

## **PROFESSIONAL SERVICES AGREEMENT**

This agreement ("Agreement"), effective upon the date of execution ("Effective Date") is by and between the Sonoma County Agricultural Preservation and Open Space District, a California special district (hereinafter "District"), and Sequoia Ecological Consulting, Inc., a California corporation (hereinafter "Consultant").

### **RECITALS**

WHEREAS, Consultant represents that it is a duly qualified in natural and cultural resources assessment, habitat restoration, management, and protection plans; environmental impact assessments and permitting services; and forest management plan assessment; and

WHEREAS, in the judgment of the General Manager of the District, it is necessary and desirable to employ the services of Consultant to provide the above services for projects on Ag + Open Space protected lands, including conservation easements and fee land properties; and

NOW, THEREFORE, in consideration of the foregoing recitals and the mutual covenants contained herein, the parties hereto agree as follows:

### **AGREEMENT**

#### **1. Scope of Services.**

1.1 Consultant's Specified Services. Consultant shall perform the services described in Exhibit A, attached hereto and incorporated herein by this reference (hereinafter "Scope of Work"), and within the times or by the dates provided for in Exhibit A and pursuant to Article 8, Prosecution of Work. Work will be authorized and performed only upon written authorization signed by District and consultant in a form attached hereto as Exhibit B ("Task Order"). Prior to work being performed under this Agreement, District and Consultant will establish and agree on the following information, which agreement shall be reflected in the Task Order:

- a. Specific description of tasks to be performed;
- b. Identification of any tasks deemed to be design professional services as defined under Government Code section 2782.8;
- c. Time allowed to perform work;
- d. Schedule for deliverables;
- e. A not-to-exceed cost;
- f. List of key personnel, if applicable;
- g. List of authorized subconsultants, if applicable; and
- h. Project-specific items to be provided by District.

In the event of a conflict between the body of this Agreement and Exhibit “A”, the provisions in the body of this Agreement shall control.

1.2 Cooperation With District. Consultant shall cooperate with District and District staff in the performance of all work hereunder. Consultant shall coordinate the work with the District’s Project Lead, per the contact information and mailing addresses below:

| DISTRICT PROJECT LEAD                                                                       | CONSULTANT PROJECT LEAD                                                     |
|---------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| Name: Sheri Emerson                                                                         | Name: Debie Montana                                                         |
| Address: 747 Mendocino Avenue – Suite 100                                                   | Address: 3073 Porter Creek Road                                             |
| Santa Rosa, CA 95401                                                                        | Santa Rosa, CA 95404                                                        |
| Phone: 707-565-7360                                                                         | Phone: (925) 855-5500                                                       |
| Email: <a href="mailto:sheri.emerson@sonoma-county.org">sheri.emerson@sonoma-county.org</a> | Email: <a href="mailto:dmontana@sequoiaeco.com">dmontana@sequoiaeco.com</a> |

1.3 Performance Standard. Consultant shall perform all work hereunder in a manner consistent with the level of competency and standard of care normally observed by a person practicing in Consultant's profession. District has relied upon the professional ability and training of Consultant as a material inducement to enter into this Agreement. Consultant hereby agrees to provide all services under this Agreement in accordance with generally accepted professional practices and standards of care, as well as the requirements of applicable federal, state and local laws, it being understood that acceptance of Contractor’s work by District shall not operate as a waiver or release. If District determines that any of Consultant's work is not in accordance with such level of competency and standard of care, District, in its sole discretion, shall have the right to do any or all of the following: (a) require Consultant to meet with District to review the quality of the work and resolve matters of concern; (b) require Consultant to repeat the work at no additional charge until it is satisfactory; (c) terminate this Agreement pursuant to the provisions of Article 5; or (d) pursue any and all other remedies at law or in equity.

1.4 Assigned Personnel.

- a. Consultant shall assign only competent personnel to perform work hereunder. In the event that at any time District, in its sole discretion, desires the removal of any person or persons assigned by Consultant to perform work hereunder, Consultant shall remove such person or persons immediately upon receiving written notice from District.
- b. Any and all persons identified in this Agreement or any exhibit hereto as the project manager, project team, or other professional performing work hereunder are deemed by District to be key personnel whose services were a material inducement to District to enter into this Agreement, and without whose services District would not have entered into this Agreement. Consultant shall not remove, replace, substitute, or otherwise change any key personnel without the prior written consent of District. With respect to performance under this

Agreement, Consultant shall employ the following Sequoia Ecological Consulting, Inc. key personnel: Debie Montana, Jesse Reeb, Julie Woodruff, Bret Hanshaw, Andrew Ford, Aurelie Hening, Ari Rogers, and Subconsultants Montrose Environmental, Carol Rice, Brad Gallup, LD Ford, Hanford ARC., and associated staff described in Exhibit A, Scope of Work.

- c. In the event that any of Consultant's personnel assigned to perform services under this Agreement become unavailable due to resignation, sickness or other factors outside of Consultant's control, Consultant shall be responsible for timely provision of adequately qualified replacements.

2. Payment. For all services and incidental costs required hereunder, Consultant shall be paid in accordance with the following terms:

For all services and incidental costs required hereunder, Consultant shall be paid on a time and material/expense basis in accordance with the budget set forth in Exhibit A, provided, however, that total payments to Consultant shall not exceed One Hundred Thousand dollars (\$100,000.00) without the prior written approval of District. Upon completion of work, Consultant shall submit its invoice for payment and shall identify the services completed and the amount charged.

The invoices shall show or include:

- Consultant Name: Sequoia Ecological Consulting, Inc.
- Name of Project: Environmental Services - Sequoia
- District Contract Number: O-1478
- Payment remittance address
- Copies of all subconsultant invoices, if any
- Description of services performed
- The hourly rate or rates of the persons performing the task, not-to-exceed the rates set forth in Exhibit A
- The time in quarter hours devoted to the task(s)
- Copies of receipts for reimbursable materials/expenses, if any, and
- Any other information requested by the District.

Expenses not expressly authorized by the Agreement shall not be reimbursed. Unless otherwise noted in this Agreement, payments shall be made within the normal course of District business after presentation of an invoice in a form approved by the District for services performed. Payments shall be made only upon the satisfactory completion of the services as determined by the District in its sole discretion.

Pursuant to California Revenue and Taxation code (R&TC) Section 18662, the District shall withhold seven percent of the income paid to Consultant for services performed within the State of California under this agreement, for payment and reporting to the California Franchise Tax Board, if Consultant does not qualify as: (1) a corporation with its principal place of business

in California, (2) an LLC or Partnership with a permanent place of business in California, (3) a corporation/LLC or Partnership qualified to do business in California by the Secretary of State, or (4) an individual with a permanent residence in the State of California.

If Consultant does not qualify, District requires that a completed and signed Form 587 be provided by the Consultant in order for payments to be made. If Consultant is qualified, then the District requires a completed Form 590. Forms 587 and 590 remain valid for the duration of the Agreement provided there is no material change in facts. By signing either form, the Consultant agrees to promptly notify the District of any changes in the facts. Forms should be sent to the District pursuant to Article 3. To reduce the amount withheld, Consultant has the option to provide District with either a full or partial waiver from the State of California.

