

ATTACHMENT – SCOPE OF WORK

Introduction

The services to be provided by the Program Manager include the planning, management, and construction-related services associated with replacement of lead lines as described in this Request for Proposal (RFP), Attachment – Scope of Work and Attachment – Agreement.

The Program Manager is required to meet the goals and obligations described in this Scope of Work; however, the means and methods by which the Program Manager chooses to achieve the Program requirements shall be at their discretion and described in their technical approach as required by the RFP documents. In identifying and describing the approach to provide the required services, the Program Manager shall wholly address the stated requirements of the RFP, Scope of Work, and the Agreement.

The Program Manager will be required to adhere to the terms and conditions as outlined in the Agreement, as signed by the Board and the Program Manager, including all attachments therein.

The Program Manager must execute this Scope of Work as included in the Agreement, inclusive of the Board’s Draft Lead Line Replacement Plan, and must remain in compliance with all applicable regulatory and bylaw requirements, including but not limited to:

- US Environmental Protection Agency (EPA) Final Lead and Copper Rule Revisions (LCRR).
- EPA Final Lead and Copper Rule Improvements (LCRI) and subsequent updates as proposed and finalized by EPA over the life of the work.
- AWWA/ANSI C810-17 – Replace and Flushing of Lead Service Lines.
- NSF/ANSI 42 (Particulate Reduction) and 53 (Lead Reduction): Filtration System Standards.
- Applicable local bylaws and permits.

Background

The Board wants to be proactive in replacing lead lines within its service boundaries in full such that no lead line remains, including galvanized lines requiring replacement (GRR) as defined by EPA. To that end, the Board has developed its materials inventory and Lead Line Replacement Plan as defined in the EPA’s Final LCRR and Final LCRI. The Board has requested and was awarded initial funding from the State of Louisiana through the Drinking Water State Revolving Fund (DWSRF) for the planning, management and construction-related services for the replacement of lead lines.

Program Objectives

The Program Manager will support the Board to achieve each of the following objectives:

- a) Maximize grant funding for the Program to support the continuation of the Program beyond the initial DWSRF funding that is anticipated to close in October 2024.
- b) Identify the material of service lines in the water system, including connectors, to support the Board’s obligation to i) submit the Baseline Inventory by Dec. 2027 and ii) have no service lines designated as “Lead Status Unknown” in the materials inventory by 2037, and related obligations as required under the Final LCRI.

- c) Replace an agreed upon number of lead lines and GRRs in each program year, including schools and licensed childcare facilities. All known lead lines and GRRs at schools and childcare facilities shall be replaced by the end of 2026.
- d) Maintain an annual replacement rate in disadvantaged communities that is above the overall annual replacement rate.
- e) Promote and use the Program to build local skills and capacity of the local workforce.

Key Performance Indicators (KPIs) will be identified in the initial Agreement and subsequent contract renewals, with values agreed upon by the Board and Program Manager based on the previous year's performance. To achieve the above objectives, the Program Manager is responsible for performing the scope of work, including but not limited to:

- Manage the communications, scope, schedule and budget as the Program Manager.
- Maintain and update the materials inventory as required by the Final LCRI.
- Develop and manage a service line materials investigation and verification program, including potholing activities, to identify and confirm the service line materials.
- Manage and oversee service line replacements as required, such that the service line from the watermain to the building entry is non-lead.
- Coordinate community outreach and education about the Program and any construction activities that will impact local neighborhoods, residents and businesses.
- Communicate Program information and updates with the public and support the Board with compliance reporting.
- Plan and manage post-replacement activities, including service line flushing, point-of-use filter distribution and post-replacement water quality test kit distribution, analysis and reporting. The Program Manager is expected to directly contract with Vendors for point-of-use filter supply and water quality kit supply, distribution, and analysis. The Program Manager is responsible for filter storage and distribution and reporting of analytical results, using either their own forces or the services of the Vendor.
- Identify funding sources, support the Board to prepare and submit funding applications, and administer external funding sources.

Scope of Services

The Program Manager will provide the following scope of services, including those activities which are necessary for the execution of the work and to achieve the Board's objectives. The Program Manager's scope of work includes any additional efforts which may not be explicitly stated below but are necessary to perform the work.

Task 1 – Program Management Services

Task 1.1 Program Management

The Program Manager shall:

- Prepare and maintain a Program Management Plan and update as needed and no less than on an annual basis.
- Prepare a Program Quality Control Plan and update as needed and no less than on an annual basis. Maintain documentation to demonstrate the implementation and use of the Quality Control Plan. See Attachment – Agreement.

- Prepare a Program Health and Safety Plan and update as needed and no less than on an annual basis.
- Prepare a Program Communication Plan and update as needed and no less than on an annual basis.
- Prepare a Risk Management Plan and update as needed and no less than on an annual basis. Review the risk register with the Board monthly.
- Submit monthly progress reports and invoices in a timely manner (30 days) that detail activities performed during the previous month, planned activities for the upcoming month and provide a 90-day Program look ahead identifying anticipated Program activities and any potential risks to completion of the planned work.
- Facilitate the Program Kick-off Meeting within the first month upon receiving the Notice to Proceed.
- Facilitate monthly progress meetings and submit a summary of each meeting to document key decisions.
- Track and forecast the Program budget.
- Prepare an overall Program schedule and provide monthly updates to the Program schedule.
- Prepare and maintain the Program Risk Register and include updates in the monthly progress report.

