

REQUEST FOR PROPOSALS

to prepare the

2025 URBAN WATER MANAGEMENT PLAN



Montecito Water District
583 San Ysidro Road
Santa Barbara, CA 93108

July 2025

Proposers shall submit to District an electronic copy (PDF) of the Proposal via email to akanold@montecitowater.com by **12:00 PM on Monday August 11, 2025**. Proposals shall be clearly labeled **Proposal for 2025 Urban Water Management Plan**. The Fee Proposal shall be submitted in a separate PDF labeled **Fee Proposal for 2025 Urban Water Management Plan**.

I. STATEMENT OF PURPOSE

The Montecito Water District (District) is soliciting proposals from qualified consultants to provide professional consulting services to prepare the District's 2025 Urban Water Management Plan (UWMP) in full compliance with the California Urban Water Management Planning Act, as codified in Section 10610 of the California Water Code and the Department of Water Resources (DWR) 2025 Urban Water Management Plan Guidebook for Water Suppliers (once released). The Consultant shall submit the adopted UWMP electronically by July 1, 2026 in accordance with DWR requirements.

The selected Consultant shall provide the full range of services for UWMP development including but not limited to: water production and consumption data gathering, review and analysis; population and demographic analysis; demand projection development; system supply analysis; water supply reliability assessment; water shortage contingency planning (WSCP) updates; demand management measure analysis; and climate change impact analysis.

As key sections of the UWMP are developed, namely the supply and demand projections and water shortage contingency planning components, the Consultant shall in conjunction with District staff, make several presentations to the Strategic Planning Committee and Board of Directors and the public at scheduled meetings, via video conference as required. The purpose of these presentations will be to solicit Committee, Board and public input well in advance of developing a final draft UWMP.

The Consultant shall also assist the District with making the required notifications to other local agencies and public hearing notifications as specified by the Urban Water Management Planning Act. The Consultant shall assure that electronic versions of the plan meet the specifications of Section 508 of the Rehabilitation Act and be fully available to people with disabilities.

II. BACKGROUND

The Montecito Water District (District) was formed as a County Water District in November 1921, in accordance with the California Water Code, with the purpose of furnishing potable water within the District. The District executed the first contract with the United States Bureau of Reclamation (USBR) in 1949 to receive water from Lake Cachuma (Bradbury Dam). A merger in 1995 with the former Summerland County Water District increased the total acreage of the District's service area which currently covers 9,909 acres. The District's service area shown in Figure 1 includes the unincorporated Montecito and Summerland communities, as well as Toro Canyon, and small portions of the western Carpinteria Valley and the eastern portion of the City of Santa Barbara.

