

Procurement Department
T: (703) 335-8925

BP RFP



REQUEST FOR PROPOSALS (RFP)

Date: June 26, 2024

SOLICITATION NUMBER: RFP SA 2423
TITLE: Professional Engineering, and As-Built Survey Services
RFP CLOSING DATE/TIME: July 31, 2024 at 2:00 P.M. (EST)
PRE-PROPOSAL CONFERENCE: July 3, 2024, at 10:00 A.M.(EST)
QUESTION DEADLINE: July 16, 2024, at 12:00 Noon (EST)
SUBMIT 1 ORIGINAL, 4 COPIES & 1 USB THUMB DRIVE OF YOUR PROPOSAL TO:

STREET ADDRESS:
Prince William County Service Authority
Procurement Department,
Attn: Aziza Kamal, Procurement Officer
4 County Complex Court
Woodbridge, VA 22192

In compliance with this Request for Proposals (RFP) and all the conditions imposed in this RFP and hereby incorporated by reference, the undersigned firm hereby offers and agrees to furnish all goods and services in accordance with the attached signed Proposal or as mutually agreed upon by subsequent negotiation, and the undersigned firm hereby certifies that all information provided below and in any schedule attached hereto is true, correct, and complete.

Company Name

Authorized Signature

Date

Name and Title Printed

Phone Number

Email Address

Note: Prince William County Service Authority does not discriminate against faith based organizations in accordance with the Code of Virginia § 2.2-4343.1 or against an Offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment.

RFP SUBMISSION FORM

Name of RFP: **Professional Engineering, and As-Built Survey Services**
RFP Number: **SA 2423**
Closing Date/Time: **July 31, 2024, at 2:00 P.M. (EST)**

SECTION I - COMPANY IDENTIFICATION AND OWNERSHIP DISCLOSURE

Company: _____ Contact Person: _____

Title: _____
Address: _____ Telephone No: _____

FAX No: _____
Remittance Address: _____ Email: _____

Indicate Which: Corporation [] Partnership [] Sole Prop. []

Minority Owned/Controlled Bus.	Yes []	No []	Small Bus.	Yes []	No []
Women Owned/Controlled Bus.	Yes []	No []	Disabled Veteran:	Yes []	No []

If your firm is certified as any of the business types listed above, provide your certification number, the date issued and the name of the organization that issued the certification.

Certification No. _____ Certification Date: _____ Issuing Organization: _____

Organized under the laws of the State of _____

Principal place of business at _____

Parent Company if any _____

Subsidiaries or Affiliated Entities
Performing Work, if any: _____

SCC: _____

FEIN: _____

Following are the names and address of all persons having an ownership interest of 3% or more in the Company: (Attach more sheets if necessary)

Name

Address

SECTION II - CONFLICT OF INTERESTS

This solicitation is subject to the provisions of Section 2.2-3100 et. seq., Virginia Code Annotated and the State and Local Government Conflict of Interests Act.

The Offeror [] is [] is not aware of any information bearing on the existence of any potential organizational conflict of interest.

SECTION III – COLLUSION

I certify that this submission is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting an offer for the same services, materials, supplies, or equipment, and is in all respects fair and without collusion or fraud. I understand collusive bidding is a violation of the State and Federal law and may result in fines, prison sentences, and civil damage awards.

I hereby certify that the responses to the above representations, certifications, and other statements are accurate and complete. I agree to abide by all conditions of this RFP and certify that I am authorized to sign for the Offeror.

We agree to furnish all material, labor, and supervision necessary to complete the Work in accordance with the Bid Document. By signing this bid form, we certify that we have access to all materials, equipment, and labor necessary to complete the Work within the Contract Times.

Signature

Date

Name (Printed)

Title

OFFEROR MUST COMPLETE AND RETURN THIS FORM WITH ITS PROPOSAL PACKAGE

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Request for Proposals (RFP) -SA 2423
Professional Engineering, and As-Built Survey Services

SECTION 1 INTRODUCTION

The Prince William County Service Authority (“Service Authority”) is a public utility created in 1983 under the Virginia Water and Sewer Authorities Act and chartered by the Prince William Board of County Supervisors. The Service Authority is an independent body responsible for providing comprehensive water and sewer services in Prince William County. The Service Authority has approximately 97,000 customers and owns and operates wastewater treatment facilities for the eastern portion of the county.

Prince William County’s population is among the most rapidly growing in the region. In addition, Prince William County’s racially and ethnically diverse population makes it one of the most globally represented communities in the region. The County’s work force is highly skilled and well educated, including a higher than average number of multi-lingual workers. According to one national daily newspaper, “Prince William County is at the leading edge of a diversity explosion that is currently sweeping the USA”. More than half of the County’s population is either African American, Hispanic, Asian or some other racial/ethnic minority background.

The Service Authority is dedicated to excellence in providing safe, reliable water service to our customers and returning clean water to the environment and is guided in all its actions by our vision and values below:

Vision:

The Prince William County Service Authority is a trusted public steward and nationally recognized model for performance excellence. We reflect the diverse and vibrant community we serve and nurture diversity, equity and inclusion in relationships with our community, customers, businesses and industry colleagues. We create value for our community through our Areas of Excellence.

Values:

Safety Always
Customer-First Focus
Integrity
Respect & Inclusion
Excellence
Ownership

The Service Authority is committed to continuous improvement, diversity, and fairness in its actions as reflected in its values of Safety Always, Customer-First Focus, Integrity, and Respect & Inclusion, Excellence and Ownership. The Service Authority expects the performance of its work force, suppliers and partners to reflect our vision and values.

The Service Authority advances organizational excellence through its commitment to diversity, inclusion, and equity. This commitment to diversity for our employees and by extension, for our

service providers, suppliers and contractors, helps us to deliver excellent water, wastewater and public services. An important part of our procurement program involves a commitment to doing business with Small (including employment service organizations), Minority-owned, Women-owned, and Service-disabled Veteran-owned Business Enterprises (SWaM). The most competitive suppliers will have SWaM utilization plans and will support the SA's supplier-diversity commitment. (Reference Attachment C)

SECTION 2 BACKGROUND INFORMATION

The Service Authority desires to engage the services of multiple qualified firms to perform Professional Engineering, and As-Built Survey Services. The successful firm(s) must demonstrate capabilities to fulfill the duties required under this Request for Proposals (RFP). The Service Authority intends to enter into Contract(s) in the form of Basic Ordering Agreement (BOA) with the selected firm(s). Under the BOA specific tasks will be identified and Task Orders issued.

The Service Authority provides no guarantee of the amount of work to be assigned to the selected firm(s) and may utilize other engineering firms for consulting Work. The Service Authority plans to issue other solicitations for professional engineering work on specified projects during the term of the resulting contract. Successful Offeror(s) that are awarded a contract under this solicitation are also encouraged to submit a proposal for these future solicitations.

SECTION 3 PROCUREMENT RULES AND RFP DEFINITIONS

This RFP, the resulting Proposal document and Contract Document shall be consistent with and governed by the Service Authority's Procurement and Contract Management Regulations. In the event of an inconsistency between the solicitation and selection requirements set forth in this RFP versus those set forth in the Procurement and Contract Management Regulations, the inconsistency shall be resolved by giving precedence to the solicitation and selection requirements of the Procurement and Contract Management Regulations.

- A. **IMPORTANT NOTICE TO POTENTIAL OFFERORS:** Receipt of this document does not indicate that the Service Authority has pre-determined Your organization's qualifications to receive a contract or be selected for any work or project. Such determination will be made after the opening and will be based on the Service Authority's evaluation of Your Proposal Package compared to the specific requirements and qualifications contained in this RFP.
- B. The Service Authority has established for purposes of this RFP that the words "shall", "must", or "will" are equivalent in this RFP and indicate a mandatory requirement or condition. The Service Authority may disqualify a Proposal Package for failure to comply with any mandatory requirements.
- C. The Service Authority has established for purposes of this RFP that the words "should" or "may" are equivalent in this RFP and indicate very desirable conditions or requirements that are permissive in nature. Deviation from, or omission of, such a desirable condition or

requirement will not cause rejection of a Proposal Package but will be considered in the evaluation process.

D. **ACCEPTANCE PERIOD:** Unless otherwise specified in the RFP, all formal Proposals submitted shall be binding for one hundred twenty (120) calendar days following Proposal submission date, unless extended by mutual consent of all parties.

E. General RFP Definitions:

1. **Addendum:** A written or graphic instrument issued prior to the due date and time of Proposals that clarifies, corrects or changes the proposal documents.
2. **Administrative Contracting Officer (ACO) also referred to as Service Authority Contract Administrator:** The Service Authority representative who manages actions that must be taken to assure full compliance with all of the terms and conditions contained within the resulting Contract Document, including price.
3. **Basic Ordering Agreement (BOA):** A written instrument of understanding negotiated between the Service Authority and the Consultant that contains (1) terms and clauses applying to anticipatory agreements between the parties during its term, (2) a description of the commodities and /or services to be provided, and (3) methods for pricing, issuing, and delivering future orders under the Basic Ordering Agreement. A Basic Ordering Agreement is not a contract.
4. **Change Order:** A written order to the Consultant or executed by the Service Authority, issued after execution of a Contract or Purchase Order (PO), authorizing and directing an addition, deletion or revision of any nature or an adjustment in the price, schedule, quality or quantity of the Work. Any positive or negative change in the Contract constitutes a Change Order.
5. **Consultant:** The successful Offeror with whom a contract is executed pursuant to this RFP.
6. **Contract:** When used as a proper noun and capitalized the term “Contract” shall mean: The solicitation’s ensuing agreement obligating the Consultant to furnish the goods and/or services promised in exchange for payment from the Service Authority. (When used as a common noun with lower case the term “contract” shall mean: a mutually binding legal agreement between two (2) or more parties).
7. **Contract Document(s):** Documents which establish the rights and obligations of the and Service Authority and include: The signed Contract, Addenda (which pertain to the resulting Contract Documents), the Notice to Proceed, together with all written Amendments, Change Orders, Work Change Directives, Field Orders, and Engineer’s written interpretations and clarifications issued on or after the Effective Date of the resulting contract.
8. **Contracting Officer Representative (COR) also referred to as Service Authority Project Manager:** the representative of the ACO responsible for the inspection and approval or disapproval of all deliverables and payment of invoices under Authority Contracts. Designation as a COR does not convey authority to execute Contracts or Change Orders.
9. **Day(s):** Calendar Days, unless otherwise specified.
10. **Dollar “\$”:** United States of America dollars.

11. **Drawings:** That part of the resulting Contract Documents prepared or approved by the Consultant which graphically shows the scope, extent, and character of the Work to be performed by the Consultant.
12. **Key Person (Key Personnel):** As listed in Section 5.11, the designated person or persons employed by the Contractor or Subcontractor, whose individual action or inaction can impact the timely accomplishment of the Work.
13. **Materials:** All information, works of authorship, programs, systems, processes, methodologies, techniques, concepts, tools, analytical approaches, data, database models and designs, discoveries, inventions, ideas, and materials related thereto (whether patentable or not), including all documentation, technical information or data, specifications and designs and any changes, improvements, or modifications thereto or derivatives of any of the foregoing.
14. **Notice to Proceed:** A written notice issued by the Owner to the Consultant fixing the date on which the resulting contract times will commence to run and on which Consultant shall start to perform the Work under the resulting Contract Documents.
15. **Offeror:** The professional entity submitting a Proposal Package to the Service Authority in response to this RFP. The term Offeror in some cases refers to the successful Offeror with whom a contract is executed pursuant to this RFP.
16. **Prince William County Service Authority (Service Authority):** Public utility chartered by the Prince William County Board of County Supervisors.
17. **Procurement Officer:** A delegate of the Procurement Manager.
18. **Project Agreement/Task Order Agreement (or Task Order):** The Contract Document that the Service Authority will use to place orders for services with the Consultant for services under the BOA.
19. **Proposal or Proposal Package:** The complete submittal from an Offeror.
20. **Procurement Manager:** The Service Authority person that has been legally authorized and responsible to enter into, administer, terminate and otherwise manage contracts subject to any approval thresholds that may be established by the Service Authority's General Manager and Board of Directors.
21. **Responsible Offeror:** An Offeror who has the capability in all respects to perform fully the Contract requirements, and the experience, integrity, perseverance, reliability, capacity, facilities, equipment, and credit which will assure good faith performance.
22. **Request for Proposals (RFP):** Request for Proposals; This competitive process whereby the Service Authority is seeking competitive offers to resolve the Service Authority's need or requirement.
23. **Selection or Evaluation Committee:** any team, committee or other group that evaluates Proposals.
24. **Specifications:** That part of the resulting Contract Documents consisting of written technical descriptions of materials, equipment, systems, standards and workmanship as applied to the Work and certain administrative details applicable thereto.
25. **Subcontractor/Subconsultant:** An entity having a direct contract with the Consultant (Contractor) or with any other Subcontractor for the performance of a part of the work.
26. **Using Division or Department:** Engineering, O&M, ESWR and PMO
27. **Work:** The entire project or the various separately identifiable parts thereof required to be performed or furnished under the Contract Documents.

28. The terms “**in writing**” and “**written**” mean documents permanently inscribed or printed on paper, submitted by facsimile (fax), or submitted by e-mail, unless otherwise specified.
29. **You, Your:** Same as Offeror.

SECTION 4 SCOPE OF WORK / PROJECT OBJECTIVES AND DELIVERABLES

4.1 Scope of Work / Project Objectives

See **Attachment A – Scope of Work** for Scope of Work and Project Objectives.

SECTION 5 RFP ADMINISTRATIVE REQUIREMENTS AND INSTRUCTIONS

5.1 Proposed Schedule

The following dates are proposed by the Service Authority; however, the dates and times may be changed as the needs of the Service Authority change. It is solely Your responsibility to stay informed on the dates and times.

- A. RFP release date – June 26, 2024
- B. Preproposal conference – Non-Mandatory on July 3, 2024, at 10:00 A.M. (EST)
- C. Final date to receive written questions - July 16, 2024, at 12:00 Noon (EST)
- D. RFP closing date –July 31, 2024, at 2:00 P.M. (EST)
- E. Offeror interviews/presentations/demonstrations, if requested –TBD or Not Applicable
- F. Anticipated selection of Consultant (s)–TBD or Not Applicable

5.2 Delivery of Sealed Proposal Package

DELIVER ONE (1) ORIGINAL, FOUR (4) COPIES, AND ONE (1) USB THUMB DRIVE OF PROPOSAL PACKAGE TO:

Prince William County Service Authority
Procurement Department
Attn: Aziza Kamal, Procurement Officer, Ref: RFP SA 2423
4 County Complex Court
Woodbridge, VA 22192

MARK EACH PACKAGE: RFP SA 2423 Professional Engineering, and As-Built Survey Services.

- A. Failure to clearly mark each Proposal Package with this information may cause the Service Authority to inadvertently open the Proposal Package before the closing date and time. If the Proposal Package is inadvertently opened due to lack of markings, the Service Authority staff shall reseal the package, and the package will be opened after the official RFP closing date and time.
- B. To be considered for selection, the complete Proposal Package must be *Received and Accepted* in the Procurement Department prior to the closing date and time. An Offeror will not be considered for selection if its Proposal Package is received in the Procurement Department after the closing date and time regardless of when or how it was received by the Service Authority.
- C. Allow sufficient time for transportation and inspection. If You use a third party carrier (USPS, FedEx, Airborne, UPS, etc.) ensure that the carrier is properly instructed to deliver Your Proposal Package only to the address above.
- D. The Service Authority will **NOT** consider facsimile (fax) or electronic submission of a Proposal Package.

5.3 Late Proposal Packages

- A. The Service Authority will judge any proposal package received in the Procurement department after the closing date and time as late and the Service Authority will not open it nor consider it for selection.
- B. Upon receipt at the location specified above, the Service Authority will mark each timely received Proposal Package with the date and time of receipt. The Service Authority will safeguard Proposal Packages from unauthorized disclosure from the time of receipt, throughout the source selection process, and until selection.
- C. If the Service Authority declares administrative or liberal leave, all scheduled closing dates for that day will be extended until the next business day.

5.4 Preproposal Conference – Non-Mandatory

Date and Time: July 3, 2024, at 10:00 A.M. (EST)

The Service Authority will hold a Pre-Proposal Conference using MS Teams Meeting. While attendance is not mandatory, prospective Offerors are strongly encouraged to attend. Potential Offerors interested in attending the Pre-Proposal Conference may download the application and join the meeting via the MS Teams application by audio, video or both. If an Offeror plans to join the Pre-Proposal Conference, the Offeror must inform the Procurement Department at saprourement@pwcsa.org with the following information: vendor name, business address and contact person. The Service Authority will provide the MS Teams link to requestors only. Upon completion of the meeting, the Service Authority will post an attendance list on the Service Authority website.

5.5 Questions Concerning RFP

- A. Questions, inquiries, suggestions, or requests concerning interpretation, clarification or additional information in regard to any portion of this RFP or the selection process, must be made in writing (e-mail is acceptable) and sent to the below named individual who will be the point of contact for this RFP.
- B. Questions should be submitted by the following deadline: **July 16, 2024, at 12:00 Noon (EST)**.
- C. Mark subject line or cover page: **“Questions on RFP SA 2423 – Professional Engineering, and As-Built Survey Services”**.
- D. RFP Point of Contact for Questions:

Aziza Kamal, Procurement Officer, Ref: RFP SA 2423
E-mail: saprocurment@pwcsa.org
All questions must be received in writing.
- E. Failure by an Offeror to ask questions, request changes, or submit objections by the date indicated above shall constitute the Offeror’s acceptance of all of the terms, conditions and requirements set forth in this RFP.
- F. No answers given in response to questions submitted shall be binding upon this RFP unless released in writing as an Addendum to this RFP by the Service Authority.

5.6 Offeror’s Representative

If You intend to respond to this RFP, You may provide the name, mailing address, telephone number, and e-mail address of Your liaison person to the point of contact in order for the Service Authority to ensure that You receive any communications regarding this RFP. You should submit this information via email at saprocurment@pwcsa.org.

5.7 Offeror’s Responsibility / Clarification and Addenda

- A. By submitting a Proposal Package, You represent:
 - 1. You have read and understand this RFP.
 - 2. Your Proposal Package is made in accordance with the requirements of this RFP.
 - 3. You are familiar with the local conditions under which the proposed services must be performed.
 - 4. You will not make any claim for or have the right to cancellation of or relief from the resulting contract because of any misunderstanding or lack of information.
- B. The issuance of a written Addendum by the Service Authority’s Procurement Department is the only official method by which interpretation, clarification or additional information

can be given. The Service Authority will not be responsible for any oral representation given by any employees, representatives, or agents.

- C. If the Service Authority revises (amends) this RFP, the Service Authority's Procurement Department will post a notice on the Service Authority Internet site: <https://www.pwcsa.org/rfp-ifb>. You should acknowledge each Addendum in Your Proposal Package. Failure to acknowledge each Addendum may prevent Your Proposal Package from being considered for selection. It is solely Your responsibility as an Offeror to ensure that You have received all addenda and incorporated the changes into Your Proposal before submitting Your Proposal Package.

5.8 Restricted Discussions

- A. From the date of issuance of the RFP until final contract selection, You are prohibited from discussing the RFP or any part thereof with any employee, agent, or representative of the Service Authority except as expressly authorized by the Service Authority's Procurement Officer. The Service Authority may reject Your Proposal package for violation of this restriction.
- B. Any negotiation, decision, or action initiated or executed by You as a result of any oral or written discussions with any Service Authority employee or agent, except as authorized by the Procurement Department, is void and will not be binding upon the Service Authority. You shall only consider those communications that are in writing from the Service Authority's Procurement Department issued through addenda.

5.9 Proposal Correction or Withdrawal

- A. Any Offeror for Supplies, Services or Construction, may withdraw the Proposal from consideration if the price Proposal was substantially lower than the other Proposals due solely to a mistake therein, provided the Proposal was submitted in good faith and the mistake was a clerical mistake as opposed to a judgment mistake, and was actually due to an unintentional arithmetic error or an unintentional omission of a quantity of work, labor, or material made directly in the compilation of a Proposal, which unintentional arithmetic error or unintentional omission can be clearly shown by objective evidence drawn from inspection of original work papers, documents and materials used in the preparation of the Proposal. The Procurement Manager shall require, and so state in the solicitation, the following procedure for withdrawal of a Proposal:
 - 1. The Offeror must give notice in writing of his claim of right to withdraw the Proposal within two (2) business days after the conclusion of the Proposal opening procedure.
 - 2. No Proposal may be withdrawn under this section when the result would be to award the Contract on another Proposal of the same Offeror or of another Offeror in which the ownership of the withdrawing Offeror is more than five percent (5%).
 - 3. No Offeror who is permitted to withdraw a Proposal shall, for compensation, supply any material or labor or perform any subcontract or other work agreement for the person

or firm to whom the Contract is awarded or otherwise benefit, directly or indirectly, from the performance of the project for which the withdrawn Proposal was submitted.

- B. The Procurement Manager may contest withdrawal of any Proposal by any means provided by law. If withdrawal of the Proposal is denied, the Procurement Manager shall notify the Offeror in writing stating the reasons for the decision.
- C. If the mistake and the intended correct Proposal are clearly evident on the face of the Proposal document, the Proposal shall be corrected to the intended correct Proposal and may not be withdrawn. Examples of mistakes that may be clearly evident on the face of the Proposal document are typographical errors, errors in extending unit prices, transposition errors, and arithmetical errors.

5.10 No Obligation to Make Selection

- A. The Service Authority intends to issue one (1) or more Basic Ordering Agreements (BOA) after evaluation of submittals and negotiations as described in Section 5.13 Anticipated Selection Process. The Service Authority is not obligated to make any selection or award as a result of this RFP.
- B. The Service Authority has the sole discretion and reserves the right to cancel this RFP, and to reject any and all Proposal Packages, to waive any and all informalities and/or minor irregularities, or to re-advertise with either the identical or revised scope of work, if it is judged to be in the Service Authority's best interests to do so.

5.11 Offeror's Key Personnel

- A. The Service Authority will be making its decisions on selecting the best qualified Offeror(s) based upon the information submitted in the Offeror's Proposal Package. This includes the resume and experience of the Offeror's Key Personnel. By submitting a Proposal Package, You are representing that each person listed or referenced in Your Proposal Package will be available to perform the services described by the Service Authority, throughout the duration of the resulting BOA, barring illness, accident, or other unforeseeable events of a similar nature in which case You must promptly provide a qualified replacement.
- B. The Procurement Officer and the Manager Contracting Officer Representative (COR) have the right to review and approve or disapprove the Proposal of any Key Personnel assigned to a requirement prior to the person beginning the performance of the Work. If the Procurement Officer considers the Proposal of the assigned person to be inadequate, the Procurement Officer may request further documentation of the person's qualifications, or may request that another qualified person be assigned, also pending the Procurement Officer's approval.

5.12 Minimum Offeror Requirements

- A. To be considered for selection, an Offeror shall meet or exceed each of the following minimum requirements. Failure to meet a requirement will result in a negative evaluation rating.
- B. Qualification Requirements for the Contract shall include the following:
 - 1. The Procurement Officer and/or the Selection Committee will determine responsibility based upon the following factors:
 - a) *Experience*: determined by examining internal and readily available public files, which indicate how the Offeror performed in the past;
 - b) *Integrity, Perseverance, and Reliability*: determined by conducting an in-depth evaluation of the management of the Offeror's organization, the organization's philosophies, ethics standards and policies, reputation in the industry, and the organization's quality control programs;
 - c) *Capacity, Facilities, and Equipment*: determined by information submitted by the Offeror and/or by plant or facility visits, if judged appropriate;
 - d) *Financial Capacity*: determined by an investigation of the Offeror's financial statements, readily available public files, and/or credit reports as well as bonding capabilities; and,
 - e) *Eligibility*: determined by whether the Offeror is qualified and eligible to be selected under applicable laws and regulations.
 - f) Requisite professional registration for the professional services.
 - 2. The Procurement Officer may request additional information, other than that already in the Proposal Package, or may request additional or clarifying information to determine the Offeror's responsibility under this section. If the Offeror fails to supply the information requested within the time required, the Procurement Officer shall make the determination of responsibility or non-responsibility based solely upon available information. If the available information is insufficient to make a determination of responsibility, the Procurement Officer shall determine the Offeror to be non-responsible. If Your organization is listed as an exclusion record in the federal System for Award Management (SAM) <https://www.sam.gov/> at the time of the RFP closing date or becomes an exclusion record at any time prior to award, the Procurement Manager shall immediately determine Your organization as non-responsible.

5.13 Anticipated Selection Process

- A. Initial Technical Evaluation Process:
 - 1. The Procurement Officer will provide a copy of each technical Proposal to the Selection Committee members for their evaluations.
 - 2. The Selection Committee members will evaluate each Proposal in accordance with the Evaluation Criteria.

3. In addition to the materials provided by the Offeror, the Selection Committee may utilize site visits and/or may request and evaluate additional material, information, and/or references from other sources.
4. The Procurement Officer may invite any Offeror to make an in-person (oral) presentation and/or demonstration to the Selection Committee. The Procurement Officer may require that specific individuals identified in the Proposal Package participate in the oral presentation and/or demonstration.
5. The Procurement Officer may request written clarifications from any Offeror to clarify any ambiguity and/or minor irregularity.
6. The Selection Committee members will evaluate and rank all Proposals.
7. The ranking will be provided to the Procurement Officer.

B. Negotiations:

1. The Procurement Officer will invite the top ranked Offeror for negotiations. The Service Authority reserves the right to negotiate any and all elements, except legal requirements, of the evaluation criteria.
2. The Service Authority anticipates negotiating, at minimum, the following elements:
 - a) Staffing;
 - b) Labor hours per labor classification;
 - c) Labor rate per labor classification;
 - d) General and Overhead (G&O) rates, profit, expenses, and mark-up on materials.
3. At the conclusion of the negotiations the Procurement Officer will request a Best and Final Offer.
4. If after receipt and analysis of the Best and Final Offer, the Procurement Officer and the top ranked Offeror reach a mutual agreement on all elements, then the Procurement Officer will formally select the Offeror and request the Offeror to execute a BOA.
5. If the Procurement Officer and a top ranked Offeror cannot reach a mutual agreement on all elements, then the Procurement Officer will formally conclude the negotiations with the Offeror and begin the negotiations process following steps 2-4 above, with the next highest ranked Offeror.
6. This process will continue until the Procurement Officer selects an Offeror or determines that the current RFP process will be terminated if an agreement cannot be reached.

C. Award:

1. Award Notices will be posted online at the following address:
<https://www.pwcsa.org/rfp-ifb>

5.14 Evaluation Criteria

A. The Selection Committee will base the initial and final evaluation on the following criteria:

Evaluation Criteria	Maximum Points per Evaluation Criteria
Staffing Plan and Experience of Key Personnel (Refer to Section 6.4, Tab 2, A)	30
Qualifications and Experience of the Firm in the Public Utilities Sector (Refer to Section 6.4, Tab 2, B)	30
Availability of the Firm (Refer to Section 6.4, Tab 2, C)	20
Approach to the Professional Engineering, and As-Built Survey Services (Refer to Section 6.4, Tab 2, D)	10
Task Control and Project Management Experience and Practices for Client Management and Responsiveness (Refer to Section 6.4, Tab 2, E)	10
Maximum Evaluation Points	100

5.15 Minor Irregularities

The Service Authority reserves the right to waive minor irregularities in submitted Proposal Packages if such action is in the best interest of the Service Authority. A minor irregularity is defined as an issue that does not have an adverse effect on the Service Authority's best interests, and will not affect the outcome of the selection process by giving any Offeror an advantage or benefit not enjoyed by other Offerors.