Deliverables:

1. Program Management Plan.
2. Program Quality Control Plan.
3. Program Health and Safety Plan.
4. Program Communication Plan.
5. Risk Management Plan.
6. Monthly progress reports and invoices.
7. Monthly progress meeting agendas and summaries including updates to the risk register.

Task 1.2 – Program Schedule and Budget Reporting

The Program Manager shall:

- Submit a detailed Program schedule and budget to the Board within fourteen (14) calendar days of receiving written authorization of notice to proceed from the Board. Submit Program schedule and budget updates monthly with each invoice.
- Submit monthly reports. Information accompanying the monthly update to the Program schedule and budget shall include, at a minimum:
 - Description of the work completed during the reporting period.
 - Update of the estimated level of effort necessary to complete the balance of the work remaining.
 - Explanation of any extra work completed beyond the agreed upon scope of work along with documentation seeking authorization to perform such services.
- Prepare, participate and close negotiations for contract renewal approximately ninety (90) calendar days prior to the end of the calendar year. The Board initiates budget planning in August for the subsequent year's capital program and the Program Manager is expected to provide Program budget information to support the Board's annual budgeting efforts.

The Board has the sole right to approve, reject, or require changes to all schedules relating to the performance of this Agreement, including, without limitation, any proposed progress schedule, and any requests for modifications.

The Program Manager acknowledges and agrees that time is of the essence in the performance of this Agreement. As such, all work will be completed within the agreed upon schedule, inclusive of schedule milestones associated with receiving and administering funding for the Program.

Deliverables:

1. Initial detailed Program schedule and budget.
2. Annual updates to Program schedule and budget, submitted ninety (90) calendar days prior to yearend.
3. Monthly Program progress, schedule and budget update.

Task 2 – Contractor Procurement

The Program Manager will manage procurement activities to select Contractor(s) to perform field work, including but not limited to investigations and replacements. The Agreement governing the work of the Contractor(s) will be held with the Board and not the Program Manager.

Typical timelines to complete the procurement process, consistent with Public Bid Laws concerning public works contracts, are:

- Allow up to 60 days for review of contract documents, including by the Board's legal and procurement teams.
- Minimum 25 days from the first date of advertisement to bid opening.
- No later than 45 days from bid opening to award contract.
- No later than 60 days from the award of contract to execute contract.
- No later than 30 days from contract execution to issue notice to proceed.

See Louisiana Revised Statute 38:2215 for further details.

The Program Manager shall:

- Assist the Board to engage a pool of qualified Contractor(s) to execute service line material identifications, validations, replacements, and property restoration.
- Develop procurement documents (60% and Final), including specifications and drawings, in accordance with the public bid law and funding requirements, to allow the Board to select the lowest cost Contractor(s) to execute the work. Assume no less than three separate procurements will be undertaken for investigations and replacements.
- Contractor(s) will be selected in accordance with the Board's procurement policies, including those related to use of economically disadvantaged businesses enterprises, with a preference for using the local workforce.
- Assume Contractor(s) will be retained for an initial one-year term. Re compete the contracts annually.
- The Board, on the recommendation of the Program Manager, will engage/disengage Contractor(s) as necessary to successfully meet the Program KPIs described in the Agreement.

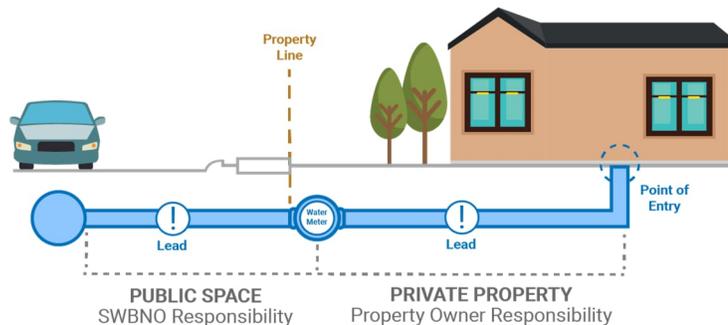
It is the expectation of the Board that the Program Manager shall annually review lessons learned with each contractor to identify delivery efficiencies and any other areas of potential improvement related to the cost, quality and customer experience of the Program.

Deliverables:

1. Contract Documents (60%, Final), to govern the work of the Contractor(s); updated annually to support recompeting the work.
2. Summary of pre-bid meeting with Contractor(s); submit annually.
3. Recommendation letter to the Board for award to the successful Contractor(s) to the lowest bidder or bidders if more than one; submit annually.

Task 3 – Lead Line Replacement Program

The ownership of the service line is a shared responsibility between the Board and the property owner, as depicted in the figure below. It is the Board’s intention to replace lead service lines, including galvanized requiring replacement such that the entire service line is lead free from the watermain connection to the point of termination at the building structure, without entering the building itself. It is the Board’s intention to replace lead lines on private property so long as funding is available.



The Program Manager shall oversee the execution of all tasks required for the replacement of lead lines and GRR. This includes activities to identify the service line materials and maintain the lead materials inventory for the purpose of planning and prioritizing lead line replacements.

A framework for lead line replacement in the Board’s water system is described in the Draft Lead Line Replacement Plan, which has been developed following the requirements of the Final LCRR. The Program Manager shall use the Draft Lead Line Replacement Plan as the basis for operationalizing the Lead Line Replacement Program.

The website representation of the materials inventory is embedded into the Board’s Lead Awareness Page and can be accessed using <https://www.swbno.org/Projects/LeadAwareness>.

