

March 14, 2023

Brandon Moody
Water Quality Manager
Charlotte County Government
18500 Murdock Circle
Port Charlotte, Florida 33948

RE: One Charlotte, One Water Plan – Scope of Services
Work Order #265, File #2023000215
Contract Number 2015000421- Civil, Planning, Environ. and Sustain. Services
Jones Edmunds No.: 95347-011-23

Dear Mr. Moody:

Thank you for the opportunity to provide consulting services to Charlotte County under the Professional Services Library RLI 2015000421. The attached outlines our scope of work and fee for the Charlotte County – One Charlotte, One Water Plan.

BACKGROUND AND PURPOSE

As directed by the Fiscal Year 2021 to 2022 (FY21-22) Strategic Plan, Charlotte County is developing a Countywide water-quality protection strategy, referred to as the *One Charlotte, One Water Plan*. This Plan will make recommendations related to infrastructure improvements, process enhancements, policy adjustments, environmental assessment/management options, and communications strategies to achieve the following goals:

1. Identifying and tracking sources of impairments to waters in Charlotte County and those portions of Charlotte Harbor, the Gulf of Mexico, the Peace and Myakka Rivers, Lemon Bay, and the Caloosahatchee River that receive drainage from tributaries within the County's boundaries.
2. Establishing mechanisms for reducing negative anthropogenic impacts to the County's waters through measures such as County infrastructure enhancements, green design strategies, code and policy amendments, and public outreach/participation.
3. Developing strategies for collaboration in monitoring, assessment, education, and abatement of impacts to the County's waters, such as public-private partnerships, inter-agency initiatives, and aligning activities within applicable County and regional management plans.
4. Examining measures that ensure equitable access to the services and amenities provided by healthy waters.

The Plan will serve as a blueprint for expenditure of funds and resources to complete projects that will bring the County closer to accomplishing the goals described above. Recommended projects may be physical (e.g., infrastructure) or procedural (e.g., policies and programs). Each proposed project plan will describe the need it fulfills and its estimated cost. For those projects that cannot be immediately initiated due to lack of information or

resources, the Jones Edmunds team (Jones Edmunds and Janicki Environmental) will identify those needs.

SCOPE OF SERVICES

To begin fulfilling the goals identified above, the Jones Edmunds team proposes starting with the following Scope of Services that creates the initial iteration of the *One Charlotte, One Water Plan*, which will encompass an ambitious strategy requiring many years and a large amount of funding to fully implement. This phase of the project will accomplish the following:

- Gather and synthesize status, current activities, and stakeholder input associated with water quality in the County.
- Recommend enhancements to future water-quality monitoring based on the County's established goals.
- Determine the appropriate pollutant loading model that the County should develop and determine the cost needed for that effort.
- Develop a pollutant load-reduction strategy by Waterbody Identification (WBID) and establish priorities for implementation.
- Develop Countywide programmatic recommendations including those that can be initiated in the near-term.
- Develop fast-track implementation projects for which the County can seek grant funding.
- Identify grant funding sources applicable to the *One Charlotte, One Water Plan*.
- Provide maintenance recommendations to improve water quality, habitat, and erosion control while providing adequate flood protection.
- Provide recommendations to reduce nutrient loading from reclaimed water.

TASK 1 –KICKOFF MEETING, DATA COLLECTION AND INITIAL ASSESSMENT, AND STAKEHOLDER MEETINGS

TASK 1.1 – KICKOFF MEETING

The Jones Edmunds team will conduct a Kickoff Meeting with County staff. This meeting will establish lines of communication; review project goals, critical success factors, schedule, milestones, and deliverables; and begin planning the Stakeholder Meetings. Planning for the stakeholder meetings will include determining which elements of the project will benefit from having subject matter experts (e.g., land development code, stormwater design, and monitoring and data-related recommendations). A 3-hour kickoff meeting has been budgeted to allow input from County staff from the various departments to be included in this process.

Deliverables: Prepare and deliver an agenda, meeting materials, and meeting minutes.

TASK 1.2 – DATA COLLECTION AND INITIAL ASSESSMENT

The Jones Edmunds team will gather and summarize existing water-quality-related data as follows:

- The latest run from the Florida Department of Environmental Protection (FDEP) Impaired Waters Rule (IWR) database.
- The latest FDEP WBID boundaries from FDEP.
- Monthly discharge monitoring data (Reuse Flow, Direct Injection Well (DIW) Flow, 5-day carbonaceous biochemical oxygen demand (CBOD5), Total Nitrogen (TN) and Total Phosphorus (TP) from the County’s three water reclamation facilities (WRFs) for the past 3 years.
- Discharge reuse flow to major users with reuse stormwater lakes/ponds, number and duration of wet-weather lake/pond discharge and water-quality data (TN, TP, and other) from these reuse stormwater lakes/pond for 12 months/year for the past 3 years.
- Location of septic systems.
- Charlotte County Code of Ordinances and Comprehensive Plan.
- Water-quality-related activities (e.g., from the County’s Municipal Separate Storm Sewer System National Pollutant Discharge Elimination System (NPDES MS4) Permit and ongoing monitoring).

