SOCWA's project manager, acting as an extension of staff for this project. Dudek will include in the scope of work sufficient time and budget to administer all services, as well as the following activities:

- Prepare daily activity reports to document daily start and stop times; the size of the contractor's crew; the equipment used; visitors to the job site; climatic conditions throughout the day; the quantities of materials used; the work accomplished; periods of contractor downtime and the cause; inspection procedures and results; and verification of compliance with the contract documents. All entries will be dated and timed.
- Monitor compliance with contract documents.
- Verify that all deliveries and installation of equipment and materials conform to the contract documents and approved shop drawings.
- Respond to inquiries regarding the requirements of the contract documents.
- Monitor the contractor's schedule and regular progress updates.
- Take digital photographs during key points in the construction to document progress.
- Provide daily communication and conferences with various parties, including SOCWA, the engineer, and operations.
- Review and respond to Requests for Information (RFIs) that are not related to design requirements and intent.
- Generally, review and process submittals (detailed review by the engineer).
- Review change orders and provide recommendations.



Task 2.1 Weekly Job Site Meetings

Dudek will work with SOCWA to conduct weekly job site meetings to review the project progress, issues, and schedule.

Task 2.2 Partial Payment Requests

Each month, Dudek will review the contractor's partial payment request for work completed. We will ensure appropriate payment for the actual quantities of work completed.

Task 3: Construction Monitoring

We will be on site daily during working hours and whenever work is performed outside of normal working hours. We will be available by cell phone whenever we are not at the site to answer any questions and resolve issues. Garrett will be the key point of contact for the contractor's project manager and superintendent during the work. He will not direct the contractor's work, but will facilitate the contractor's efforts by anticipating issues that might affect work progress.

Task 3.1 Forms/Checklist

Documentation is critically important in construction, and all communication will be provided to the affected personnel in writing. Garrett will maintain daily logs, complete incident reports, and photograph elements of the project. Dudek will assist SOCWA with progress pay estimates, contract change orders, labor and equipment records, personnel records, and other general correspondence that will ensure the effectiveness of the project.

Task 4: Project Closeout

Dudek will perform the following minimum project closeout activities:

- Comprehensive final review of the project, in conjunction with SOCWA staff, for the purpose of preparing a final punch list; verification of contractor's satisfactory completion of punch-list work
- Assistance with the resolution of any outstanding project issues (claims, time extensions, punch-list items, etc.)
- Verification that final testing, clean-up, restoration, and demobilization are complete
- Comparison between the pre-construction and post-construction conditions of the construction areas and access routes to ensure that all areas are returned to pre-construction conditions.

Clarification: Safety Monitoring

Per our field discussion, Dudek will not monitor the contractor's safety program/plan as stated: "Firm will monitor the Contractor's Safety Program required for compliance with Cal/OSHA." Instead, Dudek will perform typical construction management safety protocols and if and when we see any issues, we'll inform the contractor. This will keep the contractor 100% responsible for monitoring and complying with his safety program, including compliance with all Cal/OSHA requirements. Dudek will receive a copy of the Contractor's Safety Program for the files and mark it "Receipt Only."

Schedule

The project schedule for fieldwork is from December 28, 2026, to May 27, 2027, for about 5 months or 110 working days.

Dudek Team's Anticipated Work Resources Schedule

- Dudek's field representative (Garrett) will be on site full-time during the entire field construction period (110 working days) and will be involved in the pre-construction activities.
- Dudek Project Manager George Litzinger will be involved as required during initial startup of the project to establish the protocols with SOCWA and Dudek's team.
- Marius will provide construction management services and coordinate amongst all team members. He will be involved as needed and conduct weekly progress meetings and document control items for the project.

Project Team

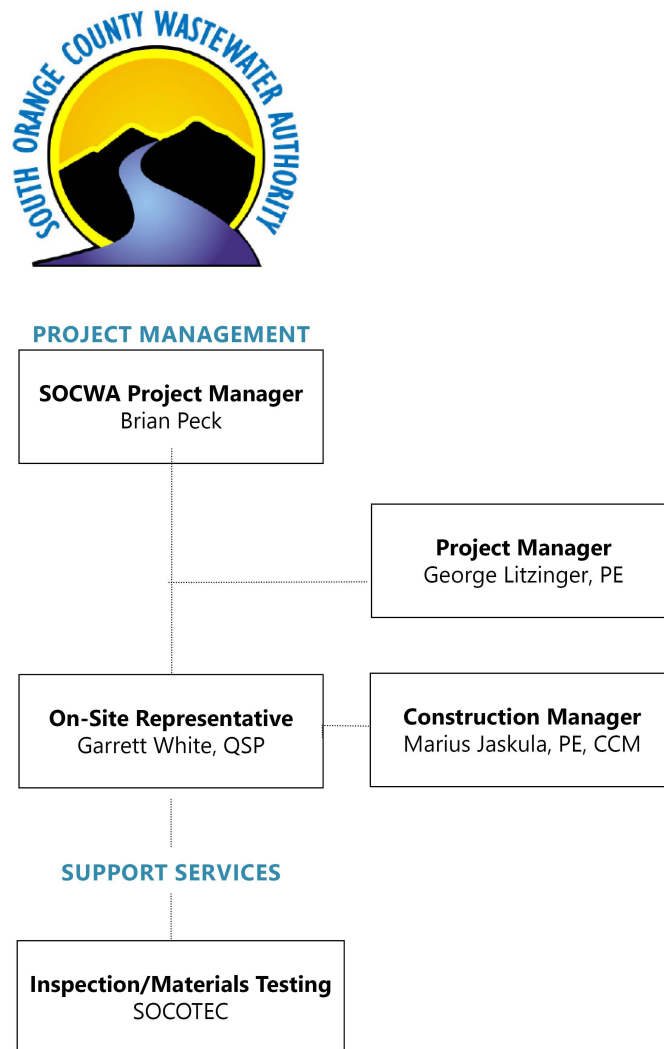
George Litzinger has 43 years' experience providing construction management on a variety of public works projects, including many similar treatment plant projects. He will serve as the project manager for this project and will support the project as required.

Marius Jaskula has 35 years' experience as a construction manager on numerous treatment plant projects. He will provide the construction manager and administrative tasks, including attending the pre-construction meeting; chairing the weekly progress meetings; assisting SOCWA with the project documentation; administering the contract; performing schedule review; and reviewing and assessing change orders. He will be using SharePoint to manage the documentation for the project. Marius has excellent communication skills and will be the main point of contact for SOCWA.

Garrett White has 38 years' experience as an on-site representative and field inspector on numerous treatment plant projects. He will attend the pre-construction and weekly progress meetings; pre-job-walk with the contractor; provide full-time monitoring of the contractor's work; perform tracking of the contractor's quantities installed and monthly progress payments; prepare daily reports; receive contractor's material tickets and log information; and check the contractor's traffic control work, coordinating daily with SOCWA's treatment plant operators and responding to any concerns and operational issues. Garrett will be the main point of contact in the field for the contractor and SOCWA. He will also be responsible for coordinating with subconsultant SOCOTEC for any special inspection and materials testing needs.

Figure 1. Organizational Chart presents our proposed team and lines of communication for this project. The Dudek team, composed of George Litzinger as project manager, Marius Jaskula as construction manager, and Garrett White as the on-site representative, has worked together on many treatment plant projects in the past. SOCOTEC is being brought onto the team for inspection and materials testing.

Figure 1. Organizational Chart



Dudek works hard to establish and maintain excellent working relationships with our clients. **Table 1** highlights clients for whom this team has performed similar services. **All three of these references are specific for George, Marius, and Garrett.**

Table 1. References

Company and Contact Name	Phone Number and Email
City of Huntington Beach Patrick Bannon, Capital Projects Supervisor	815.603.2811 Patrick.Bannon@surfcity-hb.org
Moulton Niguel Water District Bobby Aguiar, Construction Administrator	949.831.2500 BAguiar@mnwd.com
South Coast Water District Vernon Weisman, JRWSS Capital Program Manager	949.499.4555 VWeisman@scwd.org

Availability of Assigned Staff and Back-Up Resources

Dudek is committed to providing consistent, highly qualified construction management staff throughout the duration of the contract. Our proposed team is fully available to support this project, and they are backed by 30 construction management staff as well as a firmwide network of more than 1,000 professionals across 21 offices nationwide, including experienced resident engineers, construction managers, inspectors, schedulers, and technical specialists. This depth of resources allows Dudek to quickly provide additional capacity, specialized expertise, or seamless staff replacement when needed, ensuring uninterrupted service, schedule adherence, and responsive support for this project.

List of Deliverables

Dudek will provide comprehensive construction management deliverables, including meeting agendas and minutes, daily inspection reports, progress documentation, submittal and RFI tracking, payment request and change order reviews, project records, photographic documentation, punch lists, and final project closeout documentation.

Cost Breakdown of Total Fee

As requested in the RFP, the Cost Breakdown of Total Fee is included in a separate PDF file with this submittal.

Appendix A

Resumes

George Litzinger, PE

PROJECT MANAGER/CONSTRUCTION MANAGEMENT DIVISION MANAGER

George Litzinger is a licensed civil engineer with 43 years' experience in leadership and supervision in engineering and construction. As Dudek's Construction Management Division manager, George is responsible for all Dudek construction projects and programs covering both large and small projects with budgets of up to \$100 million. His duties typically include managing construction staff and providing support in contract administration, cost management and control, scheduling, contract bidding/award, constructability reviews, field engineering, project management, claims management, and estimating.

George has managed a variety of projects for both the private and public sectors, including water and sewage treatment plants, reservoirs, pump stations, pipelines, parks and golf courses, small dams, subdivisions, streets and roads, drainage projects, fire stations, and a variety of public buildings.

Project Experience

Anaerobic Digester No. 3, Western Riverside County Regional Wastewater Authority, California. Served as project manager for this project to upgrade and expand facilities at the Western Riverside County Regional Wastewater Authority Treatment Plant. The project included construction of a new concrete digester with a fixed steel cover, a pump mixing system, and all appurtenances, including piping, valves, gas safety equipment, instruments, and hatches; the installation of a new membrane gas holding cover with associated blowers, piping, and gas safety equipment; the installation of new digester heating equipment, including pumps and a heat exchanger; and other civil, yard piping, mechanical, and electrical work, including testing and startup.

Railroad Canyon Water Reclamation Facility Yard Piping Modifications Project, Elsinore Valley Municipal Water District, Lake Elsinore, California. Served as project manager on this project that involved the construction and modification of the Railroad Canyon Water Reclamation Facility's aeration basins. The facility is a wastewater reclamation facility designed to treat an average daily flow of 1.3 million gallons per day. The basins were modified with new piping, pumps, electrical, and baffles to retain the sewage for the purpose of creating an "anoxic zone" to denitrify the sewage prior to reuse.

Assembly Bill 900 Medium-Security Facility Waterline Extension, County of Imperial, California. Served as project manager for this project that included the installation of more than 5,000 linear feet of 12-inch C-900 PVC water line. The project was a joint venture between the City of El Centro and the County of Imperial to provide fire flow and additional capacity serving the County's new medium-security detention center and sheriff station. The project traversed several farm fields, subdivisions, a school, and existing roadways to "loop" the water system, providing sufficient pressure and capacity to the facility. A key aspect of the project was the constant coordination with detention facility and sheriff station personnel to allow access and temporary water service during construction. Shutdowns for tie-ins were scheduled with strict timelines for completion so that outages were kept to a minimum. The project was completed 1 month ahead of schedule and within budget.

Education

United States
International University,
San Diego
BS, Civil Engineering,
1985

Certifications

Professional Civil
Engineer (PE),
CA No. 47544

California Contractor
Engineering Class "A"
License No. 731744

Landscape License C-27

Professional Affiliations

Construction
Management Association
of America

American Society of Civil
Engineers

Building Industry
Association

Construction Industry
Federation

Wastewater Treatment Plant Expansion Project, Goleta Sanitary District, California. The Dudek construction management team provided construction management and inspection services for a \$30 million upgrade to the District's wastewater treatment plant that services the Cities of Goleta and Santa Barbara. It was the first major upgrade of the plant since 1985. George provided a constructability review of the project's plans and specifications and evaluated the project for value-engineering opportunities. Project improvements included a new biofilter and secondary clarifiers, new sludge tanks and a flow equalization tank, and upgraded employee facilities.

Avenue 48 Wastewater Treatment Plant Expansion, City of Coachella, California. Dudek provided construction management and inspection of this 18-month, \$30 million treatment plant expansion, which was funded by the State of California's Revolving Fund Program. George and the construction management team performed a constructability review for this project and managed the bid process on behalf of the City. Dudek's construction quality-assurance experts coordinated every aspect of the construction process with the contractor and provided inspection of all civil, structural, mechanical, and electrical/instrumentation work.

Water Recycling Demonstration Project, City of Anaheim, California. Served as project principal. Dudek provided construction management, inspection, and initial operation services. The project consisted of constructing a new state-of-the-art, 50,000-gallon-per-day treatment facility within a 2,000-square-foot building constructed adjacent to City Hall. The facility incorporated several treatment methods, a membrane bioreactor, ozone, and ultraviolet disinfection, to treat raw sewage into Title 22-compliant recycled water for toilet and irrigation use throughout the City. The project also included the construction of a new lift station and force main.

On-Call Construction Management Services, Ramona Municipal Water District, Ramona, California. Over a 6-year period, provided construction management services for more than \$30 million worth of Ramona Municipal Water District capital improvement projects. These projects upgraded and expanded the District's water system and increased capacity to higher elevations. Projects included the San Vicente Storage Reservoir, Mt. Woodson Reservoir, San Vicente Treatment Plant, Dye Road Booster Pump Station, and Dye Road Pipelines.

Imperial Water Treatment Plant Expansion, City of Imperial, California. Served as project manager for the City of Imperial's \$15 million water treatment plant upgrade and expansion. The project doubled the City's treatment capacity to 7 million gallons per day and was constructed by a design-build construction team. The project was one of the first of its kind using an engineer, procure, construct contract with a guaranteed maximum price. The project was completed on time, within budget, and free of litigation.

Poway and Olive Street Pump Stations, Ramona Municipal Water District, Ramona, California. Responsible for construction management services for the Poway Pump Station and Olive Street Pump Station for the Ramona Municipal Water District. Construction management and inspection were provided for all aspects of construction, including grading, concrete, masonry, electrical, and instrumentation work. The Olive Street Pump Station is a new station that provides system pressure throughout the Ramona community. The station contains two new 40-horsepower and two new 20-horsepower vertical-turbine pumps. The Poway Pump Station is a high-pressure water booster station. This station included the installation of two new 900-horsepower vertical-turbine pumps into a building that was retrofitted to accept the new pumps. The pump station transfers water up a 400-foot grade to an open reservoir that serves the town of Ramona.

Marius Jaskula, PE, CCM

CONSTRUCTION MANAGER

Marius Jaskula has 35 years' experience in construction management, contract administration, and quality assurance on civil public works infrastructure projects. His project work has included water and stormwater pump/lift stations; reservoirs; sewers and water treatment facilities; California Department of Transportation (Caltrans) structures; roadway construction; large earthwork projects; and water, sewer, and drainage pipeline projects with tunneling. During his career, Marius has held numerous positions, including construction manager for the U.S. government (Navy), construction manager/resident engineer for a municipality and engineering consulting firms, and quality control manager and superintendent for a general contractor.

Education

University of Illinois at Chicago
BS, Civil Engineering

Certifications

Professional Civil Engineer, CA No. C61060
CMCI Certified Construction Manager, No. A1588

Project Experience

Manglar Blending Facility, Department of Water and Power, City of Corona, California. Construction manager and resident engineer for a \$10.5-million project to construct new pumping, blending, chemical feed, and piping facilities at the Manglar Blending Facility. The facility enables the City to blend treated and untreated groundwater to achieve the desired water quality targets. The City uses two blending cells in the 905 Zone potable water distribution system to enable the use of groundwater from the Temescal Groundwater Basin and stores it at the Manglar and Garretson tanks. The Manglar tank receives water with elevated nitrate concentrations from City-owned wells 11, 12, 14, 15, and 27 via a well collector line at flow rates ranging from 1,000 gallons per minute (gpm) to 3,800 gpm. Work at the Manglar Blending Facility included demolishing existing pump station and facilities; constructing sitework, including retaining walls, paving, concrete, fences, gates, grading, landscaping, and miscellaneous site improvements; constructing five new potable water pumps with 20-foot-deep pump cans; constructing potable water transmission piping in Manglar Avenue; constructing chemical storage and injection equipment; constructing a 100-foot by 60-foot concrete masonry unit block building to house mechanical and electrical equipment; constructing plumbing, heating, ventilation, air conditioning, and lighting improvements; constructing electrical infrastructure for new 1600-amp power service; and constructing emergency power, fuel tank, and control devices. Project issues included adjacent community residences and extensive coordination with Water operations staff during construction and startup.