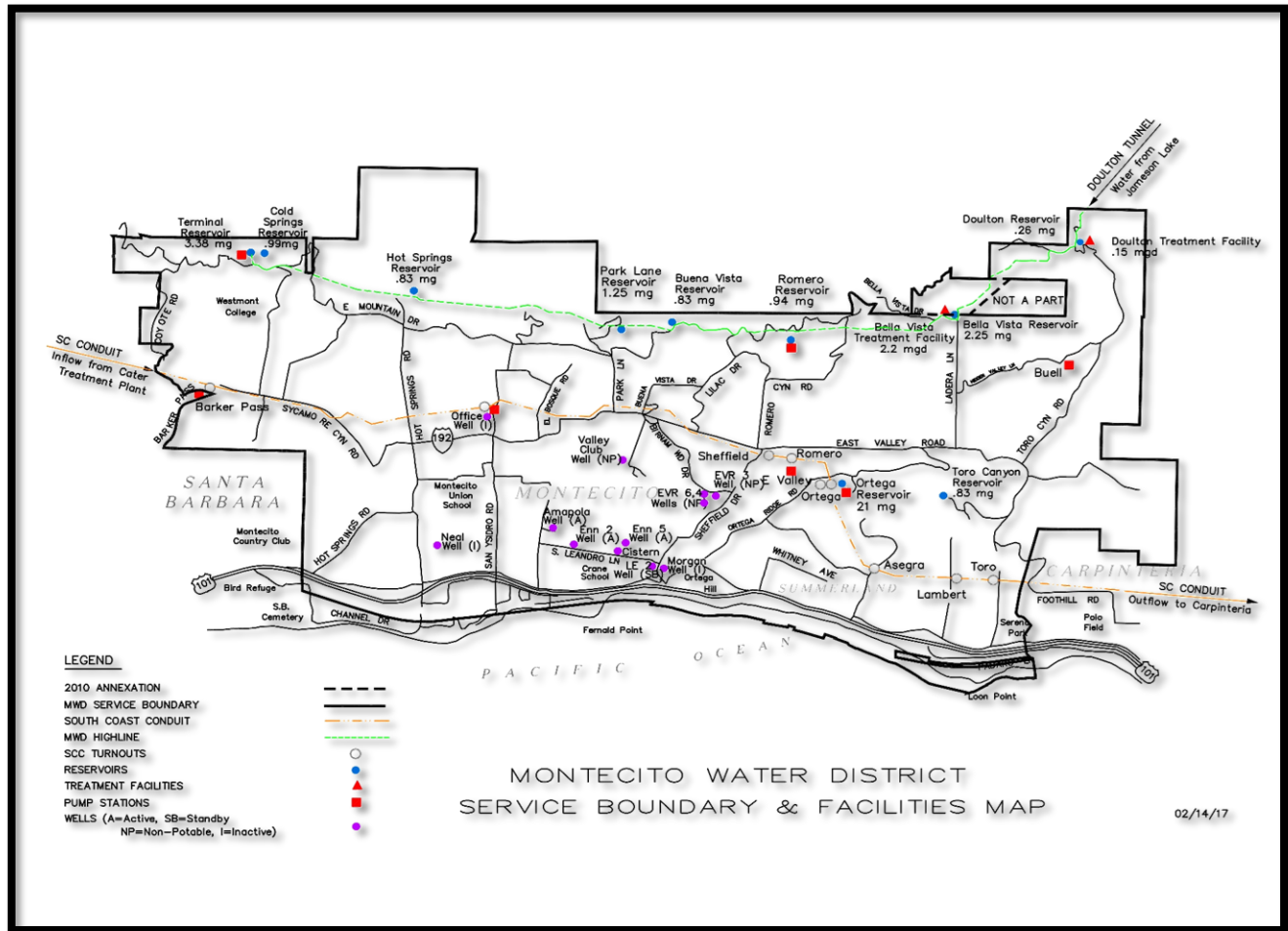


Figure 1 – District Service Area

The District obtains its water supplies from multiple sources including Lake Cachuma, water imported through the State Water Project, the Water Supply Agreement with the City of Santa Barbara (desal), the District's own Jameson Lake and Doulton Tunnel, and the local groundwater basin. The District's 2015 UWMP created a goal of increasing water supply reliability by pursuing local, rainfall independent supplies. In April 2017, the District's Board of Directors approved participation in the Semitropic Water Storage District (Semitropic) Groundwater Banking and Exchange Program by purchasing 1,500 shares, guaranteeing the return of up to 1,500 AF of District water stored in the program per year.

In June 2020, the District Board of Directors approved a 50-year Water Supply Agreement with the City of Santa Barbara for 1,430 acre-feet of water with deliveries commencing in January 2022.

In December 2022, the District adopted its first Water Use Efficiency Plan (WUEP) which is a long-term plan targeting permanent changes in customer use water, consistent with the State's goal of Making Conservation a California Way of Life. The WUEP includes a variety of recommended actions to encourage and help achieve a permanent long-term reduction in water use.