Methods used to develop and update the lead materials inventory included a review of historical records (e.g., tap cards), maintenance records, and results from field work from the meter replacement program. The Program Manager may use other identification methods approved by the Louisiana Department of Health to achieve the objectives of the Program.

Task 3.1 – Investigations

The Oct. 2024 materials inventory includes properties for which the material designation of the service line is “Lead Status Unknown”. To allow for the efficient replacement of service lines across the water system, the Program Manager is responsible for updating the materials inventory using methods allowed by the Louisiana Department of Health. Under the Final LCRI, the Board is required to i) complete all Validation work necessary to confirm the assumptions used to designate a service line as “non-lead” by 2034 and ii) identify the materials of all service lines in the water system such that no lines are designated “Lead Status Unknown” by 2037.

“Identification” means the procedure to designate the material of the service line using the minimum requirement of Louisiana Department of Health of one (1) pothole approximately 18” to 24” from the meter box for each portion of the service line being verified. Therefore, two (2) potholes (one on each side of the meter), are required to physically verify both the public and private portions of the line. Additional information is available at <https://ldh.la.gov/page/LSLI>.

Where connectors are used, the Final LCRI requires that the material of connectors be identified as part of the lead materials inventory. Per the Final LCRI, a connector is a short segment of pipe not exceeding 3 feet that can be bent and is used for connections between service piping. When a property is visited for an investigation or verification, efforts should be taken to identify the material of connector(s) in addition to the service line. A third pothole may be necessary to identify the material of the connector between the service line and other components used to supply water to the property, information that the Program Manager shall add to the Baseline Inventory.

“Investigation” means identification of the material composition of the water line as part of updating the materials inventory and is therefore performed independently of lead line replacement. An investigation may not result in an immediate replacement, regardless of whether it is lead or GRR.

“Verification” means the identification of the service line material prior to its replacement, as part of the replacement work. A verification resulting in lead or GRR results in an immediate replacement. While the Program Manager develops a strategy to identify the service line materials (using investigations and verification, as part of the Inventory Identification Plan), it is anticipated that identification of the service line to update the inventory will focus on verifications (as part of replacements) in the initial two years of the Program.

The Program Manager shall:

- Use verifications and investigations to transition the Oct. 2024 Initial Inventory into the Baseline Inventory required by the Final LCRI. The Program Manager is expected to use a combination of desktop, non-invasive and invasive methods to plan, coordinate, and update the lead materials inventory over the course of the contract. Where invasive field methods are used to identify the service line material, the Program Manager shall oversee the work of Contractors performing the field work. Service line materials that can be identified without Contractors or equipment can be performed by the Program Manager, such as reviewing historical records, updating the predictive model (if used), or campaigning to engage customers.
- Develop strategy and plan to identify the service line materials for all services designated as “Lead Status Unknown” in the Oct. 2024 Initial Inventory, based on a projected number of investigations and verifications performed each year, including budget requirements. This is referred to as the Inventory Identification Plan. Establish schedule to support the Board’s obligations to identify all service line materials to meet the Final LCRI requirements.

- Include approach to validate non-lead lines in the Inventory Identification Plan. Maintain and document information related to designating a service line as “Non-Lead” to support the Board’s obligation under the Final LCRI for the non-lead validation protocol used to designate the service line material in the Inventory.
- Document the material of connectors, where encountered, in the Baseline Inventory.
- Manage Contractor(s) tasked with performing investigations using potholing and other visual methods to investigate and identify the service line materials independently of lead service line replacement. Use methods of direct evidence acceptable to the Louisiana Department of Health to resolve the unknown service line materials within the inventory and update the Program Inventory.
- Manage Contractor(s) tasked with restoration of any areas disturbed during investigations, including but not limited to asphalt, concrete, and vegetation, to their pre-existing conditions. Restoration is required to disturbed areas on both public and privately owned property.
- Starting in 2027, provide point-of-use filters to customers where the service line is physically disturbed during efforts to investigate the service line material, as required in the Final LCRI. Properties where the material is verified are expected to receive a filter as part of service line replacement activities.

Deliverables:

1. Inventory Identification Plan, updated annually.
2. Weekly updates to the program database with all identification data subjected to quality assurance reviews (see Task 5).
3. Monthly progress meetings to describe updates to the inventory based on materials identification, including:
 - a. The number of investigations completed the previous month.
 - b. The number of verifications completed the previous month.
 - c. The number of properties for which the designation was changed from “Unknown Lead Status.”
 - d. The number of investigations planned for the following three months.
 - e. The number of verifications planned for the following three months.
 - f. Discussion as needed to resolve conflicts preventing the identification of the service line material.
4. Monthly updates on the status of permits including the number open/closed and forecasted to be pulled to support service line materials identification.
5. Starting in 2027, summary of the number of filters distributed to properties where the service line is disturbed during investigation.

Task 3.2 – Service Line Replacements

Following replacement, the entire service line shall be lead free from the watermain connection to the point of termination at the building structure, without entering the building itself. The Program Manager will be responsible for managing – not performing – the construction activities required to complete service line replacements as described in the Draft Lead Line Replacement Plan. Replacements must be performed in accordance with the requirements of the Final LCRR and Final LCRI.

Under the Final LCRI, the Board is required to submit and make publicly available the Lead Line Replacement Plan starting in 2027, with updates provided annually. The Program Manager is required

to maintain a current Lead Service Line Replacement Plan, updated at least annually, prior to the Final LCRI compliance deadline. To meet the Board's Program Objectives, it is the responsibility of the Program Manager to develop a phased plan to allow the Board to replace all of the lead lines within the required timeframe and at the replacement rate described in the Final LCRI and as described in the Board's Lead Service Line Replacement Plan and any updates to that Plan.

