

APPENDIX G

**CITY OF SAN BERNARDINO
MUNICIPAL WATER DEPARTMENT**

**DEVELOPER-INSTALLED
AGREEMENT CHECKLIST**



City of San Bernardino
Municipal Water Department
195 North "D" Street
San Bernardino, CA 92402

**APPLICATION FOR WATER SYSTEM INFRASTRUCTURE
INSTALLATION AGREEMENT - TRACT**

TRACT No. Insert Tract No., EPN Insert EPN No.

SAN BERNARDINO MUNICIPAL WATER DEPARTMENT

Applicant: _____,

a _____
(Corporation, Individual, Partnership, Other)

Address: _____

City/State: _____ Zip Code: _____

Contact Name: _____ Title: _____

Telephone No.: _____ Fax No.: _____

Request for Water System Infrastructure Installation Agreement:

To construct and convey Water System Infrastructure in accordance with pending Water Improvement Plans for Tract No. Insert Tract No. and the Water System Infrastructure Installation and Conveyance Agreement.

Deferment of Acquisition Fees Not Deferred

Project Description and Location:

Provide all labor, materials, equipment, and subcontracts required for the installation and conveyance of water system infrastructure, water service laterals, and meters for Insert Number of Units units in Tract No. Insert Tract No. in accordance with the approved Water Improvement Plans submitted to the San Bernardino Municipal Water Department and approved by the Department's Engineer.

DEVELOPER: _____

SIGNED: _____
(AUTHORIZED REPRESENTATIVE)

PLEASE PRINT NAME

TITLE: _____
(AUTHORIZED REPRESENTATIVE)

DATE: _____

**APPLICATION FOR WATER SYSTEM INFRASTRUCTURE
INSTALLATION AGREEMENT - PUBLIC ENTITY**

PROJECT NAME: Insert Project Name , EPN Insert #

SAN BERNARDINO MUNICIPAL WATER DEPARTMENT

Applicant: _____,
a _____
(Corporation, Individual, Partnership, Other)

Address: _____

City/State: _____ Zip Code: _____

Contact Name: _____ Title: _____

Telephone No.: _____ Fax No.: _____

Request for Water System Infrastructure Installation Agreement:

To construct and convey Water System Infrastructure in accordance with pending Water Improvement Plans for **Insert Project Name** and the Water System Infrastructure Installation and Conveyance Agreement.

Project Description and Location:

Provide all labor, materials, equipment, and subcontracts required for the installation and conveyance of water system infrastructure and water service laterals for construction of Insert Project Name in accordance with the approved Water Improvement Plans submitted to the San Bernardino Municipal Water Department and approved by the Department's Engineer.

DEVELOPER: _____

SIGNED: _____
(AUTHORIZED REPRESENTATIVE)

PLEASE PRINT NAME

TITLE: _____
(AUTHORIZED REPRESENTATIVE)

DATE: _____

**APPLICATION FOR WATER SYSTEM INFRASTRUCTURE
INSTALLATION AGREEMENT - NON TRACT**

PROJECT NAME: Insert Parcel Map # or Project Name , EPN Insert #

SAN BERNARDINO MUNICIPAL WATER DEPARTMENT

Applicant: _____ ,

a _____

(Corporation, Individual, Partnership, Other)

Address: _____

City/State: _____ Zip Code: _____

Contact Name: _____ Title: _____

Telephone No.: _____ Fax No.: _____

Request for Water System Infrastructure Installation Agreement:

To construct and convey Water System Infrastructure in accordance with pending Water Improvement Plans for Insert Parcel Map # or Project Name and the Water System Infrastructure Installation and Conveyance Agreement.

Project Description and Location:

Provide all labor, materials, equipment, and subcontracts required for the installation and conveyance of water system infrastructure and water service laterals for Insert Parcel Map # or Project Name in accordance with the approved Water Improvement Plans submitted to the San Bernardino Municipal Water Department and approved by the Department's Engineer.

DEVELOPER: _____

SIGNED: _____

(AUTHORIZED REPRESENTATIVE)

PLEASE PRINT NAME

TITLE: _____

(AUTHORIZED REPRESENTATIVE)

DATE: _____

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST

COST LETTER PROCESSING PHASE 1

TENTATIVE TRACT OR PARCEL MAP NO.

