



LAKE WHATCOM WATER AND SEWER DISTRICT
ON-CALL GENERAL ENGINEERING AND COMPREHENSIVE PLANNING SERVICES
REQUEST FOR QUALIFICATIONS

I. INTRODUCTION

A. The Lake Whatcom Water and Sewer District (District) is seeking qualifications from qualified consulting firms (Consultant) to provide general engineering professional services on an on-call basis and to prepare the District's Water System Comprehensive Plan and Sewer System Comprehensive Plan Updates. This Request for Qualifications (RFQ) outlines the information necessary to understand the consultant selection process and the required documentation a Consultant must submit. After reviewing this RFQ, any Consultant that determines it has the necessary expertise and experience and could successfully perform the required services may submit its Statement of Qualifications (SOQ), addressing the items set forth herein. A general overview of the selection process is as follows:

1. Consultants shall deliver the SOQ to the District no later than 2:00 p.m. on June 9, 2026, after which time they will be reviewed and evaluated. The SOQ shall be delivered to:

Attn: Greg Nicoll, P.E., District Engineer
Lake Whatcom Water and Sewer District
1220 Lakeway Drive
Bellingham, WA 98229

2. The District may, at its option, contact a Consultant and ask clarifying questions concerning the Consultant's SOQ.
3. At the District's option, the District may conduct interviews with Consultants qualifying as finalists.

B. The purpose of this RFQ is to obtain a qualified consultant to provide professional services for General Engineering Services and prepare the District's comprehensive planning documents.

1. General Engineering Services: The scope of work for General Engineering Services includes providing routine professional engineering and surveying services, expertise, and support for operations, maintenance, developer improvements, and customer service. General Engineering Services do not typically include major District capital projects such as sewer pump station improvements, water booster stations improvements, reservoir designs, etc. The District typically makes a separate request for qualifications for each major capital improvement project.
2. Comprehensive Planning Services: The scope of work for Comprehensive Planning Services includes preparing the 2028 Water System Comprehensive Plan Update (work to begin in 2027), the 2030 Sewer System Comprehensive Plan Update (work to begin in 2029) and other planning documents as requested by the District. The District may, at its sole discretion, elect not to contract with the selected on-call engineering Consultant for any of these planning services and solicit and contract for these services separately from this



contract. If the District elects to contract with the selected on-call engineering Consultant for planning services, services will be contracted by a work order under this contract.

- C. The District intends to select the most qualified consultant engineering firm for these services.
- D. The duration of Consultant Services for General Engineering Services is targeted to begin around August 1, 2026 and is for a period of up to five (5) years, at the end of which the District will request and evaluate new qualifications from interested Consultants.

II. DISTRICT SUMMARY

- A. The Lake Whatcom Water and Sewer District is a special purpose district operating under Title 57 Revised Code of Washington. Originally formed in 1968 as Whatcom County Water District No. 10, the District provides water service to approximately 4,100 equivalent residential units (ERUs) and sewer service to approximately 4,400 ERUs in an 18-square mile area encompassing Lake Whatcom. The District is operated by 18 full-time professionals, governed by a five-member board of commissioners elected from within the District, and has an annual budget of approximately \$12 million.
 - 1. Water System Summary. The District owns and operates three Group A water systems and one Group B water system. In total, the District operates two water treatment plants, six booster stations, eight reservoirs, and approximately 70 miles of transmission and distribution mains. Additional information specific to the District's water system may be found in the 2018 Water System Comprehensive Plan, available on the District's website at <https://lwwsd.org/resources/water-system-comprehensive-plan/>.
 - 2. Sewer System Summary. The District owns and operates 26 sewer lift stations and over 75 miles of sewage collection and conveyance lines. The District does not treat the sewage it collects, instead delivering its wastewater to the City of Bellingham's treatment plant for treatment and disposal under terms of an interlocal agreement that expires in 2034. Additional information specific to the District's sewer system may be found in the 2020 Comprehensive Sewer Plan, available on the District's website at <https://lwwsd.org/resources/comprehensive-sewer-plan/>.

III. PROCUREMENT PROCESS

A. General Information

- 1. Compliance with Legal Requirements.
 - a. The procurement of these professional services will be in accordance with applicable District, federal, state and local laws, regulations and procedures. The District reserves the right to reject any and all SOQs received. Any Consultant failing to submit information in accordance with the procedures set forth herein may not be considered responsive and may therefore be subject to disqualification by the District.
 - b. In accordance with the provisions of this RFQ, the District will evaluate all SOQs received found to be in compliance with this RFQ. The final selection, if any, will be that



Consultant which, in the opinion of the District, best meets the requirements set forth in the RFQ and is determined to be the most highly qualified for the services requested.

2. Costs borne by Proposers. All costs incurred in the preparation of an SOQ and participation in this RFQ and negotiation process shall be borne by the proposing Consultants.
3. Public Disclosure. Once in the District's possession, SOQs shall become property of the District and considered public documents under applicable Washington State laws. All documentation that is provided to the District may be subject to disclosure in accordance with Washington State public disclosure laws.

B. Protests

1. Time to File a Protest.
 - a. Any prospective Consultant may file a protest challenging the requirements identified in the RFQ provided such protest is received no later than ten (10) calendar days prior to the date established for responding to this solicitation.
 - b. A financially interested Consultant may file a protest based on evaluation of SOQs provided such protest is received no later than five (5) calendar days after the protesting party knows or should have known of the facts and circumstances upon which the protest is based.
 - c. In no event shall a protest be considered if all SOQs are rejected or after execution of this contract.
2. Form of Protest. A protest shall be in writing and addressed to: Attention: General Manager, Lake Whatcom Water & Sewer District, 1220 Lakeway Drive, Bellingham, WA 98229. The protest shall include the following:
 - a. The name, address and telephone number of the party protesting or their representative;
 - b. The RFQ number and contract title under which the protest is submitted;
 - c. A detailed description of the specific grounds for protest and any supporting documentation; and
 - d. The specific ruling or relief requested.
3. Determination of Protest. Upon receipt of a timely written protest, the District General Manager shall investigate the protest and shall, prior to execution of the contract, respond in writing to the protest. The District General Manager's decision shall be considered the final action by the District.
4. Compliance with Protest Process. Failure to comply with these protest procedures will render a protest untimely and inadequate and may result in rejection thereof by the District.



5. Exhaustion of Administrative Remedies. As a mandatory condition precedent to initiating a lawsuit against the District, a prospective Consultant shall comply with the Protest Procedures defined herein.
6. Venue. By responding to this RFQ and for the convenience of the parties, the prospective Consultant acknowledges and agrees that a lawsuit or action related to or arising out of this procurement shall be brought in the Superior Court of Whatcom County, Washington.

C. Schedule

1. Anticipated Schedule. The selection process is anticipated to proceed as outlined below and is subject to change:

<u>Date</u>	<u>Selection Process</u>
May 13, 2026	Public Announcement of the RFQ
June 9, 2026	Submittals Due (4:00 p.m.)
June 16, 2026	Notification of short-list for interviews
July 8, 2026	Recommendation to Board
July 2026	Contract Execution

2. Notification. The District will notify appropriate Consultants of changes in the RFQ and Notice of Selection. *Consultants interested in submitting an SOQ in response to this RFQ are strongly encouraged to notify the District of their interest to ensure that they are provided with all addenda or other communications related to this solicitation.* E-mail or call such notice to Greg Nicoll, 360-734-9224, greg.nicoll@lwwsd.org.
3. Addenda. In the event it becomes necessary to revise any part of the RFQ, addenda will be provided to all Consultants still under consideration at the time the addendum is issued. If any Consultant has reason to doubt whether the District is aware of the Consultant's interest, it is the responsibility of the Consultant to notify the District to be sure that addenda are received.