OC-44 Pipeline Rehabilitation Project, Mesa Water District, California. Construction manager and resident engineer for a \$3.3-million project to repair an old failing section of pipeline that had a history of failures and emergency repairs. The project included slip lining approximately 2,000 linear feet of 30-inch ductile iron pipe inside the existing 42-inch pipeline where it crosses the San Diego Creek and Bonita Creek. Welded steel pipe connections and transition fittings were provided at each connection point to the existing pipeline. The project is located in a sensitive habitat and required coordination with regulatory agencies, County of Orange, City of Newport Beach, Caltrans, and several local businesses.

Wells 32 and 33 Equipping, Department of Water and Power, City of Corona, California. Construction manager and resident engineer for a \$1.3-million project to develop and equip recently constructed groundwater wells. Well 33 has a sustainable yield of up to 1,500 gpm with moderate levels of nitrates and perchlorates that are treated at

the ion exchange treatment plant. Well 33 was placed in service with a 200-horsepower deep vertical turbine well pump driven by a variable frequency drive. Wells equipping consisted of well heads for both wells, associated mechanical piping and equipment, valves, flow meters, and a reinforced concrete masonry wellhouse. Project site improvements included miscellaneous yard piping, connections to water supply and transmission mains, sewer and water services, grading, drainage, asphalt concrete pavement, concrete flatwork, and steel fences and gates. The plant electrical and instrumentation system entailed the installation of a City-furnished motor control center, switchgear, emergency generator, and Supervisory Control and Data Acquisition (SCADA) equipment.

Ion Exchange Treatment Plant Project, Department of Water and Power, City of Corona, California. Construction manager and resident engineer for an \$8 million project to construct a new resin treatment ion exchange water treatment plant. Plant design flows were initially set at 1,600 gpm with the ability to expand to 6,000 gpm as local water supplies are developed. The 9,300-square-foot treatment plant building footprint incorporates a chemical room and process room, 30-foot-high masonry walls with architectural features, and a steel truss roofing system. The ion exchange treatment process consists of seven steel vessels loaded with resin for nitrate and perchlorate removal, process piping, filters, valves, flow meters, a compressed air scouring system, and associated mechanical equipment. Chemical treatment includes a salt delivery and storage system; briner; chemical storage, including containment walls; drain and delivery systems; chemical storage tanks; metering pumps; piping; and transfer pumps. Project site improvements include miscellaneous yard piping, connections to water supply and transmission mains, backwash water discharge and regenerate discharge drain piping, grading, drainage, asphalt concrete pavement, concrete flatwork, and tubular steel fences and gates. The plant electrical and instrumentation system entailed the installation of a City-furnished motor control center, switchgear, and SCADA equipment.

Bradt Reservoir Floating Cover Project, South Coast Water District, California. Construction manager for a \$2.3 million project to replace the existing failing geomembrane floating cover. The project consisted of replacing the 6.3-acre cover with a new weight-tensioned chlorosulfonated polyethylene geomembrane cover, including access hatches, vents, and a rainwater pump removal system. Supporting site work included Hypalon liner repairs; the replacement of inlet and outlet slide gates; the replacement of drain and outlet valves; electrical work; SCADA modifications; chemical system modifications; and drain piping installation.

Recycled Water System Expansion, City of San Clemente, California. Resident engineer for an \$8.2 million multiphase project to install 10 miles of recycled water pipelines (6-inch to 20-inch PVC and ductile iron), homeowners association service conversion connections, the Bella Collina Towne & Golf Course metering station, and a new pressure-reducing station. The project also included a new 200,000-gallon DN tank. Managed all aspects of construction and provided daily inspection services. The project required coordination with multiple agencies, including the City of San Clemente, South Coast Water District, 10-plus homeowners associations, and Caltrans. The project also involved the expansion of the City's water reclamation plant from 2,200,000 gallons per day (gpd) to 5,000,000 gpd and a new effluent pump station.

Water Recycling Demonstration Project, City of Anaheim, California. Resident engineer for a \$6.5 million project serving as a demonstration facility showcasing the viability of recycled water and the value of conserving limited potable water supplies. The project consisted of a 50,000 gpd capacity (100,000 gpd at buildout) membrane bioreactor water reclamation facility at the north side of the City Hall. The project included an influent pump station with a sewer diversion structure, a force main, and a recycled water distribution system to surrounding landscaped areas and to the dual-plumbed water system at Anaheim West Tower. The treatment facility is housed in a beautiful 2,000-square-foot building with a 25-foot-tall waterfall feature and floor-to-ceiling window wall glazing, allowing for outside viewing of the interior treatment plant workings.

Garrett White, QSP

ON-SITE REPRESENTATIVE

Garrett White has 38 years' experience in the construction industry, with an emphasis in the construction of water, wastewater, and storm drain facilities for public agencies. He has been involved with the construction of large- and small-diameter pipelines, treatment plants, pump stations for potable and non-potable distribution systems, and horizontal directional drilling (HDD) with an emphasis in trenchless technologies. For the past 15 years, Garrett has been responsible for providing field inspection services and construction management for various cities and water districts on capital improvement and developer projects. As a field engineer, he is responsible for project coordination, issuing field orders, verifying adherence to submitted schedules, quality assurance and quality control (QA/QC), maintaining adherence to water pollutions prevention practices, project documentation, and the review of as-built records.

Project Experience

Cured-in-Place Pipe Lining of the Sanitary Sewer System Project, City of Laguna Beach, California. Provided full-time construction and stormwater inspections during bypass pumping and installation of over 24,000 linear feet (LF) of 8-inch cured-in-place pipe (CIPP) and 4,500 LF of CIPP ranging from 10-inch to 18-inch diameters. The project included the installation of 75 lateral liners, multiple spot repairs, and chemical grout to prevent infiltration. Served as the full-time project/construction manager and inspector, providing public outreach and coordination with residents and businesses for approximately 1 month while the City engineer took a leave of absence. A small portion of this project (approximately 1,000 LF) included the installation of CIPP liner on the historic Coast Highway in Laguna Beach, California.

Flood Control Channel and Reconstruction Repair Project, City of Temecula, California. This project consisted of the construction of a steel sheet pile wall to protect Pala Community Park from future erosion from Temecula Creek located adjacent to an existing soccer field. The sheet pile wall was constructed to a depth of approximately 30 feet and included the installation of ground anchors followed by pressure grouting to secure the sheet pile wall in place, as well as the installation of a reinforced concrete cap. Inspected all landscape restoration and the construction of a new pedestrian sidewalk that was constructed over the buried sheet pile wall. Coordinated with the local native Pala Band of Mission Indians and biologists. Oversaw the construction, including testing of the ground anchor tendons, for conformance with the contract specifications. Served as the full-time qualified stormwater pollution prevention plan (SWPPP) practitioner (QSP) for the City of Temecula.

Gilly Street, Adams Avenue, Decay Avenue Water Pipeline Replacement Project; Western Municipal Water District; March Air Reserve Base; California. Provided full-time construction inspection for the construction of a new potable water line system within the historic Green Acres community located within March Air Reserve Base. The work generally consisted of the abandonment of the existing cast iron pipeline constructed with lead-filled joints

Education

Palomar College Courses:
Public Works Inspection I
Water Distribution I
Water Treatment I

Certifications

ACI Concrete Field-Testing Technician, Grade I

ACI Concrete Repair Basics Qualified SWPPP Practitioner (QSP), No. 23394

OSHA 10-Hour Confined Space Safety and Training Certification

NASSCO Certifications:

NASSCO-Certified Trainer Cured-in-Place Pipe (ITCP)

Pipeline Assessment Certification (PACP)

Manhole Assessment and Certification (MACP)

and the replacement of the existing water line with new C-900 PVC. Work included the removal and restoration of a historic concrete roadway and required coordination with a federally employed historian to satisfy restoration requirements. Installation of the pipeline required extensive pothole activities to locate water meter service locations for approximately 250 residents while maintaining service.

Annual Sewer Rehabilitation Program Phase 1 and 2, City of San Juan Capistrano, California. Served as the construction inspector for Phase 1 and as the construction manager on Phase 2 for this project, which consisted of the installation of 8,000 LF of small-diameter CIPP and over 5,000 LF of large-diameter (21-inch) CIPP. As the construction manager, prepared and issued change orders and field orders for modifications to the contract documents. Also served as the QSP for this project.

Sewer Rehabilitation Project Phase I through III and Lining of Abandoned Force Main, City of Culver City, California. Served as inspector on this project, which included the rehabilitation of over 278,000 LF of sewer mains and 200 maintenance holes that were located in busy urban areas and backyard easements. The project involved CIPP lining of two 8-inch diameter siphons and over 70 open trench point repairs, including review and assessment for the installation of over 900 feet of full-circle CIPP lining of existing service lateral connections based on the NASSCO lateral assessment certification program condition grading system. This was a challenging Citywide project that required coordination with multiple agencies (City of Los Angeles, U.S. Army Corp. of Engineers, and Golden State Water Company) and thousands of residents, and large corporations (Sony Studios, Culver Movie Studios, and the NFL Network). In addition, inspected the traffic control and site SWPPP.

Recycled Water Expansion Projects, City of San Clemente, California. Served as inspector on these projects. The City of San Clemente expanded its recycled water system by constructing multiple projects in three concurrent phases: Water Reclamation Plant Expansion and Pump Station (Project 1); Cordillera and Recycled Water Reservoirs and Pipeline Schedule III and IV (Project 2); and Pipeline Schedule I and II (Project 3). The treatment and effluent pumping systems were expanded; 10 miles of recycled water transmission mains (6-inch to 20-inch PVC and ductile iron) were constructed; an existing reservoir was converted; and a new, small reservoir was constructed.

Water Recycling Demonstration Project, City of Anaheim, California. Served as the inspector for Dudek on this project that consisted of constructing a new, state-of-the-art, 50,000-gallon-per-day treatment facility within a 2,000-square-foot building constructed adjacent to City Hall. The treatment facility incorporated several treatment methods, including a membrane bioreactor, ozone, and UV disinfection, to treat raw sewage into Title 22 recycled water for toilet and irrigation use throughout the City of Anaheim. The project also included the construction of a new lift station and force main.

Yorktown 30-Inch Transmission Main Corrosion Rehabilitation, City of Huntington Beach, California. Responsibilities include confined space entry into the over 18,000 LF of 30-inch cement-mortar lined and coated water line during “hot work” procedures, in compliance with California Occupational Safety and Health Administration regulations, for inspection of the interior pipe to verify its condition and assess the continuity of cathodic jumper wires being installed. This project included the installation of over 16 30-inch butterfly valves, multiple air and vacuum valves, blow assemblies, blind flange replacements, access maintenance holes, aged interconnection, and inline valves. Provided QA/QC during external pin brazing of valves and appurtenances and monitoring of the contractor-implemented lockout/tagout security and procedures. Provided coordination with the California Department of Transportation site representative during the rehabilitation of the water line on State Highway 35/Beach Boulevard. Implemented and maintained strict compliance of SWPPP documentation per National Pollutant Discharge Elimination System requirements during construction.

Cost Breakdown of Total Fee

Table 1 presents Dudek’s fee estimate based on a 110-working-day construction schedule.

Table 1. Fee Estimate

Staff/Role	Hours	Hourly Rate	Total
George Litzinger, PE, Project Manager	20	\$195	\$3,900
Marrius Jaskula, Construction Manager	220	\$195	\$42,900
Garrett White, On-Site Representative	880	\$165	\$145,200
Direct Costs	Budget		\$500
Total			\$192,500



August 27, 2026

QUALIFICATIONS FOR
SOUTH ORANGE COUNTY WASTEWATER AUTHORITY
RFTOP JB LATHAM TREATMENT PLANT DIGESTER UNDERGROUND
PIPING UPGRADES



SUBMITTED TO:
South Orange County Wastewater Authority
34156 Del Obispo Street
Dana Point, CA 92629
949.324.5279
Attention: Roni Young Grant, Capital Improvement
Program Manager



SUBMITTED BY:
La Salle Solutions, LLC
One Park Plaza Ste. 600
Irvine CA, 92614
949.852.3636



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COVER LETTER

August 27, 2026

Ms. Roni Young
Capital Improvement Program Manager
South Orange County Wastewater Authority
34156 Del Obispo Street
Dana Point, CA 92629

RE: Task Order Proposal for Construction Management Services, J.B. Latham Treatment Plant Digester Underground Piping Upgrades Project (RFTOP dated July 27, 2026)

Legal Business Name
La Salle Solutions, LLC

Form of Business
Corporation

Primary Contact Person
Dennis La Salle Jr.
619.501.2645
dlsalle@lasallecm.com

Dear Ms. Young and Members of the Selection Committee,

La Salle Solutions, LLC submits this task order proposal to provide construction management services for the J.B. Latham Treatment Plant Digester Underground Piping Upgrades Project, under our existing As-Needed Construction Management Services contract with the South Orange County Wastewater Authority (SOCWA). This project will replace two failing underground piping systems, digester gas and hot water, within an active anaerobic digester complex that cannot pause operations to accommodate construction. SOCWA needs a construction management team that can protect plant performance, hold the contractor to the technical specifications, and keep the project moving through a demanding tie-in sequence without a misstep.

SOCWA's Capital Improvement Program depends on consultants who stay engaged across projects rather than starting over with every task order. La Salle Solutions structured our proposal, and our proposed team, around that expectation. Randy Lovan, our proposed Senior Project/Construction Manager, and our project team met with your staff at the pre-proposal meeting and site walkthrough to understand the plant's operational constraints firsthand, including the sequencing around the heat exchangers, the digester isolation windows, and the coordination required with your operations staff before any shutdown. That groundwork is reflected throughout the attached proposal, and it is the same level of engagement SOCWA can expect on every task order we support under this contract.

Randy Lovan brings direct construction management experience on anaerobic digesters, digester gas systems, gas flare replacement, and process piping within active wastewater treatment plants, including his work on the City of Palm Springs Digester No. 2, Waste Gas Flare, and Filtrate Pump Station Improvement Project and the San Jacinto Valley Regional Water Reclamation Facility digester conversion. His background matches the scope and complexity SOCWA has outlined for this project. Behind Randy, La Salle Solutions maintains a bench of qualified Construction Inspectors, including Enrique Castañeda, Mohammad Adib, and John Martin, so SOCWA has confirmed, experienced staff ready to cover this task order and back each other up if project demands shift. Our long-term teaming relationship with HDR adds further depth on scheduling and technical support, giving SOCWA a full team rather than a single point of failure.

Our approach is built around how SOCWA already manages this program. Document control will run through SOCWA's SharePoint system as your staff has established, and our Construction Manager will work within that structure rather than introducing a separate platform. Our scope of services, project team qualifications and references, hours breakdown, staff availability, and list of deliverables follow, along with the Cost Breakdown of Total Fee submitted under separate cover as required.

La Salle Solutions has no exceptions to this RFTOP or to our As-Needed Construction Management Services contract with SOCWA, and we confirm there are no conflicts of interest that would preclude us from performing the requested services. Randy Lovan and the proposed project team are available to begin work on SOCWA's schedule. Please contact Dennis La Salle Jr. at 619.501.2645 or dlsalle@lasallecm.com with any questions.

Thank you for your consideration,



Dennis La Salle Sr., CCM
Principal-in-Charge

SCOPE OF SERVICES / PROJECT APPROACH

PROJECT UNDERSTANDING

La Salle Solutions understands that the J.B. Latham Treatment Plant Digester Underground Piping and Flare System Upgrades – Phase I is an important component of SOCWA's ongoing Capital Improvement Program to rehabilitate aging process infrastructure and restore reliable service to systems supporting the plant's anaerobic digestion operations. The project addresses existing hot-water and digester-gas piping infrastructure that has experienced deterioration and corrosion and requires replacement to improve system reliability and reduce the potential for future failures. The work includes installation of new underground and aboveground piping, connections to existing digester systems, associated supports and appurtenances, demolition and abandonment of existing piping, and testing, cleaning, passivation, startup, and commissioning.