Insert Legal Description

FOR SBMWD TO PREPARE ITEMIZED COSTS AND CONDITIONS FOR WATER SERVICE IN THE FORM OF A COST LETTER, ALL OF THE ITEMS LISTED IN THIS SECTION MUST BE SUBMITTED TO THE SBMWD ENGINEERING SECTION.

******To Be Completed by Developer and Returned to SBMWD******

Request For Information Form

For SBMWD Use Only (Date Submitted)

Application for Water System Infrastructure Installation Agreement Form

For SBMWD Use Only (Date Submitted)

Tentative Water Improvement Plans (1 set - 11" x 17", 1 set - 22" x 34")

For SBMWD Use Only (Date Submitted)

Tentative Tract/Parcel Map (1 set - 11" x 17", 1 set - 22" x 34")

For SBMWD Use Only (Date Submitted)

Vicinity Map (8-1/2" x 11")

For SBMWD Use Only (Date Submitted)

Developer-Installed Information Sheet

For SBMWD Use Only (Date Submitted)

*******FOR SBMWD USE ONLY*******

Engineering Project Number (EPN) _____

Tract No. _____
(Including County recorded map book, page, etc.)

Nontract _____

Public Entity _____

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
COST LETTER PROCESSING PHASE 1

TENTATIVE TRACT OR PARCEL MAP NO.

*******FOR SBMWD USE ONLY (CONT.)*******

Project Description from ERC/DRC

For SBMWD Use Only (Date Submitted)

Hydraulic Grade Line Request For System Hydraulic Analysis

For SBMWD Use Only (Date Submitted)

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
PLAN CHECK PROCESSING PHASE 2

TENTATIVE TRACT OR PARCEL MAP NO.

Insert Legal Description

PRIOR TO THE SBMWD PERFORMING A PLAN CHECK ON ANY WATER INFRASTRUCTURE IMPROVEMENT PLANS, THE FOLLOWING ITEMS MUST BE SUBMITTED TO THE SBMWD ENGINEERING SECTION:

******To Be Completed by Developer and Returned to SBMWD******

- Copy of receipt for Plan Check Fees paid

For SBMWD Use Only (Date Submitted)

- Two (2) Copies of the Approved Hydraulic Analysis Report per Uniform Design and Construction Standards

For SBMWD Use Only (Date Submitted)

- One (1) Set of Approved Tract or Parcel Map with Legal Description (22" x 34")

For SBMWD Use Only (Date Submitted)

- One (1) Set (22" x 34") and Two (2) Sets (11" x 17") of Tentative Water Improvement Plans (Prepared to SBMWD AutoCAD Standards per Uniform Design and Construction Standards)

For SBMWD Use Only (Date Submitted)

- One (1) Copy of Grading Plans (11" x 17")

For SBMWD Use Only (Date Submitted)

- One (1) Copy of Street Improvement Plans (11" x 17")

For SBMWD Use Only (Date Submitted)

- One (1) Copy of Sewer Improvement Plans (11" x 17")

For SBMWD Use Only (Date Submitted)

- One (1) Copy of Plumbing Plot (11" x 17")

For SBMWD Use Only (Date Submitted)

- Two (2) Copies of Easement Documents

For SBMWD Use Only (Date Submitted)

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
PLAN CHECK PROCESSING PHASE 2

TENTATIVE TRACT OR PARCEL MAP NO.

*****To Be Completed by Developer and Returned to SBMWD (CONT.)*****

- One (1) Copy of Fire Flow Requirement Letter from Fire Department

For SBMWD Use Only (Date Submitted)

- One (1) Copy of the Soils Report

For SBMWD Use Only (Date Submitted)

- Construction Schedule in MS Project Format

For SBMWD Use Only (Date Submitted)

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
AGREEMENT PROCESSING PHASE 3

TENTATIVE TRACT OR PARCEL MAP NO.

Insert Legal Description

PRIOR TO PROCESSING A DEVELOPER-INSTALLED AGREEMENT, THE FOLLOWING ITEMS MUST BE SUBMITTED TO THE SBMWD:

******To Be Completed by Developer and Returned to SBMWD******

- Recorded Tract/Parcel Map (4 sets - 11" x 17" , 2 sets - 8½" x 11", and one copy in electronic PDF format)
(Note: If the tract/parcel map has been recorded but a copy is not yet available from City Engineering, then a signed copy of the tract/parcel map together with the recording information may be substituted.)