3. Method and Place of Giving Notice, Submitting Bills and Making Payments. All notices, bills, and payments shall be made in writing and shall be given by personal delivery or by U.S. Mail or courier service. Notices, bills, and payments shall be addressed as follows:

|              |                                                                                                                                         |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| TO DISTRICT: | Sonoma County Agricultural Preservation<br>and Open Space District<br>747 Mendocino Avenue<br>Santa Rosa, CA 95401<br>Fax: 707-565-7359 |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------|

Invoices may be electronically submitted to: [aposd.ap@sonoma-county.org](mailto:aposd.ap@sonoma-county.org)

|                |                                                                                                                                                                                                                       |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| TO CONSULTANT: | Attn: Debie Montana<br>Sequoia Ecological Consulting, Inc.<br>1342 Creekside Drive,<br>Walnut Creek, CA 94596<br>Email: <a href="mailto:dmontana@sequoiaeco.com">dmontana@sequoiaeco.com</a><br>Phone: (925) 855-5500 |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

When a notice, bill or payment is given by a generally recognized overnight courier service, the notice, bill or payment shall be deemed received on the next business day. When a copy of a notice, bill or payment is sent by facsimile or email, the notice, bill or payment shall be deemed received upon transmission as long as (1) the original copy of the notice, bill or payment is promptly deposited in the U.S. mail and postmarked on the date of the facsimile or email (for a payment, on or before the due date), (2) the sender has a written confirmation of the facsimile transmission or email, and (3) the facsimile or email is transmitted before 5 p.m. (recipient's time). In all other instances, notices, bills and payments shall be effective upon receipt by the recipient. Changes may be made in the names and addresses of the person to whom notices are to be given by giving notice pursuant to this paragraph.

4. Term of Agreement. The term of this Agreement shall be from Effective Date and expire on November 1, 2026 (11/1/2026) unless terminated earlier in accordance with the provisions of Article 5 below. The District has the authority to extend the term of this Agreement for an optional 2 years.

5. Termination.

5.1 Termination Without Cause. Notwithstanding any other provision of this Agreement, at any time and without cause, District shall have the right, in its sole discretion, to terminate this Agreement by giving 5 days written notice to Consultant.

5.2 Termination for Cause. Notwithstanding any other provision of this Agreement, should Consultant fail to perform any of its obligations hereunder, within the time and in the manner herein provided, or otherwise violate any of the terms of this Agreement, District may immediately terminate this Agreement by giving Consultant written notice of such termination, stating the reason for termination.

5.3 Delivery of Work Product and Final Payment Upon Termination. In the event of termination, Consultant, within 14 days following the date of termination, shall deliver to District all reports, original drawings, graphics, plans, studies, and other data or documents, in whatever form or format, assembled or prepared by Consultant or Consultant's subcontractors, consultants, and other agents in connection with this Agreement and shall submit to District an invoice showing the services performed, hours worked, and copies of receipts for reimbursable expenses up to the date of termination.

5.4 Payment Upon Termination. Upon termination of this Agreement by District, Consultant shall be entitled to receive as full payment for all services satisfactorily rendered and reimbursable expenses properly incurred hereunder, an amount which bears the same ratio to the total payment specified in the Agreement as the services satisfactorily rendered hereunder by Consultant bear to the total services otherwise required to be performed for such total payment; provided, however, that if services which have been satisfactorily rendered are to be paid on a per-hour or per-day basis, Consultant shall be entitled to receive as full payment an amount equal to the number of hours or days actually worked prior to the termination times the applicable hourly or daily rate; and further provided, however, that if District terminates the Agreement for cause pursuant to Section 5.2, District shall deduct from such amount the amount of damage, if any, sustained by District by virtue of the breach of the Agreement by Consultant.

5.5 Authority to Terminate. The Board of Directors of the Sonoma County Agricultural Preservation and Open Space District has the authority to terminate this Agreement on behalf of the District. In addition, the General Manager, in consultation with County Counsel, shall have the authority to terminate this Agreement on behalf of the District.

6. Indemnification. Consultant agrees to accept responsibility for loss or damage to any person or entity, including District, and to defend, indemnify, hold harmless, and release District, its officers, agents, and employees, from and against any actions, claims, damages, liabilities, disabilities, or expenses, that may be asserted by any person or entity, including Consultant, that arise out of, pertain to, or relate to the negligence, recklessness, or willful misconduct of Consultant or its agents, employees, contractors, subcontractors, or invitees hereunder, whether or not there is concurrent or contributory negligence on District's part, but, to the extent required by law, excluding liability due to District's conduct. This indemnification obligation is not limited in any way by any limitation on the amount or type of damages or compensation payable to or for Consultant or its agents, employees, contractors, subcontractors, or invitees under workers' compensation acts, disability benefits acts, or other employee benefit acts.

7. Insurance. With respect to performance of work under this Agreement, Consultant shall maintain and shall require all of its subcontractors, consultants, and other agents to maintain, insurance as described in Exhibit C, which is attached hereto and incorporated herein by this reference.

8. Prosecution of Work. The execution of this Agreement shall constitute Consultant's authority to proceed immediately with the performance of this Agreement. Performance of the services hereunder shall be completed within the time required herein, provided, however, that if the performance is delayed by earthquake, flood, high water, or other Act of God or by strike, lockout, or similar labor disturbances, the time for Consultant's performance of this Agreement shall be extended by a number of days equal to the number of days Consultant has been delayed.

9. Extra or Changed Work. Extra or changed work or other changes to the Agreement may be authorized only by written amendment to this Agreement, signed by both parties. Minor changes, which do not increase the amount paid under the Agreement, and which do not significantly change the scope of work or significantly lengthen time schedules may be executed by the General Manager in a form approved by County Counsel. The District's Board of Directors must authorize all other extra or changed work. The parties expressly recognize that, pursuant to Sonoma County Code Section 1-11, District personnel are without authorization to order extra or changed work or waive Agreement requirements. Failure of Consultant to secure such written authorization for extra or changed work shall constitute a waiver of any and all right to adjustment in the Agreement price or Agreement time due to such unauthorized work and thereafter Consultant shall be entitled to no compensation whatsoever for the performance of such work. Consultant further expressly waives any and all right or remedy by way of restitution and quantum meruit for any and all extra work performed without such express and prior written authorization of the District.

10. Representations of Consultant.

10.1 Standard of Care. District has relied upon the professional ability and training of Consultant as a material inducement to enter into this Agreement. Consultant hereby agrees that all its work will be performed and that its operations shall be conducted in accordance with generally accepted and applicable professional practices and standards as well as the requirements of applicable federal, state and local laws, it being understood that acceptance of Consultant's work by District shall not operate as a waiver or release.

10.2 Status of Consultant. The parties intend that Consultant, in performing the services specified herein, shall act as an independent contractor and shall control the work and the manner in which it is performed. Consultant is not to be considered an agent or employee of District and is not entitled to participate in any pension plan, worker's compensation plan, insurance, bonus, or similar benefits District provides its employees. In the event District exercises its right to terminate this Agreement pursuant to Article 5, above, Consultant expressly agrees that it shall have no recourse or right of appeal under rules, regulations, ordinances, or laws applicable to employees.