La Salle also understands that the project is considerably more complex than a conventional piping replacement because construction will occur within an operating wastewater treatment facility and around active anaerobic digesters. The Contractor must work within existing operational, safety, access, and environmental constraints while coordinating excavation, utility verification, structural work, process piping installation, welding, coatings, tie-ins, testing, and startup. Existing utilities and facilities must be protected, planned shutdowns must be coordinated with SOCWA Operations, and the new systems must be tested and placed into service without compromising the continued operation of the treatment plant.

Our approach is therefore centered on protecting plant operations while maintaining construction momentum. Randy Lovan will lead the La Salle team as Construction Manager, bringing direct anaerobic digester, digester-gas, flare, process piping, commissioning, and operating-plant experience. Enrique Castañeda will provide primary field inspection and documentation, supported by Mohammad Adib, whose experience

includes the Encina Wastewater Authority Digester Improvements Project, and John Martin, whose background includes wastewater reclamation facilities, underground piping, and Orange County Sanitation District pump station projects. This team gives SOCWA the depth necessary to recognize potential problems early, coordinate effectively with Operations and MKN, and respond quickly when field conditions require additional technical or inspection resources.

THE LA SALLE DIFFERENCE

La Salle's approach is built around a simple principle: identify the operational and construction risk before it reaches the field, and then maintain enough experienced field presence to control it when it does.

This Task Order is particularly well suited to La Salle's proposed team. Randy Lovan brings direct experience with anaerobic digesters, digester-gas systems, waste-gas flares, process piping, operating wastewater plants, commissioning, and startup. Enrique Castañeda adds extensive field experience with wastewater pipelines, underground utilities, welding, pressure testing, shutdown coordination, and documentation. Mohammad Adib provides direct experience from the Encina digester improvements, while John Martin adds depth in wastewater reclamation, underground infrastructure, and pump-station construction.

Together, this team provides SOCWA with more than conventional construction management and construction inspections. It provides a team that understands the process behind the pipe. That understanding will allow La Salle to anticipate operational impacts, recognize field conditions that could become costly problems, coordinate effectively with SOCWA Operations and MKN, and keep Phase I moving safely toward successful commissioning and turnover.



KEY PROJECT RISKS AND LA SALLE'S MITIGATION APPROACH

Risk	La Salle's Solution
Maintaining Continuous Treatment Plant Operations The greatest project risk is performing construction around active wastewater treatment and digestion processes without disrupting plant operations. Construction activities, particularly tie-ins and system outages, have the potential to affect existing process systems if they are not carefully sequenced and coordinated.	 We will treat operational coordination as a construction activity, not simply an administrative requirement. Randy Lovan will work with SOCWA Operations, MKN, and SS Mechanical to identify activities that could affect existing systems and establish the required sequence, notifications, isolation requirements, and restoration procedures before work begins. Our inspectors will verify field conditions and prerequisites before critical work proceeds. This allows SOCWA Operations to understand what is occurring, when it will occur, and what must happen before the affected system is returned to service.
Existing Underground Utilities and Unknown Conditions The project requires excavation and installation of underground digester-gas piping in an existing developed treatment plant. Existing utilities, structures, piping, and undocumented conditions create a significant potential for conflicts, delays, redesign, and change orders. The specifications specifically require potholing and verification of existing utilities before proceeding with fabrication and installation.	 We will make existing-condition verification an early construction priority. Enrique Castañeda will closely review potholing and utility verification and document actual field conditions before underground work advances. Conflicts will be documented immediately and elevated through the RFI process rather than allowing the Contractor to proceed based on assumptions. Randy will coordinate with MKN and SOCWA to develop practical resolutions while protecting the schedule.
Tie-Ins and Shutdowns Tie-ins represent some of the highest-risk activities because they transition construction from independent installation into direct interaction with existing operating systems. The project includes connections to existing hot-water and digester-gas systems, making sequencing, isolation, testing, and restoration critical.	 Critical tie-ins will receive enhanced management and inspection coverage. Before each tie-in, the team will confirm the approved procedure, materials, isolation requirements, access, safety controls, testing requirements, and Operations coordination. La Salle will participate in pre-tie-in planning meetings and verify that required prerequisites are complete before the Contractor begins. During the work, the CM and Inspector will maintain direct communication with Operations and immediately identify conditions that could affect the approved sequence.
Digester Gas Safety Digester gas systems introduce unique hazards associated with flammable and potentially hazardous gases. Work involving existing digester-gas piping, demolition, connections, testing, and commissioning must be carefully controlled.	 We will verify that the Contractor follows the approved safety and work procedures and that required isolations and precautions are in place before work involving existing gas systems begins. Randy's direct experience with anaerobic digesters, digester-gas systems, and waste-gas flares provides the team with an understanding of the relationship between construction activities and process safety. Enrique and the supporting inspectors will maintain active field observation and immediately elevate unsafe or unexpected conditions.
Documentation and Defensibility Because this is a public-agency CIP project involving complex process infrastructure, complete records are essential for payment, project controls, future maintenance, and potential claims.	 Construction Inspectors will maintain detailed daily inspection records supported by photographs, quantities, material information, testing documentation, RFIs, submittals, field directives, and other relevant project records. Documentation will be timely and organized so that SOCWA can readily understand what occurred, where it occurred, who performed the work, and how compliance was verified.

Welding, Piping Quality and Coatings

The long-term value of the project depends on the quality of the new piping installation. Welding, pipe alignment, supports, fittings, valves, coatings, corrosion protection, and testing must all be properly executed. Deficiencies that are not identified before piping is buried or systems are placed into service can become expensive and disruptive to correct.



Inspection will focus on quality at the point of installation rather than relying solely on final inspection. The team will verify materials, installation, alignment, supports, weld-related requirements, coatings, and other specified quality requirements as the work progresses. Concealed work will receive particular attention before it is covered. Required testing and inspection documentation will be tracked as part of the project record.

Schedule and Long-Lead Items

Process piping projects can be affected by procurement, fabrication, submittal review, specialty materials, equipment availability, and field conditions. A delay in one component can affect the planned sequence and ultimately impact the plant's shutdown windows.



Randy will use the Contractor's approved schedule as an active management tool. We will track critical submittals, long-lead materials, fabrication, testing, and activities affecting tie-ins and startup. Schedule updates will be compared with actual field progress, and potential impacts will be identified early. Where a delay is developing, La Salle will work with SOCWA, MKN, and the Contractor to identify recovery options before the issue becomes a critical-path delay.

Construction in Constrained Existing Facilities

Construction within an operating treatment plant creates limited access, congestion, interactions with existing infrastructure, and potential conflicts between Contractor activities and plant operations.



Our field team will maintain active awareness of access, laydown, excavation limits, equipment movement, and interfaces with existing facilities. Daily coordination will allow the Contractor's planned activities to be evaluated against current plant conditions. When construction conditions change, La Salle will document the condition, communicate the potential impact, and coordinate a resolution before the work creates a larger operational or schedule problem.

Testing, Commissioning and Return to Service

The project does not end when the piping is physically installed. The specifications require testing and system preparation before the new systems can be placed into service, including hydrostatic and pneumatic testing, leak testing, flushing, cleaning, passivation, and commissioning.



Commissioning will be planned from the beginning of construction. The CM and Inspector will maintain a running list of required tests, inspections, deficiencies, documentation, and prerequisites for startup. This approach prevents commissioning from becoming a last-minute activity and gives SOCWA Operations confidence that the system is ready before it is placed into service.

Change Management and Cost Control

Unknown underground conditions, conflicts with existing facilities, design clarifications, and operational requirements can result in potential change orders. Poorly documented changes can create disputes and make it difficult for SOCWA to determine whether additional compensation or time is justified.



All potential changes will be documented at the field level as soon as they are identified. La Salle will distinguish between changed conditions, design clarifications, Contractor means and methods, and work already included in the Contract Documents. Randy will evaluate the potential scope, cost, and schedule impact together, coordinate with MKN and SOCWA, and provide a clear recommendation before SOCWA authorizes additional work.

Approach

La Salle Solutions approaches the J.B. Latham Treatment Plant Digester Underground Piping and Flare System Upgrades – Phase I as a highly coordinated process-mechanical and underground infrastructure project within an actively operating wastewater treatment facility. The value of this project to SOCWA extends beyond replacement of aging piping; the work is intended to restore reliability to critical digester hot-water and digester-gas systems while supporting the long-term reliability objectives of SOCWA's Capital Improvement Program. The Contract Documents require installation of new aboveground hot-water and digester-gas piping, below-grade digester-gas piping, connections to existing systems, demolition and abandonment of existing piping and appurtenances, and comprehensive testing, cleaning, passivation, and commissioning.

Our approach recognizes that the most significant construction risk is not simply installing the new piping; it is integrating the new systems into an operating treatment plant without compromising digester performance, worker safety, or the continuity of SOCWA's operations. The specifications establish specific operational constraints, including limitations on heat-exchanger outages and requirements governing tie-ins and work sequencing. The project also requires potholing and verification of existing utilities, excavation and trenching, structural supports and drilled foundations, welding and specialty piping, coatings, pressure testing, and system startup.

Our Construction Management approach therefore places particular emphasis on constructability, work sequencing, utility verification, quality control, tie-in planning, shutdown coordination, testing, and commissioning, with field decisions made in close coordination with SOCWA Operations, MKN & Associates, and SS Mechanical.

A Team Selected Specifically for J.B. Latham

La Salle has deliberately assembled a team for this Task Order based on the actual technical and operational risks of the project, rather than simply assigning our general on-call staff. **Randy Lovan, CCM, QSP**, will serve as Construction Manager and lead the Task Order. Randy brings 34 years of construction management experience and direct experience with operating wastewater facilities, anaerobic digesters, digester gas systems, gas flares, process piping, pump stations, solids-handling systems, commissioning, startup, and complex plant modifications. His experience includes the City of Palm Springs Wastewater Plant Digester No. 2, Waste Gas Flare and Filtrate Pump Station Improvement Project, an \$18 million project involving a new anaerobic digester, digester gas flare, gas holder, digester mixing system, chopper pumps, electrical, mechanical, and instrumentation improvements while the treatment plant remained operational.



Randy's experience is particularly relevant to J.B. Latham because he understands the difference between managing a conventional piping project and managing process piping that directly affects an operating digester system. He will establish the construction sequence with the Contractor, identify activities requiring coordination with Operations, monitor critical-path activities, and ensure that planned tie-ins, outages, testing, and startup activities are sufficiently developed before they reach the field. His experience also includes coordinating with operations personnel, managing claims and changes, reviewing progress payments, and ensuring that systems are ready for commissioning and startup.

Enrique Castañeda, QSP, will serve as Lead Inspector and provide the primary day-to-day field presence. Enrique brings more than 18 years of public works inspection experience, including water and wastewater pipelines, underground utilities, excavation, welding, pressure testing, and work requiring coordination of shutdowns. His experience on the City of San Diego's 2nd Otay Water Pipeline Relocation included trench excavation and shoring, water-pipe installation, field welding, hot taps, pressure testing, backfill, and coordination with City Water staff for shutdowns. He also has extensive experience documenting work, verifying quantities, reviewing pay estimates, monitoring SWPPP and safety requirements, and maintaining defensible daily records.

Enrique will be supported by a depth of experienced La Salle personnel who can be mobilized when the work requires additional technical or inspection coverage. Mohammad Adib brings direct experience from the Encina Wastewater Authority Digester Improvements Project, where he inspected digester rehabilitation, process equipment, heat exchangers, digester pumps, digester piping, a new waste-gas flare, MCC and electrical/control improvements. His responsibilities included submittal and RFI review, equipment and material inspection, constructability coordination, daily reporting, and change-order management. This is unusually direct experience for the proposed

assignment and provides La Salle with a second inspector who understands the interaction between digester mechanical systems, piping, electrical systems, and plant operations.

John Martin provides additional depth in underground wastewater infrastructure and pump-station construction. With more than 30 years of experience, John has inspected wastewater reclamation facilities, sewer mains, force mains, manholes, trenching, shoring, testing, backfill and compaction, as well as multiple Orange County Sanitation District pump station projects involving replacement pumps, controls, ventilation systems, force mains, and active facility modifications. His background gives the team additional depth for underground construction, existing-facility interfaces, pump and process systems, and field conditions that may require rapid augmentation of inspection resources.

Field-Driven Construction Management

Our Construction Manager and Lead Inspector will work as an integrated team. Randy will maintain overall responsibility for construction management, coordination, schedule, contract administration, and resolution of significant field issues, while Enrique will maintain continuous awareness of actual field conditions and provide the day-to-day verification necessary to ensure that work conforms to the Contract Documents.

Before each major construction activity, the team will review what is planned, what must be isolated, what existing systems are affected, what permits or safety controls are required, and what must be completed before the system can be returned to service. This will be particularly important for underground excavation and utility conflicts, hot-water piping, digester-gas piping, demolition, tie-ins, pressure testing, and commissioning. The technical specifications specifically require hydrostatic, pneumatic, and leak testing; verification of condensate drainage; and flushing, cleaning, pickling, and passivation before systems are placed into service.

La Salle will use the approved Contractor schedule and constrained sequence of work as active management tools rather than simply reviewing them for compliance. We will compare scheduled activities against actual field progress, identify potential impacts to critical-path work, and address procurement, submittal, fabrication, utility, and access issues before they affect the construction sequence. Where conditions differ from the plans or existing utilities are not where anticipated, the team will promptly document the condition, coordinate with MKN and SOCWA, and develop a practical path forward before the issue becomes a delay or change-order dispute.

Tie-Ins, Shutdowns and Operational Coordination

The tie-in work will receive heightened management attention because it represents the point at which construction directly interfaces with SOCWA's existing process systems. La Salle will

require the Contractor to develop detailed tie-in procedures, confirm prerequisites, coordinate shutdown windows with Operations, verify isolation and safety requirements, and establish a clear sequence for disconnecting, connecting, testing, and returning systems to service.

This approach is consistent with the project's technical requirements and with La Salle's broader SOCWA philosophy developed through our on-call CM program: plan the operational impact before the construction activity begins. Our team will participate in planning meetings with SOCWA Operations, the Contractor, and MKN to ensure that all parties understand the sequence, responsibilities, contingency measures, and restoration requirements. The objective is to eliminate surprises during shutdowns and give SOCWA Operations confidence that each critical tie-in has been adequately planned before work begins.

Quality Assurance and Documentation

La Salle will provide disciplined inspection and documentation throughout construction. Enrique will maintain detailed daily reports documenting manpower, equipment, work activities, locations, quantities, materials, testing, safety observations, utility conditions, and issues requiring resolution. Photographs will be tied to specific work activities and locations to provide a clear record of existing conditions, construction progress, concealed work, tie-ins, and completed installations.

Inspection will focus on the elements that matter most to long-term system reliability: correct materials and fittings, pipe alignment and support, welding and joining, coatings and corrosion protection, trench and bedding conditions, compaction, valves, insulation, pressure testing, and restoration. The project specifications contain extensive requirements for piping, valves, supports, coatings, trenching, testing, and commissioning, and La Salle will use those requirements as the basis for systematic field verification.

Commissioning and Successful Turnover

La Salle considers commissioning part of construction, not an activity that begins after construction is essentially complete. Our team will begin planning for startup and turnover well in advance by tracking required testing, inspection signoffs, deficiencies, equipment readiness, test reports, O&M information, and outstanding punch-list items. The objective is to avoid reaching substantial completion with unresolved technical issues that delay SOCWA's ability to place the new systems into reliable service.

This approach reflects Randy Lovan's extensive experience coordinating commissioning, debugging, and startup of wastewater treatment improvements. It also gives SOCWA continuity from the first excavation through final testing: the same team that understands the construction history will be available to resolve final issues and support successful transition to Operations.

I. Pre-Construction Meeting

Before SS Mechanical mobilizes or begins physical construction, Randy Lovan will assist SOCWA in conducting a comprehensive pre-construction meeting with MKN & Associates, SS Mechanical, SOCWA Operations and Engineering staff, and other agencies, consultants, or stakeholders as appropriate. The meeting will establish a common understanding of the project objectives, Contract Documents, construction schedule, schedule of values, contractual responsibilities, communication protocols, submittal and RFI procedures, payment and change management processes, safety requirements, quality control expectations, and documentation requirements that will govern the work through completion.