5.16 Incurred Expenses

This RFP does not commit the Service Authority to select an Offeror nor will the Service Authority be responsible for any cost or expense which may be incurred by any Offeror in preparing and submitting a Proposal Package. By submitting a Proposal Package, You agree that the Service Authority bears no responsibility or obligation for any of Your costs associated with the preparation of Your Proposal Package, preparing and delivering presentations, preparing Proposals for anticipated Task Orders, and/or any administrative or judicial proceedings resulting from this RFP process.

5.17 Exceptions

A list of any exceptions to proposed contractual terms and conditions, unless such terms and conditions are required by statutes, regulation, ordinance, or standards developed pursuant to § 2.2-1132, will be requested after the qualified Offeror(s) is ranked for negotiations.

5.18 Pre-Award Submittals

- A. Within ten (10) calendar days after the Service Authority provides written notification of selection, the Offeror shall furnish the below deliverables to the Procurement Officer.
 - 1. Required Pre-award Submittals:
 - a) Insurance Certificate(s)
 - b) Copies of Commonwealth required licenses and/or certifications
- B. If a selected Offeror fails to furnish the required submittals within the required time frame, the Service Authority may withdraw the selection from the Offeror and begin negotiations with the next ranked Offeror.

5.19 Conflict of Interest Disclosure

- A. This RFP is subject to the provisions of §2.2-3100, et seq. No member of the Board of Directors, or any employee of the Service Authority, or the spouse or any other relative who reside in the same household as any of the foregoing, may be a Consultant or Subconsultant in connection with any proposal, or have a personal interest therein.
- B. Each Offeror shall complete, and sign specified section of the RFP Cover Page dealing with conflicts of interest.
- C. Each proposed Subconsultant shall also complete the attached **Form C – Subconsultant No-Conflict of Interest Form**.

5.20 Contract Type

- A. The Service Authority will be issuing a Basic Ordering Agreement(s) to establish terms and conditions, and pricing for Work to be performed.
- B. The Service Authority will issue Task Order(s) as the Contract Document for services to be provided by the successful Offeror.

5.21 Term of Basic Ordering Agreement (BOA)

- A. The term of any BOA issued from this RFP shall be for one (1) year subject to the Service Authority's option to extend the term of the BOA in accordance with 5.21 B and C below.
- B. Option Period: If the Service Authority determines it to be advantageous, it may extend the term of the BOA for a period of three (3) additional one (1) year periods.

C. Option to Extend the Term of the BOA:

1. The Service Authority may extend the term of the BOA by written notice to the Consultant before the expiration of the BOA, provided that the Service Authority shall give the Consultant a preliminary written notice of its intent to extend at least one hundred twenty (120) Days before the BOA expires. The preliminary notice does not commit the Service Authority to an extension.
2. The terms for rate(s) adjustments for the optional periods shall be as specified in the BOA.

5.22 Limited Confidentiality of Information

- A. Except as provided in the Virginia Public Procurement Act, all proceedings, records, contracts and other public records relating to procurement transactions shall be open to the inspection of any citizen, or any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act.
- B. Cost estimates relating to a proposed procurement transaction prepared by or for a public body shall not be open to inspection.
- C. Trade secrets or proprietary information submitted by an Offeror in connection with this RFP shall not be subject to the Virginia Freedom of Information Act (§ 2.2-3700 et seq.); however, the Offeror shall (i) invoke the protections of this section of the RFP and Virginia Code Section 2.2-4342.F prior to or upon submission of the data or other materials, (ii) identify the data or other materials to be protected, and (iii) state the reasons why protection is necessary. An Offeror shall not designate as trade secrets or proprietary information (a) the entire Proposal; (b) any portion of the Proposal that does not contain trade secrets or proprietary information; or (c) line item prices or total Proposal prices. (Reference Form G)
- D. All material submitted becomes the property of the Service Authority and may be returned only at the Service Authority's option.

5.23 Competency of Offeror

- A. As part of its evaluation process, the Service Authority may make investigations to determine Your abilities to perform under this RFP. Such investigations may include requests for information such as Dun & Bradstreet reports, financial statements, bank, project or other references, information regarding other work under contract and the bonding of Consultants where applicable. The Service Authority reserves the right to REJECT Your Proposal Package if You fail to satisfy the Service Authority that You are properly qualified to carry out the obligations under this RFP.
- B. The Service Authority will not consider a Proposal Package or select a contract to any person, company or corporation that is in arrears, or is in default to the Service Authority upon any debt or contract, or that has defaulted as surety or otherwise upon any obligation

to the Service Authority. The Offeror, if requested, must present within forty-eight (48) hours evidence satisfactory to the Procurement Officer of performance ability, and possession of necessary facilities, pecuniary resources, and adequate insurance to comply with the terms of these Specifications and Contract Documents.

5.24 Protest

- A. Any Offeror or Offerors may protest the award of, or the decision to award, a contract to any other Offeror or Offerors in accordance with §2.2-4364 of the Code of Virginia, by submitting a written protest to the Procurement Manager at the address at the beginning of this RFP, within ten (10) days after the award of the contract or the decision to award a contract is made, whichever occurs first.
- B. Any protest shall state in detail the basis therefore, and the specific relief requested.
- C. Written Submission:
 - 1. The protester shall present its protest in a concise and logical written format to facilitate review. Failure to substantially comply with any of the requirements of this subsection may be grounds for dismissal of the protest.
 - 2. The protest shall include at least the following information:
 - a) Name, address, email address, and fax and telephone numbers of the protester;
 - b) Solicitation number;
 - c) Detailed statement of the legal and factual grounds for the protest, including a description of resulting harm to the protester;
 - d) Copies of supporting documents, if any;
 - e) Statement of relief requested;
 - f) All information establishing that the protester is an interested party for the purpose of filing a protest on an award decision; and,
 - g) All information establishing the timeliness of the protest.
- D. The Director of Management and Budget shall decide all protests within ten (10) Days of receipt and shall issue a written finding. This decision shall be final unless the protester institutes legal action in accordance with §2.2-4364 of the Code of Virginia.

SECTION 6 SUBMITTAL REQUIREMENTS

6.1 Submittal Requirements

Firms, organizations, or individuals (hereafter “Offerors”) interested in submitting a Proposal Package (offer) in response to this RFP should submit 1 original, marked “ORIGINAL,” and 4 copies, each marked “COPY” and 1 USB Thumb Drive of their Proposal Package for review and evaluation by the Service Authority. The Service Authority will consider Your failure to follow these instructions during the evaluation process.

6.2 **Economy of Presentation**

You should prepare Your Proposal Package simply and economically, providing a straightforward, concise description of Your solution and capabilities to satisfy the conditions and requirements of this RFP. The Service Authority does not desire fancy bindings, colored displays, or promotional material unless it specifically enhances the Service Authority's understanding of Your offer. Your emphasis should be on completeness and clarity of content.

6.3 **Proposal Package Guidelines**

- A. To facilitate analysis of Your Proposal Package, You should prepare Your Proposal Package in accordance with the instructions outlined in this section. The Service Authority will consider Your failure to follow these instructions during the evaluation process.
- B. The Service Authority emphasizes that You should concentrate on accuracy, completeness, and clarity of content. Do not assume that You will have any opportunity to make a presentation or explain any item or detail.
- C. **Cross Referencing**: To the greatest extent possible, You should compose each section on a stand-alone basis so that its contents may be evaluated with a minimum of cross-referencing to other sections of the Proposal Package. Unless otherwise clearly noted in a section, the Selection Committee will assume that information requested for Proposal Package evaluation which is not found in its designated section has not been included in the Proposal Package.
- D. **Indexing**: You should include a table of contents to delineate the topics and subsections for each Tab with more than five (5) pages.
- E. **Glossary of Definitions, Abbreviations and Acronyms**:
 1. You should include a glossary of all key words or phrases that if misinterpreted by the Service Authority would impact the success of this project.
 2. You should identify and spell out any abbreviation or acronym used, with an explanation for each.
 3. Glossaries do not count against the page limitations for their respective sections.
- F. **Page Size and Format**:
 1. A "page" is defined as all information that can be legibly printed within one piece of 8.5 x 11-inch piece of paper in accordance with the requirements 2-6 below:
 2. Text should be single-spaced;
 3. Text should be left justified;
 4. Text should be printed in a "portrait" layout;
 5. The text size should be not less than 11 point or more than 14 point;
 6. Margins should be one (1) inch on all four (4) sides;
 7. Pages should be numbered sequentially by Tab and Section; and,

8. Printed materials should be duplexed / double-sided printing on sustainable materials as long as it does not prevent a reader from clearly understanding the Proposal Package.
- G. You should submit legible tables, charts, graphs, figures, and pictures wherever practical to depict Your organizations, systems and layouts, implementation schedules, plans, etc. These displays should be uncomplicated, legible and should be printed on 8.5 x 11-inch paper.

H. **Binding and Labeling:**

1. You should submit the original paper Proposal Package in a three-ring loose leaf binder(s), with section tabs, which should permit the Proposal Package to lie flat when opened.
2. You should not staple pages together.
3. You should include a cover sheet in each binder, clearly marked with RFP SA 2423 – Professional Engineering, and As-Built Survey Services and the Offeror’s name. You should place the same identifying on the spine of each binder.

I. **Proposal Package:**

1. You shall provide 1 original and 4 copies of the Proposal Package for this RFP in the required paper format described above with all the original signatures in a pen ink color other than black. Digital or electronic signatures are not acceptable.
2. You should submit 1 complete copy of the entire Proposal Package on USB Thumb Drive.
3. You should include on the USB Thumb Drive in addition to all of the required Proposal Package submittal information, a text “INDEX” file that lists all files on the USB Thumb Drive with the complete file name (filename plus extension) and a concise written description of what is included in the file.
 - a) You should submit all text files in the PDF format.
 - b) You should submit spreadsheets in a Microsoft Excel format.
 - c) You should scan and submit manufacturers’ specifications pages in the PDF format, or, in an HTML format.
 - d) You should submit pictures, photos, and/or drawings in JPG, BMP or GIF formats.
 - e) You should clearly print: “RFP SA 2423 – Professional Engineering, and As-Built Survey Services” and the Offeror’s name directly on the top surface of each USB Thumb Drive with an indelible marker.
 - f) Electronic or facsimile (FAX) submission of Proposal Packages is not permitted for this RFP.

6.4 Proposal Package Sections

You should organize Your Proposal Package into the following major sections:

Tab 1 – Introduction, Profile & Required Information

- A. **RFP Cover Page and RFP Submission Form**. The RFP cover page and RFP Submission Form, completed and signed.
- B. **Statement of Interest (not more than one page)**. To be submitted on letterhead expressing why You are interested in this project.
- C. **Understanding of Services to be Provided (not more than three (3) pages)**. State in Your own terms what You think this solicitation is about. Succinctly, describe Your understanding of the Service Authority’s challenge. Succinctly, describe in Your own terms what You think are the Service Authority’s anticipated outcomes.
- D. **Service Delivery Plan**. Describe succinctly how You plan to accomplish each of the objectives of these services.
- E. **SWaM Subcontracting Plan**: Consultants are encouraged to offer subcontracting opportunities to SWaM businesses to the greatest extent possible. If applicable, please provide a subcontracting plan with SWaM (Small, Women-owned, Minority-Owned and Service-Disabled Veteran-Owned Enterprises). (Reference Form D)
- F. **Firm Profile / Firm History (not more than 3 pages)**. Submit a brief profile of the firm describing its history, capabilities and recent successes.
- G. **Negotiation Team**. List the full names and functional titles of each person that will be part of Your negotiation team.
- H. **Acknowledgement of Addenda**, (if any).
- I. **Licenses & Permits**. Documentation showing any licenses and/or permits required and applicable to this requirement. Virginia licenses are required for all key staff; Professional Engineer (PE) and Land Surveyor (LS) from prime Consultant and Subconsultant.

Tab 2 – Evaluation Criteria

- A. **Staffing Plan and Experience of Key Personnel**:
 - 1. Provide a staffing plan and list the full names and functional titles of all Key Personnel that will be part of the project. (Key Personnel - any person whose actions or inactions can impact the successful outcome of the project.) Describe the role each will perform in successfully accomplishing this project. (Reference Tab 1.E and Form D, SWaM Subcontracting Plan)
 - 2. **Program / Project Manager**. List the full name, business address, office telephone, cell phone, and e-mail address of the individual that will act as the program / project manager for the project. Provide a resume of the individual’s background and skills in managing similar projects. List the following information:

- a) Years of experience within the area of specialty;
 - b) Length of and type of service with firm; and,
 - c) Education and formal training, including copies of any pertinent and required licenses / certifications.
3. Provide resumes of all other Key Personnel on the project team.

B. Qualifications and Experience of the Firm in the Public Utilities Sector: Include example projects which best illustrate the team's qualifications for this requirement.

1. Example Projects: Select projects where multiple team members worked together, if possible, that demonstrate the team's capability to perform work similar to that required for this solicitation. Submit the following minimum information for each project. Present at least five (5) projects.
 - a) Title and location of project.
 - b) Year Completed. Enter the year completed of the professional services. If any of the services are not complete, leave blank and indicate the status in Brief Description of Project and Relevance to this Project below.
 - c) Project owner or user, such as a government agency or installation, an institution, a corporation or private individual.
 - d) Point of Contact: Provide name of a person associated with the project owner or the organization which contracted for the professional services, who is very familiar with the project and the firm's (or firms') performance. List telephone number and e-mail.
 - e) Brief Description of Project and Relevance to this Project. Indicate scope, size, principal elements and special features of the project. Discuss the relevance of the example project to this project.
 - f) List which firms (or branch offices, if appropriate) on the project team were involved in the example project, and their roles.
2. Outside Professionals. List the name, full mailing address, telephone numbers, e-mail, web address, and contractual relationship with the Offeror of all outside professionals (not directly employed by the proposing firm), Consultant or Subconsultants that will be part of the project. Describe the role each will perform in successfully accomplishing this project.
3. Include a proposed Project Organization Chart for all personnel, Subconsultants and outside personnel to be used on this project.
4. The Service Authority reserves the right to conduct or have conducted background checks (professional, criminal, financial) on any person or organization proposed for this project).
5. **Provide the organization's diversity policies and/or plans. Information may include EEO Reports, minority owned business information, or other diversity plans or practices. Please include any progress and results.**

- C. **Availability of the Firm**: Provide the firms current and anticipated workload and available resources during the course of this requirement.
- D. **Approach to the Professional Engineering, and As-Built Survey Services**: Provide a brief summary to emphasize Your approach to the utility coordination service; including, familiarity with Virginia Department of Health, Virginia Department of Environmental Quality, Virginia Department of Transportation and Prince William County Requirements.
- E. **Task Control and Project Management Experience and Practices for Client Management and Responsiveness**: Provide a brief summary to emphasize Your task control and project management experience and practices for client management and responsiveness.

Tab 3 – Proof of Insurability

Provide either a completed Accord form or a signed letter from Your insurance agency on its letterhead stating that You have or can get the required insurance coverage. See Attachment B – Required Insurance Limits for minimum requirements.

Tab 4 – References

- A. Provide at least five (5) recent references where the proposed product /service has been successfully used within the past five (5) years. Please use the attached **Form A – Offeror Reference Form**.
- B. The Service Authority cannot be used as a reference, however all past performance with the Service Authority will be considered during the evaluation process.

Tab 5 – Litigation

Provide information on the nature, magnitude, and outcome of all litigation and proceedings for the previous five (5) years where a court or administrative agency has ruled for or against You or Your organization in any matter related to You or Your organization’s professional activities.

Tab 6 –Subconsultants

- A. Provide a list of any proposed Subconsultant (s) that You may use on this project. Provide the same information required in Tab 1 Sections E and F, Tab 2 Section A, and complete Tabs 3, 4, 5, and 6 for each Subconsultant.
- B. Include a completed Subconsultant Reference Form for each Subconsultant proposed. Please use the attached **Form B – Subconsultant Reference Form**.

- C. Include a completed Subconsultant No Conflict of Interest Form for each proposed Subconsultant. Please use the attached **Form C – Subconsultant No-Conflict of Interest Form**.

Tab 7 – Exceptions and Other Information

Not Used

Tab 8 – Financial Stability

Please note that the information requested under this Tab is not a requirement at the time of Proposal submission. You may note under this Tab that the information will be provided upon request.

You shall certify and provide a statement that You are financially stable and have the necessary resources, human and financial, to provide the services at the level required by the Service Authority. You should attach a copy of Your latest audited financial statement and Your latest Dun & Bradstreet (D & B) report. If You do not have an audited financial statement, provide Your latest financial statements and Your latest Dun & Bradstreet (D & B) report. The Service Authority reserves the right to use a third-party to verify financial information provided in any Proposal Package.

You shall be prepared to supply Your latest financial statement upon request, preferably a certified audit; however, the Service Authority will accept a third party prepared financial statement and the latest Dun & Bradstreet (D & B) report.

SECTION 7 INSURANCE REQUIREMENTS

- A. Each Offeror shall include in its Proposal Package proof of insurance capabilities, including but not limited to, the following requirements: *(Coverage must be purchased and in place prior to a purchase order or contract being executed by the Service Authority.)*
- B. The Consultant shall maintain insurance in the amounts and forms set forth below and shall provide a Certificate of Insurance to the Service Authority.
- C. The Consultant shall comply with the insurance requirements set forth in the following numbered paragraphs, plus the coverages and limits indicated in the solicitation. Technical Proposal Packages must note any desired exceptions to the insurance coverage which may include the submission of proposed alternatives.
- D. The Consultant shall be responsible for its Work and every part thereof, and for all Materials, equipment, and property of any and all description used in connection therewith. The Consultant assumes all risks of direct and indirect damage or injury to any person or property wherever located, resulting from any action, omission, commission, or operation under the Contract, or in connection in any way whatsoever with the contracted Work.

- E. The Consultant shall, during the continuance of all Work under the Contract provide and agree to maintain the following:
1. Worker's Compensation and employer's liability insurance under the Commonwealth of Virginia statutory requirements, to protect the Consultant from any liability or damages for any injuries (including death and disability) to any and all of its employees, volunteers, or s, including any and all liability or damage which may arise by virtue of any statute or law in force within the Commonwealth of Virginia, or which may be hereinafter enacted.
 2. General liability insurance in the amount prescribed by the Service Authority, to protect the Consultant , its Subconsultants, and the interest of the Service Authority, against any and all injuries to third parties, including bodily injury and personal injury, wherever located, resulting from any action or operation under the Contract or in connection with the contracted Work. The general liability insurance shall also include the "Broad Form General Liability Endorsement", in addition to coverages for explosion, collapse, and underground hazards, where required. Completed operations liability coverage shall continue in force for one (1) year after completion of Work.
 3. Automobile liability insurance, including property damage, covering all owned, non-owned, borrowed, leased, or rented vehicles operated by the Consultant. In addition, all mobile equipment used by the Consultant in connection with the contracted Work, will be insured under either a standard automobile liability policy, or a commercial general liability policy.
- F. Liability insurance may be arranged by general liability and automobile liability policies for the full limits required, or by a combination of underlying liability policies for lesser limits with the remaining limits provided by an excess or umbrella liability policy.
- G. The Consultant shall provide insurance issued by companies admitted within the Commonwealth of Virginia, with the Best's Key Rating of at least A-VII.
- H. The Consultant shall provide an original, signed certificate of insurance, evidencing such insurance and such endorsements as prescribed herein, and shall have it filed with the Procurement Manager before any work is started.
- I. The Consultant will secure and maintain all insurance policies of its Subconsultants which shall be made available to the Service Authority on demand.
- J. The Consultant will provide on demand, certified copies of all insurance coverage on behalf of the Contract within ten (10) Days of demand by the Service Authority. These certified copies will be sent to the Service Authority from the Consultant's insurance agent or representative.
- K. No change, cancellation, or non-renewal shall be made in any insurance coverage without a thirty (30) Day written notice to the Procurement Manager. The Consultant shall furnish a new certificate prior to any change or cancellation date. The failure of the Consultant to

deliver a new and valid certificate will result in suspension of all payments until the new certificate is furnished to the Procurement Manager.

- L. Insurance coverage required in these specifications shall be in force throughout the Contract term. Should the Consultant fail to provide acceptable evidence of current insurance within thirty (30) Days of written notice at time during the Contract term, the Service Authority shall have the absolute right to terminate the Contract without any further obligation to the Consultant, and the Consultant shall be liable to the Service Authority for the entire additional cost of procuring the incomplete portion of the Contract at time of termination.
- M. Compliance by the Consultant and all Subconsultants with the foregoing requirements as to carrying insurance shall not relieve the Consultant and all Subconsultants of their liabilities and obligations under this section or under any other section or provisions of the Contract.
- N. Contractual and other liability insurance provided under the Contract shall not contain a supervision, inspection, or services exclusion that would preclude the Service Authority from supervising and/or inspecting the project as to the end result. The Consultant shall assume all on-the-job responsibilities as to the control of persons directly employed by it and of the Subconsultants and any person employed by the Subconsultants.
- O. Nothing contained herein shall be construed as creating any contractual relationship between any Subconsultant and the Service Authority. The Consultant shall be as fully responsible to the Service Authority for the acts and omissions of the Subconsultants and of persons employed by them as it is for acts and omissions of persons directly employed by it.
- P. Precaution shall be exercised at all times for the protection of persons (including employees) and property.
- Q. The Consultant and all s shall comply with the Occupational Safety and Health Act of 1970, Public Law 91-956, as it may apply to the Contract.
- R. If the Consultant does not meet the specifications of these insurance requirements, alternate insurance coverage, satisfactory to the Procurement Manager, may be considered.
- S. The Service Authority shall be named additional insured in the general liability policies and stated so on the certificate of insurance.
- T. Coverages and Limits – For specific Coverages and Limits required for this project, see **Attachment B Required Insurance Limits.**

SECTION 8 FORMS

Included on the subsequent pages are the following forms:

Form A – Offeror Reference Form

Form B – Subconsultant Reference Form

Form C – Subconsultant No Conflict of Interest Form

Form D – SWaM Subcontracting Plan

Form E - Proposal Package Checklist

Form F – State Corporation Commission (SCC) Form

Form G – Proprietary Information

Form A – Offeror Reference Form

(The Service Authority cannot be used as a reference.)

The Offeror shall be a competent and experienced organization with an established reputation within the community performing the type of work required for this contract. The Offeror shall have performed similar work for a minimum period of five (5) years. Indicate below a listing of at least five (5) recent projects completed by Your firm that can substantiate past work performance and experience in the type of work required for this contract. The Service Authority may make such investigations as it deems necessary to determine the ability of the Offeror to perform the work, and the Offeror shall furnish to the Service Authority all such information and data for this purpose as the Service Authority may request.

1. Firm Name _____

Address: _____

Contact Person: _____ Current phone #: _____

Email Address: _____

Contract Amount: _____ Name of Your project supervisor: _____

Scheduled completion date: _____ Percent complete: _____

Percent of work by own forces: _____ Actual completion date: _____

Description of Work Performed: _____

2. Firm Name _____

Address: _____

Contact Person: _____ Current phone #: _____

Email Address: _____

Contract Amount: _____ Name of Your project supervisor: _____

Scheduled completion date: _____ Percent complete: _____

Percent of work by own forces: _____ Actual completion date: _____

Description of Work Performed: _____

3. Firm Name _____

Address: _____

Contact Person: _____ Current phone #: _____

Email Address: _____

Contract Amount: _____ Name of Your project supervisor: _____

Scheduled completion date: _____ Percent complete: _____

Percent of work by own forces: _____ Actual completion date: _____

Description of Work Performed: _____

4. Firm Name _____

Address: _____
Contact Person: _____ Current phone #: _____
Email Address: _____
Contract Amount: _____ Name of Your project supervisor: _____
Scheduled completion date: _____ Percent complete: _____
Percent of work by own forces: _____ Actual completion date: _____
Description of Work Performed: _____

5. Firm Name _____

Address: _____
Contact Person: _____ Current phone #: _____
Email Address: _____
Contract Amount: _____ Name of Your project supervisor: _____
Scheduled completion date: _____ Percent complete: _____
Percent of work by own forces: _____ Actual completion date: _____
Description of Work Performed: _____

Form B – Subconsultant Reference Form

(Submit a separate reference form for each proposed Subconsultant)

The Service Authority reserves the right to reject offers from any firm not meeting the minimum qualifications. If any proposed 's experience is not deemed acceptable to the Service Authority, the Service Authority shall inform the Consultant and the Consultant must identify an acceptable substitute prior to award without affecting the prices proposed. Subconsultant shall be a competent and experienced firm with an established reputation within the community. Each subconsultant shall have performed similar work for a minimum period of five (5) years. Furnish a representative list of at least three (3) projects.

Subconsultant's Name: _____

ADDRESS: _____

TELEPHONE: _____

CONTACT NAME: _____

DESCRIPTION OF ITEM(S) TO BE SUBCONTRACTED: _____

1. Firm Name: _____

Address: _____

Contact Person: _____ Current phone #: _____

Email Address: _____

Contract Amount: _____ Name of Your project supervisor: _____

Scheduled completion date: _____ Percent complete: _____

Description: _____

2. Firm Name: _____

Address: _____

Contact Person: _____ Current phone #: _____

Email Address: _____

Contract Amount: _____ Name of Your project supervisor: _____

Scheduled completion date: _____ Percent complete: _____

Description: _____

3. Firm Name: _____

Address: _____

Contact Person: _____ Current phone #: _____

Email Address: _____

Contract Amount: _____ Name of Your project supervisor: _____

Scheduled completion date: _____ Percent complete: _____

Description: _____

Form C – Subconsultant No-Conflict of Interest Form

I HEREBY CERTIFY that

1. I (*printed name*) _____ am the
(*title*) _____ and the duly authorized representative of the firm of
(*Firm Name*) _____ whose address is
_____, and that I
possess the legal authority to make this affidavit on behalf of myself and the firm for which I am
acting; and,
2. Except as listed below, no employee, officer, or agent of the firm have any conflicts of interest, real
or apparent, due to ownership, other clients, contracts, or interests associated with this project; and,
3. This Proposal Package is made without prior understanding, agreement, or connection with any
corporation, firm, or person submitting a Proposal Package for the same services, and is in all
respects fair and without collusion or fraud.

EXCEPTIONS (List)

Signature: _____

Printed Name: _____

Firm Name: _____

Date: _____

Sworn to and subscribed before me this _____ day of _____ 202__

Personally Known _____
or Produced Identification _____, Type of Identification _____

My Commission Expires _____

(Printed, typed or stamped commissioned name of notary)

**THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR PROPOSAL
PACKAGE FOR EACH PROPOSED**

Form D - SWaM Subcontracting Plan

In reference to Section 1 and Attachment C in the solicitation, the Bidder/Offeror should provide its SWaM Subcontracting Plan by completing the following:

Bidder/Offeror Name: _____

Preparer Name: _____ **Date:** _____

- Who will be doing the work:** **I plan to use SWaM certified Subcontractors.**
 I am a certified SWaM business and plan to complete all work.
 I am not a certified SWaM business and I have no plan to use SWaM certified Subcontractors.