D. Negotiations

1. At the completion of the selection process, the selected Consultant will enter into contract negotiations with the District. Negotiation of a contract will be in conformance with applicable federal, state and local laws, regulations and procedures. The negotiated cost and pricing data, once agreed to by the District and the Consultant, shall form the basis for a billing/payment provision.
2. If the District and selected Consultant cannot come to terms on cost after three (3) revisions, the District may discontinue negotiations and go to the next highest ranked Consultant. Failure to reach an agreement after three (3) revisions demonstrates an inability to reach agreement within a reasonable timeframe.

E. Contract Terms and Conditions

1. A copy of the draft agreement for professional services is included as Attachment A.



2. By submitting a proposal, the Consultant represents that it has carefully read the terms and conditions of the agreement and agrees to be bound by them.

F. Cost and Pricing Data

1. The selected Consultant shall provide the following information within five (5) business days after Notice of Selection has been received. Failure to provide such information in a timely manner may result in the District discontinuing negotiations with the selected Consultant and starting negotiations with the next highest ranked Consultant.
 - a. Billing Rates. Selected Consultant and its subconsultants shall submit the following information:
 - (1) List of employees, in alphabetical order (last name first), with job classification and billing rate.
 - b. Other Direct Cost(s).
 - (1) Identify all Other Direct Cost(s) (ODC) for this project and the rationale used as a basis for this cost.
 - (2) For each ODC, provide the unit prices and/or rates with supporting rationale, historical data and estimating methodology used to validate these rates.
 - (3) Failure to identify ODC results in a presumption that there are no ODC.
 - c. Profit. Selected Consultant and its subconsultants shall provide the following:
 - (1) Proposed profit; and
 - (2) Rationale and justification for the proposed profit rate.
 - d. Markup on Subconsultant Costs and ODC. Selected Consultant and its subconsultants shall provide the following:
 - (1) Proposed markup on subconsultant costs and ODC; and
 - (2) Rationale and justification for the proposed markups.

IV. INSURANCE REQUIREMENTS

- A. Prior to execution of the Agreement, the Selected Consultant shall file with the District certificates of insurance and endorsements from the insurer(s) certifying to the coverage of all insurance required in accordance with the District's standard agreement. All evidences of insurance must be certified by a properly authorized officer, agent, general agent or qualified representative of the insurer(s) and shall certify the name of the insured, the type and amount of insurance, the location and operations to which the insurance applies, the expiration date, and provides that the District receives notice at least thirty (30) calendar days prior to the effective date of any policy limit or cancellation of required coverages. The Consultant shall notify the District at least thirty (30) calendar days prior to the effective date of any cancellation or reduction in coverage in the policy. The Consultant shall maintain during the entire Contract period, insurance coverage at least as broad as the limits and coverage outlined in the District's



standard agreement. The Consultant shall, upon demand of the District, make available to the District at Consultant's local office in all such policies of insurance and the receipts of payment of premiums thereon. Failure to provide such policies of insurance within a time acceptable to the District shall entitle the District to suspend or terminate the Consultant's work hereunder. Suspension or termination of the Consultant Agreement shall not relieve the Consultant from its insurance obligation hereunder.

- B. The Consultant shall obtain and maintain at a minimum the limits of insurance set forth in the Consultant Agreement. By requiring such minimum insurance, the District shall not be deemed or construed to have assessed the risks that may be applicable to the Consultant under the Agreement. The Consultant shall assess its own risks and, if it deems appropriate and/or prudent, maintain greater limits and/or broader coverage.
- C. Each insurance policy shall be written on an "occurrence" form; excepting that insurance for professional liability, errors and omissions when required, is acceptable on a "claims made" form.
- D. If coverage is approved and purchased on a "claims made" basis, the Consultant shall continue coverage either through (1) policy renewals for not less than three years from the date of completion of the work which is the subject of this Agreement or (2) the purchase of an extended discovery period for not less than three years from the date of completion of the work which is the subject of this Agreement, if such extended coverage is available.
- E. If, in order to meet the insurance requirements the Consultant must rely on the insurance to be provided by one or more subconsultant, then such subconsultant(s) shall be required to meet all of the requirements herein applicable to the insurance they are providing, and shall include District and Consultant as additional insureds on all liability policies except Professional Liability/Errors & Omissions and Workers Compensation. The District will not make any payments on work performed by subconsultants until all insurance documentation from such subconsultants have been received and accepted by the District.
- F. Provided the affected insurance policies permit the following waiver, without voiding coverage, Consultant and District waive all rights against each other to subrogation for damages covered by property insurance.

V. EVALUATION AND SELECTION CRITERIA

- A. All Submittals will be evaluated by a Consultant Selection Panel ("Panel"), which will be responsible for ranking of the Submittals. The criteria outlined below will be used in evaluating the Submittals and determining the most qualified Consultant. A total of 100 points (excluding a potential interview) has been assigned to the Evaluation Criteria. The maximum points possible will follow each criterion listed. The points indicate relative weight or importance given to each criterion.



1. Experience and Technical Competence - 40 Points
 - a. The District will evaluate the experience and technical competence of the Consultant's Key Personnel in providing on-call engineering services.
 - b. Emphasis will be placed on recent experience and expertise in performing the required services on projects with a scope of work similar in size and complexity to this Project.
2. Record of Past Performance & References - 40 Points
 - a. The District will evaluate the project team's record of performance and references on previous projects with consideration given to quality of work, ability to meet schedules and budgets, cooperation, responsiveness, and other managerial considerations.
 - b. The District will evaluate the project examples provided with respect to Key Personnel's experience with similar projects and the amount of involvement they had with the project examples. The project examples provided should demonstrate Key Personnel's experience in providing services similar in scope to this Project.
3. Familiarity with District Infrastructure and Operations – 20 Points.
 - a. The District will evaluate the project team's familiarity and understanding of the District's water distribution and sewer collection systems and the engineering services necessary to support the District's planning and operations needs
4. Interviews - 50 Points (if conducted)
 - a. The District may determine that the ranking is close and interviews with the top-ranked Consultants is necessary. The number of Consultants to participate in interviews, if any, will be determined by the District based on the recommendation of the Panel. The District may choose to use different criteria for the interview, in which case the finalists will be so notified in writing. The interview process may or may not include a Consultant presentation and the Consultants will not be given questions to prepare for in advance of the interview.
 - b. Proposers will be notified in writing of the request and provided the date, place, and time of the interview. The interview process may or may not include a Consultant presentation and the Consultants will not be given questions to prepare for in advance of the interview. The District may choose to use different criteria for the interview, in which case the finalists will be so notified in writing.
 - c. Failure to participate in the interview process shall result in a Consultant's disqualification from further consideration.

VI. DOCUMENTATION

- A. The Consultant shall submit one electronic copy (PDF file) on USB or direct file transfer via e-



mail of the Submittal. Respondents are hereby notified that e-mails exceeding 20 MB can not be received by District e-mails. Larger files shall be transmitted via a file transfer protocol (ftp) available to the District without need for accounts or specialized software requirements, links for which shall be provided via e-mail to the designated District recipient.