In October 2022, the District initiated the development of water budgets. A Water Budget is a property-specific monthly water use target that promotes efficient indoor and outdoor water use while preserving existing landscaping and semi-rural atmosphere of the community. Water budgets account for seasonal changes in water use such as irrigation in winter versus summer and provide flexibility to customers to choose how they use water on their property while discouraging water waste and excessive use. The development of water budgets is complete and was rolled out for customer use in early April 2024 on monthly water bills.

Since 2018, the District has evaluated the feasibility of implementing a Recycled Water project. The District's 2023 *Enhanced Recycled Water Feasibility Study*, prepared in collaboration with the Montecito Sanitary District (MSD), recommended a regional indirect potable reuse (IPR) project involving multiple special districts and benefiting multiple urban water purveyors and groundwater basins. Unfortunately, capital costs for public works projects have increased significantly since 2021 due to extraordinary inflation and other factors. This has resulted in an estimated 40% increase in the projected cost of the District's contemplated IPR project. The District's Board of Directors placed the recycled water project on hold until further notice. If additional planning and construction grant funding opportunities become available and/or the anticipated unit cost of advanced treated water decreases making a recycled water project financially viable, the District will consider reinitiating a recycled water project.

The District continues its evaluation of potentially storing surplus surface water in the Montecito and Carpinteria Groundwater Basins. Separate Groundwater Banking evaluations were completed in May 2025 and include the 2025 *Montecito Aquifer Storage and Recovery Feasibility Study* and the 2025 *Groundwater Modeling of Aquifer Storage and Recovery in the Carpinteria Groundwater Basin*. These studies show local groundwater banking is feasible but require further water quality and regulatory investigation.

In early 2025, the District completed an update of its *Future Demand and Water Supply Options* report, prepared by Dr. Stephen Bachman. The Report is one of the District's long-range water supply planning tools, and projects future customer water demand and water supply availability by source over the next 20 years to evaluate whether water shortages exist in the future. The Report also considers various water supply strategies, such as participation in a local groundwater banking program and a permanent sale of a portion of the District's SWP entitlement to evaluate their impact on the long-term water supply reliability and to help inform future Board decisions.

Each of these developments since 2020 should be considered in the development of the 2025 UWMP document.

III. SCOPE OF SERVICES

The proposed Scope of Services for completing the District's 2025 UWMP is described below. The consultant will work under the direction of the General Manager. Consultant shall perform the following tasks for preparing the District 2025 Urban Water Management Plan. Consultant shall follow the guidelines and requirements identified in the 2025 Urban Water Management Plan Guidebook for Retail Urban Water Suppliers (when released).

Task 1: Kick-off Meeting/Preliminary Work

- 1.1 Review all relevant District documents and data, including but not limited to, the District's *2020 UWMP*, the District's *Future Water Demand and Supply Options Report 2025 Update*, the 2022 Water Use Efficiency Plan, the 2022 5-Year Strategic Plan, the District's 3-year water supply outlook and the Montecito Groundwater Basin Groundwater Sustainability Plan (GSP).
- 1.2 Kick-off Meeting. Attend a virtual meeting with District staff to review the scope of services, develop a detailed work plan and schedule, identify initial data needed to begin work and methods to obtain data, and establish schedule for biweekly check-in meetings (virtual).

Task 2: Demand Projections

- 2.1 Using the following information, develop water demand projections in five-year increments from 2025 through 2045.
 - 2.1.1 Demographic data (e.g. population, housing unit and employment projections, etc.) from the Montecito and Summerland Community Plans, Local Coastal Plan, the County of Santa Barbara Comprehensive Plan, the Santa Barbara County Association of Governments, and the 2020 U.S. Census, and any other relevant planning document for the planning area. Determination of population should consider the extraordinary population circumstances of the service area including spanning multiple census areas, properties used as secondary residences (and therefore not counted in the census), institutions with seasonal populations such as Westmont and Music Academy of the West, and any others.
 - 2.1.2 Historical and current water production data and consumption data by user class (single-family residential, multifamily residential, commercial, institutional, dedicated irrigation, fire and other). Trends in water use reduction at the District since 2000 should be analyzed and factored into the demand projection update.
 - 2.1.3 Historical and current water savings estimates from on-going District conservation programs.
 - 2.1.4 Attend one meeting with staff and one regular meeting of the Strategic Planning Committee to present the draft Demand Projections and incorporate feedback.
 - 2.1.5 Any other information the Consultant feels is necessary or beneficial for this task.