To address the Program objective of prioritizing replacements in disadvantaged communities, the Program Manager shall plan activities to maintain a higher annual replacement rate in disadvantaged communities when compared to the annual replacement rate for the water system as a whole. This can be measured in two ways:

1. The ratio of the total number of annual replacements completed in disadvantaged communities to the total number of annual replacements completed should be greater than 0.5.

or

2. When compared to the percentage of annual replacements required by the Final LCRI (i.e., 10% per year), the percentage of annual replacements completed in disadvantaged communities should be higher than the percentage of annual replacements completed for the water system as a whole.

Either method can be employed to meet the Board's objectives to prioritize replacements in disadvantaged communities.

The Board does not have standard operating procedures to describe how to replace lead lines in their water system. The Program Manager shall develop the necessary procedures to standardize lead line replacements performed under the Program.

The Board shall provide all required access within utility easements as required to complete the work and the Program Manager is expected to coordinate with Board staff to plan and carry out connections to watermains. The Program Manager must secure relevant permits to perform the work, as well as written consent from the Property Owner to perform work on private property. Coordinate with the New Orleans Department of Public Works for necessary permits. Permits may or may not be required at each property and the permits required may vary by property, including but not limited to:

- Street cuts.
- Street closure.
- Plumbing.
- Construction zone.
- Sidewalk repair.
- Driveway or curb cut.
- Tree work.
- Heritage.

It is the Program Manager's responsibility to ensure all relevant permits are secured. The Program Manager can require Contractor(s) to prepare and submit some or all permit applications as appropriate; however, it is the responsibility of the Program Manager to manage, review, and track all permit submissions and approvals and provide a repository for all Program-related permitting information.

The Program Manager shall:

- Modify the Draft Lead Line Replacement Plan within 90 days of notice to proceed, to provide the details necessary to operationalize the Program, including but not limited to:
 - Developing standard operating procedures to identify and replace service lines, address permitting needs, address traffic planning, manage and apply the data generated and used for each property, communicate with residents and property owners, emergency repairs to the service line, and anything else necessary to standardize work procedures for high quality work for use by the various parties and anticipated multiple contractors engaged to execute the Program.
 - Prioritizing replacements at the block level using a three-year planning horizon to allow for coordination with other infrastructure projects, including collaboration with the ongoing Joint Infrastructure Recovery Response Program, and advanced communications to selected neighborhoods and communities. The Program Manager shall propose how to prioritize replacements in disadvantaged areas for approval by the Board. Any change to the indicators, values or assumptions used in the prioritization model shall be documented and approved by the Board.
 - Drafting policies for Board approval to govern the Board's approach or response to customer-initiated replacement of the privately owned portion of the service line, replacements at abandoned properties and inactive accounts, priority individual replacements at properties where elevated lead levels are measured (with the trigger for individual replacement to be proposed by the Program Manager in consultation with the Board), the allowable timeframe to restore a property and install permanent paving, and any other policies deemed necessary to execute the Program.
 - Establishing operating procedures to meet the obligations of the funding agency as required to use the funds on the Program. External funding is necessary to replace lead lines, and where funding is available, confirm that replacements will be completed at little to no direct cost to the property owner, such that there is no payment made by nor taken from the property owner and/or resident.
- Update the Lead Line Replacement Plan at least annually, to capture any changes made throughout the year.
- Obtain and close all permits necessary for successful completion of the work, including but not limited to construction paving and plumbing permits obtained through the New Orleans Department of Public Works.
- Notify the property owner and residents in advance of replacing the service line, using a series of notices provided on a predetermined schedule as described in the approved Communications Plan and in compliance with the Final LCRI.
- Develop and implement a traffic plan in work areas including deployment of signage and distribution of notices to the customer.
- Secure access to private property on which the service line is located for the purposes of replacing the service line.
 - Maintain proof of written consent where granted.
 - Where the owner refuses to allow access, document all attempts made to secure permission in accordance with the methods and number of attempts prescribed in Louisiana Department of Health and the Final LCRI.

- Provide oversight for labor, methods and services required for completion of the work. The Program Manager will manage – not perform – service line replacements; qualified Contractors will perform service line replacements under a separate agreement with the Board.
- Update the Program dashboard for all information and components related to service line replacement, including but not limited to permitting, customer consent, customer notification, restoration status, inspection, etc.
- Require Contractors to flush the service line immediately following service line replacement at each property where a replacement is performed.
- Provide residents with post-replacement household flushing guidance consistent with AWWA/ANSI C810-17 standards.
- Review household flushing guidance with each customer immediately following replacement.
- Restore asphalt, concrete, vegetation, or any other disturbed areas to their pre-existing conditions, following lead line replacement, replacements or other excavation. Restoration will be required on both the public and private side.

Deliverables:

1. Lead Line Replacement Plan with updated details for operationalize of the plan.
2. Procedure to prioritize replacements for the following three Program years, updated annually.
3. Summary of recommended work areas and properties targeted for replacement, updated at least annually.
4. Database updates completed no less than on a weekly basis, to capture replacement details, using data subjected to QA review.
5. Monthly progress reports on the number of replacements completed, budget status and future forecasting.
6. Annual reports for the number of properties where consent is refused and record of contact attempts made, including the method and date of each attempt.
7. Annual updates to the Lead Line Replacement Plan.