- B. Proposers are discouraged from submitting lengthy Submittals. The District requests that Submittals be concise and clearly written containing only essential information. Submittals shall be 25 pages or less, including any resumes and cover letter.
- Submittals shall be minimum of 11-point font.
 - Sketches, maps and charts printed on 11-inch x 17-inch paper count as one page.

The Submittal shall consist of the following parts:

1. Letter of Interest. The Letter of Interest shall contain the following information:
 - RFQ Title: On-Call General Engineering and Comprehensive Planning Services;
 - Consultant's name, mailing address, contact person, telephone and fax numbers;
 - Washington State Unified Business Identifier (UBI) and federal tax ID numbers; and
 - Stipulation that Consultant accepts all terms of the RFQ and the terms and conditions of the attached sample professional services agreement (Attachment A).
2. Statement of Qualifications. The submittal shall include the Consultant's:
 - General statement of the understanding of the scope of services.
 - Experience in providing general engineering services to public agencies.
 - Experience preparing and updating comprehensive water and sewer planning documents.
 - Experience with water and wastewater facility operations and maintenance.
 - Experience with the District's water and sewer infrastructure.
 - Permitting experience with Whatcom County and the State of Washington.
 - Approach to managing and completing projects.
 - Approach to providing cost efficient engineering support and planning services and quality control.

The submittal shall be presented in a clear, comprehensive and concise manner and shall be submitted in a complete package by the prime Consultant.

ATTACHMENT A

PROFESSIONAL SERVICES AGREEMENT FOR ON-CALL GENERAL ENGINEERING SERVICES

THIS AGREEMENT, made and entered into by and between Lake Whatcom Water and Sewer District, Whatcom County, Washington, hereinafter referred to as "District", and **[[[FIRM NAME]]]** ("Consultant"), a corporation with a place of business at **[[[FIRM ADDRESS]]]**, collectively referred to as "Parties", shall be effective upon the authorized signatures of both Parties to this Agreement ("Effective Date").

WHEREAS, the District, a special purpose municipal corporation, provides water and sewer service to its constituents; and

WHEREAS, the District desires to retain the Consultant to perform certain professional services, including engineering services necessary to provide **On-Call General Engineering and Comprehensive Planning Services** ("Project"); and

WHEREAS, the District solicited for professional services as required by RCW 39.80; and

WHEREAS, the Consultant represents it has available and offers to provide qualified personnel and facilities necessary to accomplish such services required for the Project within the required time.

The Parties enter into this Agreement. The term Agreement and Contract shall be used interchangeably and refer to this Agreement.

SECTION 1: PERIOD OF PERFORMANCE

- 1.1. All required work and services specified in the terms and conditions of this Agreement for **General On-Call Engineering and Comprehensive Planning Services per Exhibit A – SCOPE OF WORK**, shall be completed by **July 31, 2031** unless extended or terminated earlier by the District pursuant to the terms and conditions of this Agreement. The District reserves the right to amend this Agreement to modify the Scope of Work. The District also reserves the right to let the Agreement expire and to select another consultant to perform the additional study and/or phases.
- 1.2. Period of Performance Time. The Period of Performance for the Agreement may only be modified through an amendment signed by the Board of Commissioners. All subsequent Task Orders issued under this Agreement expire when the Agreement expires or is terminated.
- 1.3. Task Order Time. Time is a material consideration in the performance by the Consultant under this Agreement. The Consultant shall complete its work and services within the mutually negotiated schedule for each Task Order assigned. The completion dates for Task Orders may be modified by a written directive from the District's Project Manager; however, no Task Order completion dates shall be extended because of any

unwarranted delays attributable to the Consultant. Task Order completion dates may be extended in the event of a delay caused by the District which results in a delay in the performance of an affected Task Order, or because of unavoidable delay caused by any governmental action or other conditions beyond the control of the Consultant, which could not be reasonably anticipated and which results in a delay in the performance of an affected Task Order.

- 1.4. Task Order Time Extensions. Task Order schedules and budgets shall not be increased because of any unwarranted delays or costs attributable to the Consultant. In the event of a delay not attributable to the Consultant which (1) delay could not be reasonably anticipated and (2) results in an increase in costs to perform the work, the District may increase a Task Order schedule and/or budget pursuant to the terms and conditions of this Agreement.

SECTION 2: ADMINISTRATION AND SUPERVISION

- 2.1. **DISTRICT.** An employee of the District, hereinafter called the "Project Manager," who shall be designated in writing by the District, shall perform day-to-day management of this Agreement. Unless otherwise indicated in writing by the General Manager or its designee, the Project Manager will issue notices to proceed, approve all requests for payment, authorize termination or modification of Task Orders, and approve in writing changes to Task Order schedules and budgets. The Project Manager will also be responsible for determining when the Consultant has satisfactorily performed all work and for ensuring that the Consultant complies with all provisions of this Agreement.
- 2.2. **CONSULTANT.** The Consultant represents that it has, or will obtain, all personnel necessary to perform the services required under this Agreement and that such personnel shall be qualified, experienced and licensed as may be necessary or required by laws and regulations to perform such services. All services required under this Agreement shall be performed by the Consultant, its employees, or by subconsultants whose selection has been authorized by the District; provided, that the District's authorization shall not relieve the Consultant or its subconsultants from any duties or obligations under this Agreement or at law to perform in a satisfactory and competent manner. All contractual duties, requirements and obligations that the Consultant owes to the District shall also be owed to the District by the Consultant's subconsultants retained to perform the work pursuant to this Agreement. The term "Consultant" shall refer to **[[[FIRM NAME]]]** and all of its subconsultants.
 - A. Authorized Subconsultants. The Contract shall identify in the Billing Rates, Exhibit B, the subconsultants who are authorized to perform work under this Contract.
 - B. Process for Adding or Removing Subconsultants. If during the term of this Contract, the Consultant wishes to add or remove a subconsultant, the Consultant shall provide the Project Manager with a written request identifying the proposed change. The written request shall include the following information:
 1. Identity of the subconsultant and the work to be performed;
 2. Resumes and documentation outlining the subconsultant's experience;
 3. If the subconsultant is to perform work of the consultant or another subconsultant already identified in Exhibit B, an explanation of why the work is going to be transferred to a new subconsultant.

- C. District Approval of Subconsultants. The District has sole discretion in approving or rejecting proposed subconsultants. Each subcontract shall be available for review and the cost summary subject to review by the Project Manager prior to the subconsultant proceeding with the work. Before any subconsultant not already identified in the Contract can perform any work under this Contract, the District shall provide written authorization to the Consultant.
- D. Substitution of Personnel. The Consultant recognizes and agrees that if a change is made substituting or changing assigned key personnel, the Consultant shall be responsible for any and all costs associated with "Transfer of Knowledge and Information". The Transfer of Knowledge and Information shall be defined to include the labor hours spent reviewing project documentation, participating in meetings with Project personnel, and participating in site visits to familiarize oneself with the Project and project location(s). The District shall not pay for any time spent for the "Transfer of Knowledge and Information".
1. The Consultant shall provide sufficient advance notice of any intention to remove or reassign key personnel. The Consultant shall not remove or reassign the key personnel assigned to this Project without written consent from the District. Exhibit E, Key Personnel, is a listing of key individuals for this work. Notice for the substitution of individuals and positions identified as Key Personnel shall include the following:
 - a. An explanation of the reason for the reassignment or removal;
 - b. The name of the person proposed to replace the individual; and
 - c. Identification of the experience and qualifications of the individual proposed.
 2. For individuals who are not identified as "Key Personnel" in Exhibit E, the Consultant shall provide documentation supporting the labor rate for the substituted personnel prior to submitting an invoice and the labor rate shall not exceed 110 percent of the originally assigned personnel's labor rate.
 3. District Request Removal Personnel. The Consultant shall remove from the Project any personnel or subconsultant if, after the matter has been thoroughly considered by the District and the Consultant, the District considers such removal necessary and in the best interests of the Project and so advises the Consultant in writing. In this case, the District will compensate the consultant for Transfer of Knowledge costs associated with the removal of any personnel or subconsultant.