10.3 No Suspension or Debarment. Consultant warrants that it is not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in covered transactions by any federal department or agency. Consultant also warrants that it is not suspended or debarred from receiving federal funds as listed in the List of Parties Excluded from Federal Procurement or Non-procurement Programs issued by the General Services Administration. If the Consultant becomes debarred, consultant has the obligation to inform the District.

10.4 Taxes. Consultant agrees to file federal and state tax returns and pay all applicable taxes on amounts paid pursuant to this Agreement and shall be solely liable and responsible to pay such taxes and other obligations, including, but not limited to, state and federal income and FICA taxes. Consultant agrees to indemnify and hold District harmless from any liability which it may incur to the United States or to the State of California as a consequence of Consultant's failure to pay, when due, all such taxes and obligations. In case District is audited for compliance regarding any withholding or other applicable taxes, Consultant agrees to furnish District with proof of payment of taxes on these earnings.

10.5 Records Maintenance. Consultant shall keep and maintain full and complete documentation and accounting records concerning all services performed that are compensable under this Agreement and shall make such documents and records available to District for inspection at any reasonable time. Consultant shall maintain such records for a period of four (4) years following completion of work hereunder.

10.6 Conflict of Interest. Consultant covenants that it presently has no interest and that it will not acquire any interest, direct or indirect, that represents a financial conflict of interest under state law or that would otherwise conflict in any manner or degree with the performance of its services hereunder. Consultant further covenants that in the

performance of this Agreement no person having any such interests shall be employed. In addition, if requested to do so by District, Consultant shall complete and file and shall require any other person doing work under this Agreement to complete and file a "Statement of Economic Interest" with District disclosing Consultant's or such other person's financial interests.

**10.7 Statutory Compliance/Living Wage Ordinance.** Consultant agrees to comply, and to ensure compliance by its subconsultants or subconsultants, with all applicable federal, state and local laws, regulations, statutes and policies, including but not limited to the County of Sonoma Living Wage Ordinance, applicable to the services provided under this Agreement as they exist now and as they are changed, amended or modified during the term of this Agreement. Without limiting the generality of the foregoing, Consultant expressly acknowledges and agrees that this Agreement may be subject to the provisions of Article XXVI of Chapter 2 of the Sonoma County Code, requiring payment of a living wage to covered employees. Noncompliance during the term of the Agreement will be considered a material breach and may result in termination of the Agreement or pursuit of other legal or administrative remedies.

**10.8 Nondiscrimination.** Without limiting any other provision hereunder, Consultant shall comply with all applicable federal, state, and local laws, rules, and regulations in regard to nondiscrimination in employment because of race, color, ancestry, national origin, religious creed, belief or grooming, sex (including sexual orientation, gender identity, gender expression, transgender, pregnancy, childbirth, medical conditions related to pregnancy, childbirth or breast feeding), marital status, age, medical condition, physical or mental disability, genetic information, military or veteran status, or any other legally protected category or prohibited basis, including without limitation, the County's Non-Discrimination Policy. All nondiscrimination rules or regulations required by law to be included in this Agreement are incorporated herein by this reference.

**10.9 AIDS Discrimination.** Consultant agrees to comply with the provisions of Chapter 19, Article II, of the Sonoma County Code prohibiting discrimination in housing, employment, and services because of AIDS or HIV infection during the term of this Agreement and any extensions of the term.

**10.10 Assignment of Rights.** Consultant assigns to District all rights throughout the world in perpetuity in the nature of copyright, trademark, patent, right to ideas, in and to all versions of the plans and specifications, if any, now or later prepared by Consultant in connection with this Agreement. Consultant agrees to take such actions as are necessary to protect the rights assigned to District in this Agreement, and to refrain from taking any action which would impair those rights. Consultant's responsibilities under this provision include, but are not limited to, placing proper notice of copyright on all versions of the plans and specifications as District may direct, and refraining from disclosing any versions of the plans and specifications to any third party without first obtaining written permission of District.

Consultant shall not use or permit another to use the plans and specifications in connection with this or any other project without first obtaining written permission of District.

**10.11 Ownership and Disclosure of Work Product.** All reports, original drawings, graphics, plans, studies, and other data or documents ("documents"), in whatever form or format, assembled or prepared by Consultant or Consultant's subcontractors, consultants, and other agents in connection with this Agreement shall be the property of District. District shall be entitled to immediate possession of such documents upon completion of the work pursuant to this Agreement. Upon expiration or termination of this Agreement, Consultant shall promptly deliver to District all such documents, which have not already been provided to District in such form or format, as District deems appropriate. Such documents shall be and will remain the property of District without restriction or limitation. Consultant may retain copies of the above-described documents but agrees not to disclose or discuss any information gathered, discovered, or generated in any way through this Agreement without the express written permission of District.

**10.12 Authority.** The undersigned hereby represents and warrants that he or she has authority to execute and deliver this Agreement on behalf of Consultant.

**11. Demand for Assurance.** Each party to this Agreement undertakes the obligation that the other's expectation of receiving due performance will not be impaired. When reasonable grounds for insecurity arise with respect to the performance of either party, the other may in writing demand adequate assurance of due performance and until such assurance is received may, if commercially reasonable, suspend any performance for which the agreed return has not been received. "Commercially reasonable" includes not only the conduct of a party with respect to performance under this Agreement, but also conduct with respect to other agreements with parties to this Agreement or others. After receipt of a justified demand, failure to provide within a reasonable time, but not exceeding thirty (30) days, such assurance of due performance as is adequate under the circumstances of the particular case is a repudiation of this Agreement. Acceptance of any improper delivery, service, or payment does not prejudice the aggrieved party's right to demand adequate assurance of future performance. Nothing in this Article limits District's right to terminate this Agreement pursuant to Article 5.

**12. Assignment and Delegation.** Neither party hereto shall assign, delegate, sublet, or transfer any interest in or duty under this Agreement without the prior written consent of the other, and no such transfer shall be of any force or effect whatsoever unless and until the other party shall have so consented.

**13. Miscellaneous Provisions.**

**13.1 No Waiver of Breach.** The waiver by District of any breach of any term or promise contained in this Agreement shall not be deemed to be a waiver of such term or provision

or any subsequent breach of the same or any other term or promise contained in this Agreement.

**13.2 Construction.** To the fullest extent allowed by law, the provisions of this Agreement shall be construed and given effect in a manner that avoids any violation of statute, ordinance, regulation, or law. The parties covenant and agree that in the event that any provision of this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remainder of the provisions hereof shall remain in full force and effect and shall in no way be affected, impaired, or invalidated thereby. Consultant and District acknowledge that they have each contributed to the making of this Agreement and that, in the event of a dispute over the interpretation of this Agreement, the language of the Agreement will not be construed against one party in favor of the other. Consultant and District acknowledge that they have each had an adequate opportunity to consult with counsel in the negotiation and preparation of this Agreement.

**13.3 Consent.** Wherever in this Agreement the consent or approval of one party is required to an act of the other party, such consent or approval shall not be unreasonably withheld or delayed.

**13.4 No Third Party Beneficiaries.** Nothing contained in this Agreement shall be construed to create and the parties do not intend to create any rights in third parties.