Task 3.3 – Point-of-Use Filters

The Program Manager is responsible for selecting and directly contracting a Vendor to supply point-of-use filters certified to NSF/ANSI Standard 53 for lead removal, using procurement practices consistent with the Board’s policies, which include a competitive bidding process. The Program Manager is responsible for distributing the filters to eligible residents for their use immediately following service line replacement and, starting in 2027, to residents where investigations disturb the service line or a property designated as lead, GRR or unknown.

The Program Manager shall assume responsibility for storing the filters prior to distribution as the Board will not provide storage.

The Board has an existing limited filter distribution program that is not currently connected to the inventory. Customers that have concerns about lead in their drinking water may contact the Board using the Lead Awareness Page and request a pitcher filter, which the customer can pick up at Board facilities. As part of the Program, it is the Board’s intention to distribute filters in accordance with the Final LCRI and requirements for filters following a replacement of the service line, and in 2027, this shall be expanded to include disturbances to the service line.

Historically, lead levels in the water system have not exceeded the Action Level for lead, based on the concentration used in the Lead and Copper Rule of 15 ppb. The Final LCRI reduced the Action Level

for lead to 10 ppb. In the event that the Action Level for lead is exceeded on multiple occasions, the Program Manager's scope could be expanded during negotiations for contract renewal to include the supply and distribution of point-of-use filters before lead line replacement.

The Program Manager shall:

- Be responsible for complying with the filter distribution requirements of the Final LCRI,
- Procure and directly contract the services of a Vendor to provide point-of-use filters and replacement cartridges. Filter pitchers and filter cartridges must be certified to meet NSF/ANSI Standards 42 and 53 for lead removal in drinking water and must be guaranteed not to remove fluoride.
- Manage, store and distribute filters and an adequate supply of replacement cartridges for six (6) months of use to residents immediately following service line replacement. Where a service line supplies drinking water to multiple units within a building, provide a filter to each unit.
- Develop an SOP to provide additional replacement cartridges to large water users; similarly, develop an SOP to accommodate customers who refuse a filter because they can demonstrate that they already have a filter certified to meet NSF/ANSI Standard 53 for lead removal. The Program Manager shall only provide replacement cartridges to residents that were previously supplied with a filter by the Board.
- Provide residents with written instructions on how to properly use the filters and replacement cartridges; distribute the instructions with the filters.
- Distribute filter pitchers to customers where the material of the service line is disturbed as a result of an investigation (without replacement), starting in 2027 to comply with the Final LCRI.
- Undertake all reasonable efforts to distribute undamaged filters, with instructions, such that the filter is available to the residents immediately after the service line is replaced.

Deliverables:

1. Contract documents (60%, Final) to procure the supply and storage of pitcher filters and annual costs for the same.
2. SOP for filter distribution and monitoring for Final LCRI compliance for post-replacement filter use and, starting in 2027, filter distribution following a disturbance to the service line.
3. Written information with instructions for the proper use and maintenance of the filter and replacement cartridges; provide with the filter to residents.
4. Monthly updates on the number of households receiving filters and confirmation that filters and a six (6) month supply of replacement cartridges are delivered to customers in compliance with the Final LCRI requirements.

Task 3.4 – Post-Replacement Water Quality Kits

The Board does not have adequate capacity at their lab to analyze water quality samples following lead line replacement required by the Final LCRR. The Board intends for the Program Manager to assume the responsibilities for post-replacement water quality sampling required under the Final LCRI. The Board will continue to manage LCR compliance sampling and customer requested tap sampling. Results from LCR compliance sampling and customer requested sampling will be provided to the Program Manager.

The Program Manager shall directly contract with a Vendor for the supply, distribution and analysis of post-replacement water quality samples using procurement practices consistent with the Board's policies, which include a competitive bidding process. The Program Manager shall provide a letter to offer a sampling kit to all properties where the service line has been replaced as part of the Program.

For residents that respond to the offer of post-replacement sampling, the Program Manager shall be responsible for overseeing the distribution and processing of water quality testing kits such that the resident can collect a tap sample, have the sample analyzed and distribute the results within three (3) to six (6) months after service line replacement.

The Program Manager shall:

- Be responsible for the post-replacement water quality sampling requirements of the Final LCRI.
- Procure and directly contract with a Vendor to supply water quality testing kits and analyze tap samples for lead. The Program Manager shall provide or coordinate storage space as required.
- Distribute and collect post-replacement water quality testing kits, arrange for sample analyses, and report results to the Board and residents.
 - Provide a letter to offer water quality sampling to every property where the service line is replaced, including each household if the property is a multi-family dwelling.
 - Provide a water quality sampling kit to every property or every household in a multi-family dwelling that requests participation in response to the offer letter for sampling.
- Collect tap samples from residents.
- Contract with an LDH-accredited laboratory service provider to perform the analytical work associated with post-replacement water quality sampling and in accordance with State and Federal requirements.
- Communicate results from sampling to the resident (as required in the Final LCRI) and the Board (monthly).
 - Where lead is measured above the threshold identified in the operationalization of the Draft Lead Line Replacement Plan notify the resident, property owner and the Board promptly per LDH and Final LCRI requirements.
- Track distribution of water quality sampling kits to confirm that all properties, or households as applicable, receive a water quality sampling kit no later than four (4) months following lead line replacement, including any properties that report a missing or damaged testing kit.