Instructions

- A. If you are a certified SWaM business, complete only Section A of this form.
- B. If you are not a certified SWaM business, complete Section B of this form.
- C. If you are not a certified SWaM business and do not have a plan to use certified SWaM subcontractors, please provide your subcontractors' information by completing Form B.

Section A

If your firm is certified SWaM business provide your certification number and name of the certifying organization and the date of certification.

Certification number: _____ Certification Date: _____

Name of Certifying Origination: _____

Section B

If the "I plan to use certified SWaM subcontractors box is checked," populate the requested information below, per subcontractor to show your firm's plans for utilization of certified SWaM businesses in the performance of this contract for the initial contract period in relation to the bidder's total price for the initial contract period. Certified SWaM businesses include but are not limited to certified women-owned and minority-owned businesses and businesses with service-disabled veteran-owned status that have a SWaM business certification.

B. Plans for Utilization of SWaM for this Procurement

Subcontract #1

Company Name: _____ SWaM Cert #: _____

Contact Name: _____ SWaM Certification: _____

Certifying Organization: _____

Contact Phone: _____ Contact Email: _____

Value % or \$ (Initial Term): _____ Contact Address: _____

Description of Work: _____

Subcontract #2

Company Name: _____ SWaM Cert #: _____

Contact Name: _____ SWaM Certification: _____

Certifying Organization: _____

Contact Phone: _____ Contact Email: _____

Value % or \$ (Initial Term): _____ Contact Address: _____

Description of Work: _____

Subcontract #3

Company Name: _____ SWaM Cert #: _____

Contact Name: _____ SWaM Certification: _____

Certifying Organization: _____

Contact Phone: _____ Contact Email: _____

Value % or \$ (Initial Term): _____ Contact Address: _____

Description of Work: _____

Subcontract #4

Company Name: _____ SWaM Cert #: _____

Contact Name: _____ SWaM Certification: _____

Certifying Organization: _____

Contact Phone: _____ Contact Email: _____

Value % or \$ (Initial Term): _____ Contact Address: _____

Description of Work: _____

Form E – Proposal Package Checklist

Before submitting Your Proposal Package, review the submittal requirements and ensure each section is included. Failure to include the required materials may preclude the Selection Committee from considering Your Proposal Package.

RFP Reference	Description	N/A (x)	✓	By (initial)	PWCSA Use
Sect. 5.2	Delivery of Proposal Package				
Sect. 6.3 E	Glossary of Definitions, Abbreviations and Acronyms				
Sect. 6.3 H	Binding and Labeling				
Sect. 6.4 Tab 1 Sec A	RFP Cover Page and RFP Submission Form				
Sect. 6.4 Tab 1 Sec B	Statement of Interest				
Sect. 6.4 Tab 1 Sec C	Understanding of Services to be Provided				
Sect. 6.4 Tab 1 Sec D	Service Delivery Plan				
Sect. 6.4 Tab 1 Sec E	SWaM Subcontracting Plan				
Sect. 6.4 Tab 1 Sec F	Firm Profile/Firm History				
Sect. 6.4 Tab 1 Sec G	Negotiation Team				
Sect. 6.4 Tab 1 Sec H	Acknowledgement of Addenda				
Sect. 6.4 Tab 1 Sec I	Licenses & Permits				
Sect. 6.4 Tab 2 Sec A	Staffing Plan and Experience of Key Personnel				
Sect. 6.4 Tab 2 Sec B	Qualifications and Experience of the Firm in the Public Utilities Sector				
Sect. 6.4 Tab 2 Sec C	Availability of the Firm				
Sect. 6.4 Tab 2 Sec D	Approach to the Professional Engineering, and As-Built Survey Services				
Sect. 6.4 Tab 2 Sec E	Task Control and Project Management Experience				
Sect. 6.4 Tab 3 & Attachment B	Proof of Insurability				
Sect. 6.4 Tab 4	References				
Sect. 6.4 Tab 5	Litigation				
Sect. 6.4 Tab 6	Subconsultants				
Sect. 6.4 Tab 7	Exceptions and Other Information				
Sect. 6.4 Tab 8	Financial Stability				
Form A	Offeror Reference Form				
Form B	Subconsultant Reference Form				
Form C	Subconsultant No-Conflict of Interest Form				
Form D	SWaM Subcontracting Plan				
Form E	Proposal Package Checklist				
Form F	State Corporation Commission (SCC) Form				
Form G	Proprietary Information				

Form F-State Corporation Commission Form

Under Section 5.6 of the General Provisions of Contract Agreement, the Bidder/Offeror agrees, if this bid is accepted by the Prince William County Service Authority, for such services and/or items, that the Bidder/Offeror has met the requirements of the Virginia Public Procurement Act (VPPA) § 2.2-4311.2. Any falsification or misrepresentation contained in the statement submitted by Bidder/Offeror pursuant to Title 13.1 or Title 50 of the Code of Virginia may be cause for termination by the Prince William County Service Authority.

Bidders/Offerors shall complete the following by checking the appropriate line that applies and provide the required information. Bidders/Offerors:

is a corporation or other business entity with the following SCC identification number: _____ **-OR-**

is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust **-OR-**

is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the bidder in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from bidder's out-of-state location) **-OR-**

is an out-of-state business entity that is including with this bid an opinion of legal counsel which accurately and completely discloses the undersigned bidder's current contacts with Virginia and describes why those contacts do not constitute the transaction of business in Virginia within the meaning of § 13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia.

is pending before the SCC **an application that was submitted prior to the due date and** time **of this solicitation** for authority to transact business in the Commonwealth of Virginia and seeks consideration for a waiver to allow the submission of the SCC identification number after the due date for bids/proposals. (*Prince William County Service Authority reserves the right to determine in its sole discretion whether to allow such waiver.*)

Legal Name of Company (as listed on W-9)

Legal Name of Bidder /Offeror

Date

Authorized Signature

Print or Type Name and Title

Form G-Proprietary Information

Ownership of all data, materials, and documentation originated and prepared for the Owner pursuant to the REQUEST FOR PROPOSAL shall belong exclusively to the Owner and be subject to public inspection in accordance with the Virginia Freedom of Information Act. Trade secrets or proprietary information submitted by an Offeror shall not be subject to public disclosure under the Virginia Freedom of Information Act, however, the Offeror must invoke the protections of Section 2.2-4342F of the Code of Virginia, in writing, either before or at the time the data or other material is submitted. The written notice must specifically identify the data or materials to be protected and state the reasons why protection is necessary. The proprietary or trade secret material submitted must be identified by some distinct method such as highlighting or underlining and must indicate only the specific words, figures, or paragraphs that constitute trade secret or proprietary information. The classification of an entire proposal document, line-item prices, and/or total proposal prices as proprietary or trade secrets is not acceptable. If, after being given reasonable time, the offeror refuses to withdraw such a classification designation, the proposal may be rejected.

NOTICE OF PROPRIETARY INFORMATION

Confidentiality References Protection in Accordance with the Code of Virginia Section 2.2-4342F

Section Title	Page Number	Reason(s) for Withholding from Disclosure

RETURN THIS PAGE, IF APPLICABLE

ATTACHMENT A SCOPE OF WORK

The Consultant(s) shall provide professional services including professional engineering, surveying, and environmental services to support the Service Authority. Services include, but not limited to, the following disciplines:

- Civil Engineering and Surveying (including as-built survey and Global Positioning System capabilities)
- Structural Engineering
- Geotechnical Engineering
- Mechanical, Electrical, and Plumbing (MEP) Engineering (including Fire Protection and Life Safety)
- Landscape Architecture
- Environmental Services

The Civil Engineering and Surveying consultant shall be the prime consultant with other disciplines and specialties being sub-consultants.

The Consultant(s) shall provide the following services, but are not limited to:

1. Provide surveying services to include as-built services in accordance with Service Authority requirements and standards set forth in the Service Authority's document "As-built Survey Requirements for Consultants" dated 03-01-21 or the latest version referenced below.
2. Preparation of Engineering Project Plans and related plats, Engineering Project Plan submittal, approval, and permitting procedures in accordance with Prince William County Government requirements.
3. Provide Environmental Services, Geotechnical Engineering, compliance and safety, to include, but not limited to:
 - Flood Plain Studies and Map Revision.
 - Phase 1 and 2 Environmental Assessments.
 - Cultural Resources Study.
 - Wetland Studies, Investigations and Delineation.
 - Archeological Site Surveys.
 - Hazardous material investigation, studies, and abatement plans: asbestos, lead-based paint, etc.
 - Preservation Area Site Assessment to meet Prince William County requirements.
4. Provide Certified Arborist services.

5. Provide construction administration, including preparation of bid documents, specifications, contracts and inspections.
6. Provide AutoCAD capabilities enabling digital information exchange with Service Authority staff. The following is a list of acceptable formats/version:
 - ESRI ArcView Shapefile (preferred)
 - ESRI File/File Geodatabase
 - AutoCAD 2012-2017
 - AutoCAD DXF 2012-2017
 - MicroStation(versions 7-8)

As-Built Survey Requirements for Consultants

1. Purpose

- 1.1. In order to provide exceptional water service to Prince William County residents, the Prince William County Service Authority (SA) has a need for survey-grade data to be collected on its critical assets and catalogued in its enterprise GIS. The purpose of this document is to clearly define As-Built Survey requirements related to spatial reference systems, survey accuracies, field procedures, and digital data submission requirements for As-Built Surveying consultants offering such services to the SA.

2. Professional Licensure

- 2.1. As-Built Survey work and deliverables shall be completed under the direct, responsible charge of a Land Surveyor or Professional Engineer licensed by the Commonwealth of Virginia as prescribed in § 54.1-400 of the Code of Virginia.

3. Spatial Reference Systems

3.1. Horizontal Positions

- 3.1.1. All horizontal positions shall be referenced to the Virginia Coordinate System (VCS) NAD 83 (current realization), U.S. Survey Foot, grid coordinates.

3.2. Vertical Positions

- 3.2.1. All vertical positions shall be referenced to the North American Vertical Datum (NAVD) of 1988 (current GEOID model).

4. As-Built Survey Accuracies

- 4.1. All surveyed assets shall be within 0.15 feet, at a 95% confidence level, of their true horizontal position.
- 4.2. All surveyed assets shall be within 0.15 feet, at a 95% confidence level, of their true vertical location.
- 4.3. If the As-Built Surveyor cannot meet these accuracy standards, the As-Built Surveyor shall request SA approval of sub-standard accuracy submittal.

5. SA-Provided Files

- 5.1. The SA will provide the As-Built Surveyor with a PDF of the Inspector Plan
- 5.2. The SA will provide the As-Built Surveyor with a CAD file depicting the proposed conditions before construction.

6. Field Procedures

6.1. Field Data Collection Methodologies

- 6.1.1. It will up to the professional judgement of the licensed professional identified in section 2 to determine the appropriate technologies and / or methodologies to comply with the requirements outlined in sections 3 & 4.

As-Built Survey Requirements for Consultants



6.2. Assets to be Surveyed

- 6.2.1. All surface-visible assets shall be surveyed in accordance with sections 2, 3, and 4. (See Table 1: Surface-visible assets to be field-surveyed).
- 6.2.2. All horizontal and vertical measurements on surface-visible assets will be measured on the center of said asset.
- 6.2.3. The As-Built Surveyor shall notify SA and give the SA opportunity to locate assets that cannot be found in the field that are shown in the PDF of the Inspector Plan. The SA shall either mark assets in the field or provide direction to the As-built Surveyor on how to proceed. Assets marked as optional in the Table 1 do not require notification from As-built Surveyor or action by the SA.

Table 1: Surface-visible assets to be field-surveyed.

Sewer Assets	Water Assets	Miscellaneous
Manhole	Hydrant	Testing Station
†Clean Out	Meter	†Casing
Valve	Valve	Other Asset
Flushing Station	Meter Vault	†Line Marking
Grease Trap	†Well	‡ Property Corner
†Grinder Pump	Manhole	‡ Geodetic Point
Meter Station	†Fitting	
Lift Station	Flushing Station	
Vault	Pump Station	
Air Release	Blow Off	
	Air Release	
† Points for these assets are to be obtained if they can be located at the time of survey. Points are not required in the as-built deliverable if assets cannot be located or correctly identified in the field.		
‡ Can be substituted with an alternative means to provide Quality Assurance for horizontal positioning.		

6.2.4. Sanitary Sewers

- 6.2.4.1. All sanitary sewer slopes measured less than the state standard shall be double checked. (See Table 2: Minimum state standard sanitary sewer slopes).

As-Built Survey Requirements for Consultants



Table 2: Minimum state standard sanitary sewer slopes.

Sewage Collection and Treatment Regulations Effective Date: January 1, 2008
8 inch pipe = minimum slope of 0.40%
10 inch pipe = minimum slope of 0.28%
12 inch pipe = minimum slope of 0.22%
14 inch pipe = minimum slope of 0.17%
15 inch pipe = minimum slope of 0.15%
16 inch pipe = minimum slope of 0.14%
18 inch pipe = minimum slope of 0.12%
21 inch pipe = minimum slope of 0.10%
24 inch pipe = minimum slope of 0.08%

- 6.2.4.2. Surveyor error, errors with the benchmark, errors with equipment, and post processing errors must be completely ruled out for slopes measured below the state requirements.
- 6.2.4.3. Survey all proposed sanitary sewer shown in the plans or as directed by the SA.
- 6.2.4.4. Always survey the existing sanitary sewer manhole that the proposed sewer connects to.
- 6.2.4.5. Sanitary sewer manholes shall be survey-located at the center of the manhole structure.
- 6.2.4.6. Sanitary sewer manhole depths shall be measured from the manhole rim down to the incoming and outgoing pipe inverts.
- 6.2.4.7. If the proposed sanitary sewer is relocated between two existing manholes, the scope of work is to include surveying the upstream and downstream manholes the proposed sewer connects to.
- 6.2.4.8. If a manhole is cut into an existing sanitary sewer line, the scope of work is to include surveying the sewer runs and both the upstream and downstream manholes from the "cut in" manhole. This will probably require an adjustment to the reported lengths of sanitary in the Self Assessment form (See Attachment B: Self Assessment Form).
- 6.2.4.9. Survey all inverts into or out of a sanitary sewer manhole. However, do not increase the scope of the survey work unless directed by the SA or by these procedures. As an example, an As-Built Survey project may require the survey of a trunk sewer. At the time of the As-Built Survey, the manholes on the trunk sewer may have been cored for a connection by a collector sewer. The connection is not reported on the Inspector Plan, because they came after the installation. All inverts in and out of the manhole on the trunk sewer are to be reported. Multiple inverts into the manhole on the trunk are to be associated with the upstream manhole. However, do not survey the upstream sewer run from the collector

As-Built Survey Requirements for Consultants

system that is not shown as part of the scope of work. The collector sewer will be surveyed as part of the scope of another As-Built Survey project.

6.2.4.10. With the exception of standard Property Line Flushing Stations, all enclosures for force mains shall be opened and pumped out if necessary. GPS points shall be collected for the valves, NPT flushing connections, air releases, vacuum breakers, and combined air release / vacuum breakers. A photo graph shall be taken of the contents and inserted in the Inspector As-built (PDF) near the asset.

6.2.5. Water Hydrants

6.2.5.1. Location shall be collected on the operating nut.

6.3. Additional Spatial Reference Data Collection

6.3.1. The As-Built Surveyor shall perform Quality Assurance to assist with the horizontal positioning of surveyed assets. Quality Assurance practices shall include a check into one of the following: a single published Prince William County survey monument, a single published NGS control mark, a single SA provided project survey control point, or locating a minimum of 2 geographically dispersed property corners.

7. As-Built Surveyor Deliverables

7.1. Inspector As-Built

7.1.1. The Inspector As-Built and electronic files turned in to SA must match facilities surveyed in the field.

7.1.2. All information digitally added to the Inspector Plan (PDF file) must be red text with a red box.

7.1.3. The original file name of the Inspector Plan will remain unchanged. (The SA uses the updated file to replace information in the SA database that is linked to other document resources).

7.1.4. Information required on the cover sheet

7.1.4.1. Remove existing stamps "Record Drawing" or "Inspector Plan" and apply a new stamp titled "Inspector As-Built" in a large font in the upper right hand corner.

7.1.4.2. Insert the As-Built Surveyor's company name, address, telephone number and logo in the upper right hand corner.

7.1.4.3. Insert the following professional certification statement:

I, [Professional's Name], a duly licensed [Land Surveyor or Professional Engineer (License Number)] in the Commonwealth of Virginia, hereby certify that the As-Built measurements depicted herein and provided in digital format are true and correct to the best of my knowledge and belief as surveyed in the field on [Date].

7.1.4.4. Report horizontal and vertical datum information used for the survey as well as the accuracy standards used in the upper right hand corner.

As-Built Survey Requirements for Consultants

- 7.1.4.5. Insert the following SA Record Disclaimer on the cover sheet. (No requirements for location on the sheet).
-



The attached information was compiled from available records or collected by a third party for the sole benefit of the Prince William County Service Authority. The Service Authority strongly recommends that all elements of the existing infrastructure important to the design of a project be checked by a field survey. Utility information is provided "as-is" without warranties of any kind, expressed or implied, including but not limited to warranties of accuracy for any particular purpose or use. The Service Authority will be held harmless from any direct or indirect claim based on this data. The Service Authority is not responsible for assumptions, calculations, designs, or construction activities making use of, or derived from the data.

- 7.1.4.6. In the Sheet Index, add a red box in the sheet number where information was digitally added.
- 7.1.4.7. Add a large red box around the SA index number. This is the designation for an Inspector As-Built plan.
- 7.1.5. Information required on the plan sheets
- 7.1.5.1. Add the address number to the lots, buildings, or parcels receiving water or sanitary sewer service, if not already present on the plan sheet. Include the street name with the address number, if a property location is at a street corner or is not obvious.
- 7.1.5.2. Add the SA sanitary sewer manhole numbers consisting of a map grid number and a manhole number (e.g., 123-123).
- 7.1.5.3. Place a red "X" over valves, meters, hydrants, property line flushing stations, or other assets shown in the plan set that do not exist within 5 feet of the field location.
- 7.1.5.4. Use the SA designated symbols to show valve, meters, manholes, flushing stations and other asset locations that differ from the location shown in the plan set (e.g., valves that were added or valves that were moved more than 5 feet from the location shown in the plans). (See Attachment A: Standard Service Authority Symbols)
- 7.1.5.5. No easement or as-built information is to provide on sheets marked, "For Information Only" or "Kept for Inspectors Notes".
- 7.1.5.6. If assets could not be located in the field, identify those assets with red boxes and note as such after obtaining SA permission.
- 7.1.5.7. With the exception of standard property line flushing stations, photograph the contents of a sanitary sewer enclosures that contains force main facilities (e.g., force main valves, flushing ports, air releases). Provide an identifier with the asset

in the plan sheet and index the photograph in a separate plan sheet inserted into the plan set. In the plan sheet, apply a green dashed triangle around the structure to denote a sanitary sewer enclosure that is not a gravity sewer manhole.

- 7.1.5.8. If a manhole contains water features (e.g., valves, meters), apply a blue dashed triangle and note the manhole structure and what is inside.
 - 7.1.5.9. A legend shall be inserted in each sheet where the custom symbols are used to designate an asset location.
 - 7.1.5.10. Report water and sanitary sewer easement information provided by the SA in the plan view layout of each plan sheet. Easement width, easement type, and instrument number are to be reported for each specific easement granted outside of pavement, right-of-way, and private roads. A common reference (note) to multiple easements running out of the pavement is not acceptable. A single note on each plan sheet is acceptable to report where right-of-way or blanket utility easements for private roads are granted for water and sanitary sewer utilities in the pavement. Unless specifically noted in the plat or instructions provide by the SA, shared utility easements referenced in the plans do not provide water and sanitary sewer easement rights.
- 7.1.6. Information required on the profile sheets
- 7.1.6.1. Add the SA sanitary sewer manhole numbers. Applied manhole numbers in the plan and the profile sheets match information provided by SA.
 - 7.1.6.2. Report the surveyed sanitary sewer length and slope.
 - 7.1.6.3. Report the surveyed sanitary sewer rim and invert elevations for each manhole invert. Report inverts and adjust the profiles to make the sewer run downhill as surveyed in the field.
 - 7.1.6.4. Fittings, valves, hydrants, etc. that are moved, added, or deleted in the plan sheets are to be correctly referenced (marked up) in the plan view and profile of the profile sheet.

7.2. CAD Digital Data

- 7.2.1. The As-Built Surveyor will provide a modified version of the CAD file provided by the SA in section 5.2 with CAD drawing objects that match the As-Built points collected in the field by the As-Built Surveyor.
- 7.2.2. CAD file requirements
 - 7.2.2.1. The CAD file shall be AutoCAD version 2008 or later.
 - 7.2.2.2. The CAD file shall be named by the following convention: [PlanName]_[PhaseSectionBlock]_[SAPlanNumber] with no spaces (e.g., CampGlenkirk_Sec3_0500364).
 - 7.2.2.3. The CAD file shall not contain external drawings (xrefs).
 - 7.2.2.4. Features to be labeled in the CAD file: Line sizes, invert elevations on sanitary sewer gravity mains, and sanitary sewer manhole numbers.

As-Built Survey Requirements for Consultants



7.3. GIS Digital Data

7.3.1. The As-Built Surveyor will provide two shapefiles, one for all of the assets that can be represented as points (e.g., sanitary sewer manholes, valves, etc.) and one that represents the sanitary sewer mains, when such assets are included in the scope of the As-Built Survey.

7.3.2. Shapefile naming conventions

7.3.2.1. The name of the shapefiles cannot contain spaces. You can use numbers, letters, and underscore characters.

7.3.2.2. The shapefile name should be as follows:
[PlanName]_[PhaseSectionBlock]_[SAPlanNumber]_[PNT or LN], depending on the geometry, PNT for point assets and LN for sanitary sewer line assets.

7.3.2.3. Each shapefile is a collection of multiple files, all named the same with different extensions. The shapefile will not work if all the following files are not present or if the files are not named the same. The consultant must deliver the following files to satisfy the GIS data submission. (See Table 3: Required shapefile deliverables).

Table 3: Required shapefile deliverables.

File Extension	Definition
CampGlenkirk_Sec3_0500364_PNT.shp	Stores feature geometry
CampGlenkirk_Sec3_0500364_PNT.shx	Stores index of the feature geometry
CampGlenkirk_Sec3_0500364_PNT.dbf	Stores attribute data
CampGlenkirk_Sec3_0500364_PNT.prj	Stores coordinate system information

7.3.2.4. All shapefiles should be compressed together into one Zip file named [PlanName]_[PhaseSectionBlock]_[SAPlanNumber].

7.3.3. Shapefile data structure

7.3.3.1. In the event that shapefile fields cannot be populated with available options, the As-Built Surveyor will populate text fields with “None” and numeric fields with “-99999”.

As-Built Survey Requirements for Consultants

Table 4: Point asset shapefile data structure.

Field Name	Explanation / Example	Data Type	Field Properties		
			Length	Precision	Scale
FID	Esri-generated number	Integer			
POINT_ID	Surveyor's point ID	Text	50		
NORTH_Y		Double		18	4
EAST_X		Double		18	4
ELEV_Z		Double		18	2
DESCRIPT	Surveyor's field code	Text	50		
MHL_DEPTH	Sanitary sewer manhole depth at the out invert (decimal feet)	Double		18	2
MANUFACTUR	See Table 6 for Manufacturer type value list.	Text	50		
YR_MANUFAC	Year manufactured (e.g., 2015)	Long		10	
HDATUM	Horizontal Datum (e.g., NAD83)	Text	10		
HDATUMTAG	Horizontal Datum Tag (e.g., 2011)	Text	10		
VDATUM	Vertical Datum (e.g., NAVD88)	Text	10		
GEOID	Geoid Model (e.g., GEOID12A)	Text	10		
POINT_TYPE	See Table 7: Point type value list.	Text	50		
ASSET_ID	Sanitary Manhole IDs (e.g. XXX-YYYY where XXX must be a length of 3 and denotes the map index grid and YYYY can be a length of 1-4 characters that denotes manhole number (ex. 075-87, 098-103A)	Text	20		
PLAN_NO	SA Plan Number	Text	50		
FILENAME	Per section 7.3.2	Text	150		
RECORD_ID	Located on the Inspector Plan cover sheet (e.g., 288-176)	Text	10		
SURVEYOR		Text	100		
SURVEYYEAR	2017	Long		10	
COMMENTS		Text	200		

As-Built Survey Requirements for Consultants

Table 5: Sanitary sewer main shapefile structure.

Field Name	Explanation / Example	Data Type	Field Properties		
			Length	Precision	Scale
FID	Esri-generated number	Integer			
MANHLID_FR	*Manhole From (e.g., 123-22)	Text	20		
MANHLID_TO	*Manhole To (e.g., 098-22)	Text	20		
INVERTIN	Invert Elevation In	Double		18	2
INVERTOUT	Invert Elevation Out	Double		18	2
SLOPE	Calculated slope of the sanitary sewer gravity main based on survey data	Double		18	2
HDATUM	Horizontal Datum (e.g., NAD83)	Text	10		
HDATUMTAG	Horizontal Datum Tag (e.g., 2011)	Text	10		
VDATUM	Vertical Datum (e.g., NAVD88)	Text	10		
GEOID	Geoid Model (e.g., GEOID12A)	Text	10		
ASSET_SIZE	See Table 8: Sanitary sewer line pipe sizes.	Double		11	2
MATERIAL	See Table 9: Sanitary sewer line materials.	Text	100		
PLAN_NO	SA Plan Number	Text	50		
FILENAME	Per section 7.3.2	Text	150		
RECORD_ID	Located on the Inspector Plan cover sheet (e.g., 288-176)	Text	10		
SURVEYOR		Text	100		
SURVEYYEAR	2017	Long		10	
COMMENTS		Text	200		
<p>* The first part of the asset ID is the Service Authority's three digit Key Map number. Leading zeros in the Key Map number are required. The second part of the asset ID is the Service Authority's manhole number. No leading zeros are to be provided with this number. The manhole number is to be reported as issued by the Service Authority.</p>					

As-Built Survey Requirements for Consultants

Table 6: Manufacturer type value list for water hydrants.

American Darling	American Flow Control	Clow	Kennedy	M&H	Mueller	US Pipe	Unknown
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Table 7: Point type value list.

Sewer Assets	Water Assets	Miscellaneous
SewerManhole	WaterHydrant	TestingStation
SewerCleanOut	WaterMeter	Casing
SewerForceMainValve	WaterValve	OtherAsset
SewerFlushStation	WaterSubMeter	LineMarking
SewerGreaseTrap	WaterCommMeter	PropertyCorner
SewerGrinderPump	WaterMeterVault	GeodeticPoint
SewerMeterStation	WaterWell	
SewerSepticTank	WaterManhole	
SewerLiftStation	WaterFitting	
SewerVault	WaterFlushStation	
SewerAirRelease	WaterPumpStation	
	WaterBlowOff	
	WaterAirRelease	

Table 8: Sanitary sewer line pipe sizes.