The Jones Edmunds team will evaluate the latest IWR database and compare the results to the current WBID status. The Jones Edmunds team will also summarize the remaining data collected for this task. The findings from this task will be used to inform other tasks in this Scope of Services.

Deliverables: Electronically provide one PDF and one Word copy of a draft Technical Memorandum of Data Collection and Initial Assessment. County comments will be incorporated into a final Technical Memorandum.

TASK 1.3 – STAKEHOLDER MEETINGS

The Jones Edmunds team will prepare for and conduct up to four Stakeholder Meetings. The first meeting will be a day-long a panel of experts in subjects including, but not limited to, outreach and education; regulation, green infrastructure, and public-private cooperation; monitoring and data assessment; stormwater and county-driven infrastructure management/improvements related to elements of the Plan. This meeting will be a publicly accessible workshop (in-person or remote). The meeting will also give the public an opportunity to ask about potential measures they would like to see in the Plan. The remaining up to three meetings will be determined with the County and will be more narrowly focused and of shorter duration.

Once a draft of the Plan has been written, the Jones Edmunds team will prepare for and conduct three public meetings in different parts of the County to present the proposed Plan and receive feedback before its presentation to the Commissioners.

Deliverables: Prepare an agenda, meeting materials, and meeting minutes. The Jones Edmunds team will electronically provide one PDF and one Word copy of a draft Technical

Memorandum for County review that covers stakeholder input. County comments will be incorporated into a final Technical Memorandum.

TASK 2 – MONITORING PLAN RECOMMENDATIONS

Based on our knowledge of current County monitoring, the County’s goals for monitoring, the *Charlotte County Project Plan for Ambient Surface Water Monitoring Program*, and the information gathered in Task 1, the Jones Edmunds team will evaluate existing and proposed water-quality monitoring in the County and provide recommendations to support the County’s goals. These recommendations will include monitoring recommended for calibration/verification of the Countywide pollutant-loading model discussed in Task 3.

Deliverables: Electronically provide one PDF and one Word copy of a draft Technical Memorandum for County review. County comments will be incorporated into a final Technical Memorandum.

TASK 3 – POLLUTANT-LOADING MODEL FRAMEWORK

For mostly the same needs that Charlotte County currently has, Sarasota County (together with the Southwest Florida Water Management District [SWFWMD]) had Jones Edmunds develop the *Spatially Integrated Model for Pollutant Loading Estimates* (SIMPLE). The model was originally formulated as a seasonal/annual loading model (SIMPLE-Seasonal) and later expanded to a monthly loading model (SIMPLE-Monthly). This pollutant-loading model is the clear choice to serve the County’s needs and support water-quality planning. Based on this reasoning, this task does not include a model selection effort but focuses on identifying what data are available for the SIMPLE-Monthly model development, determining what data gaps exist, and developing a summary and cost estimate for future model development.

Deliverables: Electronically provide one PDF and one Word copy of a draft Technical Memorandum for County review. County comments will be incorporated into a final Technical Memorandum.

TASK 4 – WBID-BASED POLLUTANT LOAD-REDUCTION STRATEGY AND PRIORITIZATION

Based on results from Tasks 1 and 2, the Jones Edmunds team will develop recommendations for pollutant load-reduction strategies by WBID. Options will include waiting for the FDEP Total Maximum Daily Load (TMDL)/Basin Management Action Plan (BMAP) process, developing a Reasonable Assurance Plan (4b), developing an Alternative Restoration Plan (4e), or conducting watershed planning without a corresponding regulatory document. The team will prepare a prioritization methodology for the County and revise the methodology based on the County’s comments. The recommendations will include budget-level estimates for developing County-led plans if any are recommended.

Deliverables: Electronically provide a Technical Memorandum in PDF format of the proposed prioritization methodology for County review before submitting a draft Technical Memorandum. County comments will be incorporated into a final Technical Memorandum.

TASK 5 – PROGRAMMATIC RECOMMENDATIONS

The Jones Edmunds team will use information from the previous tasks and assess the County’s Ordinances, Comprehensive Plan, Stormwater Design Standards, and other water-quality-related practices. We will develop specific recommendations that the County may adopt, including specific mechanisms to increase community awareness and involvement. The recommendations will include requirements within the County to implement each item.

Deliverables: Electronically provide one PDF and one Word copy of a draft Technical Memorandum for County review. County comments will be incorporated into a final Technical Memorandum.