For SBMWD Use Only (Date Submitted)

- List of Lot Numbers with Addresses Flagged for Acquisition of Service Charge deferral and/or sewer capacity deferral **(Must be in Spreadsheet format)**

For SBMWD Use Only (Date Submitted)
 E-Mailed **Faxed**

- Recorded Easement Documents

For SBMWD Use Only (Date Submitted)

- Approved Signed Water Improvement Plans (One (1) set - 22" x 34" Mylars with Fire Department Approval Signature and six (6) sets - 11" x 17")

For SBMWD Use Only (Date Submitted)

- Electronic Submittal of One (1) Adobe.pdf file of signed Water Improvement Plans and AutoCAD files of final approved Water Improvement Plans

For SBMWD Use Only (Date Submitted)

- Contractor Letter of Qualification

For SBMWD Use Only (Date Submitted)

Request for Action:

Approximate Date Agreement is Needed: _____

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
AGREEMENT PROCESSING PHASE 3

TENTATIVE TRACT OR PARCEL MAP NO.

******To Be Completed by Developer and Returned to SBMWD******

Number of Agreements/Phases: _____

Additional Comments _____

*******FOR SBMWD USE ONLY (CONT.)*******

Developer-Installed Cost Letter

For SBMWD Use Only (Date Submitted)

Engineer's Estimate

For SBMWD Use Only (Date Submitted)

Developer-Installed Information Sheet

For SBMWD Use Only (Date Submitted)

Project Description from ERC/DRC

For SBMWD Use Only (Date Submitted)

Vicinity Map (8-1/2" x 11")

For SBMWD Use Only (Date Submitted)

Approved Water Improvement Plans (six (6) sets 11" x 17" each distributed to Water Quality, Operations, Distribution, Engineering, Administration (2))

For SBMWD Use Only (Date Submitted)

Recorded Tract/Parcel Map (2 sets - 11" x 17" {WU Administration}, 5 sets - 8½" x 11" {Rob Ortiz, MaryAnn Rennick, Pat Abeyta WU Administration[2]}, and one copy in electronic PDF format)

For SBMWD Use Only (Date Submitted)

Verification of Payment - (Due with Developer-Installed Agreement) when WU Admin. receives the signed Agreement.)

For SBMWD Use Only (Date Submitted)

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
AGREEMENT PROCESSING PHASE 3

TENTATIVE TRACT OR PARCEL MAP NO.

*******FOR SBMWD USE ONLY (CONT.)*******

Need to Include:

- Performance Bond (100% Engineer's Estimate)

For SBMWD Use Only (Date Submitted)

- Warranty Bond

For SBMWD Use Only (Date Submitted)

- General Liability Insurance

For SBMWD Use Only (Date Submitted)

- Workers' Compensation Insurance with Waiver of Subrogation

For SBMWD Use Only (Date Submitted)

- Auto Liability

For SBMWD Use Only (Date Submitted)

- Each policy shall contain endorsements

For SBMWD Use Only (Date Submitted)

- Signed Notarized Deferral Agreement

For SBMWD Use Only (Date Submitted)

- Signed Notarized Developer-Installed Agreement

For SBMWD Use Only (Date Submitted)

- Recordation of Deferral Agreement

For SBMWD Use Only (Date Submitted)

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
PRE-CONSTRUCTION PROCESSING PHASE 4

TENTATIVE TRACT OR PARCEL MAP NO.

Insert Legal Description

THE FOLLOWING ITEMS MUST BE COMPLETED PRIOR TO BEGINNING CONSTRUCTION ON ANY WATER SYSTEM IMPROVEMENTS:

*******To Be Completed by Developer and Returned to SBMWD*******

- Material Shop Drawing Submittals per SBMWD Standard Specification Section 1.0

For SBMWD Use Only (Date Submitted)

- Schedule Pre-construction Meeting with SBMWD Engineering per the Uniform Design and Construction Standards

For SBMWD Use Only (Date Submitted)

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
CONVEYANCE PROCESSING PHASE 5

TENTATIVE TRACT OR PARCEL MAP NO.