0.625	3	14	27	60
0.75	4	15	30	66
1	5	16	33	72
1.25	6	18	36	78
1.5	8	20	38	84
2	10	21	42	Unknown
2.25	12	23	48	
2.5	13	24	54	

As-Built Survey Requirements for Consultants

Table 9: Sanitary sewer line materials.

Ductile Iron	PVC-SCH40
Cast Iron	PVC-UltraCorr
Galvanized Iron	PVC-UltraRib
Corrugated Metal	PVC-Vylon
Steel	HDPE
Copper/Brass	HDPE-Spirolite
Type K Copper	Black Poly
PVC	Pre-stressed Concrete Cylinder Pipe
PVC-C900	Crosslinked polyethylene
PVC-C905	Asbestos Cement
PVC-SDR11	Reinforced Concrete
PVC-SDR15	Concrete Cylinder
PVC-SDR26	Fiberglass-Hobas
PVC-SDR35	Vitrified Clay
PVC-SDR36	Cured in Place Pipe
PVC-SCH21	Other

7.3.4. Topology

7.3.4.1. The CAD and Shapefile files shall adhere to the following topological rules:

7.3.4.1.1. Each asset will have a unique point or line; no duplicates are allowed.

7.3.4.1.2. Gravity sanitary sewer main lines will be drawn from the upstream manhole to the downstream manhole with no vertices between the manholes.

8. Compliance

8.1. Failure to provide As-Built services to the standards stated herein will result in terminating the use of the As-Built firm on future projects.







9. Attachments

9.1. Attachment A: Standard Service Authority Symbols

9.2. Attachment B: PO and Project Tracking Form

As-Built Survey Requirements for Consultants

ATTACHMENT A

Description	Symbol
Valves	
Meters	
Gravity Sewer Manhole	
Cleanouts	
Manhole structures containing force main assets	
Property Line Flushing Station	

ATTACHMENT B

PO & Project Tracking

					PO# (Dollar Value)	Notice to Proceed Date ##/##/##	Task Order End Date ##/##/##
Project Name	Start Date	Est. End Date	Estimated Cost	Actual Cost	Actual Waterline Surveyed (Linear Feet)	Actual Sanitary Surveyed (Linear Feet)	Notes
	##/##/##	##/##/##	\$##,###	\$##,####.##	#,###	#,###	

(PO Balance)

ATTACHMENT B REQUIRED INSURANCE LIMITS

Insurance Coverages and Limits:

Coverage Required		Minimum Limits
1.	Workers' Compensation and Employers' Liability:	Statutory Limits of the Commonwealth of VA:
	Admitted in Virginia	Yes
	Employers' Liability	\$500,000
	All State Endorsement	Statutory
2.	General Liability	\$1,000,000 Combined Single Limit Bodily Injury and Property Damage Each Occurrence
	Contractual Liability	
	Personal Injury	
3.	Automobile Liability	\$2,000,000 Combined Single Limit Bodily Injury and Property Damage Each Occurrence
	Owned, Hired & Non-Owned	
	Personal Injury	
4.	Umbrella or Excess Liability	\$5,000,000 Each Occurrence \$5,000,000 Aggregate
5.	Service Authority named as additional insured on General Liability Policies (This coverage is primary to all other coverage the Service Authority may possess.)	
6.	Cancellation notice in accordance with policy provisions required.	
7.	Professional Liability	\$2,000,000 per Occurrence, \$6,000,000 Aggregate
8.	Best's Guide Rating	A-VII or Better, or Equiv.
9.	The Certificate must state Contract No. SA 2423	

ATTACHMENT C SERVICE AUTHORITY SMALL, WOMEN OR MINORITY-OWNED AND SERVICE-DISABLED VETERAN-OWNED BUSINESS GOAL

It is an important business objective of the Service Authority to promote the economic enhancement of small, women- owned, minority-owned and service-disabled veteran-owned small businesses (SDV), collectively known as SWaM. The success of the Service Authority in maximizing participation in contracting or sub-contracting opportunities of SWaM firms (whether as a prime contractor or a subcontractor) is dependent upon Service Authority bidders/offerors and contractors partnering with us in this important endeavor.

A. Obtaining Certification

Eligible firms are encouraged to obtain certification as a SWaM business by using the services and assistance of the Department of Small Business and Supplier Diversity of the Commonwealth of Virginia (SBSD) and the Small Business Administration (SBA) or other resources to obtain certification. The Service Authority recognizes several certification sources including:

Primary Certification Entity:

The Virginia Department of Supplier Diversity (SBSD): <https://www.sbsd.virginia.gov/>

Other Certification Entity Partners of the Service Authority Include:

- (1) Small Business Administration www.sba.gov
- (2) Women’s Business Enterprise National Council www.wbenc.org
- (3) National Minority Supplier Development Council www.nmsdc.org
- (4) Carolina-Virginia Minority Supplier Diversity www.cvmsdc.org
- (5) Other U.S. State or Local Government Supplier Diversity Programs such as the North Carolina Unified Certification Program, the Maryland Office of Minority Business Enterprise and other State certification programs. Some local government programs are also accepted provided the certification process is other than self-reporting.

B. Maximizing Sub-contractor Opportunities

Bidders/Offerors and Prime Contractors should take affirmative steps prior to submission of bids/proposals and after award of a contract to facilitate participation by SWaM businesses by providing subcontractor or sub-consultant opportunities or by partnering with a SWaM firm. Such efforts may include:

- (1) Establishing and maintaining a current list of small, women-owned, minority-owned and service-disabled veteran sources available to provide goods/services.
- (2) Use the services and assistance of the Department of Small Business and Supplier Diversity of the Commonwealth of Virginia (SBSD) or other similar resources to identify sub-contractors or sub-consultants.

- (3) Encourage existing sub-contractors or sub-consultants to seek certification from one of the certification programs identified above if they are eligible.
- (4) Segment total work requirements to permit maximum SWaM participation through subcontractors or partnerships.
- (5) Assure that SWaM firms are solicited whenever they are potential sources of goods or services. This step may include:

Sending letters or making other personal contact with SWaM firms and SWaM related associations. SWaM firms should be contacted when other potential subcontractors are contacted, within reasonable time prior to bid/proposal submission. Those letters or other contacts should communicate the following:

- (i) Specific description of the work to be contracted;
 - (ii) How and where to obtain a copy of plans, specifications or other detailed information needed to prepare a detailed price quotation;
 - (iii) Date the information is due to the Bidder/Offeror;
 - (iv) Name, address, and phone number of the person in the Bidder/Offeror's firm whom the prospective SWaM subcontractor should contact for additional information.
- (6) Offerors and potential subcontractors are encouraged to communicate and collaborate using the B2B Connect tab on the solicitation webpage on eVA, Virginia's e-procurement portal and to follow projects on the Authority's website www.pwcsa.org.

PRINCE WILLIAM COUNTY SERVICE AUTHORITY

Contracts Department

4 County Complex Court, Woodbridge, Virginia 22192

T: (703) 396-6444 F: (703) 335-7954



BP CA

CONTRACT/AGREEMENT

AGREEMENT NUMBER: SA-2423

SUBJECT: Professional Engineering and As-Built Survey Services

BY AND BETWEEN:

Service Authority:

PRINCE WILLIAM COUNTY SERVICE AUTHORITY

4 COUNTY COMPLEX COURT

WOODBIDGE, VIRGINIA 22192

T: (703) 396-6444 / F: (703) 335-7954

And the Consultant:

Consultant Name

[Address][Address]

Telephone: [Telephone]

Fax: [Fax]

Contact Person: [Contact Person]

Email: [Email]

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Professional Engineering and As-Built Survey Services

AGREEMENT SA-2423

Between

THE PRINCE WILLIAM COUNTY SERVICE AUTHORITY

And

CONSULTANT NAME

For

THIS Professional Engineering and As-Built Survey Services Agreement (hereinafter referred to as the “Agreement”) is made between the Prince William County Service Authority, (hereinafter referred to as “Service Authority” or “Owner”), AND

Consultant Name authorized to do business in the State of Virginia, (hereinafter referred to as “Consultant”), whose place of business is [Insert Address].

WHEREAS, the Service Authority solicited proposals from qualified consultants on [Insert Date of RFP Release], pursuant to Service Authority RFP SA-2423. Consultant submitted a response to the RFP dated [Insert Date of Response Submittal]. Based upon the representations of Consultant in the Response to RFP, which representations the Service Authority has relied upon, the Service Authority selected the Consultant to provide said continuing Professional Engineering and As-Built Survey Services for the Service Authority;

WHEREAS, the Consultant is willing and able to perform such professional services for the Service Authority within the basic terms and conditions set forth in this Agreement; and

WHEREAS, the purpose of this Agreement is not to authorize a specific project, but to set forth certain terms and conditions which shall be incorporated into subsequent supplemental Project Agreements for specific projects or services when required;

NOW THEREFORE, in consideration of the mutual terms, conditions, promises and covenants set forth below, the Service Authority and Consultant agree as follows:

SECTION 1 DEFINITIONS

The following definitions and references are given for the purpose of interpreting the terms as used in this Agreement and apply unless the context indicates a different meaning:

- 1.1 **Administrative Contracting Officer (ACO) also referred to as Contract Administrator:** The Service Authority employee holding a valid Warrant and designated to manage and document the Consultant's performance and compliance with all of the terms and conditions of the Contract. The ACO manages contract change orders, modifications and amendments, approving, or recommending approval of the same, if required. The ACO assigns contract management functions to the Contracting Officer Representative (COR), subject to established threshold limitations, for each designated contract.
- 1.2 **Consultant:** The person or entity, including employees, servants, partners, principals, agents, and assignees that obtained from the Service Authority a contract to provide the services set forth herein.
- 1.3 **Consultant Project Manager:** The Consultant person responsible for the Project.
- 1.4 **Contract/Agreement:** When used as a proper noun and capitalized the terms "Contract" or "Agreement" shall mean: this agreement. (When used as a common noun with lower case the terms "contract" or "agreement" shall mean: a mutually binding legal agreement between two or more parties.).
- 1.5 **Contract Documents:** The Contract Documents establish the rights and obligations of the Consultant and Service Authority and include the Project Agreement, Addenda (which pertain to the Contract Documents), the Notice to Proceed, the Agreement, together with all Written Amendments, Change Orders, Work Change Directives, and Contract Administrator's/ACO written interpretations and clarifications issued on or after the Effective Date of this Agreement.
- 1.6 **Contractor:** An individual or business, other than the Consultant or its subcontractors and Subconsultants, having a contract with the Service Authority to furnish goods, services or construction for an agreed upon price.
- 1.7 **Contracting Officer:** The Service Authority person that has been legally authorized and responsible to enter into, administer, terminate and otherwise manage contracts subject to any approval thresholds that may be established by the General Manager and Board of Directors.
- 1.8 **Contracting Officer Representative (COR) also referred to as Service Authority Project Manager:** the representative of the ACO responsible for the inspection and approval or disapproval of all deliverables and payment of invoices under Authority Contracts. Designation as a COR does not convey authority to execute Contracts or Change Orders.

- 1.9 **Change Order:** A written order to the Consultant executed by the Service Authority, issued after execution of an agreement, authorizing and directing an addition, deletion or revision in the Work or an adjustment in the compensation and/or schedule.
- 1.10 **Day (s):** The word “Day” means a Calendar Day of 24 hours measured from midnight to the next midnight. Days in this Contract shall mean consecutive Calendar Days, unless otherwise specified.
- 1.11 **Deliverable(s):** All electronic and/or physical items, products, reports, studies, calculations, plans, drawings, surveys, maps, models, photographs, and specifications, the Consultant must deliver to the Service Authority, at a specified date(s), and meeting the criteria defined in this Agreement and/or all other subsequent task and sub-task agreement pursuant to this Agreement.
- 1.12 **Defective Work:** The word “Defective”, when modifying the word “Work”, refers to work that is unsatisfactory, faulty, or deficient in that it does not conform to the Contract Documents or does not meet the requirements of any inspection, reference standard, test or approval referred to in the Contract Documents, or has been damaged prior to Contract Administrator’s/ACO recommendation of final payment (unless responsibility for the protection thereof has been assumed by the Service Authority).
- 1.13 **Dollar “\$”:** United States of America dollars.
- 1.14 **Drawings:** That part of the Contract Documents prepared or approved by the Consultant which graphically shows the scope, extent, and character of the Work to be performed by the Consultant. Shop Drawings and other Consultant submittals are not Drawings as so defined.
- 1.15 **Effective Date of the Contract/Agreement:** The date this Contract/Agreement becomes effective as documented by the Service Authority on the signature page of the Contract/Agreement.
- 1.16 **Final Payment:** Payment made by the Service Authority for completed services and representing the balance of the Service Authority’s financial obligation for a specified project.
- 1.17 **Hourly Rate: (NOT USED)**
- 1.18 **Intellectual Property Rights: (NOT USED)**
- 1.19 **Key Personnel:** Designated responsible person or persons whose individual action or inaction can impact the timely accomplishment of the performance objective(s).
- 1.20 **Lump Sum:** A method of payment to the Consultant for a fixed sum amount, which constitutes Total Compensation to the Consultant for the performance by the Consultant of the Work stated in the Agreement.
- 1.21 **Materials:** All information, works of authorship, programs, systems, processes, methodologies, techniques, concepts, tools, analytical approaches, data, database models

and designs, discoveries, inventions, ideas, and materials related thereto (whether patentable or not), including all documentation, technical information or data, specifications and designs and any changes, improvements, or modifications thereto or derivatives of any of the foregoing.

- 1.22 **Maximum Amount Not-To-Exceed Compensation:** A method of payment to the Consultant to reimburse for costs up to a Maximum Not-To-Exceed amount. It is understood that the method of compensation is that of “maximum amount not-to-exceed” which means that Consultant shall perform all work stated in the Agreement for Total Compensation in the amount of or less than that stated in the Agreement.
- 1.23 **Maximum Base Rate:** The maximum, not-to-exceed base hourly rate for each category set forth in EXHIBIT B, Compensation and Labor Costs.
- 1.24 **Maximum Fully Burdened Rate:** The maximum not-to-exceed burdened rate set forth for each category listed in EXHIBIT B, Compensation and Labor Costs.
- 1.25 **Non-Reimbursable:** Costs or expenses for items and/or services that will not be directly invoiced to the Service Authority by the Consultant.
- 1.26 **Notice to Proceed:** A written notice issued by the Owner to the Consultant fixing the date on which the Contract Times will commence to run and on which Consultant shall start to perform the Work under the Contract Documents.
- 1.27 **Other Direct Costs (ODCs):** The non-salary expenses directly and indirectly attributable to the Work not covered under the non-reimbursable factor as specified in Table 2 to EXHIBIT B, Non-Reimbursable costs, which incorporated into this Project Agreement by reference. ODCs include, but are not limited to, outside reproduction services for reproduction, printing, binding and photocopying of drawings, specifications, renderings, and other documents, high-end software maintenance charges, regulatory fees paid for securing approval of authorities having jurisdiction over the Work; and work-related travel expenses as listed in item 1.33 of this Section. Subconsultant services are excluded.
- 1.28 **Multiplier:** A factor applied to the Consultant’s raw direct labor rate and further specified in EXHIBIT B, Compensation and Labor Costs.
- 1.29 **Project Agreement/Task Order:** A written agreement between the Service Authority and the Consultant meeting the requirements set forth in this Agreement to perform work as described in EXHIBIT A, Scope of Work herein, or as approved by the Board of Directors.
- 1.30 **Specifications:** That part of the Contract Documents consisting of written technical descriptions of materials, equipment, systems, standards, and workmanship as applied to the Work and certain administrative details applicable thereto.
- 1.31 **Subconsultant:** An entity having a direct contract with the Consultant, or with any Subconsultant, for the performance of a part of the Work.

- 1.32 **Total Compensation:** The total amount of compensation payable to Consultant for work under the Agreement, including, without limitation, Base Hourly Rates, Fully Burdened Hourly Rates, Other Direct Costs, Travel Expenses, and all other costs and expenses incurred by Consultant or related to Consultant's services under the Agreement.
- 1.33 **Travel Expenses:** Actual mileage, meals, and lodging expenses incurred directly for the Work for travel to and from the County. No overnight travel or out-of-town travel outside of Prince William County shall be reimbursed unless the Consultant has secured written authorization for such travel from the Service Authority's General Manager, or his designee (see EXHIBIT E, Travel Authorization Form). Reimbursement for travel expenses shall be at actual rates and shall not exceed per diem rates as established by GSA guidelines (<http://www.gsa.gov/portal/category/104715>).
- 1.34 **Work Change Directive:** A written directive to Consultant, issued on or after the Notice to Proceed of Project Agreement/Task Order, signed by the Service Authority, ordering an addition, deletion or revision in the Work.
- 1.35 **Work, Work Product or Works Made for Hire:** The entire services or the various separately identifiable parts thereof required to be provided by the Consultant under this Agreement. Work Product or Works Made for Hire as provided as a deliverable under this Agreement shall be owned by the Service Authority with the exception of pre-existing Consultant Intellectual Property Rights as defined herein.
- 1.36 The terms "in writing" and "written" mean documents permanently inscribed or printed on paper, submitted by facsimile (fax), or submitted by e-mail, unless otherwise specified.

SECTION 2 SCOPE OF SERVICES

- 2.1 The Consultant shall provide Professional Engineering, and As-Built Survey Services, to the Service Authority as specified in each Project Agreement, and as further described in EXHIBIT A, Scope of Work.
- 2.2 The Consultant hereby represents to the Service Authority, with full knowledge that the Service Authority is relying upon these representations when entering into this Agreement with the Consultant, that the Consultant has the professional expertise, experience and manpower to perform the services in a manner consistent with the standard of care in the industry.
- 2.3 The Service Authority may request changes that would increase, decrease, or otherwise modify the Scope of Work. Such changes must be contained in a written Change Order or Modification executed by the parties authorizing and directing an addition, deletion or revision in the Work or an adjustment in the compensation and/or schedule, in accordance with the provisions outlined in Section 5.21 of this Agreement.
- 2.4 The Service Authority may, at its sole discretion, solicit Proposals from other entities for professional services for any Project or other work outlined in EXHIBIT A, Scope of Work, of this Agreement.

- 2.5 The Service Authority may but is not required to enter into a Project Agreement for the Work provided under this Agreement.
- 2.6 Contract Documents: The Service Authority shall use Uniform Contract Documents (Contract Agreements, Project Agreements/Task Orders Agreements, Exhibits, RFPs/IFBs, etc.) as binding Contract Documents, which are under ownership of the Service Authority. No changes to the Service Authority Uniform Contract Documents are permitted without the express written consent of the Service Authority. Any changes made without the Service Authority consent is strictly prohibited and considered null and void.

SECTION 3 PROJECT AGREEMENT PROCESS/AUTHORIZATION OF SERVICES

- 3.1 The General Manager or his designee is authorized to approve all Project Agreements, Task Orders or Change Orders in accordance with the Service Authority Procurement and Contract Regulations.
- 3.2 The Service Authority shall initiate Project Agreements by providing the Consultant with a “Scope of Services Request”. The Consultant shall provide a proposal for Professional Engineering, and As-Built Survey Services, which shall conform to the requirements of Section 3.3 below.
- 3.3 The Service Authority and the Consultant shall use a standard form of Project Agreement, a copy of which is attached to and incorporated into this Agreement as EXHIBIT H Sample Project Agreement. At minimum, each Project Agreement or Task Order shall include the following negotiated terms:
- 3.3.1 The Scope of Services;
 - 3.3.2 The deliverables;
 - 3.3.3 The time and schedule of performance and term;
 - 3.3.4 The method and amount of compensation;
 - 3.3.5 The personnel assigned to the Specific Project;
 - 3.3.6 Any modifications to the Project Agreement form, if mutually agreed upon by the parties; and,
 - 3.3.7 The name of the Project Manager.
- 3.4 The Work rendered by the Consultant shall commence on the date indicated in the Notice to Proceed. The Consultant shall perform the completed Work Product and submit to the Service Authority as specified in the Project Agreement.

SECTION 4 SPECIAL TERMS AND CONDITIONS

4.1 Compensation Billing and Payment

- 4.1.1 The Service Authority agrees to pay the Consultant compensation for the Work provided for in this Agreement as defined in EXHIBIT B, Compensation and Labor Costs.
- 4.1.2 It is acknowledged and agreed to by Consultant that the dollar limitations set forth in each respective Project Agreement or Task Order is a limitation upon, and describes the maximum extent of, Service Authority's obligation to reimburse Consultant for direct, non-salary expenses, but does not constitute a limitation upon Consultant's obligation to incur such expenses in the performance of services hereunder.
- 4.1.3 If Service Authority requests Consultant to incur expenses not contemplated, Consultant shall notify the Service Authority in writing and obtain Service Authority approval in writing prior to incurring such expenses.
- 4.1.4 Invoices (or Applications for Payment) must contain sufficient information for the Service Authority to verify that the work was performed in accordance with this Contract. The Consultant shall submit documentation with each invoice as detailed in EXHIBIT D, Invoicing Procedures.

4.2 Contract Term Renewal and Rate Adjustments

- 4.2.1 Term of Agreement: This Agreement shall commence on the Effective Date (date as documented by the signature page of this instrument) and shall expire after one (1) year, unless and until terminated pursuant to the terms and conditions herein.
- 4.2.2 The Service Authority reserves the right to renew this Agreement for three (3) additional one (1) year periods under the same terms and conditions, contingent upon successful performance of the Consultant and subject to mutual agreement.
- 4.2.3 The Service Authority shall notify the Consultant in writing, one hundred twenty (120) Days prior to the expiration of the Agreement, or any extension thereof, of the Service Authority's intention. If the Service Authority elects to extend the Agreement, the Consultant shall immediately respond as to whether the Contract extension is acceptable. Such extension shall be executed within thirty (30) Days of the Service Authority's original notice.
- 4.2.4 Rate Adjustments Negotiated Based on Changes in Consultant's costs: Rate adjustments may be permitted annually, at the time of contract renewal, through negotiation. Any rate increases must be based on demonstrated industry wide or regional increases in the Consultant's costs. Publications

such as the Federal Bureau of Labor Statistics and the Washington-Baltimore Consumer Price Index (CPI-U) for Urban Consumers for the immediately preceding reporting period or as otherwise negotiated may be used to determine the increased value.

- 4.2.5 Rate adjustments, as approved by the Service Authority, shall become effective on the anniversary (annual renewal) date of each contract year as agreed upon by both parties via a fully executed Contract Modification. The Consultant shall bill on new approved rates from the effective date onwards. Retroactive rate adjustments are not allowed under this Agreement. The adjusted rates shall not be used to 1) adjust previously authorized Project Agreements/Task Orders; 2) increase the value of a Project Agreement/Task Order; or 3) used as a justification for a change order.
- 4.2.6 The Consultant shall, upon expending 75% of the Task Order/Contract Period of Performance, submit a letter to the Service Authority's Project Manager/COR stating whether the current schedule in effect will be met in completing the Project. If not, the Consultant shall explain the need and justification for a time extension in order to complete the project. Schedule Related Change Orders must be submitted twenty-one (21) Days prior to the Task Order/Contract expiration/completion date.
- 4.2.7 The Service Authority reserves the right to unilaterally extend an existing contract to allow for continuation of work through completion, even if a new contract has not been placed into effect.

4.3 Availability of Service Authority's Personnel

Upon a reasonable request, the Service Authority shall make its personnel, including appropriate professional personnel, administrative personnel and other employees, available for consultation in order to perform its obligations under the Contract.

4.4 Stop-Work / Suspension of Work

- 4.4.1 The Service Authority may, at its sole option, decide to suspend or stop the Consultant's performance of the services required under the contract. When, and if such action is considered, the Service Authority shall notify the Consultant of its decision in writing. The order shall be specifically identified as a stop-work order under this Section. Upon receipt of the stop-work order, the Consultant shall immediately comply with its terms and take all reasonable steps to minimize the incurrence of costs allocable to the work covered by the stop-work order during the period of suspension.
- 4.4.2 Upon receipt of any such notice, and unless the stop-work notice directs otherwise, the Consultant shall:

- 4.4.2.1 Immediately discontinue performing any services on the date and to the extent specified in the stop-work order;
 - 4.4.2.2 Place no further orders, contracts or subcontracts for material, services, or facilities with respect to suspended work other than to the extent required in the stop-work notice;
 - 4.4.2.3 Promptly make every reasonable effort to obtain suspension upon terms satisfactory to the Service Authority, of all orders, subcontracts, and rental agreements to the extent they relate to performance of work suspended; and
 - 4.4.2.4 Continue to protect and maintain the work including those portions on which performance has been suspended.
- 4.4.3 As full compensation for such suspension, the Service Authority shall reimburse the Consultant for the following documented costs, reasonably incurred, without duplication of any item, to the extent that such costs directly result from such suspension of performance:
- 4.4.3.1 All reasonable costs associated with the mobilization and demobilization of the Consultant's workforce and equipment; and
 - 4.4.3.2 An equitable amount to reimburse the Consultant for the cost of maintaining and protecting that portion of the work that has been suspended.
- 4.4.4 If, as a result of any such suspension, the cost to the Consultant of subsequently performing the service is increased or decreased, the Service Authority may consider making an equitable adjustment in accordance with Section 5.24 Disputes and Claims.
- 4.4.5 The Consultant may suspend the Work or terminate the Agreement and/or applicable Project Agreement(s) for the Service Authority's delay in payment, other than payments in dispute, beyond sixty (60) Days.
- 4.4.6 The Service Authority shall notify the Consultant in writing when the stop work has been lifted. The Service Authority shall provide in writing an effective date to resume work.

4.5 Access (Equipment)

The Service Authority agrees to permit the Consultant's authorized personnel access to the Service Authority's [specify] equipment at such times and for such purposes as reasonably necessary to permit the Consultant to perform its obligations under the Contract.

4.6 Access (Facilities)

The Service Authority agrees to permit the Consultant's authorized personnel access to the Service Authority's [specify] facility / facilities at such times and for such purposes as reasonably necessary to permit the Consultant to perform its obligations under the Contract.

4.7 Record Drawings and Specifications

- 4.7.1 During construction, Consultant shall maintain for the Service Authority a record of deviations in the Work as shown or indicated in the Drawings, Specifications, and other construction Contract Documents, as actually installed. Information on said deviations will be based on information compiled and furnished to Consultant by others, including the construction contractor or project representative, together with deviations of which Consultant is aware, based on the scope of the Agreement for which Consultant is retained for the construction phase, from the originally-issued bidding documents.
- 4.7.2 Information provided by the Service Authority is for informational purposes only. The Consultant shall be responsible to validate, or field verify key information as specified in each Project Agreement (see 5.39.7 under Consultant's Responsibilities).
- 4.7.3 Before Service Authority issues final payment to Consultant, the Consultant shall revise the Drawings and Specifications to indicate such deviations and furnish to Service Authority the resulting "record documents".
- 4.7.4 The Consultant shall deliver the required record documents in the format as specified in each subsequent Project Agreement. Record documents shall bear Consultant's standard record documents stamp and shall not require the signature or seal of Consultant's design professional.