Task 3: Water Shortage Contingency Plan

- 3.1 Working with District staff and using information supplied by the District, draft the Chapters of the 2025 UWMP related to water supply reliability and water shortage contingency planning. Must include the new Water Shortage Demand Assessment (WSDA) procedures necessary for District staff to complete subsequent Annual Water Shortage Assessment Reports.
- 3.2 This task should develop a framework for determining drought stages that accounts

for water supply shortages using an allocation-based system, or other similar system recommended by the consultant.

- 3.3 Attend one meeting with staff and one regular meeting of the Strategic Planning Committee to present the draft Water Shortage Contingency Plan and incorporate feedback.

Task 4: Draft 2025 UWMP

- 4.1 Identify any remaining data needs and draft the remaining required chapters of the 2025 UWMP and the supporting sections of the plan (e.g., Table of Contents, List of Tables & Figures, Acronyms & Abbreviations, References, Appendices, etc.), as well as the section on climate change impacts, and the checklist developed by DWR to assist them with their review.
- 4.2 The draft UWMP should include analysis and discussion of supply reliability.
- 4.3 The draft UWMP should include discussion of the Urban Water Use Objective (UWUO) and District compliance with the UWUO in the past and into the future, including strategies to continue compliance with the UWUO.
- 4.4 Attend one meeting with staff, one regular meeting of the Strategic Planning Committee, and one regular meeting of the Board of Directors to review the draft UWMP and incorporate comments into the document.
- 4.5 Send electronic notification of the draft Urban Water Management Plan Review and Amendment Period to local water agencies and other public agencies designated by District staff, at least 60 days prior to public hearing.

Task 5: Final 2025 UWMP

- 5.1 Complete a final version of the 2025 UWMP, incorporating staff, other public agency, public and Board member comments, as appropriate.
- 5.2 In conjunction with District staff, present the final draft to the Board and the public at a public hearing in April 2026. After the public hearing the District's Board will consider final adoption of this plan.
- 5.3 Provide the District with an electronic copy (one Word format and one PDF format) via sharepoint site of the final adopted 2025 UWMP. The flash drive should include all files used to create the UWMP document, in a usable format to the District. The Consultant shall assure that electronic versions of the plan meet the specifications of Section 508 of the Rehabilitation Act and be fully available to people with disabilities.

Task 6: Plan Submittal

- 6.1 Following adoption of the 2025 UWMP, submit the plan electronically as required/requested by the DWR by the July 1, 2026 submittal date.

Task 7: Corrections

- 7.1 Make any corrections identified as necessary by DWR after adoption and submit an electronic copy (one Word format and one PDF format) of the final 2025 UMWP with DWR comments incorporated to the District. The sharepoint site should include all files used to create the UWMP document, in a usable format to the District.

IV. SUBMITTAL REQUIREMENTS AND PROPOSAL FORMAT

Submittals shall conform to the requirements described herein.

Proposers shall submit to District an electronic copy (PDF) of the Proposal via email to akanold@montecitowater.com by **12:00 PM on Monday August 11, 2025**. Proposals shall be clearly labeled **Proposal for 2025 Urban Water Management Plan**. The Fee Proposal shall be submitted in a separate PDF labeled **Fee Proposal for 2025 Urban Water Management Plan**.

Proposals shall be sent to:

Montecito Water District
Attn: Adam Kanold, PE
akanold@montecitowater.com
Montecito Water District
583 San Ysidro Road
Santa Barbara, CA 93108

The minimum information required for inclusion in the Proposal shall be as listed below. The Proposer may submit additional information if needed.