**13.5 Applicable Law and Forum.** This Agreement shall be construed and interpreted according to the substantive law of California, regardless of the law of conflicts to the contrary in any jurisdiction. Any action to enforce the terms of this Agreement or for the breach thereof shall be brought and tried in Santa Rosa or the forum nearest to the city of Santa Rosa, in the County of Sonoma.

**13.6 Captions.** The captions in this Agreement are solely for convenience of reference. They are not a part of this Agreement and shall have no effect on its construction or interpretation.

**13.7 Merger.** This writing is intended both as the final expression of the Agreement between the parties hereto with respect to the included terms and as a complete and exclusive statement of the terms of the Agreement, pursuant to Code of Civil Procedure Section 1856. Each Party acknowledges that, in entering into this Agreement, it has not relied on any representation or undertaking, whether oral or in writing, other than those which are expressly set forth in this Agreement. No modification of this Agreement shall be effective unless and until such modification is evidenced by a writing signed by both parties.

**13.8. Survival of Terms.** All express representations, waivers, indemnifications, and limitations of liability included in this Agreement will survive its completion or termination for any reason.

**13.9 Time of Essence.** Time is and shall be of the essence of this Agreement and every provision hereof.

**13.10. Counterpart; Electronic Signatures.** The parties agree that this Agreement may be executed in two or more counterparts, each of which shall be deemed an original, and together which when executed by the requisite parties shall be deemed to be a complete original agreement. Counterparts may be delivered via facsimile, electronic mail (including PDF) or other transmission method, and any counterpart so delivered shall be deemed to have been duly and validly delivered, be valid and effective for all purposes, and shall have the same legal force and effect as an original document. This Agreement, and any counterpart, may be electronically signed by each or any of the parties through the use of any commercially-available digital and/or electronic signature software or other electronic signature method in compliance with the U.S. federal ESIGN Act of 2000, California's Uniform Electronic Transactions Act (Cal. Civil Code § 1633.1 et seq.), or other applicable law. By its use of any electronic signature below, the signing party agrees to have conducted this transaction and to execution of this Agreement by electronic means.

[illegible]

IN WITNESS WHEREOF, the parties hereto have executed this Agreement as of the Effective Date.

CONSULTANT:  
Sequoia Ecological Consulting, Inc.

SONOMA COUNTY AGRICULTURAL  
PRESERVATION AND OPEN SPACE DISTRICT

By: \_\_\_\_\_  
Debie Montana, President

By: \_\_\_\_\_  
Misti Arias,  
General Manager

Date: \_\_\_\_\_

Date: \_\_\_\_\_

APPROVED AS TO FORM FOR DISTRICT:

By: \_\_\_\_\_  
Luke Bowman,  
County Counsel

Date: \_\_\_\_\_

APPROVED AS TO SUBSTANCE FOR DISTRICT:

By: \_\_\_\_\_  
Sheri Emerson,  
Stewardship Program Manager

Date: \_\_\_\_\_

CERTIFICATES OF INSURANCE ON  
FILE WITH THE DISTRICT:

By: \_\_\_\_\_  
Michelle Nozzari,  
Administrative Aide

Date: \_\_\_\_\_

## Exhibit A

### Scope of Work for Sequoia Ecological Consulting, Inc.

For Environmental Services As-Needed, Open Scope Contract

Consultant: Sequoia Ecological Consulting, Inc.

Key staff will include: Debie Montana, Jesse Reeb, Julie Woodruff, Brett Hanshaw, Andrew Ford, Aurelie Hening, Ari Rogers, and Subconsultants: Montrose Environmental, Carol Rice, Brad Gallup, LD Ford, Hanford ARC. Current rate sheet attached.

Purpose:

To provide the following services for Ag + Open Space protected lands, including conservation easements and fee lands. These services are to be provided on an as-needed basis, with a not to exceed amount of \$100,000. The contract term is three years.

Basic Task 1. Project Coordination. Consultant shall coordinate all work and, upon request, attend meetings and site visits with an Ag + Open Space representative.

Basic Task 2. Report Writing

Basic Task 3. Graphics/Mapping

Technical Task 4. Natural and Cultural Resource Assessment, Habitat Restoration, Management, and Protection Plans

Technical Task 5. Environmental Impact Assessments and Permitting Services

Technical Task 6. Forest Management Plan Assessment

|                     |                             |
|---------------------|-----------------------------|
| <b>Basic Task 1</b> | <b>Project Coordination</b> |
|---------------------|-----------------------------|

Consultant shall coordinate all work and, upon request, attend meetings and site visits with an Ag + Open Space representative. If specified in the Task Order, Consultant shall attend meetings and/or coordinate meetings with staff and other stakeholders to provide updates, initial conclusions and discuss next steps or recommendations.

In support of the Consultant's work, Ag + Open Space shall provide the following as needed:

1. Access to all project reports, aerial photographs and maps relating to the site's environmental and cultural resources in order to support consultant in executing the described scope of services in an efficient manner. Site plans and base maps will be provided at Ag + Open Space's expense.

## Exhibit A

2. Access to the property.
3. Access to Ag + Open Space data layers, databases, mapping templates, and GIS data for analysis.
4. Necessary equipment and logistical support for staff training events or meetings.

|                     |                       |
|---------------------|-----------------------|
| <b>Basic Task 2</b> | <b>Report Writing</b> |
|---------------------|-----------------------|

In many cases, the Consultant may be required to prepare a written report to present background information, field surveys, and management recommendations for a specified project or property. Specific report requirements will be clearly defined in the Task Order and may include the following:

1. **Background Information/References:** List sources included in the literature review/background search including Ag + Open Space resources, interviews, polling, internet searches, meetings and summarize the results.
2. **Summarize Research Findings:** Consultants will provide initial findings to support management recommendations or conservation actions from on-going research and analysis.
3. **Site Assessment:** A descriptive analysis of field results from site assessments should include information regarding timing of field surveys, methodology, and conclusions. Data sheets shall be included as an Appendix. Specifically, the Field Survey section of the Written Report may address some of the following biological disciplines:
  - a. Identification of plant and/or animal species within the study area.
  - b. Identification of Sensitive and/or Critical Habitats within the project area.
  - c. Assessment of potential impacts to biological resources (plant, animal, critical and/or sensitive habitats) that could result from implementation of the project.
4. **Graphics:** A wide range of applicable graphics may be part of any written or web-based report, including but not limited to those specified in Basic Task 4, Graphics/Mapping.
5. **Final Report:** Ag + Open Space staff may instruct the Consultant to submit appropriate documentation such as an annotated outline or draft written report prior to submitting final report. Ag + Open Space staff shall determine the most appropriate form for draft and final report submittals depending on the scope of

## Exhibit A

work. Possible options may include:

- a. Hard-copy.
- b. Electronic copy transmitted via e-mail or compressed file via web-based data transfer site with Microsoft Word 2013 or earlier (i.e., Hightail.com).
- c. Cloud-based tools as a feasible option/alternative (Google Docs, DropBox, etc.).
- d. Americans with Disabilities Act (ADA) compliant .pdf version for posting on Ag + Open Space's website.

|                     |                         |
|---------------------|-------------------------|
| <b>Basic Task 3</b> | <b>Graphics/Mapping</b> |
|---------------------|-------------------------|

The Consultant shall prepare all graphics requested in the Task Order, which may include, but not be limited to, photos, maps, charts and tables. Consultant shall produce maps that meet Ag + Open Space standards for presentation for GIS data layers that meet minimum requirements for metadata documentation (including but not limited to summary/description, use constraints, point of contact, and field descriptions).