SECTION 3: SCOPE OF WORK

- 3.1. The Consultant shall be consultant and advisor to the District and shall not be agent or representative of the District, except as may specifically be authorized in writing by the District in respect to specific Task Order. The District hereby retains the Consultant upon the terms and conditions contained herein to perform certain work and services. The work and services to be performed by the Consultant are set forth in Schedule A, Scope of Work, attached hereto, and incorporated herein by this reference.

- 3.2. The District shall make available to the Consultant, without cost, copies of as-built plans, drawings, survey notes, studies, soil reports, maintenance and performance records, and other relevant data, and property descriptions of various District facilities related to the Project, which are readily available, and on file at the District. These documents are available solely as additional Information to the Consultant and do not relieve the Consultant of its duties and obligations under this Agreement nor constitute any representation or warranty by the District as to conditions or other matters related to the Project.
- 3.3. It shall be the responsibility of the Consultant to gather and become familiar with all site information including existing improvements.

SECTION 4: CHANGES IN WORK

- 4.1. New Task Orders. New Task Orders with a budget of \$5,000 or less can be authorized by written directive from the Project Manager. Consultant shall receive a written directive from Project Manager prior to commencing work. New Task Orders with a budget exceeding \$5,000 require Board of Commissioner approval prior to beginning work.
- 4.2. Changes to Task Orders. Any direction from the District to perform work that results in an increase or decrease in the scope of a Task Order shall be made in writing by the Project Manager. All schedule changes shall be authorized by written directive from the Project Manager. Task Order budget changes with a value of \$5,000 or less shall be authorized by written directive from the Project Manager prior to beginning work. Task Order budget changes with a value of more than \$5,000 require Board of Commissioners approval prior to the work being performed.
- 4.3. In the event the Consultant identifies something that may impact the scope of work for a Task Order schedule and/or cost, Consultant shall inform the Project Manager within five (5) business days of the event, and inform the Project Manager of possible impacts to scope, schedule and cost. If appropriate, the Project Manager may issue a written directive to the Consultant for the change in schedule and/or cost.
- 4.4. The District may, at any time, by written directive request the Consultant to make additions within the general scope of the services or work to be performed under a Task Order, delete portions or an entire Task Order, or revise portions of the Task Order work. Any changes within the general scope of work, which result in an increase or decrease in time of performance or cost, shall only be made by written directive from the Project Manager.

SECTION 5: RESPONSIBILITY OF THE CONSULTANT

5.1. Standard of Care

- A. The Consultant shall be responsible for the professional quality, technical adequacy and accuracy, timely completion and coordination of all plans, designs, drawings, specifications, reports and other services prepared or performed pursuant to this Agreement. The Consultant shall perform its work to conform to generally accepted professional standards applicable to the types of services and work provided hereunder. The Consultant shall be responsible for the professional standards, performance and actions of all persons and firms

performing work pursuant to this Agreement. The Consultant shall, without additional compensation, correct or revise any errors, omissions or specific breaches of a contractual obligation in such plans, designs, drawings, specifications, reports and other services.

- B. The District's approval of plans, drawings, designs, specifications, reports and other products of the professional services rendered hereunder shall not in any way relieve the Consultant of responsibility for the technical adequacy or accuracy thereof. Neither the District's review, approval or acceptance of, nor payment for, any of the services shall be construed to operate as a waiver of any rights under this Agreement or of any cause of action arising out of the performance of this Agreement.
- C. The Consultant shall be knowledgeable and familiar with the District's Construction General Conditions and any District provided Division 0 (which includes General and Supplemental conditions and Bidding Provisions) and Division 1 (General Construction Requirements). Any technical specifications drafted by the Consultant shall be consistent with these Divisions and such technical specifications should not create any ambiguity or conflict with these Divisions.
- D. Consistent with generally accepted professional standards, the Consultant shall promptly bring to the District's attention any concerns that the Consultant has regarding the design, or any finding, conclusions, or final decisions made by the District. The Consultant shall, at the District's request, provide the District with a written evaluation of its concerns, along with proposed solutions to any identified problems.

5.2. Maintenance of Project Documentation

- A. Upon written request by the Project Manager, the Consultant shall provide the District with access to all documents and correspondence, including e-mail communications, memoranda, and all other written materials prepared or used in performance of work on this Project.
- B. The Consultant is cautioned that information and documentation submitted to the District may become a public record in accordance with the Revised Code of Washington and may not be exempt from disclosure under the Washington State Public Disclosure Act.
- C. The Consultant acknowledges that unauthorized disclosure of information or documentation concerning this Project may cause substantial economic loss or harm to the District. Except as otherwise required by Court Order or subpoena, the Consultant shall not without prior written authorization by the Project Manager allow the release, dissemination, distribution, sharing, or otherwise publication or disclosure of information or documentation obtained, discovered, shared or produced pursuant to this Agreement.

SECTION 6: PRODUCTS

- 6.1. In the performance of this Agreement, the Consultant shall, to the extent practicable, design and draft specifications that provide for maximum use of structures, machines, products, materials, construction methods, and equipment which are readily available through competitive procurement, or through standard or proven production techniques, methods and processes.
- 6.2. The Consultant shall not, in the performance of the work under this Agreement, produce a design or specification which would require the use of structures, machines, products, materials, construction methods, equipment, or processes which the Consultant knows to be available only from a single source, unless the Consultant has provided a written justification for the use of a single source in writing and the District concurs.
- 6.3. The Consultant shall not, in the performance of the work under this Agreement, produce a design or specification which would be restrictive or written in such a manner as to contain proprietary, exclusionary, or discriminatory requirements other than those based upon performance, unless such requirements are necessary to test or demonstrate a specific thing, or to provide for necessary interchangeability of parts and equipment. The Consultant shall report to the District any single source or restrictive design or specification giving the reason(s) why, in the Consultant's professional judgment, it is necessary to restrict the design or a particular specification. The Consultant shall substantiate in writing, and to the District's satisfaction, the basis for the single source or restrictive design or specification.
- 6.4. When one or more brand names or trade names of comparable quality or utility are listed, the words "or approved equal" shall follow the brand name(s) and the salient characteristics shall be identified.

SECTION 7: COMMENCEMENT AND MONTHLY REPORTS

- 7.1. Notice to Proceed. After execution of this Agreement by the District and the Consultant, the District will issue a written notice to proceed on the individual Task Orders assigned to the Consultant. Such notices to proceed shall set forth the date of commencement of the Task Order, a description of the work to be performed, the schedule for the work authorized, and the budgets for such Task Orders. Upon receipt of a notice to proceed, the Consultant shall promptly commence work.
- 7.2. Monthly Reports. Unless otherwise stated in the Scope of Work, not later than the 10th day of each calendar month during the performance of the work, the Consultant shall submit a monthly report to the Project Manager, in a format approved by the Project Manager, sufficient to show the activities completed and the Task Order progress as measured against its schedule and budget. At a minimum the monthly report shall identify District project number, name, Task Order number, work completed, costs incurred, budget status (budget vs. estimated balance to complete), scope changes, project schedule, any variance between planned vs. actual project performance, all issues that may result in completion of any task beyond the established schedule or task budget, and all issues that may result in an increase in the Task Order budget.

