



## MEMORANDUM

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TW: 24/25-026

**DATE:** August 11, 2025

**TO:** Grant Davis, General Manager

**FROM:** Kevin Booker, Project Manager *KB*

**SUBJECT:** **Selection of Bartle Wells Associates for Sanitary Sewer Service Charges, Connection Fees, Recycled Water Fees, and Equivalent Single-Family Dwelling Unit Billing Rates**

Sonoma Water conducts a rate study (Study) for various sanitary sewer and recycled water service charges and fees. The Study will independently assess and evaluate each of the County Sanitation Districts' and Sanitation Zones' existing financial situations and provide recommendations on sanitation rates, fees, or charges that will provide each with financial stability and adequately fund sewer utility operations and capital improvement costs while minimizing rates.

Sonoma Water requires the expertise of Consultant to conduct the highly technical and specialized rate study and prepare recommendations.

On October 21, 2024, Sonoma County Water Agency and its affiliated sanitation districts (collectively Sonoma Water) issued a Request for Proposals (RFP) to the following ten firms:

- Bartle Wells Associates
- Brelje & Race Consulting Engineers
- Brown & Caldwell
- Corollo Engineers
- CDM Smith, Inc.
- Deloitte
- Larry Walker Associates
- NBS Government Financing
- West Yost
- Woodard & Curran

The RFP was also posted on Sonoma County Water Agency and County of Sonoma Purchasing Department websites.

The firm listed below submitted a Proposal.

- Bartle Wells Associates, Berkeley, California

The following criteria were used to evaluate each firm:

- Professional qualifications and demonstrated ability to perform the work.
- Responsiveness to the work requirements.
- Exceptions to standard terms in the sample agreement.
- Thoroughness of proposal.
- Local Service Provider Preference.

Bartle Wells Associates (Consultant) was selected to perform the work given their prior qualifications, demonstrated ability to perform similar work, their past work with similar public agencies and Sonoma Water, and their understanding of the needs of Sonoma Water.

Proposals and evaluation forms have been sent to Records.

Internal bargaining unit staff is not being used for this work because: work requires expertise with wastewater and recycled water connection fees and cost of service rate setting experience that staff does not have.

The hiring of Consultant for this agreement causes no conflict of interest and is not based on any financial incentive provided to Sonoma Water or its employees and representatives.

c:      Rachel Vail  
          Susanne Oliver  
          Rebecca DeSart