All consultants responsible for preparing content intended for use or publication on a District-managed or District-funded web site must comply with applicable Federal accessibility standards established by 36 C.F.R. Section 1194, pursuant to Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794(d)), the County's Web Standards & Guidelines located at <https://sonomacounty.ca.gov/Services/Web-Standards-and-Guidelines/>, and the County's Web Site Accessibility Policy located at <https://sonomacounty.ca.gov/CAO/Administrative-Policies/9-3-Website-Accessibility-Policy/>.

|                         |                                                                                                         |
|-------------------------|---------------------------------------------------------------------------------------------------------|
| <b>Technical Task 4</b> | <b>Natural and Cultural Resources Assessment, Habitat Restoration, Management, and Protection Plans</b> |
|-------------------------|---------------------------------------------------------------------------------------------------------|

For properties where Ag + Open Space is responsible for planning, permitting and executing management practices, staff will outline specific requests for management recommendations or approaches to address the land management related goals. These management recommendations or approaches must be compatible with the conservation objectives for a given property. Tasks may include development, review and analysis of the following:

1. Invasive plant management
2. Riparian habitat evaluation

## Exhibit A

3. Erosion control plans
4. Forest conditions
5. Forest management options
6. Rangeland assessments
7. Site-level fire prescriptions
8. Fuel-load reduction strategy
9. Road maintenance of existing networks
10. Fire prescriptions
11. Habitat restoration plans

Below is a list of potential services required to assist Ag + Open Space natural and/or cultural resource assessments:

### **1. Botanical Surveys**

Consultant shall conduct site assessments in the field that may include the following:

- a. Reconnaissance-level plant surveys.
- b. Plant community identification and assessment.
- c. Full season floristic surveys to cover the flowering season for all potential special status plants.
- d. Floristic surveys for special status plant species shall be conducted in compliance with regulatory protocols for special status plant species.

## Exhibit A

### **2. Wildlife Surveys**

Consultant shall conduct site assessments in the field that may include the following:

- a. Reconnaissance-level habitat assessment and/or wildlife surveys. Surveys for special status species shall be conducted in compliance with applicable regulatory protocols for the specific species. Consultant shall indicate species for which they have an incidental take permit.
- b. Design and establish motion-sensored camera wildlife monitoring and apply other non-invasive monitoring methodologies to capture actual populations and presence surveys will be useful.
- c. Complete wildlife permeability assessments to evaluate conservation value of a property to improve wildlife habitat conditions.
- d. Assessment of potential of spreading nonnative species (e.g., broom, periwinkle, English ivy), disease (Sudden Oak Death Syndrome) or opportunistic animal species (e.g., barred owl, bullfrog) that may impact habitat functions and conservation values of a given property.

### **3. Riparian Corridor Assessments and Management Recommendations**

Assess riparian corridor function and provide recommendations for protecting the natural function of the corridor.

### **4. Revegetation and Habitat Restoration Planning, Design and Monitoring**

- a. Develop native plant revegetation plans and/or habitat enhancement plans
- b. Monitor revegetation areas including documenting health and vigor of the plants, photo-documentation, monitoring report preparation, assessing compliance with plans and permits.
- c. Make recommendations for improved success, and coordination with regulatory agencies.

### **5. Cultural Resources Analysis and Protection Strategies**

- a. Perform a Northwest Information Center records search for specified properties of interest currently protected by Ag + Open Space or under consideration for acquisition.

## Exhibit A

- b. Complete site assessments of proposed capital improvement projects to document all archaeological or cultural sites.
- c. Provide a technical report that documents the findings and records all archaeological or cultural sites discovered.
- d. Contribute to the cultural resources section of management plans and cultural resources section CEQA or NEPA related studies.
- e. Advise Ag + Open Space staff on any issues that may require tribal consultation. Assist the staff in developing a strategy to reach out to any tribal entities that may have an interest in a given project.

|                         |                                                                 |
|-------------------------|-----------------------------------------------------------------|
| <b>Technical Task 5</b> | <b>Environmental Impact Assessments and Permitting Services</b> |
|-------------------------|-----------------------------------------------------------------|

Below is a list of potential services required to assist Ag + Open Space in complying with local, state and federal environmental and planning laws.

### **1. Assessment of Environmental Impact**

Site Inspection of a proposed project – Ag + Open Space staff will orient Consultant to a specific project and the Consultant will determine the potential for environmental impact in accordance with the California Environmental Quality Act (CEQA), Sonoma County environmental regulations (Permit Sonoma), U.S. Army Corps of Engineers (USACOE), and/or State Water Resources Control Board (SWRCB). Compliance with local, state and federal regulatory agencies may include:

- a. Sonoma County's General Plan
- b. National Environmental Policy Act (NEPA)
- c. Section 106 of the National Heritage Preservation Act (NHPA) – cultural resources
- d. Wetland delineation and definition of Area of Potential Effect (APE), under the jurisdictions of the Waters of U.S. and Waters of the State
- e. Americans with Disabilities Act (ADA) for universal access opportunities

### **2. Preparation of Environmental Documentation**

- a. Notice of Intent and Scoping Meeting, including Agency consultation

## Exhibit A

- b. Preparation of an Initial Study
- c. Distribution of documents to State Clearinghouse and other entities as required and appropriate

### **3. Public Meetings and Outreach**

- a. Attend Board Meetings, as requested (Ag + Open Space Board of Directors).
- b. Facilitate, support and prepare for public meetings.

### **4. Environmental and Administrative Permitting**

- a. Identify permit requirements and process including costs and potential timelines.
- b. Describe potential permit requirements (e.g., grading, drainage, building, etc.) and process for obtaining permits for any of the proposed activities, including but not limited to:
  - United States Army Corps of Engineers
  - United States Department of Fish and Wildlife
  - United States National Oceanic and Atmospheric Administration Fisheries
  - California Department of Fish and Wildlife
  - State Water Resources Control Board
  - North Coast and San Francisco Bay Regional Water Quality Control Boards
  - Permit Sonoma
- c. Prepare appropriate regulatory permit applications to state and Federal environmental regulatory agencies.

|                         |                                          |
|-------------------------|------------------------------------------|
| <b>Technical Task 6</b> | <b>Forest Management Plan Assessment</b> |
|-------------------------|------------------------------------------|

Below is a list of potential services required to assist Ag + Open Space in Forest Management Plan Assessment

### **1. Forest Site Conditions**

- a. Conduct site visits to assess assets and liabilities of a property including road conditions and design, slopes, forest type and species mix, watershed and other

## Exhibit A

property conditions which directly relate to forest operations on a given property.

- b. Review and analyze data from Timber Harvest Plans and Non-Industrial Timber Management Plans on project properties including existing timber cruises, soils maps, site index, road network maps, water resources maps (springs and well), vegetation maps, biological inventories, timber appraisals, title report, and other reports and data provided by Ag + Open Space or landowner.