Because this project will be constructed within an active digester complex, La Salle will place particular emphasis on the interfaces between construction activities and ongoing plant operations. Randy will use the meeting to confirm the planned sequencing of underground and aboveground piping work, utility verification and excavation activities, access and work-area requirements, planned tie-ins, shutdown and outage coordination, testing, commissioning, and restoration of existing systems. The team will identify activities requiring advance coordination with SOCWA Operations and establish the notification and approval process for work that could affect existing plant systems or operations.

SOCWA will establish the meeting agenda, sign-in sheet, and meeting minutes; La Salle will actively support the technical and construction coordination necessary to ensure the meeting produces actionable outcomes. Randy will confirm that the Contractor, Designer, and SOCWA understand who is responsible for each action, what must occur before critical work can proceed, and how potential conflicts will be elevated and resolved. La Salle will document key decisions, action items, required submittals, schedule commitments, and coordination requirements and will carry those items forward into subsequent progress meetings and field operations.

Our objective is for SS Mechanical to leave the pre-construction meeting with more than an understanding of the scope. The Contractor will have a clear roadmap for how the work will be executed safely, how construction will interface with SOCWA's operating systems, and what must be accomplished before each critical phase including excavation, piping installation, tie-ins, testing, and commissioning can proceed. This early alignment establishes the foundation for La Salle's field-driven approach and helps prevent avoidable delays, operational conflicts, and misunderstandings later in construction.

“The La Salle Solutions team will leverage our broad public sector construction experience to deliver high-quality consultant-led inspection services for the Owner’s capital improvement projects.

Our staff will provide complete public works inspection services with an emphasis on safety and quality based on our years of experience. Our proactive approach and the ability to align our interests with the Owner will help to ensure successful delivery of these critical infrastructure projects.

- Dennis La Salle, CCM

LA SALLE'S COMMITMENT TO SOCWA

La Salle's advantage on this Task Order is the combination of SOCWA-specific program understanding, direct digester experience, and field-level wastewater construction expertise. SOCWA does not have to rely on a generic CM team learning the facility and the process systems as construction progresses. Randy has managed anaerobic digesters and flare systems; Mohammad has directly inspected a comparable digester improvement project at Encina; Enrique brings extensive pipeline, shutdown, welding, and wastewater inspection experience; and John provides additional depth in wastewater reclamation, underground piping, and pump-station construction.

Together, this team gives SOCWA a senior construction manager who understands the process risk, a lead inspector who understands the field work, and experienced backup personnel who can be deployed when specialized or surge coverage is required.

That combination is directly aligned with La Salle's commitment under the SOCWA on-call contract to provide responsive, technically qualified, field-driven construction management that protects SOCWA's CIP investment, maintains plant operations, and delivers reliable infrastructure for the long term.



II. Progress Meetings

Randy Lovan will schedule and lead weekly progress meetings with SOCWA Engineering and Operations staff, MKN & Associates, SS Mechanical, and subcontractors or specialty representatives as required. These meetings will serve as an active project management tool rather than simply a status update, providing a structured forum to evaluate progress, identify emerging risks, coordinate upcoming work, and resolve issues before they affect the project schedule or plant operations.

Each meeting will address the Contractor's progress against the approved construction schedule, upcoming two- and three-week activities, critical-path work, submittals and RFIs, procurement and long-lead items, site access, safety, quality control, testing, potential changes, and any field conditions requiring clarification of the Contract Documents or MKN's design intent. Particular attention will be given to activities that interface with existing digester systems, planned shutdowns or tie-ins, underground utility conflicts, and work that could affect SOCWA Operations. Randy will use these discussions to confirm that upcoming critical activities have the necessary approvals, materials, labor, access, and operational coordination in place before the Contractor proceeds.

La Salle will maintain a clear and action-oriented meeting record, identifying decisions, responsible parties, required actions, and target completion dates. Action items will remain visible and will be carried forward from meeting to meeting until satisfactorily resolved. Issues that have the potential to affect the critical path, plant operations, safety, cost, or commissioning will be elevated promptly to the appropriate SOCWA and MKN representatives rather than allowed to remain unresolved.

SOCWA staff will maintain project document control through SharePoint, and La Salle will provide meeting records, action-item logs, field correspondence, and other required documentation directly into SOCWA's established system. We are intentionally

not proposing a separate document-control platform or adding a Procore requirement for this Task Order. Given the scope, duration, and requirements of the J.B. Latham project, utilizing SOCWA's existing SharePoint environment provides an efficient, transparent, and cost-effective approach while maintaining the document control and accessibility SOCWA requires.

Most importantly, the weekly meeting process will connect planning with field execution. Randy and Enrique will use information developed during each meeting to guide upcoming inspection activities and verify in the field that agreed-upon sequencing, operational coordination, and corrective actions are being implemented. This closed-loop process gives SOCWA a consistent line of sight from the Contractor's plan, to the field, to documented completion.

III. Construction Inspection and Quality Verification

La Salle's assigned Inspector will provide field inspection and quality verification across the civil, mechanical, structural, coatings, and electrical work applicable to the Task Order, with particular emphasis on the digester-gas and hot-water piping systems and their interfaces with existing facilities. Enrique Castañeda will provide primary field coverage, supported by Mohammad Adib and John Martin as needed to provide continuity and specialized inspection depth. The team will verify that materials, fabrication, installation, testing, and workmanship conform to the approved plans, specifications, submittals, and applicable Contract Documents. Given the existing corrosion and deterioration that prompted the project, La Salle will place particular emphasis on installation quality, corrosion protection, piping connections, supports, testing, and concealed work so that the improvements provide the long-term reliability SOCWA is seeking through its CIP investment.

Our Inspector will maintain daily inspection reports documenting weather, work hours, personnel and equipment, construction activities, deliveries, site visitors, deficiencies, instructions, safety observations, disputes, delays, and other significant events, with reports submitted to SOCWA weekly. A digital photographic record will be maintained throughout construction, with photographs identified by date, location, and descriptive narrative and used to document significant work, differing site conditions, concealed conditions, and potential change-order or claim issues. In addition to field inspection, La Salle will participate in weekly progress meetings, review Contractor look-ahead schedules, coordinate inspection coverage with Randy Lovan, verify quantities and support review of payment requests, review record drawings and identify missing information, and coordinate RFIs and submittals with SOCWA and MKN. This integrated inspection and documentation process will give SOCWA a clear, defensible record of construction progress and provide early identification of quality or compliance issues before they become costly to correct.

IV. Schedule Review

Randy Lovan will review, analyze, and comment on SS Mechanical's baseline construction schedule and monitor progress throughout the project using the three-week look-ahead schedule and monthly schedule update identified for the project. The three-week look-ahead will be used as an active field-management tool to confirm that upcoming activities have the necessary submittals, materials, access, inspections, and operational coordination in place, particularly for work involving existing digester systems, tie-ins, shutdowns, and testing. Randy will compare planned activities with actual field progress, identify developing delays or sequencing conflicts, and work with SOCWA, MKN, and SS Mechanical to implement corrective measures before impacts extend to the critical path.

The monthly schedule update will provide SOCWA with continued visibility into overall project performance and the planned December 28, 2026 through May 27, 2027 primary field-work window. Schedule observations and potential impacts will be incorporated into progress meetings and documented for SOCWA's project records. La Salle's scheduling specialist will remain available as a supplemental resource if SOCWA requires dedicated CPM analysis or more detailed schedule review beyond Randy's routine management and field-based schedule oversight, without adding baseline hours unless specifically authorized.

V. Safety Monitoring

Safety will be integrated into La Salle's daily construction management and inspection activities, with particular attention to the hazards associated with digester-gas piping, hot work around active gas systems, excavation and trenching for below-grade piping, confined-space activities, and construction within an operating wastewater treatment facility. Enrique Castañeda, La Salle's Lead Inspector, holds OSHA 30 certification and will provide day-to-day field safety observations while monitoring SS Mechanical's implementation of its approved safety program and applicable Cal/OSHA requirements. Randy Lovan will provide overall construction management oversight and will coordinate with SS Mechanical regarding traffic control, work areas, haul routes, trench safety, confined-space entry, fall protection, hot-work permitting, required personal protective equipment, and hazardous-material handling. La Salle will promptly document unsafe conditions and communicate required corrective actions to the Contractor and SOCWA, while recognizing that SS Mechanical retains primary responsibility for site safety.

The La Salle team will maintain heightened awareness during activities involving existing digester-gas systems and other conditions where a construction incident could affect personnel, plant operations, or the public. Our approach is to identify hazards before work begins, verify that appropriate controls are in place, and continuously monitor changing field conditions as construction progresses. La Salle's dedicated SSHO remains available as a supplemental resource should SOCWA require additional or specialized safety oversight during higher-risk activities, without including baseline SSHO hours in this Task Order.

VI. Submittal, RFI and Contract Administration / Change Management

La Salle will provide disciplined review and coordination of SS Mechanical's submittals, RFIs, and other contract-administration items to support timely resolution of technical and field issues. SOCWA and MKN & Associates will retain responsibility for review and approval of all RFIs and submittals; La Salle's role will be to provide field-based review, technical observations, constructability input, and recommendations based on actual site conditions and the requirements of the Contract Documents. Randy Lovan and Enrique Castañeda will coordinate closely with SOCWA and MKN to identify issues early, confirm that RFIs and submittals address the actual construction condition, and help prevent unresolved technical matters from affecting the schedule or critical tie-in activities.

For change orders and potential changes in scope, La Salle will independently review the Contractor's request, supporting documentation, quantities, pricing, and potential schedule impacts and provide SOCWA with an informed professional recommendation regarding entitlement, cost, and time. SOCWA will retain final authority to approve or reject any change order, with MKN providing design-related review and recommendations as appropriate. La Salle will also document the field conditions and basis for potential changes, distinguish changed conditions from work already included in the Contract, and track approved changes through completion. This approach gives SOCWA an experienced Owner's Representative evaluating changes from the standpoint of field conditions, constructability, cost, and schedule while maintaining the appropriate approval roles among SOCWA, MKN, and the Contractor.



VII. Payment Request Reviews

Randy Lovan will review SS Mechanical's monthly progress payment requests against the approved Schedule of Values, Contractor's progress schedule, and actual work completed in the field. Enrique Castañeda will verify installed quantities and completed work during his daily inspections, providing the field documentation necessary for La Salle to confirm that quantities included in each payment request are supported by the actual progress of construction. La Salle will also review applicable stored materials, testing and inspection status, approved change-order work, and required supporting documentation before providing SOCWA with its recommendation.

Our objective is to ensure that SOCWA pays only for work properly completed, verified, and eligible for payment, while maintaining timely processing so that legitimate Contractor payments are not unnecessarily delayed. Any discrepancies between the Contractor's request and observed field progress will be identified and communicated to SS Mechanical for correction before La Salle recommends payment to SOCWA. This disciplined process provides SOCWA with an additional level of cost control and protects the CIP investment throughout construction.

VIII. Commissioning and Startup

La Salle will treat testing, commissioning, and startup as an integral part of construction, beginning coordination well before the physical work is complete. Randy Lovan will work with SOCWA Operations and Maintenance, MKN, SS Mechanical, and applicable testing personnel to establish the sequence and prerequisites for bringing the new hot-water and digester-gas systems into service. La Salle will track required inspections, pressure and leak testing, flushing, cleaning and passivation, equipment readiness, outstanding deficiencies, and required documentation to ensure that each prerequisite is satisfied before the Contractor proceeds to the next commissioning activity. Particular attention will be given to the interfaces with existing digester systems and the sequencing of tie-ins so that the transition from the existing systems to the new installations is controlled and coordinated with SOCWA Operations.

During startup, Randy and Enrique will provide field oversight and coordinate closely with SOCWA's Operations and Maintenance staff to document system performance, identify deficiencies, and facilitate timely correction by SS Mechanical. La Salle will maintain a commissioning checklist and track outstanding items through resolution, including required test results, inspection records, Contractor documentation, and final acceptance requirements. Randy's direct experience with anaerobic digesters, digester-gas systems, waste-gas flares, process piping, and wastewater treatment plant commissioning and startup provides SOCWA with experienced leadership during this critical transition. Our objective is to deliver a fully tested, operational, and properly documented system to SOCWA, not simply a completed installation.

IX. Project Close-Out

At substantial completion, La Salle's Inspector will develop and maintain a detailed punch list documenting outstanding work, deficiencies, and corrective actions, while Randy Lovan will oversee and coordinate final testing, startup, commissioning, and resolution of remaining construction issues. La Salle will coordinate the correction and verification of deficiencies and participate in the final walkthrough with MKN, SOCWA Operations and Maintenance personnel, and other SOCWA representatives as directed by the Project Manager. Our objective is to ensure that the new digester-gas and hot-water systems are not only physically complete, but have been properly tested, documented, and are ready for reliable operation before La Salle recommends final acceptance.

Randy will review SS Mechanical's project record drawings for accuracy and completeness and coordinate the assembly and review of required O&M manuals and other turnover documentation provided by MKN and SS Mechanical. La Salle will also prepare an electronic warranty-expiration worksheet identifying major equipment by process area, including product, manufacturer, serial number, warranty period, and expiration date. Following filing of the Notice of Completion, La Salle will furnish the original project documentation and final reports to SOCWA within 60 calendar days, using SharePoint or another format designated by SOCWA. This closeout process will provide SOCWA with a complete, organized, and usable project record to support long-term operation and maintenance of its CIP investment.



La Salle Commitment / Why This Team

This Task Order represents exactly the type of assignment for which SOCWA's on-call Construction Management program is intended: technically complex, operationally sensitive work within an active wastewater treatment facility where safety, reliability, and coordination are essential to successful delivery. La Salle Solutions brings a team selected specifically for the J.B. Latham project rather than a generic task-order staffing model. Randy Lovan will lead the effort, bringing direct construction management experience with anaerobic digesters, digester-gas systems, waste-gas flares, process piping, commissioning, and construction within operating treatment plants. Enrique Castañeda will provide primary field inspection and daily construction oversight, supported by Mohammad Adib, whose experience includes direct inspection of digester improvements at the Encina Wastewater Authority, and John Martin, whose wastewater reclamation, underground piping, and pump-station experience provides additional depth when project conditions require it.

Our commitment to SOCWA is to anticipate issues, communicate early, protect plant operations, and get the work right the first time. We will build on the working relationship established through SOCWA's on-call program, remain familiar with the J.B. Latham facility and its operating requirements, and integrate seamlessly with SOCWA, MKN, SS Mechanical, and Operations throughout construction.