Deliverables:

1. Contract documents (60%, Final) for the supply, distribution, analysis and reporting for post-replacement water quality sampling as required under the Final LCRR and Final LCRI.
2. SOP for post-replacement water quality sampling.
3. Written instructions for how to collect the water quality sample and return the sample to the Vendor.
4. Written results to the resident; for elevated lead samples, written results to the resident and Board per LDH and Final LCRI requirements.
5. Monthly reports of water quality test kit distribution and summary of results, including confirmation that offers to sample water quality after service line replacement have been made to all properties with a service line replacement per the timing requirements of the Final LCRI.

Task 4 – Construction Management Services

The Program Manager shall be responsible for providing construction management services throughout execution of the Program, including:

- Review of Contractor/Vendor Pay Requests.
- Review and approval of Contractor shop drawings.
- Review and approval of change and/or field orders.

- Certification of the work performed by the Contractor(s).

The Program Manager shall:

- Oversee and administrate the work of Contractor(s) in accordance with the Board's Lead Line Replacement Plan updated in Task 3 and any applicable standards, laws, and State and Federal regulations.
- Provide on-site inspection services for replacement work and restoration work, where restoration is required for replacements or investigations.
- Host annual training workshops for Contractor(s), discussing topics such as community engagement and applicable technology updates.
- Organize and lead at least two "lessons learned" meetings each year with the Contractor(s), the purpose of which is to capture potential efficiencies and best practices which may be used in subsequent program years.
- Assist with plumber training and certification.
- Submit a Construction Preparedness Plan annually, 60 days prior to year-end. The Construction Preparedness Plan must be approved by the Board prior to commencing the following year's work. The Plan must detail, at a minimum:
 1. Procedures by which service line materials will be identified (including equipment and staffing needs).
 2. Procedures to replace a service line (including equipment and staffing needs) and connections to water mains constructed with the materials used in the Board's water system.
 3. Procedures for traffic control planning, including deployment of signage in work areas prior to construction.
 4. Procedures to reference the annual Communications Plan, such as timing for outreach materials provided to customers within the work area prior to construction.
 5. Requirements for property restoration.
 6. Field crew organizational chart (number of staff per replacement and inspection, and their roles).
 7. Field data collection procedures, including how quality assurance of data is performed.
 8. Process for excavation below the groundwater table.
 9. Plumber Training and Certification Plan.
 10. Construction Health and Safety Plan.
 11. Annual training plan.
- Submit an annual Health and Safety Report, detailing all safety observations, incidents, and near misses during the calendar year, and how each issue was addressed.
- Support the Board with Contractor review(s), re-competing the work annually, and/or negotiation(s) for award, as requested by the Board.

Deliverables:

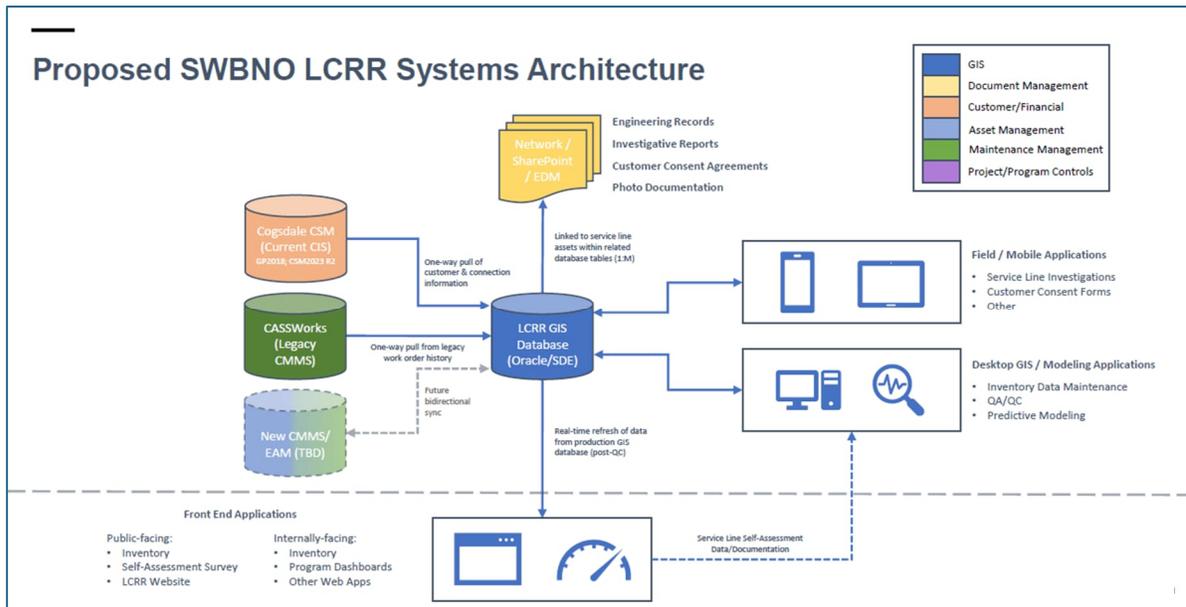
1. Construction Preparedness Plan (annually).
2. Health and Safety Report (annually).
3. Plumber Training Certification Plan.
4. Monthly updates on the status of permits, open/closed and forecast to be pulled.

Task 5 - Program Data

The Program Manager shall be responsible for managing the overall Program database and all associated data, which is anticipated to include, but is not limited to, the service line inventory, customer consent agreements, investigative activities, planned and completed replacements, predictive models (including assumptions, inputs and results, if used), and any other data required to support the successful delivery of the Program.