SECTION 8: COMPENSATION

- 8.1. Subject to the provisions set forth in this Agreement, the District will pay the **[[[FIRM NAME]]]** for authorized and satisfactorily completed work and services rendered under

this Agreement. No more than monthly progress payments shall be full compensation for work performed and services rendered, for all supervision, labor, supplies, materials, equipment or use thereof, taxes, and for all other necessary incidentals.

8.2. Compensation for work and services shall be based on Labor Costs (fully burdened billing rates which include wages and salaries, benefits, overhead and profit), and Other Direct Costs. Total Price per Task Order shall be the sum of Labor Costs and Other Direct Costs as described and defined below. Costs to be paid are identified in each Task Order comprise the following:

A. **Direct Labor Costs.** Direct Labor Costs shall be the total number of allowable hours worked on the Task Order by each individual multiplied by the Billing Rates identified in the Exhibit B for such individual.

1. Billing Rates are "fully loaded" which include salaries, overhead, and profit.
2. The District shall only pay the Labor Rate and shall not pay any premium associated with overtime.
3. The parties agree to the Labor Rates as set forth in Exhibit B. Billing Rates may be reasonably adjusted by amendment in accordance with paragraph 8.4 below.

B. **Other Direct Costs.** Other Direct Costs ("ODC") are those costs which can be specifically identified with the Contract objectives, are required for performance of the Contract, are approved in advance in writing by the Project Manager, and are actually incurred. Markup on ODC's shall be billed at [[[#]]% for subconsultants and at fixed rates as listed in Exhibit D – ALLOWABLE ODCs.

8.3. Unallowable Costs. The District shall not pay for any costs or direct charges associated with or relating to the following activities:

- A. Any resubmission, changes to or adjustments in the invoices, and fixing improper invoices and the preparation and submission of monthly invoices if this cost is not included in the Consultant's overhead.
- B. Preparation of, discussion and/or negotiation of a request for adjustments in any Labor Rate and/or Labor Escalation percentage; and
- C. Changing or reassigning personnel or subconsultants, including but not limited to preparing requests concerning Transfer of Knowledge for Key Personnel. Exception, the District will pay for costs associated with the change or reassignment resulting from a written request from the District requesting the specific personnel or subconsultant change.
- D. Preparation of any documentation related to, discussion of, or negotiation of equitable adjustment, disputes, claims or Section 16, Disputes and Remedies.
- E. Meals, except when in Travel Status.

- 8.4. Limitations on Changes to Labor Rates.
- A. The Consultant agrees that all Billing Rates identified in this Agreement shall be effective for the entire Contract duration, including all amendments; provided however, Billing Rates may be increased at the sole discretion of the District on an annual basis.
 - B. Billing Rate increases must be based on actual and verifiable increases in labor costs.
 - C. Should the Consultant seek an adjustment in Billing Rate(s) or ODC mark-up, Consultant must notify the District in writing of its request to modify the existing rate. Consultant shall submit only one request per year that must include all individual rate increase requests. This request shall include the amount of the increase for each rate in addition to the new rate.
- 8.5. Approval of Increases by District. Billing Rate adjustments require approval by the District Board of Commissioners. The Consultant shall provide additional information as requested by the District. The District shall review the Consultant's request for a rate increase and respond in writing to the request within sixty (60) calendar days of receipt of such request.
- 8.6. Effective Period. Any change to the rates shall not be effective until the date the Board of Commissioners approves, in writing, the increase. Rates shall not be retroactive. Only services performed after the date the Board of Commissioners approves the rate increase shall be billed at the new rate. The written approval is considered a part of the Contract documents and shall be incorporated into the Contract by Amendment.
- 8.7. Invoice Process. The Consultant shall submit to the Project Manager an invoice for payment for Task Order work completed to the end of the previous month. Such invoices shall be for work performed subsequent to that work covered by all previously submitted invoices and shall be computed pursuant to the rates and limitations set forth hereinabove.
- A. Invoices shall detail the work by task, hours and employee name and level for which payment is being requested; include copies of all invoices from authorized subconsultants for which payment is being requested; and shall itemize, and include copies of, receipts and invoices for the Other Direct Costs.
 - B. At no time shall the total cumulative amounts paid for Project work exceed the total which would be due upon the completion of all Task Order work multiplied by the percentage of the required work satisfactorily completed, as determined by the District.
 - C. In the event of a disputed invoice, the District shall pay the undisputed amounts and withhold from payment the disputed portion of the invoice.
- 8.8. Prompt Payment of Subconsultants. Within ten (10) business calendar days of receipt of a progress payment from the District that includes dollars for work performed by subconsultants, Consultant shall pay such subconsultants out of such amounts as are paid by the District, for all work satisfactorily completed by the subconsultant.

- 8.9. Final Payment. Final payment of any Task Order balance earned by the Consultant will be made after all of the following:
- A. Satisfactory completion of all Task Order work required by this Agreement;
 - B. Receipt by the District of the plans, studies, surveys, photographs, maps, calculations, notes, reports and all other documents and/or deliverables which are required to be prepared and submitted by the Consultant under the Task Order and this Agreement;
 - C. Delivery of all equipment/materials purchased specifically for the Task Order where the District has reimbursed the Consultant for such costs;
 - D. Receipt by the District of a fully executed final statement of amounts Invoiced by and paid to each subconsultant under this Agreement; and
 - E. No payment, whether monthly or final, to the Consultant for any Task Order work shall constitute a waiver or release by the District of any claims, right or remedy it may have against the Consultant under this Agreement or by law; nor shall such payment constitute a waiver, remission or discharge by the District of any failure or fault of the Consultant to satisfactorily perform the Task Order work as required under this Agreement.

SECTION 9: TERMINATION OF AGREEMENT

9.1. Termination for Default

- A. The District may terminate this Agreement, in whole or in part, in writing if the Consultant substantially fails to fulfill any or all of its material obligations under this Agreement through no fault of the District.
- B. If the District terminates all or part of this Contract for default, the District shall determine the amount of work satisfactorily performed to the date of termination and the amount owing to the Consultant using the criteria set forth below; provided, that (a) no amount shall be allowed for anticipated profit on unperformed services or other work and (b) any payment due to the Consultant at the time of termination may be adjusted to the extent of any additional costs the District incurs because of the Consultant's default. In such event, the District shall consider the actual costs incurred by the Consultant in performing Task Order work to the date of termination, the amount of work originally required which was satisfactorily completed to the date of termination, whether that work is in a form or of a type which is usable and suitable to the District at the date of termination, the cost to the District of completing the work itself or of employing another firm to complete it and the inconvenience and time which may be required to do so, and other factors which affect the value to the District of the Task Order work performed to the date of termination. Under no circumstances shall payments made under this provision exceed prior-approved Task Order prices. This provision shall not preclude the District from filing claims and/or commencing litigation to secure compensation for damages incurred beyond that covered by withheld payments.