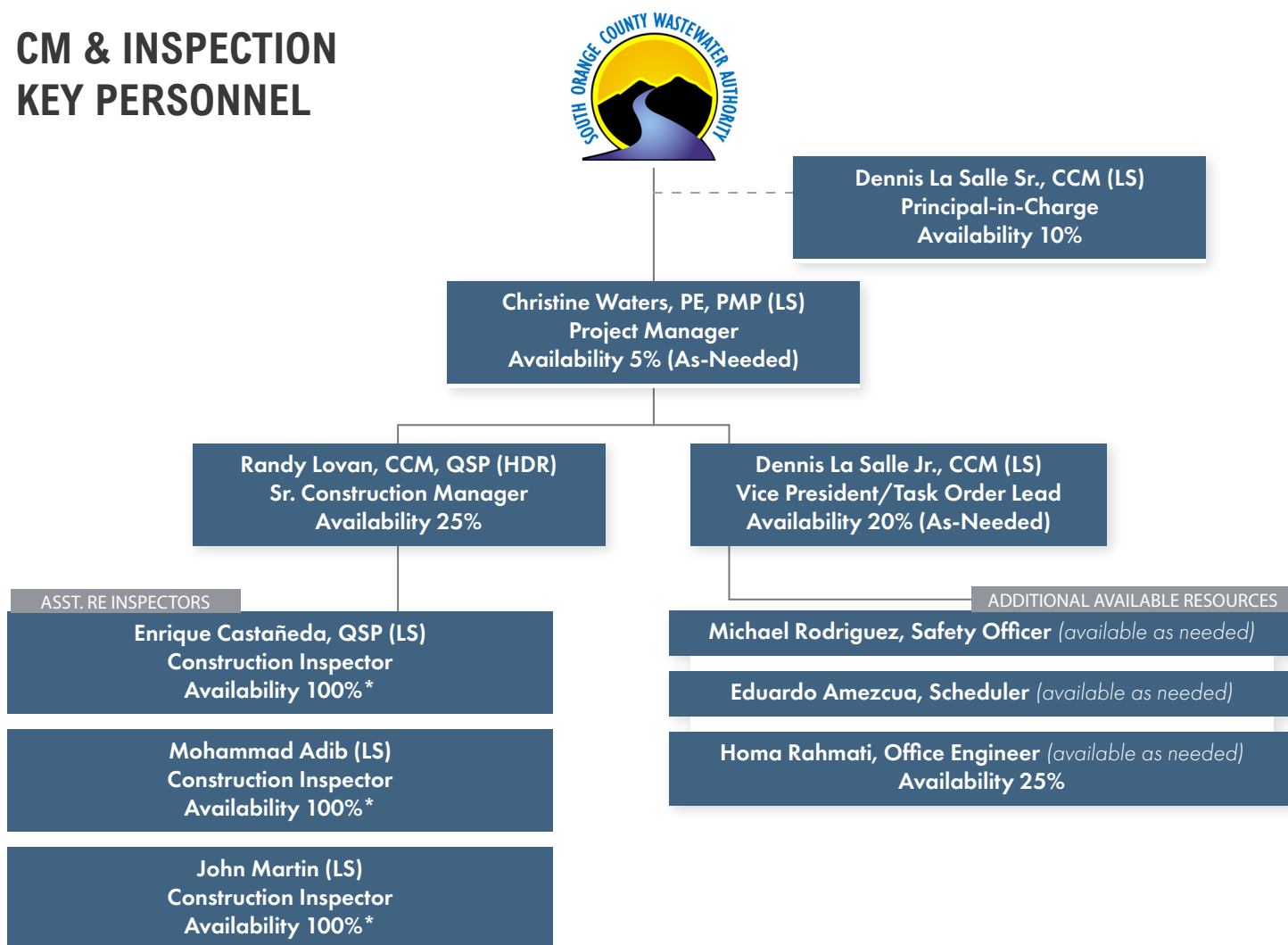
Most importantly, our team understands that the success of this project will not be measured solely by completing the piping installation—it will be measured by safely delivering reliable, tested, and fully commissioned infrastructure that supports SOCWA's long-term CIP objectives without compromising ongoing treatment operations.



PROJECT TEAM

La Salle Solutions and HDR have served as teaming partners on public agency construction management work for over ten years, delivering projects together for SANDAG, the City of San Diego, and Caltrans. That partnership carries directly into this task order: our La Salle staff bring direct delivery experience on the City of San Diego's North City Reclamation Plant, our combined bench includes staff who supported the San Jose Advanced Treatment Facilities program, and our assigned inspectors bring project-specific experience from Encina Wastewater Authority's digester improvements and High Desert Water District's wastewater reclamation upgrades. SOCWA is getting a team with a working history, not one built from scratch for this proposal.

CM & INSPECTION KEY PERSONNEL



*Only one inspector will be engaged at a time with the other two as available resources if needed.

KEY PERSONNELS RELEVANT EXPERIENCE

This task order calls for a team that has already done this kind of work, not one learning digester systems on SOCWA's schedule. Randy Lovan will lead the project as Senior Construction Manager, bringing 34 years of construction management experience that includes direct, hands-on work on anaerobic digesters, digester gas systems, and process piping inside active wastewater treatment plants. He is backed by Dennis La Salle Sr., who provides executive oversight and accountability across every La Salle assignment; Christine Waters, who brings over 30 years managing water and wastewater CM programs; and Dennis La Salle Jr., who oversees

task order delivery and contract administration. Field inspection is covered by Mohammad Adib, whose six years of experience include a digester improvements project for Encina Wastewater Authority directly comparable to this task order's scope; Enrique Castañeda, who brings 18 years of water/wastewater pipeline and utility inspection experience across San Diego-area public works agencies; and John Martin, who brings 30 years of public works inspection experience across water and wastewater infrastructure. Together, this team gives SOCWA the tenure, direct digester experience, and bench depth this project calls for.

Name, Role, Responsibilities	Years Exp.	Relevant Experience	Special Skills Related to SOCWA
Dennis La Salle Sr., CCM (LS) Principal-in-Charge <i>Provides executive oversight and accountability, ensuring quality, compliance, and alignment with SOCWA's goals; supports the PM with strategic guidance, resources, and issue resolution.</i>	30	Public works: roads, bridges, drainage, water/wastewater, military facilities	Executive oversight; staff management; QA/QC; compliance
Christine Waters, PE, PMP (LS) Project Manager <i>Leads overall on-call contract leadership.</i>	30	Water/wastewater CM programs; PM/CM	CM leadership; coordination; contract administration
Dennis La Salle Jr., CCM (LS) Vice President/Task Order Lead <i>Oversee office staff and task order delivery, managing scope, schedule, and budget while coordinating teams and ensuring quality and compliance.</i>	15	Mixed-use, water/wastewater, mixed-use high rise, military facilities	Task order management; contract admin; QA/QC; OSHA 30-Hour Safety Certified; EM-385 40-Hour Military Safety
Randy Lovan, CCM, QSP (HDR) Sr. Construction Manager <i>Leads day-to-day construction management for this task order, overseeing SS Mechanical's work against plans and specifications, coordinating schedule, safety, and shutdown planning with SOCWA Operations; serves as the primary point of contact for the project.</i>	34	Water/wastewater capital projects; LACSD On-Call CM	CM leadership; schedule/cost control; change management; stakeholder coordination
Enrique Castañeda, QSP (LS) Construction Inspector <i>Provides daily field inspection to verify SS Mechanical's work complies with contract documents and specifications, monitors safety and jobsite conditions, and prepares daily reports and photo documentation to support project records.</i>	18	Water/wastewater pipeline and utility relocation projects; storm drain systems; Caltrans structure inspection (SANDAG, City of San Diego, Caltrans)	Pipeline inspection and welding coordination; daily reporting and quantity sheets; change order preparation; Greenbook and Caltrans specifications compliance
Mohammad Adib (LS) Construction Inspector <i>Provides daily field inspection to verify SS Mechanical's work complies with contract documents and specifications, monitors safety and jobsite conditions, and prepares daily reports and photo documentation to support project records.</i>	6	Wastewater treatment plant digester improvements; Caltrans highway rehabilitation and widening; military facility projects (NAVFAC SW)	Digester system inspection; submittal, RFI, and shop drawing review; safety regulation monitoring (HSE); constructability and site issue coordination; daily reporting and photo documentation; change order process support
John Martin (LS) Construction Inspector <i>Supports field inspection and quality verification across the project, monitoring safety regulations and compliance with plans and specifications, and providing daily reporting and documentation as backup coverage to the assigned Construction Inspector.</i>	30	Water/wastewater pipeline and pump station projects; storm drain and utility installations; trenchless technology (jack and bore)	QA/QC field inspection; special inspection and testing coordination; underground utility and pipeline oversight; daily reporting and photo documentation; schedule monitoring



Total Exp: 30
La Salle: 13

Education & Training

BS Business Administration,
CETYS Universidad

MBA Coursework,
San Diego State University

Caltrans Project Management
Course, CSU Sacramento,
Turner School of Construction
Management

Licenses / Registrations

General A Engineering Contractor
License #1046887 CA-CSLB

Certified Construction Manager
#27113

DENNIS LA SALLE SR., CCM

PRINCIPAL-IN-CHARGE

Dennis La Salle has over 30 years of experience working in the construction industry for various type of public works projects such as: streets, roads, highways, drainage structures, bridges, water/wastewater, and military base facilities. During this time he has performed services as: Quality Control Manager, Project Manager, and Consultant Contract Manager, providing qualified and experienced staff for public works projects and managing the performance of La Salle staff.

City of San Diego, Streets Rehabilitation Projects, San Diego, CA

Consultant Contract Manager/Project Manager. La Salle Solutions provided qualified and experienced staff serving as CM/RE Construction Inspectors. Services included: asphalt pavement overlays, concrete pavement, ADA pedestrian ramps, concrete curbs and gutters, traffic striping, and pavement markers. Mr. La Salle's role on these projects included: contract administration, management of La Salle staff, providing staff with the tools and necessary equipment and coordinating continuing education training courses for staff.

County of San Diego, Countywide Road Rehabilitation Projects, San Diego, CA

Consultant Contract Manager/Project Manager. La Salle Solutions provided qualified and experienced staff serving as Assistant RE/Construction Inspectors for projects such as: Bear Valley Parkway Widening, Culvert Rehabilitation & Replacement, Countywide Road Asphalt and Concrete Pavement Rehabilitation. Mr. La Salle's role included: contract administration, management of La Salle staff, providing staff with tools and necessary equipment, and coordinating continuing education training courses for staff.

Caltrans District 11, Highway Rehabilitation Projects, San Diego & Imperial County, CA

Consultant Contract Manager/Project Manager. La Salle Solutions provided qualified and experienced staff serving as Assistant RE/Construction Inspectors for highway projects in the District 11 areas of San Diego and Imperial Counties, such as: I-8 / Dogwood Interchange Improvements, I-8 CRCP Concrete Pavement Replacements, I-805 Concrete Panel Replacements, I-8/1-15 HMA and Concrete Pavement Rehabilitation, SR-78 Drainage Structure Rehabilitation and R-HMA Pavement Rehabilitation, and Highway SR-163 Microsurfacing Rehabilitation. Mr. La Salle's role included: contract administration, management of La Salle staff, providing staff with tools and necessary equipment, and coordinating continuing education training courses for staff.

City of San Diego, Pure Water Conveyance Projects, San Diego, CA

Consultant Contract Manager/Project Manager. These projects include: the Morena South & Middle pipeline segments, and the Morena Northern Alignment & Tunnels. This last one includes 36,170 LF of 48-inch wastewater force main welded steel pipeline which carry wastewater to the North City facility for purification, and 36,170 LF of 30-inch welded steel pipe brine conveyance pipeline that will carry the byproduct from the water purification plant South to the Point Loma Wastewater Treatment plant. Responsibilities included: contract administration, management of La Salle staff, providing staff with necessary tools and equipment, coordinating continuing education training courses for staff.



Total Exp: 34
HDR: 2

Education & Training

Mechanical Engineering,
California State University,
Fullerton

Associate of Science, Water
Science, Santa Barbara City
College

Associate of Science,
Construction Management,
Ashworth University

Licenses/Registrations

Certified Construction Manager,
Ashworth University

Qualified SWPPP Practitioner
(QSP) CASQA #20944

DBIA Associate, Design-Build
Institute of America

Grade D4 Water Distribution
Operator, CA #08485

Grade T3 Water Treatment
Operator, CA #21195

Cross-Connection Control
Certified Specialist, University of
Southern California

Confined Space Training, NPDES
Training OSHA 30-hour, CPR with
AED, First-Aid

Reference

Bruce A Mitzel, PE
Director, Field Engineering
Eastern Municipal Water District
951.928.3777 Ext 4476
mitzelb@emwd.org

RANDY LOVAN, CCM, QSP

SENIOR CONSTRUCTION MANAGER

Randy's 34 plus years of experience includes construction management of critical wastewater treatment plant improvements performed within active operating facilities, requiring extensive coordination with operations staff, outage planning, commissioning, startup, and regulatory compliance. He has successfully managed projects involving anaerobic digesters, digester gas systems, gas flare replacement, solids handling facilities, process piping, pump stations, and rehabilitation of aging treatment plant infrastructure while maintaining uninterrupted plant operations.

Relevant experience includes serving as Construction Project Manager for the City of Palm Springs Wastewater Plant Digester No. 2, Waste Gas Flare and Filtrate Pump Station Improvement Project, which included demolition and replacement of a 1.3-MG anaerobic digester, replacement of digester gas flare systems, new gas holder facilities, digester mixing systems, and associated mechanical, electrical, and instrumentation improvements. Randy also provided oversight for improvements at the San Jacinto Valley Regional Water Reclamation Facility, including conversion of an existing digester to a centrate equalization tank and coordination of plant process modifications within an operating treatment facility. These projects provide direct experience applicable to the J.B. Latham Treatment Plant Digester Underground Piping Upgrades Project.

City of Palm Springs, Wastewater Plant Digester No. 2, Waste Gas Flare and Filtrate Pump Station Improvement Project, Palm Springs, CA

Project Manager. Randy led the proposal efforts, developed the MWH Project Team, and positioned MWH to capture the project. He is currently assisting the Client & Team with high level change management and mitigating items. Project includes demo of an existing 95' x 36' 1.3 MG Concrete Digester tank #2 and construction of a new Concrete Digester tank #2, new gas holder, replacement of digester gas flare, replacement of Filtrate Pump Station and Filtrate Pump Station force main. Digester Mixing System and Chopper Pumps, Flexible Membrane Gas Holder, Digester Fixed Cover, electrical, mechanical and instrumentation. Construction was concurrent with the plant being operational.

San Jacinto Valley Regional Water, Inspection, Contract Administration, and Documentation, San Jacinto, CA

Project Manager. Randy served as principal-in-charge on a project that provided construction management and inspection services to oversee rehabilitation of the Plant 1 aeration basins, decommissioning of Plant 1 primary and secondary clarifiers, construction of a new mixed liquor pump station, conversion of Digester No.2 to a centrate equalization tank, repurposing of an existing sludge transfer pump station to a new centrate return pump station with new flow metering stations, chemical facilities, and modifications to the existing SCADA control network. CM was part-time

Eastern Municipal Water District, San Jacinto Valley Regional Water Reclamation Facility Expansion - Title 22 Tertiary Treatment Upgrade and Plant 2 Facilities, Perris, CA

Project Manager. Randy served as construction manager for a project that expanded the existing plant from 11-mgd to 15.4-mgd with Title 22 upgrades, Plant 2 expansion and addition of Solids Handling Facilities. The upgrades and expansion modernized the existing plant to reduce energy consumption and increase production of recycled water for irrigation use. As the construction manager was responsible for leading a team of up to 10 personnel to provide field-level contract administration, including reviewing construction plans, procedures, schedules and contractor



RANDY LOVAN, CCM, QSP EXPERIENCE CONTINUED

cost proposals and claims, pre-paring correspondences to contractors and the District, preparing and reviewing estimates, approving change orders and materials, equipment and testing procedures, documenting change and claim issues, recommending extra work and claims settlements to District's management staff, estimating, negotiating and recommending monthly progress payments, drafting reports, maintaining meeting minutes, coordinating and resolving issues with agency operations personnel and project management staff and coordinating and ensuring all items are in place for commissioning, debugging and system startup. Through a direct and collaborative approach, Randy's firm successfully saved the client \$1.8M.

City of Ventura, WaterPure MBR/UV and Outfall Pump Station, Ventura, CA

Construction Project Manager. Randy negotiated a \$20M construction management fee for the Membrane Bioreactor/Ultraviolet Light Disinfection Upgrades (MBR/UV) and the Outfall Pump Station (OPS) Projects. These are two separate projects were under one CMS contract with different delivery methods. The MBR/UV project is a CMAR and the OPS is a design-bid-build delivery method. Randy led the proposal efforts by developing the capture plan, identifying the decision makers and influencers. The plan included strategic strategies meetings with Ventura to gain knowledge of project concerns, key elements, experience and desired qualifications. One of the strategies was to introduce Ventura staff to the MWH Team and obtain feedback and make adjustments prior to the release for the RFP.

City of Beaumont, Wastewater Treatment Plant (WWTP) Expansion/Renovation Project and Brine Pipeline Installation Projects, Beaumont, CA

Project Support/Area Manager. Randy provided pre-bid and pre-construction services for the \$110M MBR Wastewater Treatment Plant Expansion/Renovation Project and Brine Pipeline Installation Project. The WWTP Expansion/Renovation Project consisted of expanding and upgrading the City's WWTP from 4MGD to 6 MGD. The WWTP upgrades included installation of Membrane (MBR) system, Reverse osmosis (RO) system for salt mitigation, dewatering system, and sludge solar drying beds. The pretreatment for the RO system included two stage screening, grit removal, conventional aeration/biological treatment, and a membrane bioreactor process. The system will continue to utilize UV disinfection. The Brine Pipeline Installation Project included a 23-mile Brine Pipeline that was installed to covey brine from the WWTP location to the Inland Empire Brine Line (IEBL) at the Santa Ana River at E Street in San Bernardino. This brine will be treated at Orange County Sanitation District (OCSD).