### **2. Sustainable Forest Management Conservation Easement Provisions**

Discuss Ag + Open Space objectives for forest conservation and draft appropriate forestry provisions for a working forest conservation easement. Includes site visit and review of any existing management plans on the property.

### **3. Forest Management Review**

- a. Review proposed Management Plans on forested properties related to conservation easement provisions and provide technical comments to Ag + Open Space.
- b. Review proposed THP/NTMP for consistency with conservation easement and provide comments to Ag + Open Space.

### **4. Timber Appraisal**

Develop a Timber Appraisal Report that determines a conservation easement's impact on the market value of the harvestable timber resources of property.



## SECTION 4. COST OF SERVICE

| LABOR CATEGORY               | HOURLY RATE PER YEAR |      |      |      |
|------------------------------|----------------------|------|------|------|
|                              | 2023                 | 2024 | 2025 | 2026 |
| <b>SEQUOIA</b>               |                      |      |      |      |
| Sr. Principal                | 273                  | 287  | 301  | 316  |
| Principal                    | 247                  | 259  | 272  | 286  |
| Regulatory Compliance Mgr.   | 242                  | 254  | 267  | 280  |
| Senior Program Manager       | 236                  | 248  | 260  | 273  |
| Program Manager              | 231                  | 243  | 255  | 268  |
| Senior Technical Specialist  | 226                  | 237  | 249  | 261  |
| Senior Regulatory Specialist | 210                  | 221  | 232  | 244  |
| Senior Project Manager       | 205                  | 215  | 226  | 237  |
| Project Manager II           | 189                  | 198  | 208  | 218  |
| Project Manager I            | 173                  | 182  | 191  | 201  |
| Associate Project Manager    | 158                  | 166  | 174  | 183  |
| Assistant Project Manager    | 147                  | 154  | 162  | 170  |
| Senior Planner               | 189                  | 198  | 208  | 218  |
| Planner                      | 163                  | 171  | 180  | 189  |
| Senior Scientist             | 189                  | 198  | 208  | 218  |
| Senior Biologist             | 168                  | 176  | 185  | 194  |
| Resource Specialist          | 147                  | 154  | 162  | 170  |
| Project Biologist/Botanist   | 137                  | 144  | 151  | 159  |
| Associate Biologist/Botanist | 126                  | 132  | 139  | 146  |
| Staff Biologist/Botanist     | 121                  | 127  | 133  | 140  |
| Field Biologist/Botanist     | 110                  | 116  | 122  | 128  |
| Senior GIS Specialist        | 179                  | 188  | 197  | 207  |
| GIS Analyst                  | 154                  | 162  | 170  | 179  |
| GIS Technician               | 137                  | 144  | 151  | 159  |
| Senior Botanist              | 184                  | 193  | 203  | 213  |
| Senior Arborist              | 163                  | 171  | 180  | 189  |
| Arborist                     | 152                  | 160  | 168  | 176  |
| Botanist                     | 152                  | 160  | 168  | 176  |
| Senior Technical Editor      | 194                  | 204  | 214  | 225  |
| Technical Editor             | 153                  | 161  | 169  | 177  |
| Project Administrator        | 130                  | 137  | 144  | 151  |

| REIMBURSABLE EXPENSES           |                 |
|---------------------------------|-----------------|
| OTHER DIRECT COSTS              | RATE            |
| Regular vehicle (GSA Rate)      | \$0.655/mile    |
| Submeter GPS                    | \$100/day       |
| UTV and Trailer                 | \$95/day        |
| Fleet Vehicle                   | \$95/day        |
| iPad                            | \$10/day        |
| Wildlife remote camera          | \$20/ day       |
| Acoustic bat monitor            | \$35/unit/day   |
| Kayak Kit                       | \$75/day        |
| Survey Flashlight (Streamlight) | \$12.50/day     |
| Aquatic Survey Sampling Kit     | \$25/person/day |
| Quad-copter drone/sUAS          | \$250/day       |
| Wetsuit                         | \$70/week       |
| Drysuit                         | \$195/week      |
| YSI ProDSS Water Quality meter  | \$125/day       |

### Notes:

- » Computer, facsimile, and telephone are included in the billing rates, and there is no additional charge.
- » Reproduction, equipment and other direct expenses are reimbursed at cost plus a 15% administrative handling charge (excluding mileage).
- » Subconsultants will be billed at their indicated rate, plus a 15% administrative handling charge.
- » Per Diem, depending upon location, may be charged where overnight stays are required.
- » Weekly or monthly equipment rates at a reduced amount may be available on a contract-specific basis.
- » Expert Witness Testimony, including Depositions, is billed at the time and half.
- » Non-standard invoice processing will be billed at the hourly rates for support personnel.
- » Hours beyond 8 hours per day are charged at an overtime rate of 1.5 times our standard hourly rates for qualifying personnel. To comply with California Labor Code 512 and California Code of Regulations 11040, if onsite conditions prohibit personnel from taking required breaks, one additional hour of time will be billed per day for qualifying staff covered under the regulations.

| LABOR CATEGORY   | HOURLY RATE PER YEAR |       |       |       |
|------------------|----------------------|-------|-------|-------|
|                  | 2023                 | 2024  | 2025  | 2026  |
| Brad Gallup      | \$225                | \$235 | \$250 | \$265 |
| Carol Rice       | \$209                | \$219 | \$230 | \$242 |
| Ed Struffenegger | \$158                | \$166 | \$174 | \$183 |

# Exhibit A

Sequoia Ecological Consulting, Inc.

| LABOR CATEGORY                                                                     | HOURLY RATE PER YEAR |       |       |       |
|------------------------------------------------------------------------------------|----------------------|-------|-------|-------|
|                                                                                    |                      |       |       |       |
| <b>LD Ford</b>                                                                     |                      |       |       |       |
| Lawrence Ford, PhD, Program Director, Principal, Rangeland Conservation Scientist  | \$180                | \$185 | \$194 | \$203 |
| Felix Ratcliff, PhD, Project Director, Principal, Rangeland Conservation Scientist | \$150                | \$157 | \$164 | \$172 |
| Pete Van Hoorn, MS, Project Specialist, Rangeland Ecologist                        | \$132                | \$138 | \$144 | \$151 |
| Kaveh Motamed, MS, Project Manager, Rangeland Conservation Scientist               | \$124                | \$130 | \$136 | \$142 |
| Joyce Qiao, MS, Project Assistant, Rangeland Scientist                             | \$110                | \$115 | \$120 | \$126 |
| Michelle Katuna, (MS (expected), Project Assistant, Rangeland Scientist            | \$99                 | \$104 | \$109 | \$114 |