TASK 6 – EARLY-OUT PROJECT IDENTIFICATION

Due to grant funding currently being prioritized and because the County does not have much acreage under a BMAP or a TMDL – particularly one that is nutrient-related – and no Reasonable Assurance Plan (RAP), proposed water-quality improvements in the County are at a disadvantage to other projects throughout Florida for grant funding. The Jones Edmunds team will develop two water-quality improvements at a conceptual level that will enable design and the pursuit of grant funding. The conceptual designs will include a project narrative, general plan views, estimates of pollutant-load reductions, and an estimate of design, maintenance, and construction costs.

Deliverables: Electronically provide one PDF and one Word copy of a draft Technical Memorandum for County review. County comments will be incorporated into a final Technical Memorandum.

TASK 7 – FUNDING SOURCE IDENTIFICATION

The Jones Edmunds team will identify likely sources for grant funding opportunities for implementing water-quality improvement projects. We will summarize the grant requirements and assess the applicability to the County for future funding applications.

Deliverables: Electronically provide one PDF and one Word copy of a draft Technical Memorandum for County review. County comments will be incorporated into a final Technical Memorandum.

TASK 8 – PROGRESS MEETINGS

The Jones Edmunds team will prepare for and participate in four Progress Meetings. The meetings will be conducted remotely.

Deliverables: Prepare and deliver an agenda, meeting materials, and meeting minutes.

TASK 9 – FINAL REPORT AND COMMISSION PRESENTATION

The Jones Edmunds team will propose a Final Report outline for review and input by the County. Based on the Final Report outline and using the previously developed Technical Memoranda where appropriate, the Jones Edmunds team will produce a draft Final Report. The report will include a recommendation a framework for regularly updating the adaptive management strategy, emphasizing a data-driven approach to determining appropriate

measures, evaluating their effectiveness, and determining the next steps based on that evaluation. We will review the draft Final Report with the County and incorporate final comments into a Final Report. We will also prepare a draft PowerPoint presentation for the County to review while preparing for a Commission presentation on the Final Report. After incorporating the County’s comments into the PowerPoint presentation, we will present it to the County Commission.

Deliverables: Electronically provide a draft Final Report for the County to review and once approved provide a signed-and-sealed Final Report. Also provide draft and final copies of the PowerPoint presentation.

SCHEDULE

Jones Edmunds will begin work on this project on receiving a signed Purchase Order and Notice to Proceed (NTP) from County Purchasing. This phase of the *One Charlotte, One Water Plan* is proposed to be completed within a 44-week schedule. The project tasks, durations, and milestones are estimated in the table below. Jones Edmunds will coordinate the final schedule with County staff to accommodate County staff reviews, meetings, and production of interim and final deliverables.

Table 1 Project Schedule

Tasks	Weeks from NTP
Task 1 – Kickoff Meeting, Data Collection and Initial Assessment, and Stakeholder Meetings	2–12
Task 1.1: Kickoff Meeting	2
Task 1.2: Data Collection and Initial Assessment	12
Task 1.3: Stakeholder Meetings	12
Task 2 – Monitoring Plan Recommendations	12–20
Task 3 – Pollutant-Loading Model Framework	12–20
Task 4 – WBID-Based Pollutant Load-Reduction Strategy and Prioritization	20–24
Task 5 – Programmatic Recommendations	20–28
Task 6 – Early-Out Project Identification	28–36
Task 7 – Funding Source Identification	28–36
Task 8 – Progress Meetings	12–48
Task 9 – final Report and Commission Presentation	36–48

COMPENSATION

Jones Edmunds proposes to complete the Scope of Services outlined above on a lump-sum basis for the nine major tasks outlined below. The lump-sum, not-to-exceed cost is \$150,000. Invoices will be sent monthly and based on percent complete for each task. Each invoice will include a summary of work for that period.

Table 1 Fee Breakdown per Task

Task	Fee
Task 1 – Kickoff Meeting, Data Collection and Initial Assessment, and Stakeholder Meetings	\$30,000
Task 2 – Monitoring Plan Recommendations	\$15,000
Task 3 – Pollutant Loading Model Framework	\$10,000
Task 4 – WBID-Based Pollutant Load-Reduction Strategy and Prioritization	\$20,000
Task 5 – Programmatic Recommendations	\$20,000
Task 6 – Early-Out Project Identification	\$20,000
Task 7 – Funding Source Identification	\$5,000
Task 8 – Progress Meetings	\$10,000
Task 9 – Final Report and Commission Presentation	\$20,000
TOTAL FEE	\$150,000

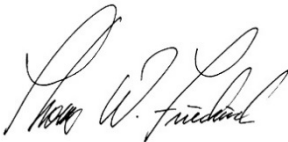
ASSUMPTIONS AND EXCLUSIONS

- The County will identify the stakeholders for the Stakeholder Meetings and be responsible for invitations and meeting locations.
- The schedule will be based on mutual agreement between County staff and the Jones Edmunds team and assumes that the County will provide written comments on each draft deliverable within 2 weeks of receiving the deliverable.
- The compensation for this project assumes that the project will be completed within the scheduled duration.

Sincerely,



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