Santa Margarita Water District (SMWD), Oso Creek Water Reclamation Plant (OCWRP), Design and Construction Services, Rancho Santa Margarita, CA

Construction Project Manager. Randy is serving as construction manager for the new treatment plant to replace the OCWRP. The design is partially completed by SMWD staff, and HDR will take over the design and complete it. The design will be done in several packages and issued for construction in a logical sequence. The design includes a new headworks and influent lift station, fine screening, MBR, chlorine contact basin, and effluent pump station. The work includes coordination with the City of Mission Viejo's architect for a co-located office building and community event space.



Total Exp: 18

La Salle: 8

Education

Engineering,
Scottsdale Community College
Engineer-in-Training Course,
University of San Diego

Registration

Qualified SWPPP Practitioner
(QSP) #27484

Reference

Lotous Lenguyen, PE
llenguyen@sandiego.gov

ENRIQUE CASTAÑEDA, QSP

CONSTRUCTION INSPECTOR

Enrique Castañeda has over 18 years of experience providing services for Public Works agencies such as: City of San Diego, SANDAG, and Caltrans. Projects include: water/wastewater, storm drain systems, roads and streets, highways, buildings and parking structures, and underground utilities. Knows Greenbook and Caltrans specifications.

City of San Diego DPW, Street & Road Maintenance Projects, San Diego, CA

CM/RE Construction Inspector. Asphalt overlay program included: grinding asphalt pavement, dig outs, tack coat, placement of new AC pavement course, slurry seal, traffic striping, ADA ramps and concrete work, traffic signals and street lights. Responsibilities included: monitoring traffic control and SWPPP, field inspections to ensure compliance of City of San Diego Plans & Specifications, attended construction meetings, recorded daily diaries, photo documented, prepared change orders, reviewed pay estimates, prepared quantity sheets, and uploaded to the City.

City of San Diego, 2nd Otay Water Pipeline Relocation, San Diego County, CA

CM/RE Construction Inspector. Relocation of water pipelines with oversight and inspections included: excavation of install shoring and ensuring appropriate benching of trenches, gravel placement, installation of water pipes, field welding of joints in pipes, hot tap into existing pipe, water pressure testing, placement of sand cushion, backfill, and manhole construction. Responsibilities included: coordinating welding inspections, coordinating with City Water and involved parties for water shutdowns, ensuring BMPs, inspections to ensure compliance with City Plans & Specifications, attending construction meetings, photo documenting, preparing daily diaries of construction activities and quantity sheets. Uploaded all documents to the City.

Caltrans D11, Highway SR-78 Storm Drain Replacements, San Diego County, CA

Assistant RE / Construction Inspector. Six-mile pavement rehabilitation and culvert replacement project included: storm drains and culverts, including replacement of storm drain pipes, earthwork, excavations, removal of drainage pipes, installation of new concrete storm drain pipes, backfill and compaction, aggregate base course, HMA asphalt replacement, rock slope protection, inlets, chainlink fences, concrete drainage ditch, landscaping, reinforced concrete drainage structures, slurry seal, and traffic striping. Responsibilities included monitoring traffic control, coordinating material sampling and on-site testing, inspection to verify compliance of Caltrans Plans & Specifications, photo documentation, daily diaries, and prepared quantity sheets.

SANDAG, Mid-Coast Trolley UTC Parking Structure, San Diego, CA

Civil and Structural Building Inspector. Construction of a four-level parking structure. Major elements included: installation of underground utilities, electrical utilities, falsework, and reinforcing steel, pouring and finishing reinforced concrete with curing, concrete pavement, ADA ramps, HMA paving for parking lot with concrete curbs and gutters, elevators, traffic striping, and signage. Responsibilities included: monitoring compliance of SWPPP, field inspections of civil and structural work to verify compliance with SANDAG Plans & Specifications and building codes. Prepared daily reports of construction activities, photo documented work performed, and attended weekly progress meetings.



Total Exp: 6

La Salle: 1

Education & Training

BS Construction Engineering
Technology, Cal-Poly Pomona

Confined Space Training

Reference

Ramy Beshara, P.E., QSD, QSP
Resident Engineer
Caltrans
213.792.9662

James W. Shih, PE
Construction Engineer
213.793.7522

MOHAMMAD F. ADIB

CONSTRUCTION INSPECTOR

Mohammad F. Adib, is a CM/RE Construction Inspector with over 6 years of experience providing services for Public Works and infrastructure projects in Southern California, for projects such as wastewater treatment plants, military facilities, and highway roadway and structures. He has provided services for agencies such as Encina Wastewater Authority, Caltrans, and NAVFAC SW.

Encina Wastewater Authority Digester Improvements project, San Diego County, CA
Mr. Adib, as Project Engineer, for the Encina Wastewater Authority treatment plant, which required improvements to maintain performance and reliability to continue to meet the wastewater treatment needs of Northern San Diego County. Major elements of the improvements included: upgrades to the process equipment and rehabilitation of the digester systems such as: structural and coating upgrades, installation of a new mixing system, new heat and exchangers and equipment, a digester transfer and drawdown pump, extension of piping from the existing alternative fuels receiving facility to digester, rehabilitation of the digester area drainage pit, installation of new waste gas flare, replacement of a motor control center, replacement of power and control conduit and wiring to the digester and gas management systems. Responsibilities included: monitoring safety regulations (HSE), reviewing submittals, RFIs, shop drawings, and as-built drawings; inspections of materials and equipment to ensure they meet specifications; inspections of jobsite, being performed to comply with Plans and Specifications and Code compliance requirements. Coordinated constructability and site issues. Prepared daily reports of construction activities and photo-documented work being performed. Supervised progress and participated in the management of the change order process.

Caltrans District 11 Highway I-8 pavement rehabilitation and widening, San Diego County, CA

Mr. Adib served as Assistant RE/Construction Inspector for the Caltrans Highway I-8 project, which consisted of the rehabilitation of the pavement on the westbound. Major elements of work included: construction of a new travel lane and shoulder, placement of 50 Tons. of R-HMA, installation of 30 linear feet of concrete barriers, grinding of existing asphalt pavement and placement of a 2-inch overlay, installation of 50 linear feet of reinforced concrete pipe (RCP), three concrete manhole inlets, 100 linear feet of Midwest Guardrail system, and traffic pavement striping. Responsibilities included: monitoring traffic control, monitoring safety regulations, coordinating material testing and surveying services, and field inspections of work being performed to verify compliance with Caltrans Plans and Specifications. Prepared daily diaries of construction activities, photo-documented work performed, prepared quantity sheets, and participated in regular progress meetings.

Caltrans D-8, Highway I-15 Pavement rehabilitation, San Bernardino, CA

Mr. Adib, as Assistant RE / Construction Inspector, for the Caltrans Highway I-15 project in San Bernardino, which consisted of the rehabilitation and widening of on-ramps. Major elements of work included: grinding existing pavement, placement of a 2' overlay with R-HMA, construction of a Type D HMA dike, installation of Metal Beam Guardrail, installation of 50 ft of reinforced concrete pipe (RCP) and 100 ft of concrete alternative pipe culvert, and associated erosion control measures. Responsibilities included: monitoring traffic control, monitoring safety regulations, coordinating material testing and surveying services, and field inspections of work being performed to verify compliance with Caltrans Plans and Specifications. Prepared daily diaries of construction activities, photographed work performed, and prepared quantity sheets.



Total Exp: 30

La Salle: 1

Education & Training

Coursework, Santiago
Community College (water and
wastewater distribution and
treatment plants)

10 Hours OSHA Safety Training

SWPPP Training

Confined Space Training

Reference

Terrie Krie
Construction Inspection
Supervisor
Arcadis
714.305.5223

Raul Cuellar
Engineer
OCSD
714.593.7828

JOHN MARTIN

CONSTRUCTION INSPECTOR

John Martin has over 30 years of experience providing services for Public Works Infrastructure projects in Southern California, for projects such as water and wastewater, storm drains, structures, highways, and streets for multiple agencies such as High Desert Water District, Orange County Sanitation District, and municipalities. Performing quality control and quality assurance activities, experience in trenchless technologies, coordination of quality control testing and special inspections, and monitoring schedules.

High Desert Water District, Wastewater Reclamation Plant, Yucca Valley, CA

Mr. Martin served as Assistant RE/Construction Inspector for the High Desert Water District Wastewater Reclamation project upgrades; Major elements of work included: replacement of wastewater pipes such as: ten miles of 8" SDR 35 sewer mains, and 500 ft of sewer laterals of 4" – 6", and 3,000 ft of 20" sewer force main; installation of all new sewer mains along with new sewer manholes, two jack and bore operations for the force main and main line sewer, shoring where needed, excavations for trenches and man holes, backfill and compaction. Responsibilities included: monitoring safety regulations and field inspections of work being performed to verify compliance with plans and specifications. Prepared daily reports on construction activities and documented work performed.

Orange County Sanitation District, Pump Station projects, Orange County, CA

Mr. Martin served as Assistant RE / Construction Inspector for the improvements on several pump stations, such as a) Rocky Point Pump Station, which constructed a replacement pumping station for the existing Pump station in Newport Beach; in addition, the discharge force mains from the facility were reconstructed by using trenchless technologies (jack & bore) and open trench. b) Westside Pump Station: project rehabilitation and increase the station's capacity to meet current and peak wet-weather flows; construction of separate access stairwell to the lower section of the pump station; replacement of the pumps and controls and modification of ventilation systems. Responsibilities included: monitoring safety regulations, field inspections of work being performed to verify compliance with plans and specifications, prepared daily reports of construction activities and photo document work performed.

Victorville Green Tree Extension, Victorville, CA

Mr. Martin served as Assistant RE / Construction Inspector for the improvements to the City's infrastructure. Project included: installation of 4,000 ft of 12" C900 water main, installation of 2,000 ft of 12" DIP water main, and installation of 2,000 ft of reinforced concrete pipe (RCP). Scope of work: installation of 6,000 ft of water main and 2,000 ft of storm drain, including excavation of trenches, shoring where needed, installation of pipes, testing of the pipes, backfill, and compaction. Responsibilities included: monitoring safety regulations, field inspections of work being performed to verify compliance with plans and specifications, prepared daily reports of construction activities and photographic documentation of work performed.

Total Exp: 30+
La Salle: 6

Education & Training
BS, Civil Engineering,
The Cooper Union University

Licenses / Registrations
Professional Engineer, Civil,
#058689 CA

Project Management
Professional (PMP) #1552782

CHRISTINE WATERS, PE, PMP

PROJECT MANAGER (AS-NEEDED)

Christine Waters has over 30 years of experience providing services for Public Works projects in the Southern California region leading large municipal and federal infrastructure projects to improve water quality, enhance reliability, and increase use of recycled water. Experience includes program management, planning, design and construction services for water treatment plants, pipelines, tunnels, pump stations, and reservoirs for a variety of water, recycled water, and wastewater projects. Served in company leadership roles to improve project management performance, enhance safety culture, and strengthen QC/QA focus.

City of San Diego, Pure Water Program, North City Projects, San Diego, CA

Deputy Program Manager. The North City projects will produce 30 MGD of purified water for reservoir augmentation, and required supporting City Project Managers on the North City Water reclamations plant expansion, North City Pure Water Facility, and MBC Improvements, totaling over \$680 Million. Responsibilities included: Providing strategic project delivery advice and assisting with project delivery system compliance, schedule monitoring, cost control, managing risks, preparing RFPs, reviewing deliverables, change management, permitting, bid period, and construction support. Also assisting with program reporting, grant and loan applications, public outreach, environmental documentation, review of Title 22 Engineering report and NPDES permit application, utility coordination, equipment pre-selections, energy economics, and easement acquisitions.

City of San Diego, Otay Water Treatment Plant, City of San Diego / Chula Vista, CA

Senior Project Manager. Replacement of chlorine gas system with an on-site sodium hypochlorite generation system to avoid safety concerns with storage and operation of the chlorine gas system. Lead the design generation units team for this design-build project that included temporary disinfection system demolition, two 1,000-lb/day on-site hypochlorite generation units, brine and hypochlorite storage tanks, chemical feed pumps and piping systems, chlorine dioxide generator system modifications, hydrochloric acid feed system, electrical services upgrades, and plant control system modifications. Responsibilities included: leading a multi-discipline design team, planning construction sequencing, coordinating design requirements with hypochlorite and chlorine dioxide generator system vendors, coordinating with construction contractors and City plant operations, and field inspection staff.

City of Escondido, Watershed Sanitary Survey Update, Escondido, CA

Senior Project Manager. Update of the watershed sanitary survey update for the Lake Henshaw, San Luis Rey River, Escondido Canal, Lake Wohlford, and Dixon Lake watersheds for the City of Escondido and Vista Irrigation District. Responsibilities included: leading the team to update the GIS land use and population mapping, the lakes' raw water quality, monitoring data, treated water quality, status of initial recommendations, and preparing new recommendations and reports.

City of San Diego, Lower Otay Treatment Plant Upgrades, Phases I & II, San Diego / Chula Vista, CA

Senior Project Manager. Addition of chlorine dioxide generator and contactor for primary disinfection, powdered activated carbon feed facility, granulated activated carbon filter cap, chemical feed system upgrades, reservoir circulators, and SCADA system upgrades to the existing 34.2 MGD plant. Responsibilities included: leading a multi-discipline design team and providing engineering services during construction. Design team conducted bench-scale testing and analysis for optimizations.



Total Exp: 15
La Salle: 5

Education & Training

BS Business Management, San Diego State University

Caltrans Project Management Course, CSU Sacramento, Turner School of Construction Management

Licenses / Registrations

Certified Construction Manager (CCM), #41119

CSLB General Contractor's License A #1046887

OSHA 30-Hour Safety Certified

EM-385 40-Hour Military Safety Certified

DENNIS LA SALLE JR., CCM

VICE PRESIDENT/TASK ORDER MANAGER (AS-NEEDED)

Dennis La Salle has over 15 years of experience working in the construction and real estate development industries, performing services as Development Manager and Project Manager for private and public works projects in San Diego County, such as: design-build mixed-use residential high rises, City parks, highways, roadways, streets, water/wastewater, and military base facilities.

City of San Diego, Pure Water Conveyance Projects, San Diego, CA

Consultant Project Contract Manager. La Salle Solutions provided contract administration and supervision of CM/REs for several water and wastewater projects of the City of San Diego's Pure Water Program, including pipelines and pump stations. Mr. La Salle II provided management of La Salle staff, providing staff with necessary tools and equipment, and coordinating continuing education training courses for staff.

Caltrans Districts 7, 8, 11, 59, Southern California

Consultant Project Construction Manager. La Salle Solutions provided contract administration and supervision of La Salle staff, providing services as Resident Engineers and Roadway Inspector for highway, roadways, bridges, and structures. Mr. La Salle II provided management of La Salle staff, providing staff with necessary tools and equipment, and coordinating continuing education training courses for staff.

Pinnacle International, 11th & Broadway Phases 1 & 2, San Diego, CA

Project Director. La Salle Solutions provided development and permitting, procurement, contract administration, and construction management for these design-build phases. The projects consisted of relocating a 12-unit historical building and construction of a mixed-use building containing two high-rise towers of 32 stories each and approximately 320 feet tall, comprised of 618 residential units, 49 affordable housing units, 11,361 SF of retail space and seven below-grade parking levels. La Salle managed, marketed, and operated rentals upon construction completion and procured approvals for occupancy.

Pinnacle International, 15th & Island Phases 1 & 2, San Diego, CA

Project Director. La Salle Solutions provided development and permitting, procurement, contract administration, and construction management for these design-build phases. The project consisted of two phased mixed-use residential developments located on 120,000 SF (superblock site), and construction of 1,106,007 SF above-grade for 956 residential units (72 affordable units), and 20,127 SF of retail space. La Salle managed, marketed, and operated rentals upon project completion.