- C. Upon receipt of a termination notice the Consultant shall at no additional cost to the District:
1. Promptly discontinue all services affected (unless the notice directs otherwise);
 2. Terminate all subcontracts to the extent they relate to the work terminated; and
 3. No later than thirty (30) calendar days after receipt of termination, promptly deliver or otherwise make available to the District all data, drawings, electronic drawing files, specifications, calculations, reports, estimates, summaries, Official Task Order Documentation and other Task Order documentation, such other information and materials as the Consultant or subconsultants may have accumulated in performing this Agreement, whether completed or in progress and all equipment/materials purchased specifically for the Project where the District has paid the Consultant for such items.

9.2. Termination for Convenience

- A. The District may terminate this Agreement, in whole or in part, for the convenience of the District. The District shall terminate by delivery to the Consultant a Notice of Termination specifying the extent of the termination and the effective date.
- B. If the District terminates this Contract for convenience, the District shall pay the Consultant only for the following items
1. An amount for Direct Labor Costs and Indirect Costs in accordance with the Contract and Exhibit B for services satisfactorily performed to the date of termination;
 2. Actual and reasonable Other Direct Costs incurred before the termination; and
 3. Actual and Reasonable termination settlement costs the Consultant reasonably incurs relating to commitments which had become firm before the termination, unless the District determines to assume said commitments. Reasonable termination settlement costs include settlement costs for subconsultants and actual reasonable accounting and clerical costs related to preparing Termination Settlement Proposal.:
- C. Upon receipt of a termination notice the Consultant shall at no additional cost to the District:
1. Promptly discontinue all services affected (unless the notice directs otherwise);
 2. Terminate all subcontracts to the extent they relate to the work terminated;

3. No later than thirty (30) calendar days after receipt of termination, promptly deliver or otherwise make available to the District all data, drawings, specifications, calculations, reports, estimates, summaries, Official Task Order Documentation, other Task Order documentation, and such other information and materials as the Consultant may have accumulated in performing this Agreement, whether completed or in progress and all equipment/materials purchased specifically for the Project where the District has reimbursed the Consultant for such costs; and
4. Take any action necessary, or that the District may direct, for the protection and preservation of property related to this Agreement that is in the possession of the Consultant and in which the District has or may acquire an interest.

SECTION 10: OWNERSHIP AND USE OF DOCUMENTS

- 10.1. Reports, studies, drawings, specifications, calculations or other information developed under the terms of this Agreement shall become the property of the District after full payment to Consultant for their preparation. Any reuse of drawings/plans, specifications and/or calculations for another project without written verification or adaptation by Consultant will be at the District's sole risk and without liability or legal exposure to Consultant. District shall defend, indemnify and hold Consultant harmless from all claims, damages, losses, and expenses, including attorney's fees, arising out of or resulting therefor. The District further acknowledges that it may receive certain materials from Consultant by way of electronic file and agrees that should it modify such materials in connection with their subsequent use, that Consultant shall bear no responsibility for the contents thereof.

SECTION 11: THIRD-PARTY CLAIMS AND DISPUTES

- 11.1. At the District's request, Consultant will assist the District in review and evaluation claims and disputes, preparing information for the District's legal counsel, providing services as witness in litigation or arbitration to which the District is a party and providing other services in connection with actual or potential claims or disputes arising out of the work, regardless of whether or not consultant is named in such legal action. The parties shall cooperate to agree on the compensation for such services. If Consultant is determined to be responsible for the claim, dispute or litigation due to its negligence or breach of the contract herein, it shall remit back to the District the amounts paid under this section to the extent of such negligence or breach.

SECTION 12: AUDIT AND ACCESS TO RECORDS

- 12.1. The Consultant, including its subconsultants, shall maintain books, records, documents, and other evidence directly pertinent to performance of the work under this Agreement in accordance with generally accepted accounting principles and practices consistently applied. The District, or any of its duly authorized representatives, shall, for the purpose of audit and examination, have access to and be permitted to inspect such books, records, documents, and other evidence for inspection, audit and copying for a period of six years after completion of the Project. The District shall also have access to such books, overhead data, records and documents during the performance of Project work if

deemed necessary by the District to verify work performed and Invoices, to assist in negotiations for amendments to the Agreement or modifications to tasks, and to resolve claims and disputes.

- 12.2. Audits conducted under this Section shall be in accordance with generally accepted auditing standards and established procedures and guidelines of the reviewing or audit agency(ies).

SECTION 13: LEGAL RELATIONS

- 13.1. The Consultant shall comply, and shall ensure its subconsultants comply, with all the terms of this Agreement and the District resolutions and federal, state and local laws, regulations and ordinances applicable to the work and services to be performed under this Agreement.
- 13.2. In performing work and services hereunder, the Consultant and its subconsultants, employees, agents and representatives shall be acting as independent contractors and shall not be deemed or construed to be employees or agents of the District in any manner whatsoever. The Consultant shall not hold itself out as, nor claim to be, an officer or employee of the District by reason hereof and will not make any claim, demand or application to or for any right or privilege applicable to an officer or employee of the District. The Consultant shall be solely responsible for any claims/costs and/or losses arising from the Consultant's failure to pay wages, compensation, benefits or taxes and/or pay for services, supplies and/or materials provided by Consultant employees, agents and representatives, including subconsultants, and will protect, defend, indemnify and hold the District harmless there from.
- 13.3. To the maximum extent permitted by law, the Consultant agrees to indemnify and save harmless the District, its officers, agents and employees, from and against any and all suits, claims, actions, losses, costs, reasonable attorney fees and expenses, penalties, judgments, settlements and damages of whatsoever kind or nature arising out of, in connection with, or incident to errors or omissions in the performance of contractual obligations, and/or the negligent performance of work or services provided by or on behalf of the Consultant, except to the extent caused by the negligence of the District. The Consultant's Indemnity obligation includes an obligation to (a) satisfy any judgment or other final decision of a court or other tribunal; (b) pay any reasonable settlement negotiated by the District with respect to claims that are within the scope of the indemnity obligation; and (c) pay all claims against the District by an employee or former employee of the Consultant or its subconsultants, and for this purpose, by mutual negotiation, the Consultant expressly waives, as respects the District only, all Immunity and limitation on liability under any industrial insurance act, including Title 51 RCW, other worker's compensation act, disability benefit act, or other employee benefit act of any jurisdiction which would otherwise be applicable in the case of such claim, The Consultant further agrees to defend all claims against the District and its officers, agents, and employees which, if proven, could result in liability of the District, its officers, agents, or employees for loss or damage caused by any such errors, omissions, or negligent work or services performed by the Consultant. The Consultant's obligation to defend shall include timely payment of all reasonable attorney fees, costs and expenses incurred in the defense of such claims. In the event of litigation between the parties to enforce the rights under this paragraph, reasonable attorney fees and expenses shall be allowed to the prevailing party.

- 13.4. The District's rights and remedies in this Agreement are in addition to any other rights and remedies provided by law.
- 13.5. The indemnification, protection, defense and save harmless obligations contained herein shall survive the expiration, abandonment or termination of this Agreement.