4.8 Surveys

If the Consultant or any of their representatives, employees, or Subconsultants move or destroy or render inaccurate any survey control point, such control point shall be replaced at the Consultant's expense.

4.9 Consultant Personnel

The presence or duties of the Consultant's personnel at a work site, whether as onsite representatives or otherwise, do not make the Consultant or the Consultant's personnel in any way responsible for those duties that belong to the Service Authority and/or the construction contractors or other entities, and do not relieve the construction contractors or any other entity of their obligations, duties, and responsibilities, including, but not limited to, all construction methods, means, techniques, sequences, and procedures necessary for coordinating and completing all

portions of the construction work in accordance with the Contract Documents and any health and safety precautions required by such construction work.

The Consultant and the Consultant's personnel have no authority to exercise any control over any construction contractor or other entity or their employees in connection with their work or any health or safety precautions and have no duty for inspecting, noting, observing, correcting, or reporting on health or safety deficiencies of the construction contractor(s) or other entity or any other persons at the site except the Consultant's own personnel, provided Consultant's personnel shall report to the Service Authority any health and safety deficiencies of the construction contractor(s) or other entity or any other person at the site that Consultant's personnel actually observe.

4.10 Environmental Violations

For all contracts and subcontracts in excess of \$100,000.00, the Consultant shall comply with all applicable standards, orders, or requirements issued under Section 306 of the Clean Air Act (42 USC 1857(h), Section 508 of the Clean Water Act (33 USC 1368), Executive Order 11378, and Environmental Protection Agency regulations (40 CFR, Part 15), which prohibit the use under nonexempt Federal contracts, grants, or loans, of facilities included on the EPA List for Violating Facilities.

4.11 Intellectual Property Indemnity

- 4.11.1 The Consultant warrants that products and/or services sold to the Service Authority by the Consultant and the use thereof do not infringe or violate any patent, copyright, trademark, mask work, trade secret, or any intellectual property of a third party. The Consultant shall indemnify, settle on behalf of, and hold harmless Service Authority from and against any and all demands, claims, proceedings, actions, losses, damages, liabilities, costs, and expenses (including reasonable attorneys' fees, other expenses for investigation, handling, and litigation, and settlement or judgment amount) asserted against or incurred by the Service Authority, by reason of, resulting from, or arising in connection with any breach of this Section.
- 4.11.2 The Service Authority shall promptly notify the Consultant of any claim regarding indemnification and give information and assistance reasonably requested by the Consultant. If a court or a settlement enjoins the use of such products and/or services, the Consultant shall, at its own expense and at the Service Authority's option, obtain for the Service Authority either the right to continue using such products and/or services, replace same with a non-infringing product and/or service, modify same so it becomes non-infringing, or refund the value of such products and/or services and accept return for same.
- 4.11.3 The Consultant shall have no liability to the Service Authority with respect to any infringement of patent, copyright, trademark, or other intellectual property rights, resulting from the Consultant's compliance with the Service

Authority's proprietary design, specification, or instructions, from the Service Authority's modification of such product without disclosure to the Consultant's or the Service Authority's use of such product with any product and/or service not supplied by the Consultant (except as specified by the Consultant).

4.12 **Rider Clause (NOT USED)**

SECTION 5 GENERAL PROVISIONS

5.1 Independent Consultant

- 5.1.1 The Consultant shall act as an independent Consultant and will not be considered or deemed to be an agent, employee, joint venture, or partner of the Service Authority. The Consultant will have no authority to contract for or bind the Service Authority in any manner and shall not represent itself as an agent of the Service Authority or as otherwise authorized to act for or on behalf of the Service Authority.
- 5.1.2 Personnel policies, tax responsibilities, social security and health insurance, employee benefits, purchasing policies and other similar administrative procedures applicable to services rendered under this Agreement shall be those of the Consultant.
- 5.1.3 The Consultant warrants that they have not employed or retained any company or person, other than a bona fide employee working solely for them to solicit or secure a contract/agreement with the Service Authority and that they have not paid or agreed to pay any person, company, corporation, individual, or firm other than a bona fide employee working solely for the Consultant any fee, commission, percentage, gift, or other consideration contingent upon or resulting from this Agreement. In the event the Consultant violates this provision, the Service Authority shall have the right to terminate this Agreement or any Project Agreement, without liability, and at its sole discretion, to deduct from the contract price, or otherwise recover the full amount of such fee, commission, percentage, gift or consideration.
- 5.1.4 The Service Authority may require, in writing, that the Consultant removes from the work site any employee the Service Authority deems incompetent, careless, or otherwise objectionable.
- 5.1.5 The Consultant shall not require any employee to work in unsanitary, hazardous, or dangerous surroundings or working conditions. The Consultant shall supervise the work force to ensure that all workers conduct themselves and perform their work in a safe and professional manner.
- 5.1.6 Immigration Reform and Control Act of 1986. The Consultant certifies to the Prince William County Service Authority that they do not and will not during

the performance of the Contract employ illegal alien workers or otherwise violate the provisions of the Federal Immigration Reform and Control Act of 1986.

5.2 No Assignment of Contract

5.2.1 The Consultant shall not assign, transfer, convey, sublet, or otherwise dispose of any award or of any of its rights, title, or interests therein, without the prior written consent of the Contracting Officer. In the event that the Consultant intends to assign, transfer, convey, sublet, or otherwise dispose of any award or any of its rights, title, or interests therein, the Consultant shall provide written notification to the Service Authority no less than twenty (20) Days prior to the intended assignment. All assignments of rights are prohibited whether they are voluntary or involuntary, by merger, consolidation, dissolution, operation of law, or any other manner. For purposes of this Section:

5.2.1.1 a “change of control” is deemed an assignment of rights; and

5.2.1.2 “merger” refers to any merger in which a party participates, regardless of whether it is the surviving or disappearing corporation.

5.2.2 Consequences of Purported Assignment or Delegation: Any purported assignment of rights or delegation of performance in violation of this Section will be void.

5.3 Governing Law and Choice of Forum

This Contract is binding upon the assigns and successors of each party. Except to the extent Federal law is applicable, the interpretation, effect, and validity of this Contract is governed by the laws of the Commonwealth of Virginia.

5.4 Permits, Licenses, Certificates, and Taxes

5.4.1 The Consultant shall use civil engineering firms that are familiar with, experienced and well versed in the Prince William County Development Plan review process to prepare, process and secure approval of site plans with Prince William County that are required for Service Authority projects.

5.4.2 The Service Authority shall stipulate in each Project Agreement/Task Order, all permitting requirements for the approval of authorities having jurisdiction over the Service Authority’s project(s). The Consultant shall adhere to the permitting requirements outlined in the Project Agreement/Task Order.

- 5.4.3 The Consultant shall be solely responsible for complying with any applicable Federal, State and local laws, codes, ordinances, regulations and Prince William County business license that may be required.
- 5.4.4 The Service Authority reserves the right to require documentation that Consultant is abiding by the ordinances, regulations, and laws applicable to the Contractor or Consultant and its services.
- 5.4.5 If Consultant is required by any regulatory agency to maintain professional license or certification to provide any product and/or service solicited under this Agreement, the Service Authority reserves the right to require documentation of the current license and/or certification at any time during the contract period.
- 5.4.6 Failure to keep required license and/or certification current and in force for the term of the Contract and any extension, will result in the Consultant being deemed to be in breach of Contract and the Service Authority may take any appropriate actions.
- 5.4.7 The Service Authority is exempt from state sales tax. A Commonwealth of Virginia Sales and Use Tax Certificate of Exemption will be provided upon request.

5.5 Legal Fees (NOT USED)

5.6 Consultant Must Be Authorized To Transact Business In The Commonwealth

- 5.6.1 In accordance with the Virginia Public Procurement Act (VPPA) § 2.2-4311.2 a Consultant organized as a stock or non-stock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Code of Virginia Title 13.1 or Title 50 or as otherwise required by law.
- 5.6.2 The Consultant shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, or to be revoked or cancelled at any time during the term of the Contract.
- 5.6.3 The Service Authority may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this Section.

5.7 Indemnification and Hold Harmless

- 5.7.1 To the fullest extent permitted by law, the Consultant shall indemnify and hold harmless the Service Authority, its officers, directors, agents and employees

(together the “Indemnified Parties”) from and against third party liability, suits, actions, damages, costs, losses and expenses, including but not limited to reasonable attorneys’ fees, expert witness costs and all other reasonable costs and expenses incurred in preparing, negotiating, or prosecuting through trial and appeal any claims or demands for personal injury, bodily injury, sickness, diseases or death or damage or destruction of tangible property or loss of use resulting there-from, to the proportionate extent caused by, misconduct or negligent acts, errors or omissions of the Consultant, its officers, agents, employees or Subconsultants in the performance of Work under this Agreement and any Project Agreement.

- 5.7.2 The Service Authority has agreed in this Agreement to require all designers and contractors covered by the Service Authority’s future contracts related to a Project Agreement resulting from this Agreement, to indemnify and hold Consultant harmless to the same extent that the designer or Consultant is obligated to indemnify and hold the Service Authority harmless and also require the designer and contractor to add Consultant as an additional insured on the designer’s or contractor’s Commercial General Liability and Auto Liability insurance policies applicable to the Work.
- 5.7.3 The Consultant acknowledges that specific consideration has been paid or will be paid under this and each Project Agreement for this hold harmless and indemnification provision, and further agrees with the foregoing provisions of indemnity and also agrees to provide insurance as set forth in 5.34, Insurance.
- 5.7.4 The provisions of this Section shall survive termination, cancellation and expiration of this Agreement.

5.8 **Disclaimer of Liability**

As a political subdivision of the Commonwealth of Virginia, the Service Authority cannot hold harmless or indemnify any Consultant for any liability whatsoever.

5.9 **Non-discrimination of Consultants**

The Service Authority will not discriminate against any Consultant because of race, religion, color, sex, national origin, age, disability, faith-based organizational status, or any other basis prohibited by state law relating to discrimination in employment or because the Consultant employs ex-offenders, unless the Service Authority has made a written determination that employing ex-offenders on the specific contract is not in its best interest. If this Contract is made with a faith-based organization and an individual who applies for or receives goods, services, or disbursements provided pursuant to the Contract objects to the religious character of the faith-based organization from which the individual receives or would receive the goods, services, or disbursements, the public body shall offer the individual, within a reasonable period of time after the date of his/her objection, access to equivalent goods, services, or disbursements from an alternative provider.

5.10 Anti-Discrimination

- 5.10.1 The Consultant certifies to the Prince William County Service Authority that it will conform to the provisions of the Federal Civil Rights Act of 1964, as amended, as well as the Virginia Fair Employment Contracting Act of 1975, as amended, where applicable, the Virginians with Disabilities Act, the Americans with Disabilities Act and § 2.2-4311 of the VPPA.
- 5.10.2 If the Consultant is a faith-based organization, the organization shall not discriminate against any recipient of goods, services, or disbursements made pursuant to the Contract on the basis of the recipient's religion, religious belief, refusal to participate in a religious practice, or on the basis of race, age, color, gender or national origin and shall be subject to the same rules as other organizations that contract with public bodies to account for the use of the funds, provided however, if the faith-based organization segregates public funds into separate accounts, only the accounts and programs funded with public funds shall be subject to audit by the public body. (§ 2.2-4343.1E of the VPPA).
- 5.10.3 In every contract over \$10,000 the provisions in subsections 5.10.4 and 5.10.5 below apply.
- 5.10.4 During the performance of the Contract, the Consultant agrees as follows:
- 5.10.4.1 The Consultant will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Consultant. The Consultant agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this nondiscrimination clause.
- 5.10.4.2 The Consultant, in all solicitations or advertisements for employees placed by or on behalf of the Consultant, shall state that such Consultant is an equal opportunity employer.
- 5.10.4.3 Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements for this Section.
- 5.10.5 The Consultant will include the provisions of subsection 5.10.4 above in every subcontract or purchase order over \$10,000, so that the provisions will be binding upon each Subconsultant or Vendor.

5.11 Ethics in Public Contracting

The Consultant hereby certifies that it has familiarized itself with Article 6 of Title 2.2 of the VPPA, Sections 2.2-4367 through 2.2-4377, VA Code Ann., and that all amounts received by it, pursuant to this procurement, are proper and in accordance therewith.

5.12 Drug-Free Workplace To Be Maintained By Consultant For Contracts Over \$10,000

The Consultant, during the performance of this Contract, agrees to:

- 5.12.1 Provide a drug-free workplace for its employees.
- 5.12.2 Post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the Consultant's workplace and specifying the actions that will be taken against employees for violations of such prohibition.
- 5.12.3 State in all solicitations or advertisements for employees placed by or on behalf of the Consultant that the Consultant maintains a drug-free workplace.
- 5.12.4 Include the provisions of the foregoing clauses in every subcontract or purchase order over \$10,000.00, so that the provisions will be binding upon each Subconsultant or Vendor.

For the purpose of this Section, "drug-free workplace" means a site for the performance of Work done by the Consultant in accordance with this chapter, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession, or use of any controlled substance or marijuana during the performance of the Contract.

5.13 Terminations

- 5.13.1 Termination for Non-Allocation of Funds:
 - 5.13.1.1 If the Service Authority does not allocate funds for any succeeding fiscal year subsequent to the one in which a Contract is entered into, then the Service Authority may terminate, in whole or in part, the Contract upon thirty (30) Days prior written notice to the Consultant.
 - 5.13.1.2 Such termination for non-allocation of funds, in whole or in part, shall be effected by delivery of a Notice of Termination signed by the Service Authority General Manager or designee, mailed or delivered to the Consultant, and specifically setting forth the effective date and conditions of the termination.

- 5.13.1.3 Upon receipt of such Notice of Termination, the Consultant shall:
 - 5.13.1.3.1 Cease any further deliveries or Work due under the Contract, on the date, and to the extent, which shall be specified in the Notice of Termination; and
 - 5.13.1.3.2 Place no further orders with any Subconsultant except as may be necessary to perform that portion of the Contract not subject to the Notice of Termination; and
 - 5.13.1.3.3 Terminate all subcontracts except those made with respect to contract performance not subject to the notice or which the Service Authority elects to take assignment of; and
 - 5.13.1.3.4 Settle all outstanding liabilities and claims which may arise out of such termination, with the ratification of the Contracting Officer; and
 - 5.13.1.3.5 Use all reasonable efforts to mitigate any damages which may be sustained by it as a consequence of termination, in whole or in part, under this clause.
- 5.13.1.4 After complying with the foregoing provisions, the Consultant shall submit a termination claim within six (6) months after the effective date of its termination, in whole or in part, unless an extension is granted by the Contracting Officer.
- 5.13.1.5 In the event of termination, in whole or in part, under this Section 5.13.1, the Service Authority shall be responsible to pay the Consultant only for terminated work performed through the date of termination. This payment shall not include any interest, anticipated profit or lost opportunity costs of the Consultant.
- 5.13.1.6 In the event that the Consultant is not satisfied with any payments which the Service Authority shall determine to be due under this clause, the Consultant may submit a claim in accordance with the Disputes and Claims clause of the Contract.
- 5.13.1.7 The Consultant shall include similar provisions in any subcontract.
- 5.13.2 Termination by Mutual Consent:
 - 5.13.2.1 During performance of the Contract, if the Service Authority and the

Consultant mutually agree that it would be in the best interests of both parties to agree to terminate, in whole or in part, the Contract, then fair and reasonable considerations shall be negotiated, and the Contract deemed completed with respect to the portion terminated.

- 5.13.2.2 Such termination for mutual consent, in whole or in part, shall be effected by delivery of a Notice of Termination signed by the Service Authority General Manager or designee, mailed or delivered to the Consultant, and specifically setting forth the effective date and conditions of the termination, in whole or in part, as mutually agreed with the Consultant.
- 5.13.2.3 Upon receipt of such Notice of Termination, the Consultant shall:
 - 5.13.2.3.1 Cease any further deliveries or Work due under the Contract, on the date, and to the extent, which shall be specified in the Notice of Termination; and
 - 5.13.2.3.2 Place no further orders with any Subconsultant except as may be necessary to perform that portion of the Contract not subject to the Notice of Termination; and
 - 5.13.2.3.3 Terminate all subcontracts except those made with respect to contract performance not subject to the notice or which the Service Authority elects to take assignment of; and
 - 5.13.2.3.4 Settle all outstanding liabilities and claims which may arise out of such termination, with the ratification of the Contracting Officer; and
 - 5.13.2.3.5 Use all reasonable efforts to mitigate any damages which may be sustained by it as a consequence of termination, in whole or in part, under this clause.
- 5.13.2.4 After complying with the foregoing provisions, the Consultant shall submit a termination claim within six (6) months after the effective date of its termination, in whole or in part, unless an extension is granted by the Contracting Officer.
- 5.13.2.5 In the event of termination, in whole or in part, under this Section 5.13.2, the Service Authority shall be responsible to pay the Consultant only for terminated work performed through the date of

termination and other fair and reasonable compensation as agreed to by the parties. This payment shall not include any interest, anticipated profit or lost opportunity costs of the Consultant.

5.13.2.6 In the event that the Consultant is not satisfied with any payments which the Service Authority shall determine to be due under this clause, the Consultant may submit a claim in accordance with the Disputes and Claims clause of the Contract.

5.13.2.7 The Consultant shall include similar provisions in any subcontract.

5.13.3 Termination for Convenience of the Service Authority:

5.13.3.1 The Consultant and the Service Authority agree that the Service Authority has the sole right to terminate the Contract, or any Work or delivery required thereunder, for the convenience of the Service Authority, from time to time either in whole or in part, whenever the General Manager of the Service Authority or his designee shall determine that such termination is in the best interests of the Service Authority.

5.13.3.2 Such termination for convenience, in whole or in part, shall be effected by delivery of a Notice of Termination signed by the Service Authority General Manager or designee, mailed or delivered to the Consultant, and specifically setting forth the effective date and conditions of the termination.

5.13.3.3 Upon receipt of such Notice of Termination, the Consultant shall:

5.13.3.3.1 Cease any further deliveries or Work due under the Contract, on the date, and to the extent, which shall be specified in the Notice of Termination; and

5.13.3.3.2 Place no further orders with any Subconsultant except as may be necessary to perform that portion of the Contract not subject to the Notice of Termination; and

5.13.3.3.3 Terminate all subcontracts except those made with respect to contract performance not subject to the notice or which the Service Authority elects to take assignment of; and

- 5.13.3.3.4 Settle all outstanding liabilities and claims which may arise out of such termination, with the ratification of the Contracting Officer; and
- 5.13.3.3.5 Use all reasonable efforts to mitigate any damages which may be sustained by it as a consequence of termination, in whole or in part, under this clause.
- 5.13.3.4 After complying with the foregoing provisions, the Consultant shall submit a termination claim within six (6) months after the effective date of its termination, in whole or in part, unless an extension is granted by the Contracting Officer.
- 5.13.3.5 In the event of termination, in whole or in part, under this Section 5.13.3, the Service Authority shall be responsible to pay the Consultant for terminated work performed through the date of termination plus all reasonable, verifiable costs of termination, including the cost of settling and paying any reasonable claims as provided in this Section, but in no event shall this amount be greater than the original contract price, reduced by any payments made prior to Notice of Termination and further reduced by the price of the supplies not delivered, or the services not provided and any amounts remaining but related to any part of the Contract that has not been terminated. The Contract shall be amended to reflect the amount to be paid, and the Consultant shall be paid the agreed amount. This payment shall not include any interest, anticipated profit or lost opportunity costs of the Consultant.
- 5.13.3.6 In the event that the Consultant is not satisfied with any payments which the Service Authority shall determine to be due under this clause, the Consultant may submit a claim in accordance with the Disputes and Claims clause of the Contract.
- 5.13.3.7 The Consultant shall include similar provisions in any subcontract and shall specifically include a requirement that Subconsultant(s) make all reasonable efforts to mitigate damages which may be suffered. Failure to include such provisions shall bar the Consultant from any recovery from the Service Authority whatsoever of loss or damage sustained by a Subconsultant(s) as a consequence of termination, in whole or in part, for convenience.

5.13.4 Termination for Consultant's Default:

5.13.4.1 Each term and condition of this Contract is material and any breach or default by the Consultant in the performance of any such term and condition shall be considered a material breach or default of the entire Contract for which the Service Authority shall have the right to terminate, in whole or in part, the Contract for default as set forth in this Section 5.13.4, without penalty or liability.

5.13.4.2 In addition, any of the following shall constitute a default for which the Service Authority shall have the right to terminate the Contract for default in whole or in part, as set forth in this Section 5.13.4, without penalty or liability:

5.13.4.2.1 Consultant failure to make prompt payment to Subconsultant or Suppliers pursuant to the Contract requirements, including but not limited to any applicable provisions of the VPPA, Va. Code Ann. Section 2.2-4300 et seq.

5.13.4.2.2 The Consultant is dissolved, becomes insolvent, generally fails to pay or admits in writing its inability generally to pay its debts as they become due.

5.13.4.2.3 The Consultant makes a general assignment, arrangement or composition agreement with or for the benefit of its creditors or makes, or sends notice of any intended, bulk sale; the sale, assignment, transfer or delivery of all or substantially all of the assets of Consultant to a third party; or the cessation by Borrower as a going business concern.

5.13.4.2.4 The Consultant files a petition in bankruptcy or institutes any action under federal or state law for the relief of debtors or seeks or consents to the appointment of an administrator, receiver, custodian or similar official for the wind up of its business (or has such a petition or action filed against it and such petition action or appointment is not dismissed or stayed within 45 Days).

- 5.13.4.2.5 The reorganization, merger, consolidation, liquidation, suspension of business operations or dissolution of the Consultant (or the making of any agreement therefor).
- 5.13.4.3 In the event of a default by the Consultant, the Service Authority may provide seven (7) calendar Days written notice to the Consultant of the event of default. The Consultant shall diligently commence to cure the default within such seven (7) calendar Days, or if it fails to do so, the Contract shall be deemed terminated, in whole or in part as specified in the written notice, as of the end of such seven (7) calendar Days.
- 5.13.4.4 Upon the effective date of the termination, the Consultant shall:
 - 5.13.4.4.1 Cease any further deliveries or Work due under the Contract, on the date, and to the extent, which shall be specified in the Notice of Termination; and
 - 5.13.4.4.2 Place no further orders with any Subconsultant except as may be necessary to perform that portion of the Contract not subject to the Notice of Termination; and
 - 5.13.4.4.3 Terminate all subcontracts except those made with respect to contract performance not subject to the notice or which the Service Authority elects to take assignment of; and
 - 5.13.4.4.4 Settle all outstanding liabilities and claims which may arise out of such termination, with the ratification of the Contracting Officer; and
 - 5.13.4.4.5 Use all reasonable efforts to mitigate any damages which may be sustained by it as a consequence of termination, in whole or in part, under this clause.
- 5.13.4.5 After complying with the foregoing provisions, the Consultant shall submit a termination claim within six (6) months after the effective date of its termination, in whole or in part, unless an extension is granted by the Contracting Officer.

5.13.4.6 In the event of termination, in whole or in part, under this Section 5.13.4, the Service Authority shall be responsible to pay the Consultant for terminated work performed through the date of termination but in no event shall this amount be greater than the original contract price, reduced by any payments made prior to Notice of Termination and further reduced by the price of the supplies not delivered, or the services not provided, and further reduced by the costs of any damages incurred by the Service Authority as result of the Consultant's default and any amounts remaining but related to any part of the Contract that has not been terminated. The Contract shall be amended to reflect the amount to be paid, and the Consultant shall be paid the agreed amount. This payment shall not include any interest, anticipated profit or lost opportunity costs of the Consultant, or any costs incurred by the Consultant arising from the termination.

5.13.4.7 In the event that the Consultant is not satisfied with any payments which the Service Authority shall determine to be due under this clause, the Consultant may submit a claim in accordance with the Disputes and Claims clause of the Contract.

5.13.4.8 The Consultant shall include similar provisions in any subcontract.

5.13.4.9 In the event that the Consultant is terminated, in whole or in part, by the Service Authority for default and it is subsequently determined by a court of competent jurisdiction that such termination, in whole or in part, was without cause, such termination shall thereupon be deemed a termination for convenience under Section 5.13.3 and the provisions in Section 5.13.3 shall govern.

5.13.4.10 In the event that the Consultant has provided a performance bond in connection with this Contract, the Service Authority may elect to proceed under and in accordance with the default and termination provisions of the performance bond instead of this Section 5.13.4.

5.13.5 Termination for the Service Authority's Default:

5.13.5.1 If the Consultant at any time determines the Service Authority to be in material breach of this Agreement, the Consultant shall provide the Service Authority with seven (7) calendar Days written notice of

the event of default. The Service Authority shall diligently commence to cure the default within such seven (7) calendar Days, or if it fails to do so, the Contract shall be deemed terminated as of the end of such seven (7) calendar Days.

5.13.5.2 Upon the effectiveness of such termination, the Consultant shall:

5.13.5.2.1 Cease any further deliveries or Work due under the Contract, on the date, and to the extent, which shall be specified in the Notice of Termination; and

5.13.5.2.2 Place no further orders with any Subconsultant except as may be necessary to perform that portion of the Contract not subject to the Notice of Termination; and

5.13.5.2.3 Terminate all subcontracts except those made with respect to contract performance not subject to the notice or which the Service Authority elects to take assignment of; and

5.13.5.2.4 Settle all outstanding liabilities and claims which may arise out of such termination, with the ratification of the Contracting Officer; and

5.13.5.2.5 Use all reasonable efforts to mitigate any damages which may be sustained by it as a consequence of termination under this clause.

5.13.5.3 After complying with the foregoing provisions, the Consultant shall submit a termination claim within six (6) months after the effective date of its termination, unless an extension is granted by the Contracting Officer.

5.13.5.4 In the event of termination under this Section 5.13.5, the Service Authority shall be responsible to pay the Consultant for work performed through the date of termination plus all reasonable, verifiable costs of termination, including the cost of settling and paying any reasonable claims as provided in this Section, but in no event shall this amount be greater than the original contract price, reduced by any payments made prior to Notice of Termination and further reduced by the price of the supplies not delivered, or the

services not provided. The Contract shall be amended to reflect the amount to be paid, and the Consultant shall be paid the agreed amount. This payment shall not include any interest, anticipated profit or lost opportunity costs of the Consultant.

5.13.5.5 In the event that the Consultant is not satisfied with any payments which the Service Authority shall determine to be due under this clause the Consultant may submit a claim in accordance with the Disputes and Claims clause of the Contract.

5.13.5.6 The Consultant shall include similar provisions in any subcontract and shall specifically include a requirement that Subconsultant (s) make all reasonable efforts to mitigate damages which may be suffered. Failure to include such provisions shall bar the Consultant from any recovery from the Service Authority whatsoever of loss or damage sustained by a Subconsultant (s) as a consequence of termination by the Consultant for the Service Authority's default.

5.13.5.7 These remedies for default and termination are the Consultant's sole and exclusive remedies for default and termination, and the Consultant hereby waives any right to other compensation or damages in the event it terminates the Contract for the Service Authority's default.