City of San Diego, Faultline Park, San Diego, CA

Project Manager. La Salle Solutions provided development and permitting, procurement, contract administration, and construction management for this 60,000 SF City Public Park located in East Village of downtown San Diego. The park was built along the Rose Canyon Faultline. La Salle managed operation and maintenance of the park for eight years after completion.



Total Exp: 10
La Salle: 1

Certifications

OSHA 30-Hour Safety Training
Certificate

EM-385, 40-Hour Military Safety
Training Certificate

MICHAEL RODRIGUEZ

SITE SAFETY & HEALTH OFFICER

Michael Rodriguez has 10 years of experience providing services for Public Works projects in the Southern California region, specializing as Site Safety & Health Officer (SSHO) working on military bases for NAVFAC Southwest projects.

Military Bases: California & Arizona

Site Safety and Health Officer. Provided services on various projects for NAVFAC Southwest on various Military Bases, in particular monitoring safety operations of work performed, verifying that personnel on site are using appropriate Personal Protective Equipment (PPE). Responsibilities included: performed daily safety meeting prior to starting work, inspected equipment, regular jobsite walks monitoring that workers maintained safety regulations. Coordinated with NAVFAC SW Engineering Technicians and Safety Officers. Prepared daily reports of safety operations. Notable projects include: AirForce Base, Yuma, AZ; Naval Base Point Loma, CA; Camp Pendleton, CA; Naval Base Ventura County, Point Mugu, CA; Naval Air Station North Island, Coronado, CA; Naval Amphibious Base, Coronado, CA; and Naval Base San Diego, CA.

Construction Jobsites, San Diego, CA

Site Safety & Health Officer. Provided services as Safety Officer on various jobsites in San Diego, CA, monitoring the safety operations of heavy machinery, verifying that all workers on site used the appropriate Personal Protective Equipment (PPE), and performing work per safety regulations. Performed daily safety meetings in the morning, and regular jobsite walks during the day. Prepared daily safety reports.

USACE Military Projects

Site Safety & Health Officer. Provided services for several USACE projects, such as construction of the border wall, consisting of the fence replacement projects in San Diego and Imperial Counties in CA, and border wall projects in New Mexico. Verified that all personnel used the appropriate PPE, performed inspections of the equipment, performed daily safety meeting prior to starting work, and jobsite visits to verify correct operation of heavy equipment in surrounding areas. Prepared daily safety reports.

Construction Jobsites in San Diego County, CA

Site Safety & Health Officer. Provided services for several construction projects in San Diego, monitoring that there was a clean and safe work environment on the jobsite, verifying traffic safety, and that all personnel were using appropriate PPE.



Total Exp: 12

La Salle: 1

Education & Training

Construction Management
Courses, Cal Poly Pomona

AA, Fullerton College

EDUARDO AMEZCUA

SCHEDULER

Eduardo Amezcua has over 12 years of experience providing services as Senior CPM Scheduler, with extensive expertise in construction scheduling, project controls, and time impact delay analyses across diverse infrastructure, themed entertainment, hospitality, and healthcare projects. He is adept at using Primavera P6 to develop, monitor, and update complex construction schedules, and is skilled in collaborating with project teams to ensure timely delivery and compliance with project goals. Proven ability to analyze and mitigate project risks effectively.

City of San Diego, Pure Water Program Phase 1, San Diego, CA

Senior CPM Scheduler. Weekly/monthly updates of detailed CPM schedules for various projects, ensuring alignment of projects milestones and regulatory deadlines. Provided ongoing schedule updates, status reports, and critical path analyses for the program management team. Conducted delay analysis and proposed mitigation strategies to address schedule impacts, minimizing disruptions to project timelines. Collaborated with engineers, contractors, and client representatives to incorporate design revisions, field conditions, and resource constraints into the project schedules.

Disneyland, Themed Entertainment Projects, Anaheim, CA

Senior CPM Scheduler. Provided CPM Scheduling services for various themed entertainment projects across the Disneyland resort. Developed a comprehensive master schedule for multiple projects, ensuring seamless coordination and timely delivery. Delivered weekly schedule analysis and prepared delay claims for projects within Facilities Asset Management.

Hospitality Projects, Los Angeles, CA

Senior CPM Scheduler. Delivered expert CPM Scheduling services for the Sunset Time Hotel, San Manuel Casino Expansion (pre-construction phase). Created detailed pre-construction and construction schedules, ensuring alignment with project objectives and timelines. Worked closely with project stakeholders to anticipate challenges and provide proactive solutions.

Healthcare Projects, Anaheim, CA

Senior CPM Scheduler. Provided CPM Scheduling services for Anaheim Community Hospital, Lomas Linda University Medical Center. Managed complex schedules for hospital and healthcare facility construction, ensuring compliance with stringent healthcare standards and timelines. Conducted regular schedule updates and analyses to maintain transparency and stakeholder alignment.



Total Exp: 15

La Salle: 1

Education & Training

BS Civil Engineering, Isfahan
University of Technology

Licenses / Registrations

CA Engineer in Training

HOMA RAHMATI, CA EIT

OFFICE ENGINEER (AS-NEEDED)

Homa Rahmati has over 15 years of experience providing office engineering, quantity engineering, and construction management support for public infrastructure programs, including highway and freeway improvements, light rail transit systems, high-speed rail construction, and commercial building construction throughout Southern California. Her background includes submittal and RFI processing, contract document control, quantity verification, progress payment review, and coordination with project controls, scheduling, and construction management teams.

LA Metro, Interstate 5 North County Enhancement Program, Los Angeles County, CA Quantity Engineer/Office Engineer. The North County Enhancement Program included improvements to Interstate 5 in Los Angeles County. Homa's responsibilities included reviewing Contractor submittals and RFIs and preparing responses, reviewing inspector daily reports, and preparing and updating the weekly statement of working days in accordance with Caltrans standards. She filed project documents according to the Caltrans 63-category system in the Caltrans Construction Manual, prepared quantity sheets and daily reports using the Headlight program, and reviewed and approved time and materials tickets for extra work billing. She worked closely with the Project Controls and traffic management teams and coordinated with the project's Resident Engineer, Assistant Resident Engineer, and construction management group on quantities and calculation backup for field activities, while monitoring labor compliance.

LA Metro, Crenshaw/LAX Light Rail Transit Project, Los Angeles County, CA Office Engineer. This project consisted of construction of the Crenshaw/LAX Light Rail Transit line. Homa's responsibilities included verifying implementation of Metro's policies, procedures, and plans; reviewing and confirming coordination of design and quantity calculations for plan details; and representing the project team in meetings with consultant staff, Contractors, and outside agencies. She reviewed submittals, RFIs, and requests for clarification and maintained the associated document control files, reviewed the Contractor's schedule, and participated in project update meetings. She coordinated with Metro engineers and managers to provide comments on submittals, RFIs, and RFCs.

California High-Speed Rail Project, Construction Package 2-3, Fresno County, CA Project Engineer/Office Engineer. This project consisted of construction of Package CP 2-3 of the California High-Speed Rail Program, extending from Fresno to Bakersfield. Homa's responsibilities included coordinating the review of submittals and RFIs, managing and submitting reviewed contract documents and amended design submittals to document control, and preparing applications for new grade separation crossings and encroachment permits for bridge construction over rivers. She administered Contractor work to verify compliance with the contract documents, participated in construction progress meetings, and prepared draft meeting minutes. She monitored the project budget, scheduled and checked project plans and drawings, and analyzed contract changes to prepare the necessary contract amendments.

REFERENCES

Randy Lovan**Senior Construction Manager**

Bruce A Mitzel, PE
Director, Field Engineering
Eastern Municipal Water District
951.928.3777 Ext 4476
mitzelb@emwd.org

Mohammad Adib**Construction Inspector**

Ramy Beshara, P.E., QSD, QSP
Resident Engineer Caltrans
213.792.9662

James W. Shih, PE
Construction Engineer
213.793.7522

Enrique Castañeda**Construction Inspector**

Lotous Lenguyen, PE
llenguyen@sandiego.gov

John Martin**Construction Inspector**

Terrie Krie
Construction Inspection Supervisor Arcadis
714.305.5223

Raul Cuellar
Engineer OCSD
714.593.7828



HOURS BREAKDOWN

SOCWA's field schedule for the J.B. Latham Treatment Plant Underground Piping project runs from December 28, 2026, through May 27, 2027, a 105-working-day window that excludes weekends and SOCWA-observed holidays. The project team built its labor hour allocation directly from this schedule, sizing inspection and construction management coverage to the pace and risk profile of the work rather than applying a flat rate across the full calendar duration.

Construction Inspector Enrique Castañeda is budgeted for 840 hours, reflecting full-day, on-site coverage across all 105 working days at eight hours per day. This level of presence allows him to verify Contractor performance against the plans and specifications in real time, monitor safety continuously given the project's proximity to active heat exchanger and digester operations, and maintain the daily documentation SOCWA relies on for progress payment review.

Construction Manager Randy Lovan, CCM, QSP, DBIA Assoc., is budgeted at approximately 27 percent of the field duration, 225

hours, concentrated around schedule reviews, change order evaluation, coordination with SOCOTEC for specialty inspection, and the operational tie-in windows that carry the greatest risk to plant continuity, including the heat exchanger shutdown scheduled for May 1 through 27, 2027. This is oversight calibrated to where SOCWA needs it most: embedded during the field work's highest-risk sequences rather than spread evenly across lower-risk stretches of the schedule.

Routine administrative and document-control activities are supported by Homa Rahmati, Office Engineer on an 80-hour level-of-effort basis, keeping submittal tracking, correspondence, and reporting current without adding unnecessary staff to the field team.

Additional team members, including the Project Manager, Scheduler, and Safety Officer, are available on an as-needed basis at no cost to the base hours. These roles represent bench depth SOCWA can draw on if conditions change, not idle overhead built into the fee.

105 WORKING DAYS | 1,145 TOTAL HOURS | LEAN, RISK-ALIGNED CM + FIELD INSPECTION

105

Working Days

840

Inspector Hours

225

CM Hours

80

Office Engineer Hours

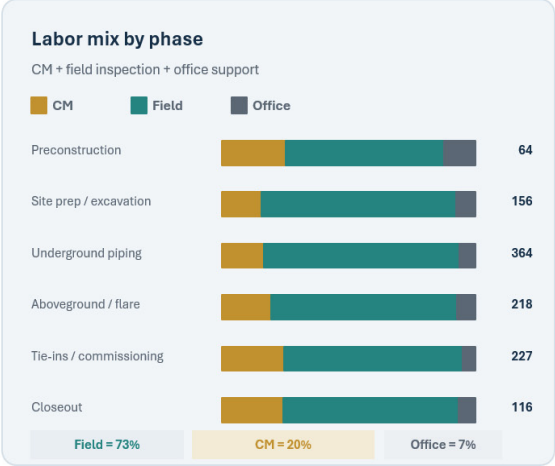
1,145

Total Base LOE

Construction Sequence & Staffing Allocation

PHASE	DAYS	CM	FIELD	OFFICE
01 Preconstruction & Meetings	5	16	40	8
02 Site Preparation / Utility Verification / Excavation	15	24	120	12
03 Underground Piping Installation	35	60	280	24
04 Aboveground Piping, Flare & Appurtenances	20	42	160	16
05 Tie-Ins, Testing & Commissioning	20	55	160	12
06 Punch List, Closeout & Acceptance	10	28	80	8
TOTAL	105	225	840	80

Phase Duration and Labor Mix



The following page breaks this 1,145-hour allocation down by construction phase, giving SOCWA a clear view of exactly where inspection, construction management, and office engineering support are concentrated across the 105-working-day schedule.

PROJECT PHASE BREAKDOWN

1 Phase 1 – Preconstruction & Meetings

5 Working Days / Initial Preconstruction Activities, with Meetings Continuing Throughout Construction

Activities include the preconstruction meeting with SOCWA, MKN, SS Mechanical, and applicable stakeholders; review of the Contract Documents, Contractor's approved schedule and Schedule of Values; establishment of communication and document-control procedures; coordination of site access and staging; review of Contractor safety requirements and work plans; and initial coordination with SOCWA Operations regarding the construction sequence and operational constraints.

Throughout construction, Randy will lead and participate in weekly progress meetings, coordinating with SOCWA, MKN, SS Mechanical, and subcontractors as appropriate. Meetings will address progress, upcoming work, three-week look-ahead schedules, safety, RFIs, approved submittals, potential changes, schedule issues, testing, tie-ins, and items requiring coordination with SOCWA Operations. La Salle will maintain action-item tracking and ensure unresolved issues remain visible through completion. SOCWA/MKN will retain responsibility for approval of RFIs and submittals, while La Salle will track and enforce the approved requirements in the field.

Randy Lovan – 16 Hours | Enrique Castañeda – 40 Hours | Homa Rahmati, Office Engineer – 8 Hours

2 Phase 2 – Site Preparation, Utility Verification & Excavation

15 Working Days

This phase now represents actual field construction. Activities include mobilization into the work area, site preparation, protection of existing facilities, utility locating and potholing, verification of existing conditions, excavation and trenching, shoring and trench-safety observations, removal or abandonment of existing piping as applicable, and preparation for underground piping installation.

Enrique will verify that SS Mechanical's work conforms to the approved plans, specifications, and approved submittals and will document actual field conditions. Randy will manage coordination with SOCWA and MKN when field conditions differ from the Contract Documents and will track RFIs, potential changes, schedule impacts, and operational conflicts.

Randy Lovan – 24 Hours | Enrique Castañeda – 120 Hours | Homa Rahmati, Office Engineer – 12 Hours

3 Phase 3 – Underground Piping Installation

35 Working Days

This will be the largest field-construction phase and includes installation of the underground digester-gas and hot-water piping, fittings, valves, connections, supports as applicable, welding, coatings/corrosion protection, testing, bedding, backfill, and compaction. Enrique will verify installation against the approved submittals and Contract Documents, with particular attention to materials, alignment, connections, weld-related requirements, testing, and conditions that will become concealed.

Randy will focus on construction coordination, schedule management, RFIs and potential changes, Contractor performance, coordination with SOCWA Operations and MKN, and resolution of field issues. Any RFI or submittal requiring design or contractual approval will be routed through SOCWA/MKN; La Salle will provide field observations and recommendations but will not independently approve the item.

Randy Lovan – 60 hours | Enrique Castañeda – 280 Hours | Homa Rahmati, Office Engineer – 24 Hours

4 Phase 4 – Aboveground Piping, Flare & Appurtenances

20 Working Days

Activities include aboveground digester-gas and hot-water piping, flare-system work, valves, equipment connections, supports, mechanical installation, welding, coatings, and interfaces with existing digester systems. Enrique will verify that the installation follows the approved plans, specifications, and approved Contractor submittals and will document quality, progress, deficiencies, and testing.

Randy will coordinate sequencing and interfaces among SS Mechanical, SOCWA, MKN, and Operations, with particular attention to activities that establish the conditions for the subsequent tie-ins and commissioning.

Randy Lovan – 42 Hours | Enrique Castañeda – 160 Hours – Homa Rahmati, Office Engineer – 16 Hours

5 Phase 5 – Tie-Ins, Testing & Commissioning

20 Working Days

This phase receives significant management attention because it represents the transition from construction to operational service. Activities include final connections to existing systems, planned shutdowns and outages, digester-gas and hot-water tie-ins, pressure and leak testing, flushing, cleaning/passivation as required, deficiency correction, startup preparation, and commissioning.

Randy will coordinate the work closely with SOCWA Operations, MKN, and SS Mechanical and will verify that prerequisites for critical activities have been satisfied. Enrique will provide field inspection and documentation throughout testing and startup. SOCWA and MKN will retain approval authority for RFIs, submittals, testing requirements, and design-related decisions, while La Salle will verify that the Contractor performs the work in accordance with those approved requirements.

Randy Lovan – 55 Hours | Enrique Castañeda – 160 Hours | Homa Rahmati, Office Engineer – 12 Hours

6 Phase 6 – Punch List, Closeout & Acceptance

10 Working Days

Activities include substantial-completion inspection, punch-list development and verification, correction of deficiencies, final testing documentation, record-drawing review, O&M documentation, warranty information, final quantity verification, final walkthrough, and support for SOCWA's acceptance process.

Randy will coordinate the closeout process with SOCWA, MKN, and SS Mechanical, while Enrique will verify completion of field deficiencies and maintain the final inspection record.