## Montrose Environmental Solutions 2023 List of Chargeable Rates

| Staff                                                    |                                 |
|----------------------------------------------------------|---------------------------------|
| Classification                                           | Hourly Rate                     |
| Principal                                                | \$252                           |
| Director II                                              | \$231                           |
| Director I                                               | \$221                           |
| Senior Associate II                                      | \$210                           |
| Senior Associate I                                       | \$200                           |
| Associate II                                             | \$192                           |
| Associate I                                              | \$184                           |
| Analyst II                                               | \$173                           |
| Analyst I                                                | \$163                           |
| Surveyor                                                 | \$142                           |
| Technician II                                            | \$131                           |
| Technician I                                             | \$115                           |
| GIS Analyst/CAD Technician                               | \$147                           |
| Technical Editor                                         | \$126                           |
| Publication Specialist                                   | \$110                           |
| Administrative Assistant                                 | \$110                           |
| Direct Expenses<br>(10% markup; includes subconsultants) |                                 |
| Item                                                     | Rate                            |
| Mileage                                                  | Current IRS Rate (\$0.655/mile) |
| Printing (in-house)                                      |                                 |
| - Black/white prints                                     | \$0.15 per page                 |
| - Color prints                                           | \$1.00 per page                 |
| - CDs (including label and envelope)                     | \$1.50 each                     |
| Equipment rental                                         |                                 |
| - GIS mapping                                            | \$30/hour                       |
| - GPS unit or Auger                                      | \$100.00/day                    |
| Outside vendors; including                               | At cost plus markup             |
| - Equipment rentals                                      |                                 |
| - Document production and supplies                       |                                 |

## HANFORD

### Sonoma County Ag & OSD -- 2023 Rates

| CLASSIFICATION/CATEGORY*         | 2023 Rate | 2024 Rate | 2025 Rate | 2026 Rate | 2027 Rate |
|----------------------------------|-----------|-----------|-----------|-----------|-----------|
| PROJECT MANAGER                  | \$ 185    | \$ 196    | \$ 208    | \$ 220    | \$ 234    |
| SUPERINTENDENT                   | \$ 160    | \$ 170    | \$ 180    | \$ 191    | \$ 202    |
| FOREMAN                          | \$ 90     | \$ 95     | \$ 101    | \$ 107    | \$ 114    |
| PW LANDSCAPE MAINTENANCE LABORER | \$ 75     | \$ 80     | \$ 84     | \$ 89     | \$ 95     |
| PW LABORER GROUP 3               | \$ 94     | \$ 100    | \$ 106    | \$ 112    | \$ 119    |
| PW LABORER GROUP 4               | \$ 85     | \$ 90     | \$ 96     | \$ 101    | \$ 107    |
| QUALIFIED APPLICATOR             | \$ 85     | \$ 90     | \$ 96     | \$ 101    | \$ 107    |
| EQUIPMENT OPERATOR GROUP 3       | \$ 107    | \$ 113    | \$ 120    | \$ 127    | \$ 135    |
| EQUIPMENT OPERATOR GROUP 4       | \$ 105    | \$ 111    | \$ 118    | \$ 125    | \$ 133    |
| EQUIPMENT OPERATOR GROUP 6       | \$ 102    | \$ 108    | \$ 115    | \$ 121    | \$ 129    |
| TEAMSTER GROUP 2                 | \$ 86     | \$ 91     | \$ 97     | \$ 102    | \$ 109    |
| TEAMSTER GROUP 3                 | \$ 87     | \$ 92     | \$ 98     | \$ 104    | \$ 110    |
| TEAMSTER GROUP 4                 | \$ 87     | \$ 92     | \$ 98     | \$ 104    | \$ 110    |

Please assume 3% increase on below rates, per year, past 2023. Mark-up rate for materials and equipment not listed is cost + 15%.

| Unit Description                  | Estimated Cost Per Unit Per Day (2023) |
|-----------------------------------|----------------------------------------|
| WEED TRIMMER, CHAINSAW PER PERSON | \$50.00                                |
| HIGH WEED MOWER                   | \$230.00                               |
| 4WD TRACTOR                       | \$690.00                               |
| SKID STEER                        | \$900.00                               |
| FLAIL MOWER SKID STEER ATTACHMENT | \$560.00                               |
| EXCAVATOR <6TN                    | \$620.00                               |
| EXCAVATOR 10TN                    | \$760.00                               |
| EXCAVATOR 20TN                    | \$1,110.00                             |
| EXCAVATOR 40TN                    | \$2,230.00                             |
| WHEEL LOADER 3CY                  | \$1,050.00                             |
| SKIP LOADER                       | \$500.00                               |
| BACKHOE                           | \$640.00                               |
| HYDROSEEDER (3000 GAL)            | \$3,600.00                             |
| HYDROSEEDER (1000 GAL)            | \$2,410.00                             |
| GPS UNIT                          | \$520.00                               |
| 4 WHEEL DRIVE PICKUP              | \$300.00                               |
| ATV/UTV                           | \$240.00                               |
| 500-GAL TRAILER                   | \$240.00                               |
| 5 CY DUMP TRUCK                   | \$1,010.00                             |
| 10 CY DUMP TRUCK                  | \$1,380.00                             |
| TRANSFER TRUCK                    | \$1,740.00                             |
| LOWBED HAUL TRUCK                 | \$1,740.00                             |
| WATER TRUCK                       | \$1,010.00                             |

#### QUALIFICATIONS

- Rates are based on basic hourly time 8 hrs/day 40 hrs/week. Overtime rates to be increased by 1.5x base rate.
- Rates include full markup.
- Labor classifications provided are CA DIR Northern California.
- 2023 rates provided as currently advertised may be subject to predetermined increases per CA DIR in later years.
- Equipment includes equipment indirect costs (fuel, oil, grease).
- Equipment mobilization/demobilization is not included in the equipment cost (calculated separately, to be determined).
- Cost per mile of travel to/from site (i.e., travel to the project site from Hanford Petaluma operations yard) is charged at mobilization rate (to be determined) of necessary equipment for the work. Driver of vehicle and vehicle rate is charged with applicable tolls.
- Travel rate for work between project sites during the same day is mandated to be prevailing wage per CA DIR.

Note: Rates are subject to an annual increase of 3.5% on January 1 of each calendar year.

Rates may be raised on an annual basis subject to the prior written approval of the Ag + Open Space General Manager.



## Exhibit B

TASK ORDER #: \_\_\_\_\_  
AGREEMENT #: \_\_\_\_\_  
TOTAL: \_\_\_\_\_  
TOTAL NOT TO EXCEED

# Task Order

Consultant shall perform the services as outlined in below, within the times or by the dates provided for herein. Such work shall be subject to the terms and conditions of that certain Agreement for Services (Open Scope) dated \_\_\_\_\_.