SECTION 14: INSURANCE

- 14.1. Prior to execution of the Agreement, the Consultant shall file with the District certificates of insurance and endorsements from the insurer(s) certifying to the coverage of all insurance required herein. All evidences of insurance must be certified by a properly authorized officer, agent, general agent or qualified representative of the insurer(s) and shall certify the name of the insured, the type and amount of insurance, the location and operations to which the insurance applies, the expiration date, and provides that the District receives notice at least thirty (30) calendar days prior to the effective date of any policy limit or cancellation of required coverages. The Consultant shall notify the District at least thirty (30) calendar days prior to the effective date of any cancellation or reduction in coverage in the policy. Documentation of coverage shall be provided on each insurance renewal date. The Consultant shall, upon demand of The District, make available to The District at Consultant's local office in The District all such policies of insurance and the receipts of payment of premiums thereon. Failure to provide such policies of insurance within a time acceptable to The District shall entitle The District to suspend or terminate the Consultant's work hereunder, Suspension or termination of this Agreement shall not relieve the Consultant from its insurance obligation hereunder.
- 14.2. The Consultant shall obtain and maintain at a minimum the limits of insurance set forth below. By requiring such minimum insurance, the District shall not be deemed or construed to have assessed the risks that may be applicable to the Consultant under this Agreement. The Consultant shall assess its own risks and, if it deems appropriate and/or prudent, maintain greater limits and/or broader coverage.
- 14.3. Each insurance policy shall be written on an "occurrence" form; excepting that insurance for professional liability, errors and omissions when required, is acceptable on a "claims made" form.
- 14.4. If coverage is approved and purchased on a "claims made" basis, the Consultant shall continue coverage either through (1) policy renewals for not less than seven years from the date of completion of the work which is the subject of this Agreement or (2) the purchase of an extended discovery period for not less than seven years from the date of completion of the work which is the subject of this Agreement, if such extended coverage is available.
- 14.5. If, in order to meet the requirements of this Section, the Consultant must rely on the insurance to be provided by one or more subconsultant, then such subconsultant(s) shall be required to meet all of the requirements herein applicable to the insurance they are providing, and shall include District and Consultant as additional insureds on all liability policies except Professional Liability/Errors & Omissions and Workers Compensation. The District will not make any payments on work performed by subconsultants until all insurance documentation from such subconsultants have been received and accepted by the District.

- 14.6. Provided the affected insurance policies permit the following waiver, without voiding coverage, Consultant and District waive all rights against each other to subrogation for damages covered by property insurance.
- 14.7. The Consultant shall maintain limits no less than, for:
- A. General Liability. \$1,000,000 combined single limit per occurrence for bodily injury, personal injury and property damage, and for those policies with aggregate limits, a \$1,000,000 aggregate limit. Coverage shall be at least as broad as Insurance Services Office form number (CG 00 01) covering COMMERCIAL GENERAL LIABILITY.
 - B. Professional Liability Errors and Omissions. \$2,000,000 per claim and in the aggregate.
 - C. Automobile Liability. \$1,000,000 combined single limit per accident for bodily injury and property damage. Coverage shall be at least as broad as Insurance Services Office form number (CA 00 01) covering BUSINESS AUTO COVERAGE, symbol 1 "any auto"; or the combination of symbols 2, 8, and 9.
 - D. Workers' Compensation. Statutory requirements of the State of residency. Coverage shall be at least as broad as Workers' Compensation coverage, as required by the Industrial Insurance Act of the State of Washington, as well as any similar coverage required for this work by applicable Federal or "other States" State Law.
 - E. Employer's Liability or "Stop Gap". Coverage shall be at least as broad as the protection provided by the Workers Compensation policy Part 2 (Employers Liability) or, in states with monopolistic state funds, the protection provided by the "Stop Gap" endorsement to the general liability policy.
- 14.8. Any deductibles or self-insured retentions must be declared to, and approved by, the District. The deductible and/or self-insured retention of the policies shall not limit or apply to the Consultant's liability to the District and shall be the sole responsibility of the Consultant.
- 14.9. The insurance policies required in this Agreement are to contain, or be endorsed to contain the following provisions:
- A. Liability Policies except Professional Liability & Errors and Omissions and Workers Compensation:
 - 1. The District, its officers, officials, employees and agents are to be covered as additional insured as respects liability arising out of activities performed by or on behalf of the Consultant in connection with this Agreement. Such additional insured status shall include Products-Completed Operations.
 - 2. To the extent of the Consultant's negligence, the Consultant's insurance coverage shall be primary insurance as respects the District, its officers, officials, employees and agents. Any insurance and/or self-insurance

maintained by the District, its officers, officials, employees or agents shall not contribute with the Consultant's insurance or benefit the Consultant in any way.

3. The Consultant's insurance shall apply separately to each insured against whom a claim is made and/or lawsuit is brought, except with respect to the limits of the insurer's liability.
4. The Consultant's Protection and Indemnity (to include Jones Act) policy shall waive rights of subrogation against the District.

14.10. If at any time of the foregoing policies shall fail to meet the minimum standards above, the Consultant shall, upon notice to that effect from the District, promptly obtain a new policy, and shall submit the same to the District, with the appropriate certificates and endorsements, for approval.

SECTION 15: DISPUTES AND REMEDIES

15.1. **Choice of Law.** This Agreement and all provisions hereof shall be interpreted in accordance with the laws of the State of Washington in effect on the Effective Date.

15.2. **General Manager Review.** All claims, counter-claims, disputes and other matters in question between the District and the Consultant arising out of or relating to this Agreement or the breach of it shall be referred to the General Manager or a designee for determination, together with all facts, data, contentions and so forth which relate thereto. The General Manager shall make a determination within thirty (30) calendar days of such referral.

15.3. **Mediation and Arbitration.** The parties will first attempt to mediate any dispute arising under or in connection with this Agreement, in accordance with the provisions of the Washington Uniform Mediation Act, Ch. 7.07 RCW. In the event such mediation is unsuccessful, any such dispute will be settled by arbitration as set forth in this Section 15.3. No legal right of action may arise out of any such dispute until arbitration has been completed. Each party, however, will have full access to the courts to compel compliance with these arbitration provisions, to enforce an arbitration award or to seek injunctive relief, whether or not arbitration is available or under way. The arbitration will take place as follows:

- A. **Notice.** The party demanding arbitration must give the other parties a written notice. The written notice must contain, in addition to the demand for arbitration, a clear statement of the issue or issues to be resolved by arbitration, an appropriate reference to the provision of the Agreement which is involved, the relief the party requests through arbitration, and the name and address of the arbitrator requested by the demanding party.
- B. **Response.** The party receiving the notice of the demand for arbitration must provide a written response to the demand within fifteen (15) days following receipt of the notice. The response must contain a clear statement of the respondent's position concerning the issue or issues in dispute and the name and address of the arbitrator it selects as the arbitrator to hear the dispute. If the parties fail to agree upon an arbitrator within five (5) days following the time

allowed for this response to the demand for arbitration, the demanding party may apply to the presiding department of the Superior Court for Whatcom County, Washington to designate the arbitrator.

- C. Arbitration. The arbitrator will meet in Bellingham, Washington, within twenty (20) days after the selection of the arbitrator and will allow each party an opportunity to submit oral and written evidence and argument concerning the issue in dispute. The arbitrator may resolve only the question or questions submitted to arbitration and must include as part of his consideration a full review of the Agreement and all material incorporated in the Agreement by reference.
 - D. Decision. The decision of the arbitrator will be final and will bind the parties.
 - E. Consent to Change. By consent of all parties to any dispute under this Agreement, the method of selection of an arbitrator or arbitrators, or even the arbitrator(s) selected, may be changed at any time.
 - F. Payment of Costs. Subject to the provisions of Section 13.3, in any arbitration, each party will pay its own costs, witness fees and attorneys' fees. The fees charged by the arbitrator and the costs of the proceeding shall be borne equally.
 - G. State Law. Except to the extent inconsistent with the terms of this Agreement, the terms and provisions of Chapter 7.04A RCW are incorporated in and made a part of this Agreement.
- 15.4. Exhaustion of Administrative Remedies. Referral to and determination by the General Manager or a designee and mediation and arbitration shall be a condition precedent to the commencement of a civil action to adjudicate such dispute.
- 15.5. Jurisdiction & Venue. Subject to these provisions herein, the Superior Court of Whatcom County, Washington, shall have exclusive jurisdiction and venue over any legal action arising under this Agreement and the laws of the state of Washington shall apply.