5.14 **Material Breach**

If the Consultant at any time determines the Service Authority to be in material breach of this Agreement, the Consultant shall follow provisions outlined in Section 5.13.5.1.

5.15 **Causes of Delay**

5.15.1 Neither party shall be considered in default in the performance of its obligations hereunder to the extent that the performance of any such obligation is actually delayed, hindered or prevented by any cause which is unanticipated and beyond the reasonable control of the party affected thereby. Causes of delay which, if unanticipated and reasonably beyond the control of the party claiming delay may include but are not limited to the following: war (declared or undeclared), fire, riot, storm, hurricane, earthquake, tornado, strike or labor dispute not involving the Consultant's labor force, epidemic or Phase 5 or higher pandemic (as defined by the World Health Organization), act of terrorism or sabotage or any law, proclamation order, regulation, or ordinance of any government agency or any court, or any other cause similar to those enumerated above.

5.15.2 The party affected by any Causes of Delay shall give prompt written notice to the other party advising of the nature and extent of any Causes of Delay

and advising of the effects of the Causes of Delay upon the completion and cost of the Work hereunder. The parties shall consult promptly with each other concerning the Causes of Delay and shall endeavor to agree upon mutually acceptable corrective action. In the event of a Causes of Delay which prohibits performance by the Consultant for more than sixty (60) Days, either party may terminate this Agreement for convenience and shall have no further obligation hereunder. Consultant shall be entitled to request an adjustment to the Project Agreement schedule as a result of any such delay.

5.16 Prime Consultant

5.16.1 The Consultant shall act as the prime Consultant for all products, equipment, services, software or supplies marketed by other suppliers and shall assume full responsibility for the procurement and maintenance of such items or services. The Consultant shall be considered the sole point of contact with regard to all stipulations, including payment of all charges and meeting all requirements of this Contract.

5.16.2 The Consultant shall include the full name, address, and telephone number of every company bearing an interest in the proposed equipment or services. All Subconsultants will be subject to review by the Service Authority in regard to competency and security concerns. After the issuance of this Contract no change in Subconsultants will be made without the prior written consent of the General Manager, or his designee.

5.16.3 The Consultant shall be responsible for all insurance, permits, licenses, etc., for any and all Subconsultants. Even if the Subconsultant is self-insured, the Service Authority will require the Consultant to provide the insurance certificates.

5.17 Payments to Subconsultants

5.17.1 In the event that the Consultant uses a Subconsultant for any portion of the Work under this Contract, the Consultant shall take one (1) of the two (2) following actions within seven (7) Days after receipt of amounts paid to the Consultant by the Service Authority for work performed by a Subconsultant under the Consultant:

5.17.1.1 Pay a Subconsultant for the proportionate share of the total payment received from the Service Authority attributable to the work performed by that Subconsultant under the Consultant; or

5.17.1.2 Notify the Service Authority and any Subconsultants, in writing, of its intention to withhold all or a part of the Subconsultant's payment with the reason for nonpayment.

- 5.17.2 Upon receiving a written notice from the Subconsultant, the Consultant shall pay interest to a Subconsultant on all monies owed by the Consultant that remain unpaid after seven (7) Days following receipt by the Consultant of payment from the Service Authority for work performed by a Subconsultant under this Contract, except for amounts withheld under subsection 5.17.1.2 of this Section. The Consultant's obligation to pay an interest charge to a Subconsultant pursuant to the provisions of this Section will not be construed to be an obligation by the Service Authority. A contract modification will not be made for the purpose of providing reimbursement for any such interest charge. A cost reimbursement claim will not include any amount for reimbursement for such interest charge.
- 5.17.3 Unless otherwise provided under the terms of this Contract, interest shall accrue at the rate of 3.0% per annum. The Consultant shall include in each of its subcontracts a provision requiring each Subconsultant to otherwise be subject to the same payment and interest requirements set forth in this Section with respect to each lower-tier Subconsultant.
- 5.17.4 Any subcontract with a Subconsultant shall afford to the Consultant rights against the Subconsultant which correspond to those rights afforded to the Service Authority against the Consultant herein, including but not limited to those rights of termination as set forth herein.
- 5.17.5 No reimbursement shall be made to the Consultant for any Subconsultants that has not been previously approved by the Service Authority for use by the Consultant.

5.18 Acceptance of Deliverables

All deliverables shall bear the name of Consultant except for deliverables prepared by a Service Authority authorized Subconsultant, which shall be properly identified as such and submitted by Consultant. The Service Authority shall determine the acceptability of all Deliverables.

5.19 Payment Terms

- 5.19.1 The Service Authority will remit full payment on all undisputed invoices in accordance with the terms of this Contract.
- 5.19.2 The Service Authority will pay interest at a rate of 3.0% per annum, on all undisputed invoices not paid within thirty (30) Days after acceptance of the service(s), AND a properly completed invoice.

5.20 Material and Workmanship

- 5.20.1 The Consultant is solely responsible for the professional quality, technical accuracy, timely completion and coordination of all the products and/or services furnished under this Contract. The Consultant shall, without

additional considerations, correct or revise any errors, omissions or other deficiencies not meeting the applicable standard of care, or the requirements of the Basic Ordering Agreement (BOA) or Task Order, in their services and/or products.

- 5.20.2 All equipment, materials, and articles of any kind that the Consultant may incorporate into the Work covered by this Contract shall be new, genuine manufacturer's recommended and most suitable for the purpose intended. The term "new" is defined as of original nature, unused, not previously owned, and free of any damages or defects. The use of such used equipment, materials and articles under this Contract is strictly prohibited.
- 5.20.3 The Consultant shall be responsible for all Materials delivered and work performed until completion and acceptance of the entire Work, except for any completed unit of work which may have been accepted by the Service Authority.

5.21 Modifications or Changes to the Contract

- 5.21.1 All modifications and changes to this Agreement shall be in writing.
- 5.21.2 The Service Authority's General Manager or his designee shall have the sole authority to order changes in this Agreement which affect the cost or time of performance. Such changes shall be ordered in writing specifically designated to be a "Change Order".
- 5.21.3 Change Orders shall be limited to reasonable alterations in the work to be performed, compensation or the time of performance.
- 5.21.4 The Consultant shall not perform any work described in any Change Order unless it has received a signed Change Order and Purchase Order from the Service Authority.
- 5.21.5 Once final payment has been requested and made, the Consultant only has sixty (60) Days to present or file any claims against the Service Authority concerning the Contract. After that period, the Service Authority shall consider that the Consultant has waived any right to claims against the Service Authority concerning the Contract.

5.22 Modifications to the Contract Due to Public Welfare, Change in Law or Ordinances

- 5.22.1 The Service Authority shall have the power to make changes to this Contract as the result of changes in laws or Ordinances of the Federal, Commonwealth of Virginia and/or Prince William County to impose new rules and regulations on the Consultant under the Contract relative to the scope and methods of providing services as shall from time-to-time be necessary and desirable for the public welfare.

- 5.22.1.1 The Service Authority shall give the Consultant notice of any proposed change and an opportunity to be heard concerning those matters. The scope and method of providing services as referenced herein shall also be liberally construed to include, but is not limited to the manner, procedures, operations and obligations, financial or otherwise, of the Consultant.
- 5.22.1.2 In the event any future change in Federal, Commonwealth of Virginia or Prince William County law or the Ordinances that materially alters the obligations of the Consultant, or the benefits to the Service Authority, then the Contract shall be amended consistent therewith.
- 5.22.1.3 Should those amendments materially alter the obligations of the Consultant, then the Consultant or the Service Authority shall be entitled to an adjustment in the rates and charges established under the Contract. Nothing contained in the Contract shall require any party to perform any act or function contrary to law. The Service Authority and the Consultant agree to enter into good faith negotiations regarding modifications to the Contract which may be required in order to implement changes in the interest of the public welfare or due to change in law. When such modifications are made to the Contract, the Service Authority and the Consultant shall negotiate in good faith, a reasonable and appropriate compensation for any additional services or other obligations required of the Consultant directly and demonstrably due to any modification in the Contract under this Section.

5.23 Waiver of Claims

Once final payment has been requested and made, the Consultant only has sixty (60) calendar Days to present or file any claims against the Service Authority concerning the Contract. After that period, the Service Authority shall consider that the Consultant has waived any right to claims against the Service Authority concerning the Contract.

5.24 Disputes and Claims

- 5.24.1 If the Consultant wishes to make a contractual claim, whether for extra compensation, damages or any other relief, he shall give Service Authority Contract Administrator/ACO Notice in strict accordance with the Contract Documents. The Consultant's failure to comply strictly with the requirements of the Contract shall result in waiver of the claim. In any event, all contractual claims shall be submitted in writing no later than sixty (60) Days after final payment.
- 5.24.2 Resolution of any outstanding claims, counterclaims, disputes and other matters in question arising out of or relating to the Contract Documents to the

extent not resolved by the parties hereto, shall be resolved exclusively by non-binding mediation if agreed to by both parties, or litigation in either the Circuit Court of Prince William County, Virginia or the United States District Court for the Eastern District of Virginia, Alexandria Division. These two courts shall have exclusive and binding jurisdiction and venue over any and all disputes arising under this Agreement. The parties voluntarily waive any and all rights to a trial by jury. The fact finder shall be the court, sitting without a jury; provided, however, that nothing contained herein shall be construed to invalidate the finality of Service Authority's decisions.

5.24.3 No Claims Against Individuals: No claim whatsoever shall be made by the Consultant against any officer, Board Member, Authorized Representative or employee of Service Authority for, or on account of, anything done or omitted to be done in connection with this Contract, and the Consultant shall be strictly liable for all costs, attorney's fees and expenses incurred by any individual or entity who is sued in violation of this Section.

5.24.4 Disputes: In order to: (i) clearly identify the existence of a dispute between the parties and (ii) promote the prompt, efficient and fair resolution of each such dispute, the parties shall adhere strictly to the claims resolution procedure set forth below. Time is of the essence in meeting these requirements.

5.24.4.1 Claims Resolution Procedures

5.24.4.1.1 In accordance with Section 2.2-4363, VA Code Ann., this provision shall be followed for consideration and handling of all claims by the Consultant under this Contract. Section 2.2-4365, VA Code Ann., is not applicable to this Contract, and under no circumstances is this paragraph to be construed as an administrative appeals procedure governed by Section 2.2-4365, VA Code Ann.

5.24.4.1.2 Any claim shall be submitted in writing within ten (10) Days after the occurrence of the event giving rise to the claim, or within ten (10) Days of discovering the condition giving rise to the claim, whichever is later.

5.24.4.1.3 Claims by the Consultant with respect to this Contract shall be submitted in writing in the first instance for consideration by the Contract Administrator/ACO.

- 5.24.4.1.4 The decision of the Contract Administrator/ACO shall be rendered in writing within thirty (30) Days from the receipt of the claim from the Consultant.
- 5.24.4.1.5 If the Consultant is not satisfied with the decision or resolution of the Contract Administrator/ACO, the Consultant may appeal the claim with the Service Authority's Deputy General Manager/Chief Administrative Officer within thirty (30) Days of the Contract Administrator's/ACO decision.
- 5.24.4.1.6 The Service Authority Deputy General Manager/Chief Administrative Officer's decision on the claim shall be rendered in writing to the Consultant within thirty (30) Days of receipt of the claim from the Consultant.
- 5.24.4.1.7 If the Consultant is not satisfied with the decision or resolution of the Deputy General Manager/Chief Administrative Officer, the Consultant may appeal the claim to the Service Authority General Manager within thirty (30) Days of the Deputy General Manager/Chief Administrative Officer's decision. The Consultant may submit the appeal to the Service Authority General Manager by mailing or otherwise furnishing the Deputy General Manager/Chief Administrative Officer a copy of the claim and a request for the Service Authority General Manager's determination.
- 5.24.4.1.8 The Service Authority General Manager's decision on the claim shall be rendered in writing to the Consultant within thirty (30) Days of receipt of the appeal from the Consultant, and shall be final and binding on behalf of Service Authority, unless the Consultant files a lawsuit against the Service Authority.
- 5.24.4.1.9 Should any decision-maker designated under this procedure fail to make a decision within the time period specified, then the claim is deemed to have been denied by the decision-maker. Pending a final determination of a claim, the Consultant shall proceed diligently with the performance of the Work under the Contract.

5.24.4.1.10 In accordance with the provisions of Section 2.2-4363, VA Code Ann., full compliance with this procedure set forth in the provision shall be a precondition to the filing of any lawsuit by the Consultant against the Service Authority Board of Directors of the Service Authority arising out of this Contract.

5.25 Compliance with Occupational Safety and Health (OSHA) Requirements

5.25.1 All services, practices and items furnished shall comply with the Federal Occupational Safety and Health Act of 1970, as amended, as well as any pertinent Federal, Commonwealth of Virginia, and/or local safety or environmental codes. Lack of knowledge of these requirements will not relieve the Consultant of their responsibilities.

5.25.2 Suppliers/providers including dealers, distributors, and/or manufacturers shall be responsible for having complied with all Federal, State, and local standards, regulations, and laws concerning the product or service specified, and the use thereof, applicable and effective on the date of manufacture or use or date in service including safety and environmental standards as apply to both private industry and governmental agencies.

5.25.3 The Consultant certifies that all Materials and equipment used in the performance of and/or delivered under this Contract shall meet all applicable OSHA or Commonwealth of Virginia requirements. If any material or equipment is subsequently found to be non-compliant with any applicable OSHA or Commonwealth of Virginia requirement, all costs necessary to comply with the requirement shall be borne solely by the Consultant.

5.26 Records and Right to Audit

5.26.1 Consultant shall maintain and require Subconsultants to maintain complete and correct records, books, documents, papers and accounts pertaining to the Work performed in connection with this Agreement including without limitation, reasonable substantiation of all incurred invoice costs pre-approved by the Service Authority.

5.26.2 Such records, books, documents, papers and accounts shall be available at all reasonable times for examination and audit by the Service Authority or any authorized Service Authority representative with reasonable notice and shall be kept for a period of three (3) years after the completion of the project to be performed pursuant to this Agreement. Incomplete or incorrect entries in such records, books, documents, papers or accounts will be grounds for disallowance by or reimbursement to the Service Authority of any fees or expenses based upon such entries.

- 5.26.3 Audit under this provision is to be according to conditions applicable, including, but not limited to, the Section entitled "Termination for Consultant's Default", the Section entitled "Termination for Convenience", and EXHIBIT D, "Invoicing Procedures", plus all other Agreement provisions, including quantities billed, excepting that specified lump sum, fixed percentage, and unit prices are not subject to audit.
- 5.26.4 Audit access to the Consultant's records in lump sum or unit price areas when applicable shall be sufficient to satisfy the Service Authority that all quantities meet the specifications and terms under this Agreement including verification of the Consultant's payments to its suppliers and Subconsultants. The Consultant shall remit promptly to the Service Authority the amount of any adjustment resulting from audit.
- 5.26.5 Refusal of the Consultant to comply with the provisions in this Section shall be grounds for immediate Termination for Consultant's Default by the Service Authority of this Agreement or any Project Agreement.
- 5.26.6 Records pertaining to Hourly Rates and Consultant's personnel information shall be made available to the Service Authority to allow audit of the Work, provided that Service Authority shall take all steps necessary to ensure such information is maintained as Confidential Information as defined herein.
- 5.26.7 The provisions of this Section shall survive termination, cancellation and expiration of this Agreement.

5.27 **Strikes or Lockouts**

The Service Authority will not compensate the Consultant for any expense or delay caused to the Consultant by a strike, slowdown, lockout, or other concerted employee work interrupting activity by employees of the Consultant or Subconsultant except adjustment of the Contract time where warranted, which shall be solely at the Service Authority's discretion.

5.28 **Ownership of Documents/Deliverables**

- 5.28.1 All contracts and subcontracts for the preparation of reports, studies, plans, Drawings, Specifications, or other data entered into by the Consultant for a project shall provide that all such documents, in electronic form, facsimile or hard-copy and the respective rights obtained by virtue of such subcontracts shall be considered Work Product and become the property of the Service Authority upon payment for services performed, as they are performed.
- 5.28.2 Any finished or unfinished documents related to the Project, including but not limited to reports, research materials, working papers, studies, calculations, plans, Drawings, surveys, maps, models, photographs, Specifications and other data to include any information containing

employee personal information, whether provided by the Owner to the Consultant in connection with the Project or services under this Agreement, or produced by the Consultant, shall be and remain at all times, throughout the Project and thereafter, the property of the Owner, and shall be delivered to the Owner no later than ten (10) Days after any termination of this Agreement or prior to final payment of the Project.

- 5.28.3 The Consultant shall have the right to keep one (1) record set of any such documents that it has produced, but in no event shall the Consultant use or disclose, or permit to be used or disclosed, any such documents without the Owner's prior written authorization, which may be given or withheld in the Owner's sole and unfettered discretion. This requirement shall survive the termination or expiration of this Agreement.
- 5.28.4 Any reuse of such documents by the Service Authority without the written verification or adaptation by the Consultant for the specific purpose intended will be at the Service Authority's sole risk.
- 5.28.5 At the conclusion of its Work and before final payment, or from time to time as may be required by the Service Authority, the Consultant shall release and deliver to the Service Authority any and all such originals, provided, however, that the Consultant may, with the Service Authority's approval, reproduce such originals for the purpose of the Consultant's record file of the Work. The Consultant shall not sell, copy, or reuse any Drawings in total or in part for any other project, except with the prior written permission of the Service Authority.
- 5.28.6 Except as otherwise agreed and documented with respect to the Service Authority's Materials and Work Product or Works Made for Hire, Consultant shall retain all right, title and interest, including all Consultant Intellectual Property Rights, in and to the Consultant Material.
- 5.28.7 Any of the Consultant's Intellectual Property incorporated into or delivered to the Service Authority as Work Product or Works Made for Hire shall be licensed to the Service Authority without additional cost for reasonable use in the course of its business.

5.29 **Authorized Workforce Documentation (E-Verify)**

Within five (5) Days from notice of award of the Contract, the Consultant may be required to submit to the Service Authority documentation that each employee, worker, and all Subconsultants or employees and workers are authorized to work within the United States. This documentation must include appropriate eligibility information from the U. S. Citizenship and Immigration Services E-Verify website.

5.30 Right to Require Performance

The failure of the Service Authority at any time to require performance by the Consultant of any provision of this Agreement shall in no way affect the right of the Service Authority thereafter to enforce same, nor shall waiver by either Party of any breach of any provision hereof be taken or held to be a waiver of any succeeding breach of such provision or as a waiver of any provision itself.

5.31 Waiver

5.31.1 No Oral Waivers. The parties may waive this Agreement only by writing executed by the party or parties against whom the waiver is sought to be enforced.

5.31.1.1 Effect of Failure, Delay or Course of Dealing: No failure or delay in exercising any right or remedy, or in requiring the satisfaction of any condition, under this Agreement, and no act, omission or course of dealing between the parties operates as a waiver or estoppel of any right, remedy or condition.

5.31.1.2 Each Waiver for a Specific Purpose: A waiver made in writing on one occasion is effective only in that instance and only for the purpose stated. A waiver once given is not to be construed as a waiver on any future occasion or against any other person.

5.32 Service Authority's Responsibilities

5.32.1 Assist the Consultant by placing at its disposal all reasonably available information as may be requested in writing by the Consultant and allow reasonable access to all pertinent information relating to the services to be performed by the Consultant. Consultant shall use and rely on such information for informational purposes only and shall carefully review, analyze, and verify the contents and suitability of the information before proceeding with the Work.

5.32.2 Furnish to the Consultant, at the Consultant's request, all existing studies, reports and other reasonably available data pertinent to the services to be provided by the Consultant.

5.32.3 Arrange for access to and make all reasonable provisions for the Consultant to enter upon Service Authority's public property as required for the Consultant to perform services.

5.32.4 In the event that Consultant believes the Service Authority is not reasonably complying with the requirements of the Sections above, Consultant shall immediately provide written notice of such non-compliance to the Service Authority.

5.32.5 The Service Authority reserves the right to use either directly, or through assignment to another entity, any Subconsultant of the Consultant to perform work outside of this Agreement, as required and as deemed appropriate by the Service Authority.

5.33 Avoidance of Conflicts of Interest

5.33.1 The Consultant agrees not to accept employment during the time this Agreement is in effect which might be construed as a conflict of interest with the Consultant's Work for the Service Authority. The Consultant shall conscientiously avoid a conflict of interest with regard to work for the Service Authority, but when unavoidable, the Consultant shall take the following action:

5.33.1.1 Disclose in writing to the Service Authority the full circumstances as to possible conflict of interest;

5.33.1.2 Assure in writing that the conflict will in no manner influence its judgment or the quality of its services to the Service Authority; and

5.33.1.3 Decline to accept financial or other forms of compensation from more than one employer or client for services on the same project or services pertaining to the same project without the prior written consent of the Service Authority.

5.33.2 The Consultant shall promptly inform the Service Authority of any business associations, interest or circumstances which may be influencing its judgment or the quality of its services to the Service Authority.

5.33.3 The Consultant shall not solicit or accept financial or other valuable considerations from material or equipment suppliers for specifying their products.

5.33.4 The Consultant shall not solicit or accept gratuities directly or indirectly from contractors, their agents or other parties dealing with the Service Authority in connection with Work for which they are responsible.

5.33.5 The Consultant and its employees shall be bound by the provisions of the Service Authority Code of Ethics provided in the Service Authority's purchasing regulations, as may be amended from time to time, which standards shall by this reference be made a part of this Agreement as though set forth in full.

5.33.6 The Consultant agrees to incorporate the provisions of this Section into any subcontract.

5.34 **Insurance**

- 5.34.1 The Consultant shall maintain insurance in the amounts and forms set forth in EXHIBIT C, Required Insurance Limits and shall provide a Certificate of Insurance to the Service Authority.
- 5.34.2 The Consultant shall comply with the insurance requirements set forth in Section 5.35 below.
- 5.34.3 The Consultant shall be responsible for its work and every part thereof, and for all materials, equipment, and property of any and all description used in connection therewith.
- 5.34.4 The Consultant assumes all risks of direct and indirect damage or injury to any person or property wherever located, resulting from Consultant's action, omission, commission, or operation of the Consultant under this Agreement, or in connection in any way whatsoever with the contracted work.

5.35 **Insurance Limits of Liability**

The Consultant shall provide the Certificate of Insurance with limits as shown in EXHIBIT C at the time of award. The limits of liability for the insurance required shall provide coverage for not less than the amounts shown in EXHIBIT C or greater where required by law.

5.36 **Additional Insurance Terms and Conditions**

- 5.36.1 Liability insurance may be arranged by general liability and automobile liability policies for the full limits required, or by a combination of underlying liability policies for lesser limits with the remaining limits provided by an excess or umbrella liability policy.
- 5.36.2 The Consultant shall provide insurance issued by companies admitted or authorized to do business within the Commonwealth of Virginia, with the Best's Key Rating of at least A-:VII.
- 5.36.3 The Consultant shall provide an original, signed certificate of insurance, evidencing such insurance and such endorsements as prescribed herein, and shall have it filed with the Service Authority's Procurement Department before any work is started.
- 5.36.4 The Consultant shall obtain and retain copies of insurance policies of its Subconsultants, which Consultant shall make available to the Service Authority on demand. The Consultant may redact certain confidential information, provided such redaction will not impact the Service Authority's ability to understand the insurance coverage terms. The Consultant shall remain responsible under this Agreement for acts and omissions of its Subconsultants. The Consultant shall ensure the same terms and conditions are

conveyed to all Subconsultants, to include all insurance requirements and limits described in this Agreement.

- 5.36.5 In the event of a claim the Consultant shall provide on demand, certified copies of all insurance coverage on behalf of this Agreement within ten (10) Days of demand by the Service Authority. These copies will be sent to the Service Authority from the Consultant's insurance agent or representative. The Consultant may redact certain provisions that it deems to contain confidential information, provided such redaction will not impact the Service Authority's ability to understand the coverage terms.
- 5.36.6 The Consultant shall furnish a new certificate prior to any expiration or cancellation date. The failure of the Consultant to deliver a new and valid certificate will result in suspension of all payments until the new certificate is furnished to the Service Authority's Procurement Department.
- 5.36.7 Insurance coverage required in these specifications shall be in force throughout the contract term. Should the Consultant fail to provide acceptable evidence of current insurance within thirty (30) Days of written notice at time during the contract term, the Service Authority shall have the absolute right to terminate this Agreement without any further obligation to the Consultant, and the Consultant shall be liable to the Service Authority for the entire additional cost of procuring the incomplete portion of this Agreement at time of termination.
- 5.36.8 Compliance by the Consultant and all Subconsultants with the foregoing requirements as to carrying insurance shall not relieve the Consultant and all Subconsultants of their liabilities and obligations under this Section or under any other Section or provisions of this Agreement.
- 5.36.9 Contractual and other liability insurance provided under this Agreement shall not contain a supervision, inspection, or services exclusion that would preclude the Service Authority from supervising and/or inspecting the project as to the end result. The Consultant shall assume all on-the-job responsibilities as to the control of persons directly employed by it and of the Subconsultants and any person employed by the Subconsultant.
- 5.36.10 Nothing contained herein shall be construed as creating any contractual relationship between any Subconsultant and the Service Authority. The Consultant shall be as fully responsible to the Service Authority for the acts and omissions of its Subconsultant and of person employed by them as it is for acts and omissions of persons directly employed by it.
- 5.36.11 Precaution shall be exercised at all times for the protection of persons (including employees) and property.

- 5.36.12 The Consultant and all Subconsultants shall comply with the Occupational Safety and Health Act of 1970, Public Law 91-956, as it may apply to this Agreement.
- 5.36.13 If the Consultant does not meet the specifications of these insurance requirements, alternate insurance coverage, satisfactory to the Service Authority's Procurement Department, may be considered.
- 5.36.14 The provisions of this Section shall survive termination, cancellation and expiration of this Agreement.

5.37 Representative of Service Authority and Consultant

- 5.37.1 The Service Authority Contract Administrator/ACO designates the Service Authority's Project Manager/COR, as the person to whom all communications pertaining to the Day-to-Day conduct of this Agreement shall be addressed.
- 5.37.2 The Consultant appoints the Consultant Project Manager, as specified in this Agreement, as the Consultant's Representative to whom all communications pertaining to the Day-to-Day action of this Agreement shall be addressed.

5.38 All Prior Agreements Superseded

This document incorporates and includes all prior negotiations, correspondence, conversations, agreements or understandings applicable to the matters contained in this Agreement and the parties agree that there are no commitments, agreements or understandings concerning the subject matter of this Agreement that are not contained in this document. Accordingly, it is agreed that no deviation from the terms of the Agreement shall be predicated upon any prior representations or agreements whether oral or written.

5.39 Consultant's Responsibilities

- 5.39.1 The Consultant shall comply with all laws, ordinances and governmental rules, regulations and orders now or at any time during the term of this Agreement which as a matter of law are applicable to or which affect the procedures of the Consultant.
- 5.39.2 The obligation of the Consultant to comply with governmental requirements is provided for the purpose of assuring proper safeguards for the protection of person and property.
- 5.39.3 The Consultant shall employ fully qualified, skilled and properly trained personnel capable of performing the required Work as identified herein. The Consultant is responsible for the conduct of all personnel, including Subconsultants, while on the jobsite. The Consultant is responsible for the actions and interactions of its employees and Subconsultants with Service Authority staff, its customers, suppliers and Contractors. The Consultant shall

ensure that its employees and Subconsultants behave professionally and consistent with the Service Authority's vision and values in all Work performed on its behalf. The Service Authority reserves the right to reject Consultant's personnel that the Service Authority determines, in its sole discretion, to be unqualified to perform the Work or for improper behavior during Work performance. The Service Authority further reserves the right to request that Consultant replace any worker deemed unsuitable by the Service Authority.