1. Table of Contents
2. Background of Firm
3. Proposer's qualifications and experience within the last seven (7) years as the prime consultant of record, and descriptions of representative projects similar in nature and scope that include owner name and references that can be contacted by District.
4. Subconsultant's (if any) qualifications and experience within the last five (5) years and descriptions of representative projects similar in nature and scope that include owner name and references that can be contacted by District.
5. Proposer's understanding of the project and a description of how the Proposer will approach the project with specific milestones and deliverables for each task.

6. Detailed description of the Scope of Services to be provided with a breakdown of different tasks. Proposer may revise the scope of services in this RFP and should call out the proposed revisions in their proposal.
7. Organization chart of key personnel and resumes for project team, including name of Project Manager, key staff members, and any subconsultants to be retained by Proposer.
8. Proposed project schedule provided by Proposer shall include time for review of deliverables by District staff and include any meetings.
9. Confirmation of Receipt of all related addenda (if any).
10. Proposer's fee for the project, broken down separately for each of the tasks. The fee shall be based on the Proposer's employee rate schedule with a not to exceed amount, including the estimated costs for mileage, reimbursable and reproduction costs. Please submit employee rate schedule with the proposal. Fee Proposal shall be submitted separately and marked **Fee Proposal for 2025 Urban Water Management Plan**. Proposer's fee will not be used as the sole basis for selection; however, it will be a key factor for consideration. The District's FY2026 budget includes \$150,000 for the development of the 2025 UWMP.

V. EVALUATION OF PROPOSALS AND SELECTION PROCESS

Proposer submittals will be evaluated as described below. Submittals which do not comply with all submittal requirements as stipulated herein may be considered non-responsive by the District and may not be considered for selection. Proposals deemed responsive will be evaluated based on the following.

1. Qualification of Firm and Key Personnel including any Subconsultants
2. Experience and qualifications of the project team with similar projects
3. Understanding of District's project goals
4. Quality and completeness of the proposal
5. Total fee
6. Proposed Scope of Work

The District may elect to conduct interviews of some or all Proposers. The above items will be used in combination with the interview to evaluate and select a qualified firm to complete the project. The District will evaluate the submittals and create a ranking of the consultants. Selection of the consultant who is deemed to be the most qualified among those submitting

will be made on the basis of the experience of the firm and proposed project team, and expertise and success with similar projects.

VI. SCHEDULE

While a detailed schedule shall be developed by the Consultant, the District expects that the Consultant will meet several critical dates:

- **August 11, 2025** – proposals due from consultants
- **August 22, 2025** – anticipated Notice to Proceed (NTP) to consultant
- **November 2025** – complete a draft of demand projections to staff and the Strategic Planning Committee for consideration and comment.
- **January 2026** - complete and present a draft of the Water Shortage Contingency Plan to staff and the Strategic Planning Committee and Board of Directors for consideration and comment.
- **March 2026** - complete a draft 2025 UWMP to be presented to the Strategic Planning Committee and Board of Directors for consideration and comment.
- **April 2026** - present a final draft of the 2025 UWMP to be considered for adoption at a public hearing.
- **Before July 1, 2026** - submit the report electronically to the DWR.

VII. RESERVATION OF RIGHTS

The District reserves the rights to reject any and all Proposals. This Request for Proposals is a solicitation, not an offer to contract. The District reserves the right to issue clarifications and other directives regarding this RFP, to require further clarification or information with respect to any Proposal submitted, and to determine the final terms and conditions of any contract. Any and all costs associated with the preparation and response to this RFP shall be borne solely by the Proposer and at no cost to the District.

VIII. QUESTIONS

Questions regarding this Request for Proposal (RFP) shall be emailed to:

Adam Kanold, PE
Montecito Water District
583 San Ysidro Road
Santa Barbara, CA 93108-2124
akanold@montecitowater.com

Questions submitted after 5:00 PM on Wednesday August 6, 2025 will not be answered.