The Program is currently using Esri's ArcGIS Online platform for service line inventory management and CASSWorks as the Computerized Maintenance Management System (CMMS). It is anticipated that a new CMMS and/or Enterprise Asset Management (EAM) System will be selected and implemented within the next 24 months and will likely not be available to support the Program during the initial two-year contract for the Program. It is expected that the Program Manager will also need to pull data from the Board's Customer Information System (CIS), which is Cogsdale CSM. The Program Manager may propose other software solutions as necessary to perform the work.

A schematic of the anticipated data solution architecture is provided below:



It is anticipated that a more robust, GIS-centric database will need to be developed to support the needs of the Program, and the Program Manager will be responsible for designing, developing and maintaining the Program database, identifying all technology solutions that will be employed to support the Program, integrating existing datasets/databases and existing business systems as needed, and developing all documentation and training materials for the Program.

The Program Manager shall:

- Maintain the service line inventory, including public and private portions of the service line, with all required attributes to meet State and Federal regulatory requirements for service line inventories.
- Develop and maintain a database to track and action investigations, consent, replacements, filter distribution and water quality kit distribution, and any other activities necessary to operate or execute the Program.

- Develop applications as needed to collect data from field activities, as well as associated media.
- Maintain a Program dashboard to communicate progress and status to meet the Board needs.
- Maintain a public-facing Program website, to include an interactive service line material map, the contents of which will be detailed out in the Communications Plan.
- Provide the hosting environments and all licensing and/or usage credits related to both the Procure and Esri ArcGIS platforms as required to support the Program, including (but not limited to) ArcGIS Pro and extensions, ArcGIS Online, ArcGIS Portal, and other related solutions.

Task 5.1 – Database

The Program Manager will be responsible for establishing and maintaining the Program database and provide documentation on how to use and maintain the database.

The Program Manager shall:

- Create and maintain a database, including a dashboard, capable of providing the Board with detailed information pertaining to the work at the property level and Program overall, including but not limited to:
 - Permit log.
 - Signed customer agreements.
 - Photos of investigations and/or replacements, both before and after work is performed.
 - Payment and overall Program financials.
- Enter only QA reviewed data into the database; document the QA procedure used for database entries.
- Data will be stored within a secure environment throughout the duration of the Program and will not be shared externally without the consent of the Board.

Deliverables:

1. Database schema and documentation on data standards & specifications.
2. Final program database, in a format to be agreed upon between the Board and the Program Manager.
3. All documentation, engineering records, investigative reports, photos and related documents that have been collected and organized through the course of the Program.
4. Weekly updates to the Program dashboard.
5. Annual reports.

Task 5.2 – Inventory

The inventory is used to select properties for investigations and ultimately select properties for lead line replacements. The inventory is also used to document the status and type of replacement performed, distinguishing for full or partial lead and galvanized requiring replacement.

The Program Manager shall:

- Maintain the inventory as required for compliance with the Final LCRI.
- Maintain documentation to describe how the material of each service line is designated in the inventory and any assumptions used to adjust the inventory as a whole.
- Maintain an interactive web based, GIS map of the service line inventory within the distribution boundary of the Board's water supply; include actual and planned replacement dates and areas/addresses.
- Record the total number of service lines by material and any changes therein.

- Track the percentage of service lines verified and replaced relative to the total number of service lines in the water system.
- Manage the processes and procedures for collecting data and reporting updates to the inventory.
- Track the phase of construction for each property and update the interactive map accordingly.
- Track completed construction activities.

Deliverables:

1. Weekly updates to GIS-based service line inventory and quarterly updates to the lead map available on the Board's website.
2. Monthly updates to the Program dashboard to allow the Board to track progress on investigations and replacements.

Task 5.3 – Predictive Model

The Board previously contracted with Blue Conduit to develop a predictive model for the materials inventory for their water system. The predictive model employs historical data from the Board's archives to forecast a given property's likeliness of having a lead service line and is used to inform the Board's materials inventory for the purpose of prioritizing replacements. Blue Conduit's final run with the predictive model was performed in early fall 2025. The Board's contract with Blue Conduit has now expired and it is the Board's intention that the Program Manager will assume responsibility for updating and maintaining the predictive model developed by Blue Conduit, if the Program Manager chooses to use the predictive model. The Program Manager has the discretion to decide whether to maintain and update the existing predictive model using their own resources, contract directly with Blue Conduit or contract directly with another third party.

Deliverables:

1. Documentation to describe the development, maintenance, and modifications to the predictive model, if used.
2. Integration of predictive model outputs into the Program database, if used to inform the inventory and/or prioritization of investigations and/or replacements.

Task 5.4 – Reporting

The Program Manager shall track and prepare an annual report including but not limited to the following features and status of the inventory at the end of each program year for the water system as a whole and for disadvantage communities within the water system:

- The number of lead lines, the number of galvanized requiring replacement lines, the number of non-lead lines, and the number of lead status unknown service lines in the initial inventory.
- The number of lead lines that have been replaced in full, the date of replacement, the type of replacement (partial, full) and the address associated with each line replaced.
- The number of galvanized requiring replacement lines replaced, the date of replacement, the type of replacement, and the address associated with each service line replaced.
- The number of lead status unknown service lines remaining in the inventory.
- The number of non-lead service lines in the inventory.
- The total number of service lines initially inventoried as "non-lead" later discovered to be a lead service line or a galvanized requiring replacement service line.
- The total number of service lines designated as Lead, Galvanized Requiring Replacement, and Lead Status Unknown for the water system.