- 5.39.4 The Consultant shall exercise the same degree of care, skill and diligence in the performance of the Work as exercised by members of the same profession currently practicing under similar circumstances.

If at any time during the term of any contract for which the Consultant has provided work, it is determined that the Consultant's Deliverables, Work Product or services fail to conform to the above standard of care for the Work, upon written notice from the Service Authority, the Consultant shall immediately proceed to correct the Work, re-perform the Work which fail to satisfy the foregoing standard of care, and shall pay all costs and expenses associated with correcting said Work.

The Service Authority's rights and remedies under this Section are in addition to, and are cumulative of, any and all other rights and remedies provided by this Agreement, equity or otherwise.

- 5.39.5 The Consultant's obligations under this Section shall survive termination, cancellation or expiration of this Agreement.

- 5.39.6 Any and all Drawings, plans, Specifications, or other construction documents or Deliverables prepared by the Consultant shall conform to the standard of care in Section 5.39.4 above. Products, equipment and material specified for use shall be readily available unless written authorization to the contrary is given by the Service Authority.

- 5.39.7 Information provided by the Service Authority is for informational purposes only. The Consultant shall be responsible to validate or field verify key information as specified in each Project Agreement. When documenting in reports or technical memoranda, the Consultant shall identify the data used and whether it has or has not been validated or field verified. The Consultant shall identify data requirements that would improve the accuracy of recommendations and cost estimate of the Work, when data used has not been validated or field verified. The Consultant shall sign and execute the Service Authority's Data Usage Agreement, a Service Authority's document outlining the Service Authority's processes, procedures and policies regarding Service Authority data.

- 5.39.8 Consultant shall provide seven (7) copies of any written studies furnished under this Agreement in a format acceptable to the Service Authority.
- 5.39.9 Key Personnel: Prior to the execution of this Agreement, and prior to the commencement of any work under this Agreement, the Consultant shall submit a listing of all Key Personnel expected to be assigned to Work under this Agreement, along with their labor category and associated Minimum and Maximum Base Hourly Rate range and Minimum and Maximum Fully Burdened Rate range listed in Table 1 to EXHIBIT B, Compensation and Labor Costs for Service Authority's review and approval. All employees of the Consultant performing Work under this Agreement must be legally documented employees of the Consultant and paid under the Consultant's Federal tax identification number.
- 5.39.10 The Consultant shall not add, remove or reassign the Consultant's Key Personnel, as defined herein, from performance or positions in this Agreement without written approval from the Service Authority.
- 5.39.11 In addition, the Consultant shall submit a formal written request to the Service Authority prior to adding, removing and/or reassigning Consultant personnel as specified below.
- 5.39.12 Consultant shall submit a formal written request to the Service Authority no later than fifteen (15) Days prior to the addition, removal and/or reassignment of Key Personnel. The Consultant shall add, remove or reassign such Key Personnel only after receiving approval in the form of a written modification from the Service Authority. Replacement Personnel shall have equal quality professional experience and expertise to perform the services, subject to the Service Authority approval.
- 5.39.13 Key Personnel are defined, as those individuals assigned as follows:

Name	Function/Title

- 5.39.14 The Consultant shall designate a Consultant's Project Manager (designated as Key Personnel in Section 5.39.13) subject to the Service Authority's approval. So long as the Project Manager performs in a manner acceptable to the Service Authority and remains in Consultant's employment, the Consultant shall comply with the requirements above.

- 5.39.15 In performance of Work (including labor work of Consultant employees and/or Subconsultants) under this Agreement outside of the United States is strictly prohibited unless requested in writing by the Consultant and approved in advance and in writing by the Service Authority General Manager or his designee.
- 5.39.15.1 Upon approval, the Service Authority and Consultant shall negotiate and agreed upon applicable compensation (labor rate limits and Multiplier factor) prior to any Work being performed outside the United States under this Contract.
- 5.39.15.2 The Consultant shall provide to the Service Authority for its approval, any and all security measures proposed to preserve the Service Authority's assets in performance of the Work.
- 5.39.16 The Consultant shall perform the required services in fulfilling the Work requirements and shall notify the Service Authority in advance of performing any Work activities beyond the scope of the work requirements.
- 5.39.17 The Consultant is responsible for reviewing all tasks to ensure best available technology is being used for best results/outcomes.
- 5.39.18 Consultant covenants that the services provided by it hereunder will meet the care and skill ordinarily exercised by members of Consultant's profession practicing under similar circumstances at the same time and in the same locality.
- 5.39.19 The Consultant shall not introduce through any means any "Harmful Code" including but not limited to a virus, worm, malware ransomware, trap, trap door, back door, or any contaminant or disabling devices, including, but not limited to, timer, clock, counter, or other limiting codes, commands, or instructions intended to damage or disable the software, or any Service Authority data or other intellectual property used by Service Authority. The Consultant shall take the necessary precautions to prevent Harmful Code and shall immediately notify the Service Authority in writing of instances of Harmful Code which may impact the Service Authority. In the event Consultant introduces Harmful Code, the Consultant shall promptly, and at the Consultant's sole expense, reimburse the Service Authority for all costs, damages and losses, of any kind, incurred by the Service Authority as a result of or related to the Consultant's introduction of Harmful Code.
- 5.39.20 Notwithstanding anything else contained in this Agreement, the covenants and warranties in paragraph 5.39.19 shall be deemed to be a warranty for current and future performance and shall continue until and for so long as the Consultant is engaged to provide services to the Service Authority with respect

to the software developed hereunder, including the maintenance and enhancement thereof.

5.40 Certifications of Wage Rates

Signature of this Agreement by the Consultant certifies that the wage rates and other costs used to determine the compensation provided for in this Agreement are accurate, complete, and current as of the date of the Agreement.

The said rates and costs shall be adjusted to exclude any significant sums should the Service Authority determine that the rates and costs were increased due to inaccurate, incomplete or noncurrent wage rates or due to inaccurate presentation of fees paid to outside contractors. The Service Authority shall exercise its rights under this clause within three (3) years following final payment.

5.41 Notices

Whenever either party desires to give notice to the other, it must be given by written notice, sent by certified United States mail, with return receipt requested, addressed to the party for whom it is intended, at the place last specified, and the place for giving of notice in compliance with the provisions of this paragraph. For the present, the parties designate the following as the respective places for giving of notice, to-wit:

<u>For Consultant</u>	<u>With Copy to</u>
<u>For Service Authority</u> 4 County Complex Court Woodbridge, VA 22192 Attn: Contracts Management Department	<u>With Copy to</u> Bean Kinney & Korman PC 2311 Wilson Boulevard, Suite 500 Arlington, VA 22201 Attn: Mr. Mark Viani

5.42 Confidentiality

- 5.42.1 The Service Authority is a public entity and, as such is subject to and supports the provisions of the Virginia Freedom of Information Act (“Virginia FOIA”) and VPPA Section 2.2-4342, Public Inspection of Certain Records.
- 5.42.2 Except as provided in the VPPA, all proceedings, records, contracts and other public records relating to the Service Authority’s procurement transactions shall be open to the inspection of any citizen, or any interested person, firm or corporation, in accordance with Virginia FOIA.

- 5.42.3 The Consultant may seek protection from disclosure of its trade secrets or proprietary information submitted to the Service Authority in connection with this Agreement, the procurement of the same, and its services hereunder; provided, however, that the Consultant must:
- 5.42.3.1 Invoke the protections of VPPA Section 2.2-4342(F) prior to or upon submission of the data or other materials,
 - 5.42.3.2 Identify the data or other materials to be protected, and
 - 5.42.3.3 State the reasons why the protection is necessary.
- 5.42.4 If Consultant, when submitting materials to the Service Authority, requests that those materials not be disclosed under applicable law, the Service Authority consequently denies a request for the disclosure of such materials based on the Consultant's request, and the Service Authority's denial of the request for disclosure is challenged in court, the Consultant shall indemnify, hold harmless the Service Authority, its officers, directors, agents and employees from any and all costs, damages, fees and penalties (including but not limited to any attorneys' fees and other costs related to the litigation) relating thereto.
- 5.42.5 The Service Authority shall determine whether materials submitted by the Consultant are subject to disclosure in the Service Authority's sole discretion, and the Service Authority shall have no obligation to withhold disclosure of any materials it believes are subject to disclosure.
- 5.42.6 The Service Authority, its officers, directors, agents and employees shall have no liability to the Consultant for such disclosure of materials provided by the Consultant.
- 5.42.7 The Service Authority reserves the right to seek an opinion of the Attorney General of Virginia as guidance on matters regarding the disclosure of materials submitted by the Consultant and the applicability of Virginia FOIA, VPPA and this Agreement, with all such costs and expenses of doing so being at the sole expense of the Consultant.
- 5.42.8 Confidential Information means with respect to the Service Authority, all business and technical information of the Service Authority provided to Consultant in performance of the Work which are not subject to disclosure under Virginia FOIA or the VPPA, and with respect to Consultant, all business and technical information of Consultant provided to the Service Authority in connection with the performance of the Work including the Intellectual Property Rights which are designated as Confidential Information and are not subject to disclosure under Virginia FOIA or the VPPA.
- 5.42.9 The parties shall:

- 5.42.9.1 Keep, and not disclose to any third parties, any Confidential Information of the other party;
 - 5.42.9.2 Maintain and use the Confidential Information of one another only for the purposes of this Agreement and only as permitted herein;
 - 5.42.9.3 Only make copies of the Confidential Information as specifically authorized by the disclosing party and with the same confidential or proprietary notices as are on the original;
 - 5.42.9.4 Restrict access and disclosure of Confidential Information to their employees or agents who have a “need to know”; and
 - 5.42.9.5 Use commercially reasonable efforts, which shall be no less stringent than those efforts that each party uses to protect its own Confidential Information, to prevent the other’s Confidential Information from being disclosed or used in violation of this Agreement; provided, however, that Consultant may disclose Service Authority’s Confidential Information to its Subconsultants who are involved in performing any Services on behalf of Consultant, have a need to know such Confidential Information in order to carry out their responsibilities and have included this confidentiality clause in their contract with the Consultant.
- 5.42.10 The parties shall return or destroy all Confidential Information of the other party upon termination of this Agreement or upon written request of the other party.
- 5.42.11 Notwithstanding the forgoing, if a receiving party becomes legally compelled to disclose any of the Confidential Information of the disclosing party, the receiving party shall provide the disclosing party with prompt written notice thereof so that the disclosing party may seek a protective order or other appropriate remedy or, if appropriate, waive compliance with the provisions of this Agreement.
- 5.42.12 If such protective order or other remedy is not obtained, or the disclosing party waives compliance with the provisions of this Agreement, the receiving party shall:
- 5.42.12.1 Furnish only that portion of the Confidential Information of the disclosing party that, upon the advice of legal counsel, is legally required to disclose, and
 - 5.42.12.2 Exercise reasonable efforts to obtain assurance that confidential treatment will be afforded such Confidential Information.

- 5.42.13 In the event of a breach or threatened breach of this Section the parties recognize that money damages shall not be an adequate remedy, and therefore, in addition to any other legal or equitable remedies, the parties shall be entitled to seek an injunction, or other equitable relief or remedies, against such breach without necessity of posting bond or security, which is waived.
- 5.42.14 The Consultant shall not divulge any confidential, proprietary, draft or for official use only information (including portions of materials) concerning the Project(s) or provided to it by the Owner or any of the Owner's employees, consultants, contractors or agents, to anyone (including, for example, information on applications for permits, variances, and so forth) without the Owner's written consent, which may be given or withheld in the Owner's sole and unfettered discretion. The Owner shall designate such information as "Confidential", "Proprietary", "Draft", or "For Official Use Only". The Consultant shall obtain similar assurances from all those persons (including its employees or independent contractors) or firms retained by the Consultant pursuant to this Agreement. The Consultant further acknowledges and agrees that substantial damage will accrue to the Owner if this nondisclosure provision is breached by the Consultant or anyone for whom it is responsible, and therefore the Consultant agrees to pay any and all actual damages, costs or losses suffered by the Owner in the event there is a breach of this provision of this Agreement and to be subject to an injunction to enforce this provision. The Owner reserves the right to release any and all information relative to the Project, including, but not limited to, the time of release and the form and content hereof. This requirement shall survive the termination or expiration of this Agreement.
- 5.42.15 The Consultant shall not include or disclose, or permit to be disclosed, any photographic, artistic, text, recorded or written testimonials or names or contact information for any of the Owner's personnel, or other reference to the Project or the Owner, or any materials received in connection with the Project, in any of its promotional marketing materials, studies, research, advocacy proposals, publications or social media. This requirement shall survive the termination or expiration of this Agreement.
- 5.42.16 In its performance of Work under this Agreement and any applicable Task Order, if the Consultant is required to offer comments, opinions or testimonials on a specific subject matter related to the Work under this Agreement, under no circumstance shall the Consultant offer unsolicited written comments, opinions or testimonials other than what is specifically requested, or without the express written consent of the Service Authority. This requirement shall survive the termination or expiration of this Agreement.

5.43 **Headings**

Headings are for convenience of reference only and shall not be considered in any interpretation of this Agreement.

5.44 **Exhibits**

Each Exhibit referred to in this Agreement forms an essential part of this Agreement. The Exhibits, if not physically attached, should be treated as part of this Agreement and are incorporated by reference.

5.45 **Counterparts**

This Agreement may be executed in several counterparts, each of which shall be deemed an original and shall constitute one and the same instrument.

5.46 **Words and Phrases**

Where the words “required”, “approved”, “approval”, “satisfactory”, “determined”, “acceptable”, or words of like import are used in this Agreement, action by the Service Authority is indicated unless the context clearly indicates otherwise, and all Work shall be in accordance therewith. Such action, or failure to act, shall not relieve the Consultant of its contractual responsibilities for performance of this Agreement.

Wherever it is provided in the Agreement that the Consultant shall perform certain work “at its own expense”, or “without charge”, or that certain Work will not be paid for separately, such words mean that the Consultant shall not be entitled to any additional compensation from the Service Authority for such work.

5.47 **Notice of Commencement/Notice to Proceed**

Consultant shall not commence the Work until:

- 5.47.1 All insurance to be furnished hereunder has been approved by the Service Authority;
- 5.47.2 Consultant has received a Service Authority Purchase Order and written Notice to Proceed or Notice of Commencement from the duly authorized representative of the Service Authority for Work under the Agreement; and
- 5.47.3 Both parties have executed a Project Agreement for a specific project and the Service Authority shall not be responsible to pay for or reimburse the Consultant for any work that does not comply with this paragraph.

5.48 **Nonwaiver of Defaults – (NOT USED)**

5.49 Patent Indemnity

Subject to the limitations set forth in this Agreement, the Consultant shall indemnify, and save harmless the Indemnified Parties from and against any and all suits, actions, legal proceedings, claims, demands, damages, costs, expenses and attorneys' fees incident to any infringement of any patent or patents related in any manner to the subject matter of the Agreement documents prepared by the Consultant; provided, however, that any Indemnified Parties may, at such party's option, be represented in any such suits, actions or legal proceedings by attorneys of such party's own selection at its own expense.

In case any deliverable, document or other Work Product produced by or recommended by Consultant as part of its services provided under this Agreement, is held to constitute infringement of any patent or patents and its use on or for the Service Authority's project is enjoined, the Consultant shall, at its sole expense, either procure for the Service Authority the right to continue using the equipment, material, or facility that contains the infringement, replace the same with non-infringing equipment, material or facilities, or modify it so it becomes non-infringing.

The provisions of this Section shall survive termination, cancellation and expiration of this Agreement.

5.50 Consultant's Equipment and Facilities

5.50.1 The Consultant's and all Subconsultants' equipment shall be maintained in safe and good working order for the particular operating conditions. Use of equipment not meeting these requirements shall be discontinued until repaired. The Service Authority reserves the right to immediately direct the Consultant to discontinue the use of any substandard and/or unsafe equipment.

5.50.2 As requested by the Service Authority, the Consultant shall, at its own expense, repair or replace any substandard equipment used in performance of the work under this Agreement.

5.50.3 All commercial motor vehicles shall meet all U.S. Department of Transportation (DOT) and Virginia Department of Transportation (VDOT) requirements.

5.51 Use of Service Authority's Equipment or Facilities

5.51.1 Circumstances may arise where the Consultant requests the Service Authority to make available to the Consultant certain equipment or facilities belonging to the Service Authority for the performance of the Consultant's work under this Agreement.

5.51.2 If the Service Authority agrees to such request, the equipment or facilities will be charged to the Consultant at agreed rental rates. Under such circumstances,

the Consultant shall assure itself of the safety of such equipment before use and shall assume all risks and responsibilities in its use of the equipment.

5.51.3 The Consultant hereby agrees to indemnify the Service Authority from any liabilities that may arise from the Consultant's use and upon its return to the Service Authority to establish its condition and substantiate whether or not any part of the equipment used by the Consultant has been overstressed or damaged in any way as a result of its use, other than ordinary wear and tear. The cost of repairs or replacement to correct such overstress damage resulting from such use shall be at the Consultant's expense.

5.51.4 The provisions of this subsection shall survive termination, cancellation and expiration of this Agreement.

5.52 Consultant's Security Responsibilities

5.52.1 The Consultant shall at all times conduct its operations under the Agreement in a manner to avoid the risk of loss, theft, or damage by vandalism, sabotage, or other means to any property and/or documents. The Consultant shall promptly take all reasonable precautions which are necessary and adequate against any conditions which involve a risk of a loss, theft, or damage of its property or that of the Service Authority.

5.52.2 The Consultant shall comply with all applicable laws and regulations. The Consultant shall cooperate with the Service Authority on all security matters and shall promptly comply with any project security requirements established by the Service Authority.

5.52.3 Such compliance with these security requirements shall not relieve the Consultant of its responsibility for maintaining proper security for the above noted items, nor shall it be construed as limiting in any manner the Consultant's obligation to undertake reasonable action as required to establish and maintain secure conditions at the site.

5.52.4 The Consultant shall prepare and maintain accurate reports of incidents of loss, theft, or vandalism and shall furnish these reports to the Service Authority within six (6) hours of becoming aware of the incident.

5.52.5 Representatives and employees of the Consultant must enter the Service Authority property through an entrance designated by the Service Authority, and must adhere to all security rules and regulations, and Consultant agrees to comply and cause compliance by its Subconsultants therewith.

5.52.6 The Consultant may obtain authorization for trucks and other vehicles to enter the Service Authority's property subject to compliance with the Service Authority's rules and regulations.

- 5.52.7 The Service Authority will accept no responsibility for replacement of, protection to, or policing of, the Consultant's equipment, tools or materials which are furnished or used in its work at the Service Authority's property.
- 5.52.8 The Consultant shall conduct, or has conducted, a criminal background check at its own expense on each of its employees engaged in performing Work under this Contract prior to the commencement of such services. No Consultant employee shall be eligible to perform Work for the Service Authority if he or she, to the Consultant's knowledge, (1) has been convicted of or was placed in a pre-trial diversion program for any crime involving dishonesty or breach of trust including, but not limited to, check kiting or passing bad checks; embezzlement, drug trafficking, forgery, burglary, robbery, theft, perjury; possession of stolen property, identity theft, fraud, money laundering, shoplifting, larceny, falsification of documents; and/or (2) has been convicted of any sex, weapons or violent crime including but not limited to homicide, attempted homicide, rape, child molestation, extortion, terrorism or terrorist threats, kidnapping, assault, battery, and illegal weapon possession, sale or use.
- 5.52.9 The Consultant also agrees that all of its contracts or other agreements with Subconsultants and vendors shall prohibit the Subconsultants and vendors from assigning any employee providing services for the performance of Work for this Agreement without first performing or obtaining a criminal background check on such employee.
- 5.52.10 In addition, the Consultant shall not tolerate any inappropriate behavior on the Service Authority's public property and shall immediately remove from the property any Consultant personnel who is found to be engaging in any inappropriate behavior.

5.53 Damage of Property

The Consultant shall replace any lost or stolen property, repair any damage of whatever kind or character, whether publicly or privately owned, including the property of the Service Authority, to the extent caused by its operations (including its Subconsultants) to the condition such property was in prior to the damage or other incident, all to the reasonable satisfaction of the Service Authority.

The provisions of this Section shall survive termination, cancellation and expiration of this Agreement.

5.54 Inspection of Work

The Service Authority shall at any and all times have access to the Work being performed under this Agreement, and all aspects thereof and to the premises affected thereby, for inspection purposes including the utilization at the Service Authority's expense of third-party inspectors, and the Consultant shall provide proper facilities for such access and inspection.

5.55 Cooperation

Service Authority or other parties may perform work, including the normal operations of the Service Authority, in the vicinity of or on the premises affected by this Agreement, and the Consultant's work or use of certain facilities may be interfered with as a result of such concurrent activities. The Service Authority reserves the right to require the Consultant to schedule the order of performance of its work in such a manner as will minimize interference with the work of any of the parties involved and the Consultant acknowledges that such interferences will not constitute cause for additional compensation to the Consultant.

5.56 Progress

- 5.56.1 If requested by the Service Authority's Project Manager/COR, prior to commencement of the Work, the Consultant shall prepare and submit to the Service Authority for approval, a progress schedule indicating the proposed dates for the starting of and completion of the various parts of the Work outlined herein.
- 5.56.2 The Consultant shall give the Service Authority full information in advance as to its plans for performing each part of its Work. If at any time the Consultant's progress is inadequate to meet the requirements of this Agreement, the Service Authority may so notify the Consultant who shall thereupon take such steps as may be necessary to improve its progress. If, within a reasonable period as determined by the Service Authority, the Consultant does not improve performance to meet the currently approved Agreement Schedule, the Service Authority may require an increase in the Consultant's labor force, the number of shifts, overtime operations or additional Days of work per week. Neither such notice by the Service Authority nor the Service Authority's failure to issue such notice shall relieve the Consultant of its obligations to achieve the quality of work and rate of progress required by this Agreement.
- 5.56.3 Failure of the Consultant to comply with the Service Authority's instructions may be grounds for termination, in accordance with the applicable provisions of this Agreement.

5.57 Assignment Upon Termination

The Consultant Work Product shall become the property of the Service Authority upon payment for services performed, as they are performed and the Consultant shall within ten (10) working Days of receipt of written direction from the Service Authority, delivery to either the Service Authority or its authorized designee, all Work Product in its possession, including but not limited to, designs, Specifications, Drawings, studies, reports and all other documents and data in the possession of the Consultant pertaining to such Project Agreement. Upon the Service Authority's request, the Consultant shall additionally assign its rights, title and interest under any Subconsultant's agreements to the Service Authority.

5.58 Warranties and Limit of Liability – (NOT USED)

5.59 Order of Precedence

In the event of an inconsistency between provisions of this Agreement, the inconsistency shall be resolved in the following order:

- A. Change Order(s) B. Project Agreement C. “this” BOA Agreement

5.60 Severability

If any term or provision of this Agreement or the application thereof to any person or circumstances shall, to any extent, be held invalid or unenforceable, the remainder of this Agreement, or the application of such terms or provision to persons or circumstances other than those as to which it is held invalid or unenforceable, shall not be affected, and every other term and provision of this Agreement shall be deemed valid and enforceable to the extent permitted by law.

EXHIBIT A SCOPE OF WORK

- b. The Consultant shall provide a written request prior to and for approval by the Service Authority Project Manager/COR to add Key Personnel, labor categories, transfer employees from one category to another or remove employees from a category.
 - c. Overtime must be pre-approved by the Service Authority Project Manager/COR. If an hourly consultant employee is eligible for overtime, their billable rate may not exceed the Maximum Fully Burdened Rate.
2. **Other Direct Costs (ODC):** ODC's shall be charged at cost. The Consultant shall seek best value when incurring other direct costs. The Service Authority has the right to reject such costs. Allowable and unallowable ODC's are detailed in Table 2.
 3. **Subconsultant Costs:** The Prime Consultant's cost for services provided by a Subconsultant shall not exceed a 10% markup on labor and must be pre-approved. The Service Authority expects the Consultant to seek best value when sub-consulting and reserves the right to negotiate at a lower cost than 10%.
 4. **Allowable and Unallowable Costs:** The following table provides allowable and unallowable costs. Any costs not included in this table requires the Service Authority to determine in writing if the cost is allowable or unallowable.