Insert Legal Description

PRIOR TO CONVEYANCE (DEDICATION) OF THE WATER INFRASTRUCTURE IMPROVEMENTS TO THE SBMWD, THE FOLLOWING ITEMS MUST BE SUBMITTED TO THE SBMWD. NO BENEFICIAL USE OF WATER WILL BE ALLOWED THROUGH METERS OR FIRE HYDRANTS PRIOR TO THE WATER SYSTEM IMPROVEMENTS BEING CONVEYED (DEDICATED) TO THE SBMWD:

******To Be Completed by Developer and Returned to SBMWD******

- As-built Drawings Per Section 3.0 of the Standard Specification and Section 4.1.3 of the Uniform Design and Construction Standards

For SBMWD Use Only (Date Submitted)

- Total Itemized Project Costs For Water Improvements

For SBMWD Use Only (Date Submitted)

- Itemized Materials List

For SBMWD Use Only (Date Submitted)

- Certified Copy of Notice of Completion, Filed with the County of San Bernardino Recorder

For SBMWD Use Only (Date Submitted)

- Financial Releases from Subcontractors and Material Suppliers

For SBMWD Use Only (Date Submitted)

- Compaction Test Reports Signed and Sealed by a Registered Engineer

For SBMWD Use Only (Date Submitted)

- Copy of receipts of payment for all outstanding fees

For SBMWD Use Only (Date Submitted)

**DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
CONVEYANCE PROCESSING PHASE 5**

TENTATIVE TRACT OR PARCEL MAP NO.

*******FOR SBMWD USE ONLY (CONT.)*******

- All Outstanding Fees and Deposits Paid in Full

For SBMWD Use Only (Date Submitted)

- Release of Lien for Payment of Deferred Acquisitions recorded with the County

For SBMWD Use Only (Date Submitted)

- All Outstanding Construction Punch List Items are Complete and Satisfactory to SBMWD

For SBMWD Use Only (Date Submitted)

- Conveyance Memorandum Prepared by Engineering

For SBMWD Use Only (Date Submitted)

- Conveyance Agreement prepared and sent to Developer for Notarizing

For SBMWD Use Only (Date Submitted)

- Receipt of Notarized Conveyance Agreement from Developer

For SBMWD Use Only (Date Submitted)

- Conveyance Agreement Executed by General Manager

For SBMWD Use Only (Date Submitted)

- Executed Conveyance Agreement sent to Developer

For SBMWD Use Only (Date Submitted)

- Notification to Developer and Bonding Company to Convert 100% Performance Bond to 25% Warranty Bond

For SBMWD Use Only (Date Submitted)

- Receipt of Warranty Bond

For SBMWD Use Only (Date Submitted)

- Easement documents documented in SBMWD Skinner Book (Includes Water Easements recorded directly on Tract and/or Parcel Maps)

For SBMWD Use Only (Date Submitted)

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
SERVICE INSTALLATION PHASE 6

TENTATIVE TRACT OR PARCEL MAP NO.

Insert Legal Description

*******FOR SBMWD USE ONLY*******

- Open Job Order (JO) for project under "Developer-Installed - Capital Work Order (WO) Category."
 - Verify Payment. File copy of receipt of payment in JO file.
 - Staff notifies Purchasing/Stockroom of pending issuance of paid for materials. Material shortages back-ordered.
 - Staff notifies Customer Service of pending service installation and request hard copies of JOs.
 - If street addresses are available from the City of San Bernardino Development Services, issue copy to Customer Service and retain copy for EPN and JO files.
 - Issue an Index Map showing streets and lot numbers to Customer Service and provide Customer Service with addresses.
 - File hard copies of Job Orders originating from Customer Service.

- Open Purchase Order (PO) for inspection services against JO No. 4
 - Staff to notify Professional Inspection Service Contractor(s) of pending inspection. Estimate service installation date, number of services, phases of construction, locations.

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
SERVICE INSTALLATION PHASE 6

TENTATIVE TRACT OR PARCEL MAP NO.

*******FOR SBMWD USE ONLY (CONT.)*******

- Original hard copy JOs from SBMWD Customer Service or JO file are issued to Professional Inspection Service Contractor. Remainder of JOs filed in JO file.