Deliverables:

1. Annual Report, finalized and ready for submission within thirty calendar (30) days after the end of Program year.

Task 6 – Communications, Education and Outreach

Task 6.1 – Communication, Outreach and Education

The Program Manager shall be responsible for promoting the Program including updating existing materials and developing new materials to support the Program needs. The efforts undertaken as part of this task must address the overall Program to the broader community as a whole while also providing details to individual households participating in the Program.

Building on the Draft Communications Plan, the Program Manager shall:

- Make modifications to the Draft Communications Plan to meet the Program Needs and to address the requirements of the Final LCRR and Final LCRI.
- Submit the Communications Plan annually for Board approval sixty (60) days prior to year-end that details, at a minimum, the following:
 1. Summary of previous Program years communication to internal and external stakeholders, education and outreach activities completed and any recommended changes for the subsequent year.
 2. Number of community meetings hosted per year in disadvantaged communities.
 3. Number of community meetings attended per year (in addition to the hosted meetings) to support outreach efforts delivered by the Board or their representatives.
 4. Plan for focusing on disadvantaged communities as identified in the annual Lead Line Replacement Plan.
 5. Plan for consent outreach in areas targeted for replacement as identified in the annual Lead Line Replacement Plan.
 6. Methods and number of opportunities to receive customer feedback, answer questions and provide further community education.
 7. Plan for any other outreach efforts to encourage participation in the Program.
 8. Plan for communications with internal stakeholders, including City staff, about the Program and their role to contribute to the success of the Program.
- Develop public outreach and education materials for, at a minimum:
 1. Consent outreach.
 2. Program enrollment status based on service line material designation.
 3. Educational materials before construction commences (to describe what the residents can expect during construction).
 4. Educational materials during construction (e.g., traffic notices).
 5. Post-replacement premise plumbing flushing instructions.
 6. Post-replacement filter use and maintenance instructions.
 7. Post-replacement water quality testing instructions.

Deliverables:

1. Annual Communications Plan, approved by the Board, and updated annually for submission 60 days before end of the contract year.
2. Outreach materials.

Task 6.2 – Call Center

The Program Manager shall provide a call center, content for the Board’s Lead Awareness page, and a toll-free number that customers can call to ask questions concerning the Lead Line Replacement Program, to notify the Board of a customer-initiated replacement and/or to report problems concerning the Program work.

The Program Manager shall incorporate the following requirements for the call center:

- Provide an automatic call distribution (ACD) system capable of receiving and queuing calls.
- Provide the flexibility to route calls to waiting agents.
- Provide communications in English, Spanish and Vietnamese; develop and provide a standard operating procedure to accommodate requests for communication in other languages, as requested.
- Collect and report data on call volumes, waiting times, abandoned rates, and durations.
- Staff the call center to be able to answer at least 85 percent of all calls within one minute during scheduled hours. Calls received outside of scheduled hours are not included in the evaluation of this requirement and should be promptly directed to a voice message.
- Staff the call center between the scheduled hours of at least 7:00 a.m. and 8:00 p.m. (GMT-4), Monday through Saturday.
- Indicate proposed call center hours and availability of web access for scheduling appointments and questions.

The Board prefers a call center physically located within the United States of America.

Deliverables:

1. Standard operating procedure to accommodate requests for communications in languages other than English, Spanish and Vietnamese.
2. Monthly reports about the customer call center performance.

The metrics for the call center will not be incorporated into the KPIs for the Agreement in Year 1 and Year 2.

Task 7 – Workforce Development

The Program Manager shall develop and implement a Local Workforce Development Plan. Additionally, a Local Workforce Development Plan will be required from the Contractors selected to execute the field work.

The Program Manager shall:

- Plan to describe how the Program Manager intends to meet the Board’s small, local, disadvantaged business enterprise (SLDBE) goals and objectives as described by the KPIs in Attachment – Agreement.
- Participation plan to encourage the local workforce to join the trades and become registered.
- Plan for a multi-year mentor/protégé program to develop meaningful career/job opportunities for skilled and unskilled labor necessary to deliver the Program, with one or more of the EDBP subcontractors engaged by the Program Manager.
- Outreach plan to encourage potential Contractors, updated annually in alignment with expectations for contract renewal.

Deliverables:

1. Local Workforce Development Plan, updated annually.
2. Quarterly reporting to document progress toward achieving SLDBE participation goals.

Task 8 – Funding

The Board will apply and secure funding with the assistance of the Program Manager. The Program Manager is expected to identify funds for sustainable delivery of the Program beyond the initial funding. The Board reserves the right to decline funding identified by the Program Manager if the Board deems the terms and conditions of the funding to be unacceptable. The Board is responsible for the fees associated with permitting applications and government program funding applications.

The Program Manager shall:

- Develop a Funding Pursuit Plan to identify potential funding sources for the Program in addition to DWSRF.
- Assist the Board with funding applications.
- Identify which Program tasks are eligible or ineligible for funding.
- Monitor compliance for awarded grants and loans and provide reporting as required for all sources of funding which may include but is not limited to compliance with Davis-Bacon, Build America Buy America, etc.
- Provide all necessary invoicing documentation to allow for reimbursement by funding agency or agencies.

Deliverables:

1. Annual list of funding opportunities identified, number of applications submitted (if a source was identified, but an application was not submitted, identify the reason why, the total amount of funding for which applications were submitted and amount of funding received).
2. Annual funding report providing an overview of total program funds received, any due dates for spending, remaining funds available, projected spend rate, and available funding impacts on the ability to meet Program goals.
3. Grant and loan compliance reporting and documentation as required by the funding agency or funding entity.

END OF SCOPE OF WORK