Table 2: ALLOWABLE AND UNALLOWABLE COSTS

Type of Cost		Direct Labor	Other Direct Costs	Non-Reimbursable Costs
		Reimbursable at Base Hourly Rate Times Multiplier	Reimbursable at Cost	Unallowable costs or costs covered by Multiplier
1	Direct Labor - Consultant Staff assigned to the work	X		
2	Pre-approved overtime for hourly consultant employees exceeding 40 hours on a Service Authority Project.	X		
	Unallowable overtime includes overtime for exempt consultant employees, unauthorized overtime, or billable rates exceeding the Maximum Fully Burdened Rate.			X
3	Indirect Labor such as consultant staff not assigned to the work and executive level employees not identified as key personnel.			X
4	Overhead Salaries or Compensation			X
5	Non-Reimbursable Compensation or Benefits such as: Bonuses, Incentives and Recognition Awards Retirement Contributions and Pay Pension Plan Costs Social Security Taxes or Pay Federal and State Unemployment Allowances Allowances for Vacation, Sick leave, and Holiday Pay			X
6	Overhead Project Support Costs such as computer, routine photocopying, postage, and telecommunications.			X
7	Insurance Not Required by the Service Authority			X
8	Costs/Expenses Recoverable by Insurance			X
9	Taxes (excepting Taxes associated with specific Other Direct Costs)			X
10	Legal fees			X
11	Licenses			X

Table 2: ALLOWABLE AND UNALLOWABLE COSTS

Type of Cost		Direct Labor	Other Direct Costs	Non-Reimbursable Costs
		Reimbursable at Base Hourly Rate Times Multiplier	Reimbursable at Cost	Unallowable costs or costs covered by Multiplier
12	General Office Supplies and Equipment			X
13	Local and long distance telephone service			X
14	Buildings			X
15	Support Services (i.e. Cleaning, Storage, Utilities)			X
16	Unallowable travel such as non-work related travel and subsistence, travel that is not pre-approved, first class travel, or travel exceeding GSA rates.			X
17	Costs/Expenses (to include legal costs) Related to Consultant's Default or Breach of Contract			X
18	Recruiting and Advertising Costs			X
19	Contributions, Donations, Entertainment, or Organizational Membership			X
20	Fines and Penalties Due to Consultant's Violation or Non-Compliance with Laws and Regulations			X
21	Consultant's Defective Work (as described in Section 1, sub-section 1.12)			X
22	Interest on borrowed money and associated finance charges			X
23	Costs or expenses not in accordance with this Agreement			X
24	Outside Reproduction Services <input type="checkbox"/> Photocopying, printing or binding of drawings specifications, renderings, and other documents <input type="checkbox"/> Printing, mounting, laminating and/or physically preparing presentation materials		X	
25	Outside (job shop) drafting and model-making services		X	
26	Outside Computer Services		X	

Table 2: ALLOWABLE AND UNALLOWABLE COSTS

Type of Cost		Direct Labor	Other Direct Costs	Non-Reimbursable Costs
		Reimbursable at Base Hourly Rate Times Multiplier	Reimbursable at Cost	Unallowable costs or costs covered by Multiplier
27	High-End Computer Usage and Software Maintenance Charges		X	
28	Federal, State, and Local Regulatory Fees, including <input type="checkbox"/> OSHA Health & Safety <input type="checkbox"/> Applications Fees <input type="checkbox"/> Permits Fees <input type="checkbox"/> Permit Modification Fees <input type="checkbox"/> Filing Fees <input type="checkbox"/> Inspection Fees		X	
29	Public Information and Document Requests fees		X	
30	Laboratory analyses and tests		X	
31	Work Travel and Subsistence Expenses		X	
32	Work Equipment Expenses (Rental or Purchase), including computer and communication usage project specific		X	
33	Construction Utilities project specific – all power, water, light, fuel, oil, compressed air		X	
34	Work Related Mileage or Car Rental Charges		X	
35	Insurance Required by the Service Authority other than as described in Section 5, sub-section 5.34 of this Agreement		X	
36	Storage Related to the Work on the jobsite		X	
37	Any other costs not set forth above with the Consultant and Owner that are agreed to in writing are reimbursable		X	

EXHIBIT C REQUIRED INSURANCE LIMITS

Insurance Coverages and Limits:

Coverage Required		Minimum Limits
1.	Workers' Compensation and Employers' Liability:	Statutory Limits of the Commonwealth of VA:
	Admitted in Virginia	Yes
	Employers' Liability	\$500,000
	All State Endorsement	Statutory
2.	General Liability	\$1,000,000 Combined Single Limit
	Contractual Liability	Bodily Injury and Property Damage
	Personal Injury	Each Occurrence
3.	Automobile Liability	\$2,000,000 Combined Single Limit
	Owned, Hired & Non-Owned	Bodily Injury and Property Damage
	Personal Injury	Each Occurrence
4	Umbrella or excess liability	\$5,000,000 Each Occurrence \$5,000,000 Aggregate
5.	Service Authority named as additional insured on General Liability Policies (This coverage is primary to all other coverage the Service Authority may possess.)	
6.	Cancellation notice in accordance with policy provisions required.	
7.	Professional Liability	\$2,000,000 per Claim, \$6,000,000 Aggregate
8.	Best's Guide Rating	A-:VII or Better, or Equiv.
9.	The Certificate must state Contract No. SA-2423	

EXHIBIT D INVOICING PROCEDURES

The Consultant shall submit all invoices in accordance with the following:

Invoices (or Applications for Payment) must contain sufficient information for the Service Authority to verify that the work was performed in accordance with this Contract. The Service Authority requires that the following information be included in the invoice (or must be in the form of a report which must accompany the invoice) and contain the following information:

1. Contract Title and Contract Number, Purchase Order Number;
2. Dates services were provided (date work performed, period of performance);
3. Summary of deliverables or work achieved during the specified billing period including, for unit price work, details of quantities and prices, for lump sum work, details of the work performed in accordance with the schedule of values;
4. Written acceptance of the work and/or deliverable by the Service Authority;
5. Invoice Processing:

The Consultant shall submit invoices on a monthly basis, but no more frequently than once per month. The Consultant shall submit invoices to the Accounts Payable Department (as shown below) unless otherwise directed by the Service Authority in the Task Order Project Agreement to submit invoices in the Project Management Information System designated as PMWeb. The Consultant shall not invoice for work more than 90 Days after performance. The Service Authority shall pay invoices within 30 Days upon receipt unless any items thereon are questioned or disputed, in which event the Consultant will be notified of the disputed amounts/services, and payment will be withheld for those items pending verification of the amount and the validity of the invoice.

Invoices shall be forwarded to:

By Mail	Physical Delivery
Prince William County Service Authority Attn: Accounts Payable P O. Box 2266 Woodbridge, Virginia 22195	Prince William County Service Authority Attn: Accounts Payable 4 County Complex Court Woodbridge, Virginia 22192
Or (Electronically, via email): accountspayable@pwcsa.org	

6. The following support is required:

a. Direct Labor:

- i. Invoices must include the employee's name, labor category/title, hours worked on the Project, multiplier and the Fully Burdened Rate.
- ii. The Fully Burdened Rate must fall within the Minimum and Maximum Fully Burdened Rate for the labor category/title as approved in EXHIBIT B.

Example 1: Labor rate falls within the approved Fully Burdened Rates

- Employee Category: Consultant. Employee Base Hourly Rate = \$48.72/hour
- Base Hourly Rate of \$48.72 < Maximum Hourly Rate of \$54.00; therefore, use Base Hourly Rate of \$48.72/hour
- Base Hourly Rate x Overhead Factor = Fully Burdened Hourly Rate
 $\$48.72/\text{hour} \times 2.9 = \141.29 Fully Burdened Hourly Rate

Example 2: Labor rate falls outside of the approved Fully Burdened Rates

- Employee Category: Consultant. Employee Base Hourly Rate = \$56.25/hour
- Base Hourly Rate of \$56.25 > Maximum Hourly Rate of \$54.00; therefore, use Maximum Hourly Rate of \$54.00
- Maximum Hourly Rate x Overhead Factor = Fully Burdened Hourly Rate
 $\$54.00/\text{hour} \times 2.9 = \156.6 Fully Burdened Hourly Rate

- b. Subconsultant Fees: Subconsultant fees must be documented by copies of invoices and receipts which describe the nature of the expenses and contain a project number or other identifier which clearly indicates the expense is identifiable to the Project Agreement billed against. Subsequent addition of the identifier to the invoice or receipt by the Consultant is not acceptable except for meals and travel expenses.
- c. Other Direct Costs: Other Direct Costs shall be paid in accordance with Table 2 to EXHIBIT B and must include the consultant employee incurring the cost, nature of work with which expenses were incurred, and copies of invoices or receipts that contain the Contract Number to clearly indicate the expense is identifiable to the Contract.
- d. Travel Costs: Travel Authorization Form (Exhibit E) signed by Service Authority Project Manager/COR for advance approval of all travel expenses outside of Prince William County (See Section 1.33, Travel Expenses and in Table 2 to EXHIBIT B, Allowable and Unallowable Costs).
- e. Non-schedule work items: Proper documentation to support payment of non-schedule work/items not included in the Contract to include payroll records, and invoices for all materials, supplies, and services, purchased or leased, in performance of the work.

f. Monthly Progress Summary Report Form:

For Projects Exceeding 90 Day Duration, the Consultant shall also provide to the Service Authority Project Manager/COR no later than the 5th of each month, a written Monthly Progress Summary Report detailing the status of ALL ongoing work tasked to and performed by the Consultant and the Consultant's Subconsultants (with clear traceability of work back to the Tasks listed in the Project Payment Schedules). At a minimum, the Monthly Progress Summary Report shall include the following information:

1. Contract or Task Order number;
2. Name and title of Project;
3. A description of each Project/Task Order;
4. Budget of hours and dollars for hourly rate work (if applicable);
5. Budget of dollars for Lump Sum (if applicable);
6. Notice of any issues that could affect project completion schedule, quality or price (if applicable);
7. Cost and hours incurred to date for hourly rate work (if applicable);
8. Percent/deliverable completion to date for Lump Sum (if applicable);
9. Estimated cost and hours to complete for hourly work (if applicable);
10. Estimated percent/deliverables to complete for Lump Sum (if applicable);
11. Total of all previous Invoices;
12. Budget and schedule analysis;
13. Projected completion date; and
14. The Consultant shall perform a monthly schedule analysis to determine the health of the schedule and if necessary, provide cost variance explanations/recovery action plan(s).

EXHIBIT D

Prince William County Service Authority
Monthly Progress Summary Report

Project Title:	Contract Number:
Contract Start Date: [mm/dd/yr]	Project No:
Contract End Date: [mm/dd/yr]	PO Number:
PWCSA PM:	Contract PM:
Project Period: [mm/dd/yr] - [mm/dd/yr]	Today's Date: [mm/dd/yr]
Progress This Period:	
1. [Provide bullet summary of accomplishments during the invoice period]	
2.	
3.	
Permits:	
1.	
2.	
As of MM/DD/YY the Project budget is XX% expended.	
Items For Resolution:	Next Milestone(s) / tracking with contract dates:
1. [List issues to be resolved or information requested; if any]	1. [List specific tasks; meetings or accomplishments]
2. [List any outstanding change orders]	2.
3.	3.
4.	4.
5.	5.
Variances:	
1. [List approved change orders]	
2.	
3.	
4.	

Projected and Actual Billing (running total)

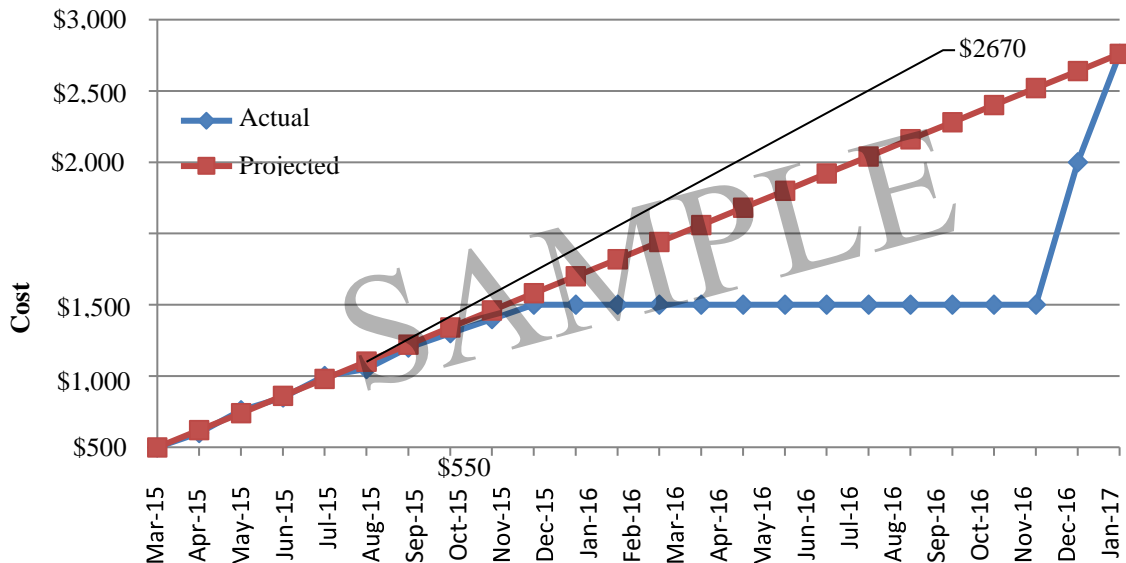


EXHIBIT D – SAMPLE INVOICE

[INSERT APPROVED SAMPLE INVOICE HERE]

EXHIBIT E TRAVEL AUTHORIZATION FORM

Please fill out Travel Authorization form & obtain approval prior to making reservations.
International travel may require a passport and/or visa.

Is travel being booked at least 7 Days in advance? Yes No

If no, please explain _____

Only coach class fare is reimbursable

Estimated cost of trip _____

Note: **Backup documentation is required to support Estimated Cost**

TRAVELLER'S NAME		TELEPHONE NUMBER:		T.A. NUMBER:
CONSULTANT COMPANY:		CONTRACT/TASK ORDER NUMBER:		TRAVEL ARRANGED BY:
PURPOSE OF TRIP				
ITINERARY				
FROM	TO	DATE	DEPARTURE TIME	
CAR RENTAL NEEDED? NO YES (IF YES PLEASE COMPLETE INFORMATION BELOW)				
CITY	NUMBER OF DAYS	SPECIAL INFORMATION		
HOTEL NEEDED? NO YES (IF YES PLEASE COMPLETE INFORMATION BELOW)				
CITY	DATE(S)	HOTEL NAME (if known)	SPECIAL INFORMATION	
IS ANY PORTION OF THIS TRIP PERSONAL? IF YES, PLEASE EXPLAIN.				
CONSULTANT SIGNATURE		DATE	SA PROJECT MANAGER SIGNATURE	

EXHIBIT F SUBCONSULTANT'S LIST

Enter CONSULTANT name is encouraged to use good faith efforts to offer subcontracting opportunities to SWaM businesses to the greatest extent possible supporting the Service Authority's supplier-diversity commitment.

EXHIBIT G OTHER

EXHIBIT H SAMPLE PROJECT AGREEMENT

[Click here to enter title.](#)

PROJECT AGREEMENT

Between

THE SERVICE AUTHORITY

And

Consultant/Company Name (CONSULTANT)

For

Project Agreement Task Order No enter number.

Enter Brief Task Order Project Description.

Pursuant to the provisions contained in Basic Ordering Agreement enter SA # enter Contract Title. Services Agreement between the SERVICE AUTHORITY and CONSULTANT for ENTER CONTRACT TITLE Services (hereinafter refer to as “Agreement”) dated enter Contract date., this Project Agreement authorizes the CONSULTANT to provide the services as set forth below:

The SERVICE AUTHORITY and the CONSULTANT agree as follows:

SECTION 1 DEFINITIONS

[Definitions specific to a Project Agreement that are not defined in the Agreement shall be inserted here]

1.1 CONTRACTING OFFICER REPRESENTATIVE (COR): Designated and authorized in writing by the Administrative Contracting Officer (ACO) to perform specific project management, technical or other administrative functions of the Contract; does not have actual, apparent or implied authority to bind the Service Authority into contractual relations.

1.2 SERVICE AUTHORITY: As defined in the Project Agreement, Section 4.2, “Project Manager/COR”, the SERVICE AUTHORITY’s designated Project Manager/COR, is referred to as the “SERVICE AUTHORITY” unless specified, throughout the Project Agreement, including all Exhibits any applicable attachments of this Task Order.

SECTION 2 SCOPE OF SERVICES

- 2.1** The CONSULTANT shall provide enter text. Services to the SERVICE AUTHORITY for the Work as described in the “Project Description” attached as EXHIBIT “1”.
- 2.2** The “Scope of Services” and tasks provided by the CONSULTANT for this Project are those services and tasks as listed in EXHIBIT “2”.

- 2.3 The SERVICE AUTHORITY may request changes that would increase, decrease, or otherwise modify the Scope of Services. Such changes must be contained in a written Change Order executed by the parties in accordance with the provisions of the Agreement, prior to any deviation from the terms of the Project Agreement, including the initiation of any extra Work.
- 2.4 Unless specifically agreed otherwise by the SERVICE AUTHORITY, the CONSULTANT is responsible for all Work necessary for the performance of the Services provided in this Project Agreement and all Deliverables required. The SERVICE AUTHORITY shall determine the acceptability of all Deliverables.
- 2.5 In its performance of Work under this Task Order, if the CONSULTANT is required to offer comments, opinions or testimonials on a specific subject matter related to the Work under this Task Order, under no circumstance shall the CONSULTANT offer unsolicited written comments, opinions or testimonials other than what is specifically requested, or without the express written consent of the SERVICE AUTHORITY. This requirement shall survive the termination or expiration of this Task Order.

SECTION 3 DELIVERABLES

- 3.1 As part of the Scope of Services the CONSULTANT shall provide to the SERVICE AUTHORITY the Deliverables as listed in EXHIBIT “3”.
- 3.2 The CONSULTANT has access and can obtain all materials, equipment and labor necessary to complete the Scope of Services within the Project Agreement Term.

SECTION 4 TERM / TIME OF PERFORMANCE / DAMAGES

- 4.1 **Term.** This Project Agreement shall commence upon the date specified in the Notice to Proceed (which shall not be prior to the date the SERVICE AUTHORITY provides a fully executed Purchase Order to the CONSULTANT) and shall continue in full force and effect for *enter # of days*. Days unless otherwise terminated pursuant to Section 8 or other applicable provisions of this Project Agreement. The SERVICE AUTHORITY in its sole discretion may extend the initial term of this Project Agreement through an approved Change Order.
- 4.2 **Project Manager/COR.** The SERVICE AUTHORITY’s designated Project Manager/COR for this Project Agreement is *Enter Project Manager’s name and title.*
- 4.3 **Commencement.** The CONSULTANT’S services under this Project Agreement and the time frames applicable to this Project Agreement shall commence upon the date specified in a written Notice to Proceed (“Commencement Date”) and receipt of a fully executed Purchase Order provided to the CONSULTANT from the SERVICE AUTHORITY. The CONSULTANT shall not incur any expenses or obligations for payment to third parties prior to the Commencement Date set in the Notice to Proceed. The CONSULTANT must receive written notice from the SERVICE AUTHORITY’S General Manager or designee prior to beginning the performance of services in any subsequent phases of this Project Agreement. Prior to granting notice for the CONSULTANT to proceed to a subsequent phase, the SERVICE AUTHORITY’S General Manager or designee may, at its sole option, require the CONSULTANT to submit the itemized deliverables/documents identified in

EXHIBIT “3” of this Project Agreement for the current phase for the SERVICE AUTHORITY’s review.

- 4.4 Contract Time.** Upon receipt of the Notice to Proceed and the fully executed Purchase Order, the CONSULTANT shall commence performance of services for the SERVICE AUTHORITY on the Commencement Date, and shall continuously perform services for the SERVICE AUTHORITY, without interruption, in accordance with the time frames set forth in the “Project Schedule,” a copy of which is attached and incorporated into this Project Agreement as EXHIBIT “3”. The number of calendar Days from the Commencement Date, through the date set forth in the Project Schedule for completion of the Work or the date of actual completion of the Work, whichever shall last occur, shall constitute the Contract Time. In no case, however, shall the Contract Time exceed the Term of this Project Agreement and any Work performed by the CONSULTANT after the Term of this Project Agreement is at the CONSULTANT’S risk.
- 4.5 Liquidated Damages. (NOT USED)**
- 4.6 SERVICE AUTHORITY Caused Delay (NOT USED)**
- 4.7** Claims for adjustments in the Project Schedule, damages or compensation, related to delays not within the control of the CONSULTANT, shall be made in accordance with Section 5.24 of the Agreement.
- 4.8** Notwithstanding the provisions of Paragraph 4.5, in the event that the contractor constructing the Project is granted an extension of the time to complete performance under the Contract for Construction, and the CONSULTANT’S contract administration services are materially extended by the SERVICE AUTHORITY via an approved Change Order as a direct result thereof and through no fault of the CONSULTANT, the CONSULTANT is entitled to compensation and paid based on the Standard Hourly Rates attached to this Task Order. The amount of compensation due by the CONSULTANT under this paragraph is pursuant to an approved Change Order.
- If, in the event that construction of the Project is suspended for more than thirty Days, the CONSULTANT shall also suspend contract administration services upon request of SERVICE AUTHORITY. Any time spent on the Project at the request of the SERVICE AUTHORITY or on the SERVICE AUTHORITY’s behalf during this suspension are considered additional services and paid based on the Standard Hourly Rates attached to this Task Order. The amount of compensation due to the CONSULTANT under this paragraph is pursuant to an approved Change Order.
- 4.9** All limitations of time set forth in this Project Agreement are of the essence.

SECTION 5 AMOUNT, BASIS AND METHOD OF COMPENSATION

5.1 The basis and method of compensation to the CONSULTANT for the services rendered pursuant to this Project Agreement are in conformance with EXHIBIT “B” of the Agreement.

End User: Please select one of the following clauses below. Then replace not used clauses with “NOT USED” after the each of the unused sections (i.e. Lump Sum Compensation NOT USED). Delete these instructions once completed.

5.2 **Maximum Amount Not-To-Exceed Compensation.** SERVICE AUTHORITY agrees to pay CONSULTANT as compensation for performance of all services as related to the Work (as listed in Exhibit “A” of the Agreement) up to a maximum amount not-to-exceed including Other Direct Costs, of \$ enter amount. Even if the CONSULTANT’S actual costs exceed the Maximum Amount Not-To-Exceed stated in this Section 5.2, the CONSULTANT shall complete the required deliverables and the CONSULTANT’S compensation shall not exceed the Maximum Amount Not-To-Exceed.

5.3 **Lump Sum Compensation.** SERVICE AUTHORITY agrees to pay CONSULTANT as compensation for performance of all services as related to the Work a Lump Sum of \$ enter amount. It is understood that the method of compensation is that of Lump Sum which means that CONSULTANT shall perform all services set forth for total compensation in the amount stated above. Said Lump Sum includes but is not limited to, compensation for all fees, expenses, and out-of-pocket costs of the CONSULTANT. Even if the CONSULTANT’S actual costs exceed the Lump Sum amount stated in this Section 5.3, the CONSULTANT shall complete the required deliverables and the CONSULTANT’S compensation shall not exceed the Lump Sum Amount.

5.4 **Other Project Specific Negotiated Compensation.** SERVICE AUTHORITY agrees to pay CONSULTANT as compensation for performance of all services as related to the Work as follows: (applicable the specific compensation terms depending on the Project Agreement requirements).

5.5 **Profit and Overhead.** The labor included in the compensation in this Section 5 are in accordance with the provisions of the Agreement, dated [enter date], which consists of a multiplier of [enter multiplier], and includes an overhead rate of [enter Overhead Rate] as calculated in accordance with the Federal Acquisition Regulation and profit of [enter Profit].

SECTION 6 BILLING AND PAYMENTS TO THE CONSULTANT

6.1 The CONSULTANT shall submit invoice electronically in accordance with EXHIBIT “D” of the Agreement and the Payment Schedule, a copy of which is attached and incorporated into this Project Agreement as EXHIBIT “3”.

6.2 Failure of the CONSULTANT to perform the duties required by this Project Agreement shall subject the CONSULTANT to, at the Owner's sole discretion, withholding, in partial or in total, payments otherwise due to the CONSULTANT for work performed under this

Agreement. Any payments withheld are not a penalty for noncompliance, but are to ensure that the SERVICE AUTHORITY will not suffer a financial loss as a result of the failure of the CONSULTANT to perform its required duties.

SECTION 7 WARRANTIES AND LIMITS OF LIABILITY

Not applicable.

SECTION 8 TERMINATION / SUSPENSION

- 8.1** Termination in accordance with Section 5.13 of the Agreement.
- 8.2** Suspension in accordance with Section 4.4 of the Agreement.
- 8.3** Assignment Upon Termination. Upon termination of this Project Agreement, the Work Product of the CONSULTANT shall become the property of the SERVICE AUTHORITY and the CONSULTANT shall within ten (10) working Days of receipt of written direction from the SERVICE AUTHORITY, transfer to either the SERVICE AUTHORITY or its authorized designee, all Work Product in its possession, including but not limited to, designs, specifications, drawings, studies, reports and all other documents and data in the possession of the CONSULTANT pertaining to this Project Agreement. Upon the SERVICE AUTHORITY’S request, the CONSULTANT shall additionally assign its rights, title and interest under any subcontractor’s agreements it is holding in connection with this Project Agreement to the SERVICE AUTHORITY. The SERVICE AUTHORITY shall use all Work Product provided under this Section solely for its intended purpose.
- 8.4** Termination for Non-Allocation of Funds: If funds are not allocated for any succeeding fiscal year subsequent to the one in which this Project Agreement is entered into, for the purposes of this Project Agreement, then the SERVICE AUTHORITY may terminate this contract upon thirty (30) Days prior written notice to the CONSULTANT.

Should the SERVICE AUTHORITY choose termination in accordance with this Section, the SERVICE AUTHORITY is liable only for payments due through the date of termination, in the same manner as if the SERVICE AUTHORITY elected to terminate the Project Agreement for convenience under Section 5.13.3 of the Agreement.

SECTION 9 KEY AND OTHER PERSONNEL ASSIGNED TO PROJECT

The CONSULTANT shall assign only qualified personnel to perform any services concerning this Project. At the time of execution of this Project Agreement, the parties anticipate that the following named Key Personnel shall perform those functions at the rates listed below. All other personnel shall perform the functions and bill in accordance with the labor categories specified in “**Exhibit B–Labor Costs and Compensation**” of the Agreement.

CONSULTANT’S KEY PERSONNEL LIST

NAME	FUNCTION/TITLE	HOURLY RATE
------	----------------	-------------

enter text.

enter text.

enter text.

enter text.

enter text.

enter text.

enter text.

enter text.

enter text.

enter text.

enter text.

enter text.

The CONSULTANT shall not remove the CONSULTANT’S Key Personnel, as named above, from performance or positions in this Project Agreement without approval of the SERVICE AUTHORITY.

In addition, the CONSULTANT shall submit a formal written request to the SERVICE AUTHORITY prior to adding, removing, reassigning or making changes to Function/Title for CONSULTANT Key Personnel as specified above.

The CONSULTANT shall submit a formal written request to the SERVICE AUTHORITY no later than fifteen (15) Days prior to the addition, removal, reassignment or changes made to Function/Title of Key Personnel. The CONSULTANT shall add, remove, reassign or change Function/Title of such Key Personnel only after receiving written approval from the SERVICE AUTHORITY.

Provide information requested below if Key Personnel is a SUBCONSULTANT.

KEY PERSONNEL LIST - SUBCONSULTANTS
--

The SERVICE AUTHORITY reserves the right to request the CONSULTANT to name an employee(s) of a SUBCONSULTANT as “Key Personnel”.

NAME/FIRM

enter text.

enter text.

The CONSULTANT shall not allow the SUBCONSULTANT to remove or substitute individuals named above as Key Personnel without the prior written approval of the SERVICE AUTHORITY.

The SERVICE AUTHORITY reserves the right to reject any proposed substitution for any of the above named individuals, and the SERVICE AUTHORITY shall have the further right to require that any individual assigned to the Work by the CONSULTANT be removed from the Project Agreement and reassigned for good cause.

SECTION 10 INCORPORATION OF AGREEMENT

All terms and conditions of the “Agreement” between the SERVICE AUTHORITY and the CONSULTANT dated enter Contract date., not specifically modified by this Project Agreement shall

remain in full force and effect and are incorporated into and made a part of this Project Agreement by this reference as though set forth in full.

SECTION 11 SEVERABILITY

If any term or provision of this Project Agreement or its application thereof to any person or circumstances shall, to any extent, be held invalid or unenforceable, the remainder of this Project Agreement or the application of such terms or provisions to persons or circumstances other than those to which it is held invalid or unenforceable, shall not be affected, and every other term and provision of this Project Agreement is deemed valid and enforceable to the extent permitted by law.

IN WITNESS WHEREOF, the parties hereto have made and executed this Project Agreement on the respective dates under each signature: The SERVICE AUTHORITY, signing by and through its General Manager or authorized designee, duly authorized to execute same and by CONSULTANT by and through its representative, duly authorized to execute same.

CONSULTANT

SERVICE AUTHORITY

By: _____

By: _____

Print Name

Print Name

Title

Title

Date _____

Date _____

EXHIBIT 1

PROJECT AGREEMENT

PROJECT DESCRIPTION

EXHIBIT 2

PROJECT AGREEMENT

SCOPE OF SERVICES

Insert Exhibit 3 here.