SECTION 16: NOTICE

- 16.1. Any notice required to be given under the terms of this Agreement shall be in writing and directed to the party at the address set forth below. Notice shall be considered issued and effective upon receipt thereof by the addressee-party. Facsimile notice shall be considered effective with proof of confirmation that the addressee has received the facsimile. Such proof would be a confirmation sheet evidencing such receipt at the fax number listed below.

[[[NAME OF FIRM]]]
Attn: [[[NAME]]]
[[[ADDRESS]]]

Fax No.: [[[###-###]]]
Phone: [[[###-###]]]

Lake Whatcom Water and Sewer District
Attn: Justin Clary, General Manager
1220 Lakeway Drive
Bellingham, WA 98229
Fax No.: 360-738-8250
Phone: 360-734-9224

SECTION 17: ENTIRETY, AMENDMENT AND EXECUTION OF AGREEMENT

- 17.1. This Agreement merges and supersedes all prior negotiations, representations and agreements between the Parties relating to the subject matter hereof and constitutes the entire agreement between the Parties.
- 17.2. The Contract documents included in the Agreement are identified below. Any inconsistency or conflict between the Contract documents shall be resolved by giving precedence in the following descending order of importance:
 - A. Agreement for Professional Services for **On-Call General Engineering and Comprehensive Planning Services**, as modified by the latest amendment;
 - B. Exhibit A, Scope of Work, as modified by the latest amendment;
 - C. Exhibit B, Billing Rates, as modified by the latest amendment;
 - D. Exhibit C, Insurance;
 - E. Exhibit D, Allowable ODCs;
 - F. Exhibit E, Key Personnel List; and
 - G. Exhibit F, Task Order form.
- 17.3. This Agreement shall be executed in two (2) counterpart copies, any of which shall be considered for all purposes as the original.

IN WITNESS WHEREOF, the Parties hereto have caused this Agreement to be executed by their respective authorized officers or representatives as of the day and year written below.

Lake Whatcom Water and Sewer District

Consultant

By: _____
Justin Clary, General Manager

By: _____

Printed Name: _____

Title: _____

Dated: _____

Dated: _____

APPROVED AS TO FORM:

By: _____
(Robert Carmichael, Attorney for Lake Whatcom Water and Sewer District)

Dated: _____

EXHIBIT A

SCOPE OF WORK Lake Whatcom Water and Sewer District General Engineering and Comprehensive Planning Services

DESCRIPTION:

Lake Whatcom Water and Sewer District routinely requires professional engineering and surveying services, expertise, and support for operations, maintenance, developer improvements, and customer service. The District also requires professional engineering services to complete updates to the District's Comprehensive Water and Sewer System Comprehensive Plans, preparation of which will begin in 2027 and 2029, respectively. The general engineering services agreement provides an administrative procedure to order services on a task order basis. The types of general engineering services that may be ordered are described below in Section A.

Section A: General Engineering Services

An executed Task Order must precede general engineering services rendered by the consultant when requested by the District.

A1: General Engineering Services

1. Assist with Capital Improvement Plan project budget estimating.
2. Assist with annexation and ULID petitions, hearings, and assessment rolls.
3. When requested by the District, attend regular, executive, and special meetings of the Board of Commissioners.
4. Provide professional advice concerning operation and maintenance of the District's water and sewer systems.
5. Provide water and/or sewer system modelling services as requested by the District.
6. Provide other services as authorized by the District.

A2: General Surveying Services

1. Provide topographic land surveys, establishment of property easements, boundaries and monuments and related computations and drafting.
2. Miscellaneous requests for GIS maps, data, and assistance.
3. Provide other services as authorized by the District.

A3: Comprehensive Planning Services

1. Prepare the 2028 update to the District's Water System Comprehensive Plan.
2. Prepare the 2030 update to the District's Sewer System Comprehensive Plan.

A4: Developer Extension Agreements

1. Review developer extension plans, specifications, and studies for compliance with District's Design and Construction Standards and Comprehensive Plans
2. Full-time inspection services during construction.
3. Hydraulic modeling as needed to establish minimum water main, tank, and pump sizes appropriate for future development and extensions.
4. Assist with the preparation of Bill of Sales and Latecomer Agreements.

5. Review land surveys, easements, boundaries, and monuments.
6. Coordinate survey control monuments and datum information with developer's surveyor.
7. Assist with review of shop drawings and submittals.
8. Provide other services as authorized by the District.

SAMPLE

EXHIBIT B

**BILLING RATES
Lake Whatcom Water and Sewer District
General Engineering and Comprehensive Planning Services**

[insert Billing Rate schedule]

SAMPLE

EXHIBIT C

INSURANCE

**Lake Whatcom Water and Sewer District
General Engineering and Comprehensive Planning Services**

[insert certificates of insurance per Section 14]

SAMPLE

EXHIBIT D

ALLOWABLE OTHER DIRECT COSTS Lake Whatcom Water and Sewer District General Engineering and Comprehensive Planning Services

Allowable Other Direct Costs (ODCs) include subconsultants and reimbursables, as listed in Exhibit B – Billing Rates or as specifically approved in each Task Order:

Subconsultants:

- As authorized by Task Order.

Reimbursables:

- Publication charges
- Project application fees, project permit fees
- Reproduction of drawings and construction documents
- Postage and shipping
- Direct expenses for travel, meal and lodging outside of Whatcom and Skagit Counties
- Mileage at project-current IRS mileage rates
- Specialized equipment rental, at rental rate

EXHIBIT E

**KEY PERSONNEL LIST
Lake Whatcom Water and Sewer District
General Engineering and Comprehensive Planning Services**

Key Personnel List

CIVIL ENGINEERING

Name Title

STRUCTURAL ENGINEERING

Name Title

LAND AND HYDROGRAPHIC SURVEY

Name Title

Administrative Staff

Name Title

EXHIBIT F

TASK ORDER FORM
Lake Whatcom Water and Sewer District
General Engineering and Comprehensive Planning Services

DESCRIPTION:

An executed Task Order must precede general engineering services rendered by the consultant. See Exhibit A – Scope of Work.

SCOPE OF WORK:

Include the following elements as applicable:

- *District project number, name, and Task Order number*
- *Brief description of work*
- *Products to be delivered*
- *Assumptions and limitations*

COST SUMMARY:

Include the following elements as applicable:

- *Estimate of hours and rates*
- *Subconsultant fees*
- *Other Direct Costs*
- *Task Order Total Price (time & materials not to exceed)*

PROJECT SCHEDULE:

Include milestone dates as applicable. All Task Orders shall have a completion date. Task Orders expire when the master contract expires.

AUTHORIZATION:

Lake Whatcom Water and Sewer District

Consultant

By: _____
Justin Clary, General Manager

By: _____

(Print Name & Title)

Dated: _____

Dated: _____