PROJECT NAME: \_\_\_\_\_ PROPERTY NUMBER IF APPLICABLE: \_\_\_\_\_

TASK: \_\_\_\_\_

### AG + OPEN SPACE CONTRACT & PROJECT LEAD:

Project Lead: \_\_\_\_\_ Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Contract Lead: \_\_\_\_\_ Email: \_\_\_\_\_ Phone: \_\_\_\_\_

### CONTRACTOR:

Company name: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Authorized Signer \_\_\_\_\_ Email: \_\_\_\_\_

Name authorized subcontractors: \_\_\_\_\_

### DELIVERABLES & SCOPE OF WORK: SCOPE OF WORK : MUST BE ATTACHED TO THIS FORM

Deliverables: \_\_\_\_\_

Time to perform work: \_\_\_\_\_ Draft report due: \_\_\_\_\_ Final report due: \_\_\_\_\_

Project-specific items to be provided by Ag + Open Space (if applicable): \_\_\_\_\_

### ACCOUNT CODES:

Account #: \_\_\_\_\_ Department: \_\_\_\_\_ Project User Code(s): \_\_\_\_\_

### CONTRACTOR:

BY: \_\_\_\_\_  
CONTRACTOR SIGNATURE  
\_\_\_\_\_  
PRINT NAME  
\_\_\_\_\_  
DATE  
\_\_\_\_\_

### AG + OPEN SPACE:

BY: \_\_\_\_\_  
PROJECT LEAD SIGNATURE  
\_\_\_\_\_  
PROGRAM MANAGER SIGNATURE  
VERIFICATION OF CONTRACT BALANCE  
BY: \_\_\_\_\_  
ACCOUNTING TECHNICIAN SIGNATURE  
\_\_\_\_\_  
AFTER COLLECTING ABOVE SIGNATURES, SUBMIT TO ADMINISTRATIVE AIDE

## Insurance Requirements

With respect to performance of work under this Agreement, Consultant shall maintain and shall require all of its subcontractors, consultants, and other agents to maintain insurance as described below unless such insurance has been expressly waived by the attachment of a *Waiver of Insurance Requirements*. Any requirement for insurance to be maintained after completion of the work shall survive this Agreement.

District reserves the right to review any and all of the required insurance policies and/or endorsements, but has no obligation to do so. Failure to demand evidence of full compliance with the insurance requirements set forth in this Agreement or failure to identify any insurance deficiency shall not relieve Consultant from, nor be construed or deemed a waiver of, its obligation to maintain the required insurance at all times during the performance of this Agreement.

### 1. Workers Compensation and Employers Liability Insurance

- a. Required if Consultant has employees as defined by the Labor Code of the State of California.
- b. Workers Compensation insurance with statutory limits as required by the Labor Code of the State of California.
- c. Employers Liability with minimum limits of \$1,000,000 per Accident; \$1,000,000 Disease per employee; \$1,000,000 Disease per policy.

d. Required Evidence of Insurance: Certificate of Insurance.

If Consultant currently has no employees as defined by the Labor Code of the State of California, Consultant agrees to obtain the above-specified Workers Compensation and Employers Liability insurance should employees be engaged during the term of this Agreement or any extensions of the term.

### 2. General Liability Insurance

- a. Commercial General Liability Insurance on a standard occurrence form, no less broad than Insurance Services Office (ISO) form CG 00 01.
- b. Minimum Limits: \$1,000,000 per Occurrence; \$2,000,000 General Aggregate; \$2,000,000 Products/Completed Operations Aggregate. The required limits may be provided by a combination of General Liability Insurance and Commercial Excess or Commercial Umbrella Liability Insurance. If Consultant maintains higher limits than the specified minimum limits, District requires and shall be entitled to coverage for the higher limits maintained by Consultant.
- c. Any deductible or self-insured retention shall be shown on the Certificate of Insurance. If the deductible or self-insured retention exceeds \$25,000 it must be approved in advance by District. Consultant is responsible for any deductible or self-insured retention and shall fund it upon District's written request, regardless of whether Consultant has a claim against the insurance or is named as a party in any action involving the District.
- d. Sonoma County Agricultural Preservation and Open Space District, its officers, agents, and employees shall be endorsed as additional insureds for liability arising out of operations by or on behalf of the Consultant in the performance of this Agreement.
- e. The insurance provided to the additional insureds shall be primary to, and non-contributory with, any insurance or self-insurance program maintained by them.
- f. The policy definition of "insured contract" shall include assumptions of liability arising out of both ongoing operations and the products-completed operations hazard (broad form contractual liability coverage including the "f" definition of insured contract in ISO form CG 00 01, or equivalent).
- g. The policy shall cover inter-insured suits between the additional insureds and Consultant and include a "separation of insureds" or "severability" clause which treats each insured separately.
- h. Required Evidence of Insurance:
  - i. Copy of the additional insured endorsement or policy language granting additional insured status; and
  - ii. Certificate of Insurance.

### 3. Automobile Liability Insurance

- a. Minimum Limit: \$1,000,000 combined single limit per accident. The required limits may be provided by a combination of Automobile Liability Insurance and Commercial Excess or Commercial Umbrella Liability

Insurance.

- b. Insurance shall cover all owned autos. If Consultant currently owns no autos, Consultant agrees to obtain such insurance should any autos be acquired during the term of this Agreement or any extensions of the term.
- c. Insurance shall cover hired and non-owned autos.
- d. Required Evidence of Insurance: Certificate of Insurance.

**4. Professional Liability/Errors and Omissions Insurance**

- a. Minimum Limits: \$1,000,000 per claim or per occurrence; \$1,000,000 annual aggregate.
- b. Any deductible or self-insured retention shall be shown on the Certificate of Insurance. If the deductible or self-insured retention exceeds \$25,000 it must be approved in advance by District.
- c. If Consultant's services include: (1) programming, customization, or maintenance of software: or (2) access to individuals' private, personally identifiable information, the insurance shall cover:
  - i. Breach of privacy; breach of data; programming errors, failure of work to meet contracted standards, and unauthorized access; and
  - ii. Claims against Consultant arising from the negligence of Consultant, Consultant's employees and Consultant's subcontractors.
- d. If the insurance is on a Claims-Made basis, the retroactive date shall be no later than the commencement of the work.
- e. Coverage applicable to the work performed under this Agreement shall be continued for two (2) years after completion of the work. Such continuation coverage may be provided by one of the following: (1) renewal of the existing policy; (2) an extended reporting period endorsement; or (3) replacement insurance with a retroactive date no later than the commencement of the work under this Agreement.
- f. Required Evidence of Insurance: Certificate of Insurance specifying the limits and the claims-made retroactive date.

**5. Standards for Insurance Companies**

Insurers, other than the California State Compensation Insurance Fund, shall have an A.M. Best's rating of at least A:VII.

**6. Documentation**

- a. All required Evidence of Insurance shall be submitted prior to the execution of this Agreement. Consultant agrees to maintain current Evidence of Insurance on file with District for the entire term of this Agreement and any additional periods if specified in Sections 1 – 4 above.
- b. The name and address for Additional Insured endorsements and Certificates of Insurance is: Sonoma County Agricultural Preservation and Open Space District, its officers, agents and employees, 747 Mendocino Avenue, Suite 100, Santa Rosa, CA 95401.
- c. Required Evidence of Insurance shall be submitted for any renewal or replacement of a policy that already exists, at least ten (10) days before expiration or other termination of the existing policy.
- d. Consultant shall provide immediate written notice if: (1) any of the required insurance policies is terminated; (2) the limits of any of the required policies are reduced; or (3) the deductible or self-insured retention is increased.
- e. Upon written request, certified copies of required insurance policies must be provided within thirty (30) days.

**7. Policy Obligations**

Consultant's indemnity and other obligations shall not be limited by the foregoing insurance requirements.

**8. Material Breach**

If Consultant fails to maintain insurance which is required pursuant to this Agreement, it shall be deemed a material breach of this Agreement. District, at its sole option, may terminate this Agreement and obtain damages from Consultant resulting from said breach. Alternatively, District may purchase the required insurance, and without further notice to Consultant, District may deduct from sums due to Consultant any premium costs advanced by District for such insurance. These remedies shall be in addition to any other remedies available to District.