Randy Lovan – 28 Hours | Enrique Castañeda – 80 Hours | Homa Rahmati, Office Engineer – 8 Hours

Total Base Level of Effort: 1,145 Hours

Per Team Member: Randy Lovan - 225 Hours | Enrique Castañeda - 840 Hours | Office Engineer - 80 Hours

La Salle Solutions has intentionally developed a lean, field-focused staffing plan for the J.B. Latham Digester Underground Piping and Flare System Upgrades – Phase I. Enrique Castañeda will provide dedicated inspection coverage throughout the anticipated 105-working-day construction period, while Randy Lovan will provide 225 hours of senior Construction Manager oversight strategically allocated to the phases and activities where his experience provides the greatest value. Routine administrative and document-control activities will be supported by Homa Rahmati, Office Engineer on an 80-hour level-of-effort basis. This structure provides SOCWA with continuous field oversight, experienced construction management, and responsive support while avoiding unnecessary administrative overhead.

AVAILABILITY OF STAFF AND RESOURCES

TEAM'S CURRENT WORKLOAD

SOCWA's on-call program depends on staff who are actually available when a task order gets authorized, not committed on paper and unreachable in the field. The table below shows current workload and the percentage of time each team member will dedicate to this task order, confirming that Randy Lovan and the

assigned Construction Inspectors have the bandwidth to support this project from preconstruction through closeout. A scheduler and safety officer are also identified as back-up resources, available on request at no additional baseline hours if project conditions call for dedicated support beyond the core team.

Name, Role, Responsibilities	Availability
Dennis La Salle Sr., CCM (LS) Principal-in-Charge	10%
Christine Waters, PE, PMP (LS) Project Manager	5%
Dennis La Salle Jr., CCM (LS) Vice President/Task Order Lead	20%
Randy Lovan, CCM, QSP (HDR) Sr. Construction Manager	25%
Enrique Castañeda, QSP Construction Inspector	100%
Mohammad Adib Construction Inspector	100%
John Martin Construction Inspector	100%
Homa Rahmati Office Engineer	25%

LaSalle Solutions is on schedule to conclude on-call task orders including, with SOCWA to be available for this task order on December 28.

LIST OF DELIVERABLES

The deliverables below follow directly from the Scope of Work in Attachment A organized by task so SOCWA can track exactly what La Salle Solutions will provide, review, and when. Randy Lovan and our assigned Construction Inspectors will produce these deliverables as a routine part of the construction management services described in the Scope of Services section of this proposal.

Tasks	Deliverable	Frequency / Timing
I. Pre-Construction Meeting	Meeting support and input on project objectives, schedule, schedule of values, contractual roles, and contract administration guidelines for the Pre-Construction Meeting with MKN & Associates, SS Mechanical, and other stakeholders	Prior to start of construction
II. Progress Meetings	- Weekly progress meetings, chaired and scheduled by La Salle Solutions, covering site safety, progress, job problems, and design or contract clarifications - Action item list tracking the outcome of each progress meeting	Weekly / updated each meeting
III. Inspection	- Daily inspection reports documenting construction activities, personnel, equipment, safety concerns, deliveries, visitors, and delays - Digital photographic library documenting significant construction activities, differing site conditions, and change order or claim items - Review of SS Mechanical's look-ahead schedule and coordination of inspection staffing needs - Review of SS Mechanical's monthly payment requests for accuracy prior to processing - Review of SS Mechanical's record drawings prior to monthly progress payment - Written responses identifying missing items for SS Mechanical to complete - Coordination of RFI responses and submittal review with SOCWA's Resident Engineer	- Daily, submitted weekly - Daily; turned over at project completion - Ongoing - Monthly - Monthly - As needed - As needed
IV. Schedule Review	Review, analysis, and comment on SS Mechanical's initial construction schedule, with ongoing monitoring of schedule and progress	Initial review, then weekly
V. Safety Monitoring	Monitoring of SS Mechanical's Cal/OSHA safety program, including traffic control, confined space, trench safety, fall protection, hot work, and hazardous materials handling	Ongoing, as needed
VI. Payment Request Reviews	Verification of SS Mechanical's monthly progress payment requests and invoices against the approved schedule of values and in-place quantities	Monthly
VII. Change Order Reviews	Tracking, documentation, and cost/schedule evaluation of proposed or authorized changes, with support for SOCWA's negotiation of added costs or credits	As needed
VIII. Specialty Inspection Coordination	Coordination of specialty inspection and testing performed by SOCOTEC, including soils and welding, with SS Mechanical's field schedule	As needed
IX. Operations Coordination	- Coordination of all temporary shutdowns and disconnects with SOCWA Operations staff, including confirmation of required advance notice - Coordination of operator training with SOCWA Operations staff as new systems come online	As needed, throughout construction
X. Project Close Out	- Detailed project punch lists at substantial completion - Oversight and coordination of construction testing, startup, and final walk-through with MKN and SOCWA's Operations and Maintenance team - Review of SS Mechanical's project record drawings for accuracy and completeness - Coordination and verification of O&M manuals provided by MKN and SS Mechanical, compiled into binders or electronic drives - Warranty expiration worksheet covering major equipment by process area, including product name, manufacturer, serial number, warranty period, and expiration date - Turnover of all original project documents and final project reports to SOCWA	- At substantial completion - At substantial completion - At project close-out - At project close-out - At project close-out - Within 60 calendar days of Notice of Completion



La Salle Solutions, LLC | One Park Plaza Ste. 600 Irvine CA, 92614
| tel. 949-852-3636 | www.lasallecm.com





August 27, 2026

**COST BREAKDOWN FOR
SOUTH ORANGE COUNTY WASTEWATER AUTHORITY
RFTOP JB LATHAM TREATMENT PLANT DIGESTER UNDERGROUND
PIPING UPGRADES**



SUBMITTED TO:
South Orange County Wastewater Authority
34156 Del Obispo Street
Dana Point, CA 92629
949.324.5279
Attention: Roni Young Grant, Capital Improvement
Program Manager



SUBMITTED BY:
La Salle Solutions, LLC
One Park Plaza Ste. 600
Irvine CA, 92614
949.852.3636

COST BREAKDOWN OF TOTAL FEE

August 27, 2026

Ms. Roni Young
Capital Improvement Program Manager
South Orange County Wastewater Authority
34156 Del Obispo Street
Dana Point, CA 92629

RE: Task Order Proposal for Construction Management Services, J.B. Latham Treatment Plant Digester Underground Piping Upgrades Project (RFTOP dated July 27, 2026)

Dear Ms. Young and Members of the Selection Committee,

La Salle Solutions proposes a total base level of effort of **1,145 labor hours** for the J.B. Latham Treatment Plant Digester Underground Piping and Flare System Upgrades – Phase I, resulting in a **total labor fee of \$262,225 based on the approved SOCWA contract rates**. The proposed staffing is intentionally lean and field-focused, with **840 hours dedicated to full-time construction inspection, 225 hours of senior Construction Manager oversight, and 80 hours of Office Engineer support** for routine document control and administrative functions.

Randy Lovan will serve as the Senior Construction Manager and will provide 225 hours of level-of-effort Construction Management services concentrated on preconstruction coordination, progress meetings, Contractor management, schedule and field issue resolution, operational coordination, critical tie-ins, testing and commissioning, and closeout. Enrique Castañeda will provide dedicated full-time field inspection coverage throughout the anticipated 105-working-day construction period. Homa Rahmati will provide limited Office Engineer support for routine document control, tracking, meeting records, correspondence, SharePoint filing, payment documentation, and closeout records.

Dennis La Salle, Principal-in-Charge; Christine Waters, PE, Project Manager; Michael Rodriguez, Site Safety and Health Officer; and Eduardo Amezcua, Scheduler, will remain available as supplemental resources at the approved contract rates; however, no baseline billable hours are included for these personnel.

PROPOSED BASE FEE | \$262,225 | 1,145 HOURS | 105-WORKING-DAY LEVEL OF EFFORT

\$262,225

Total Base Labor Fee

1,145

Total Labor Hours

840

Lead Inspector Hours

225

Senior CM Hours

80

Office Engineer Hours

Labor Categories & Approved Rates

Classification / Staff	Hours	Rate	Extended Fee
Senior Construction Manager — Randy Lovan	225	\$265	\$59,625
Lead CM/RE Inspector — Enrique Castaneda	840	\$225	\$189,000
Office Engineer — Homa Rahmati	80	\$170	\$13,600
Principal-in-Charge — Dennis La Salle	0	\$275	\$0
Project Manager — Christine Waters, PE	0	\$265	\$0
SSHO — Michael Rodriguez	0	\$175	\$0
Scheduler — Eduardo Amezcua	0	\$220	\$0
TOTAL	1,145		\$262,225

Fee by Construction Phase

Phase	Hours	Fee
1. Preconstruction & Meetings	64	\$14,600
2. Site Prep / Utility Verification / Excavation	156	\$35,400
3. Underground Piping Installation	364	\$82,980
4. Aboveground Piping, Flare & Appurtenances	218	\$49,850
5. Tie-Ins, Testing & Commissioning	227	\$52,615
6. Punch List, Closeout & Acceptance	116	\$26,780
TOTAL	1,145	\$262,225

STAFFING APPROACH | Enrique provides dedicated 8-hour/day field inspection. Randy provides targeted senior CM oversight. Homa provides limited document-control support.

Supplemental resources remain available at approved contract rates with 0 baseline billable hours. Overtime, reimbursables, and additional authorized services are excluded from the base fee.



La Salle Solutions, LLC | One Park Plaza Ste. 600 Irvine CA, 92614
| tel. 949-852-3636 | www.lasallecm.com



Agenda Item

12

Engineering Committee Meeting

Meeting Date: September 17, 2026

TO: Engineering Committee

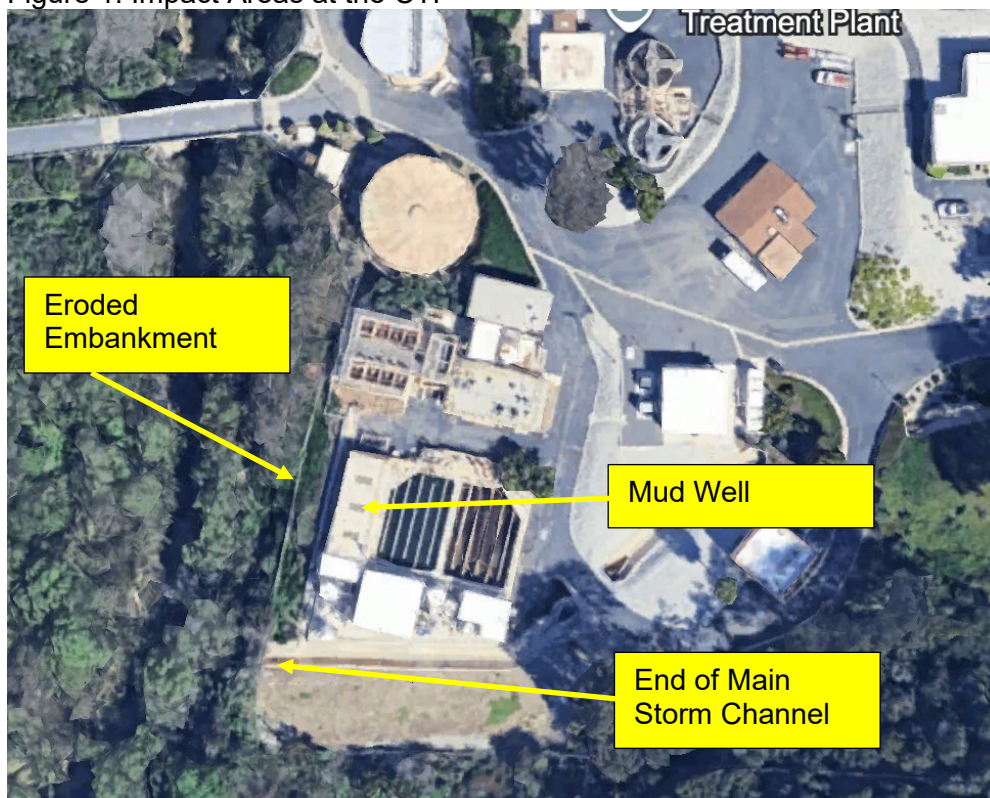
FROM: Roni Grant, Capital Improvement Program Manager

SUBJECT: Coastal Treatment Plant Storm Channel and Embankment Repairs
[Project Committee 15]

Overview

Two areas on or near the Aliso Creek embankment at the Coastal Treatment Plant (CTP) are in need of stabilization and repair. These areas are identified in Figure 1 below.

Figure 1: Impact Areas at the CTP



The Main Storm Channel is being modified as part of the Coastal Treatment Plant Storm Drain Improvement Project. During the construction work the end of the storm drain channel was found to be undermined due to the erosion of foundation materials below the concrete channel. This situation requires resolution before the onset of the wet weather season in the current calendar year. Tetra Tech has been retained to identify options for stabilizing the foundation and repair the concrete channel.

The area to the west side of the existing mudwell was subject to erosion due to an overflow event. The eroded area has largely been stabilized with the growth of vegetation including ice plant. However, the upstream most point of the erosion is showing slow loss of sand and silt material. It is proposed that evaluation be done in the current fiscal year with remedial work to be performed in the summer of 2027 (Fiscal Year 2027/28).

Background

Channel Repair and Stabilization

The main storm water channel through the CTP discharges to Aliso Creek to the south of the Aliso Creek Water Resource Enhancement Facility. The channel ends at the plant fence line which is marked by a sharp drop in the slope. The area has been protected by a heavy mat of vegetation. Protection of this embankment was evaluated in a 2017 study by Tetra Tech (see subsequent section on Embankment Erosion). The end of the channel was damaged by erosion as shown in Figure 2.

Figure 2: Original Main Storm Channel Condition



This section of the main storm water channel is part of the current Stormwater Drainage Improvements Project. The channel is being modified to include a stop log structure to divert nuisance water back into the treatment plant during non-wet weather periods. The stop log structure was to involve removal of a section of the existing channel approximately 6 to 8 feet from the end of the channel at the border fence. The design is as shown in Figure 3. In the process of removing the section of the channel to be modified the contractor (T.E. Roberts) noted that end section of the channel vibrated with motion and sounded hollow when crossed. Drilling in the surface of the concrete indicated that the channel section was underlaid by voids ranging in depth from 3 to 6 inches. It is speculated that fine soils materials were washed away by stormwater entering through cracks in the channel and exiting through the damages downstream section.

[illegible]

Embankment Erosion – West Side Mud Well

Observations of the eroded gully have indicated that the majority of the area is stabilized with vegetation. The uppermost portion of the gully is showing loss of sandy silt material. This does not pose an immediate threat to existing facilities; however, it does indicate the potential for a widening erosion issue.

[illegible]

SECTION F

NOT TO SCALE

Actions

Channel Repair and Stabilization

Tetra Tech has been retained at a fee of \$33,233 to develop three alternatives for channel stabilization and repair. These options include the following:

- Removal of the damaged channel section, regarding the existing slope, and placement of a sacrificial rip-rap pad that will require storm inspection and channel replacement of lost rip-rap.
- Removal of the damaged channel section, installation of pile-supported elements (using contractors available material), and construction of a cantilever section of new channel.
- Removal of the damaged channel section, construction of a headwall, and installation of 3-foot HDPE downpipe and outlet.

The draft memo summarizing the options has been completed by Tetra Tech. SOCWA staff will then review options with Tetra Tech and T. E. Roberts.

Embankment Erosion – West Side Mud Well

SOCWA proposes to obtain a proposal from Tetra Tech to update the gabion design prepared in 2017. The design would be modified to address only the impacted area. Bids would then be sought for construction in Fiscal Year 2027/28.

Cost Allocation

A summary of the cost allocation of the Tetra Tech evaluation by member agency is presented Table 1.

Table 1: Cost Allocation by Member Agency

Agency	PC 15 Ownership %	Cost Allocation (35271L)
Emerald Bay Service District	3.0	\$996.99
City of Laguna Beach	54.3	\$18,045.52
South Coast Water District	42.7	\$14,190.49
Total	100.00	\$33,233.00

Budget

The undermining of the channel was a component of the original Stormwater Improvements Project budget (35225AL). A separate budget item (35271L) has been created to reflect the needed work to be completed in the coming fiscal year.

Recommended Action: Committee Discussion/Direction/Action