- All service laterals installed during main extension should have warning tags and "blue wire tie locking devices" or padlocks in place. If tags and ties are not in place or are damaged - have Professional Inspection Service Contractor replace.
 - Domestic Services and combination domestic/fire service to be Red tagged - to warn third parties not to tamper with services.

 - Irrigation services and fire services to be RED tagged and YELLOW (backflow device required) tagged.

- Verification of Mains and Laterals Conveyance.
 - Staff to verify that mains and laterals have been conveyed to the SBMWD

 - No beneficial use of water shall be granted until the water improvements have been conveyed. The developer may not draft water from the activated fire hydrants with the use of an appropriate construction meter with backflow device until the mains and laterals are conveyed.

- Service Completions and Inspections.
 - Issue remainder of "Service Material Kits", if entire kit not issued previously. Create Stock Requisition using THE software - minimum of three

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
SERVICE INSTALLATION PHASE 6

TENTATIVE TRACT OR PARCEL MAP NO.

*******FOR SBMWD USE ONLY (CONT.)*******

(3) days notice required for approvals and stockroom preparation. Staff to release materials to Developer by signing stock requisition ticket at the stockroom on the day of material pick-up. All service kits to be picked up at one time only.

- Professional Inspection Service Contractor to inspect services at Developer's request. Corrections to services to be made by the Developer. All service documentation to be done by Professional Inspection Service Contractor.
- Service Information (hard JOs) collected by Professional Inspection Service Contractor turned in to Engineering.
 - Staff reviews original hard copies of JOs and passes JOs to Customer Service, retaining photocopies of all hard JOs in JO file.

Service Activation(s).

- Developer contacts Customer Service to establish an account and pay a deposit, if appropriate (such as on irrigation, fire services, combination services), if not done previously. No account or deposit required for domestic services or combination fire/domestic services.
- Developer contacts Customer Service to unlock previously inspected and approved service that is entered into Customer Service database.
- Customer Service activates services (except irrigation services) by dispatching personnel to unlock domestic services using Customer Service Order (CS) generated by Customer Service.

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
SERVICE INSTALLATION PHASE 6

TENTATIVE TRACT OR PARCEL MAP NO.

*******FOR SBMWD USE ONLY (CONT.)*******

- Developer contacts Water Quality personnel to inspect and unlock irrigation services with acceptable backflow device.
 - Water Quality personnel activates irrigation services by dispatching personnel to inspect and unlock services using CSOs generated by Customer Service.
- Close Service Installation and Inspection Job Order.
- Refund any unused portion of service inspection deposit or "Force-Account" additional inspection funds if necessary.
 - Clean-up file.

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
PROJECT CLOSE OUT PHASE 7

TENTATIVE TRACT OR PARCEL MAP NO.

Insert Legal Description

THE FOLLOWING ITEMS/TASKS MUST BE ACCOMPLISHED BY SBMWD STAFF IN ORDER TO PROPERLY CLOSE OUT THE PROJECT AND FOR THE PROJECT TO BE PROPERLY DOCUMENTED AND ARCHIVED:

*******FOR SBMWD USE ONLY*******

- Close Project/Construction Order

For SBMWD Use Only (Date Submitted)

- Gatebook/Distro Sheet Update

For SBMWD Use Only (Date Submitted)

- Backflow List Updated

For SBMWD Use Only (Date Submitted)

- Hydrant Flushing List Updated

For SBMWD Use Only (Date Submitted)

- Sampling Stand List Updated

For SBMWD Use Only (Date Submitted)

- Distribution Model Updated

For SBMWD Use Only (Date Submitted)

- System Splits Updated

For SBMWD Use Only (Date Submitted)

- Reservoirs, Boosters, Automatic Control Valves Updated

For SBMWD Use Only (Date Submitted)

- Project Closed

For SBMWD Use Only (Date Submitted)

DEVELOPER-INSTALLED AGREEMENT PROCESSING CHECKLIST
PROJECT CLOSE OUT PHASE 7

TENTATIVE TRACT OR PARCEL MAP NO.

*******FOR SBMWD USE ONLY (CONT.)*******

- Notify WU Admin to enable contract file to be archived

For SBMWD Use Only (Date Submitted)

- Project Entered into DMS

For SBMWD Use Only (Date Submitted)