



# SAWPA

SANTA ANA WATERSHED PROJECT AUTHORITY

11615 Sterling Avenue, Riverside, California 92503 • (951) 354-4220

Meeting Access Via Computer (Zoom):	Meeting Access Via Telephone:
• <a href="https://sawpa.zoom.us/j/86377423434">https://sawpa.zoom.us/j/86377423434</a>	• 1 (669) 900-6833
• Meeting ID: 863 7742 3434	• Meeting ID: 863 7742 3434

This meeting will be conducted in person at the address listed above. As a convenience to the public, members of the public may also participate virtually using one of the options set forth above. Any member of the public may listen to the meeting or make comments to the Commission using the call-in number or Zoom link above. However, in the event there is a disruption of service which prevents the Authority from broadcasting the meeting to members of the public, the meeting will not be postponed or rescheduled but will continue without remote participation. The remote participation option is provided as a convenience to the public and is not required. Members of the public are welcome to attend the meeting in-person.

## REGULAR COMMISSION MEETING TUESDAY, FEBRUARY 6, 2024 – 9:30 A.M.

### AGENDA

#### 1. CALL TO ORDER/PLEDGE OF ALLEGIANCE (Bruce Whitaker, Chair)

#### 2. ROLL CALL

#### 3. PUBLIC COMMENTS

Members of the public may address the Commission on items within the jurisdiction of the Commission; however, no action may be taken on an item not appearing on the agenda unless the action is otherwise authorized by Government Code §54954.2(b).

Members of the public may make comments in-person or electronically for the Commissions' consideration by sending them to [publiccomment@sawpa.gov](mailto:publiccomment@sawpa.gov) with the subject line "Public Comment". Submit your electronic comments by 5:00 p.m. on Monday, February 5, 2024. All public comments will be provided to the Chair and may be read into the record or compiled as part of the record. Individuals have a limit of three (3) minutes to make comments and will have the opportunity when called upon by the Commission.

#### 4. ITEMS TO BE ADDED OR DELETED

Pursuant to Government Code §54954.2(b), items may be added on which there is a need to take immediate action and the need for action came to the attention of the SAWPA Commission subsequent to the posting of the agenda.

#### 5. CONSENT CALENDAR

All matters listed on the Consent Calendar are considered routine and non-controversial and will be acted upon by the Commission by one motion as listed below.

- A. APPROVAL OF MEETING MINUTES: JANUARY 16, 2024.....7  
Recommendation: Approve as posted.
- B. TREASURER'S REPORT: DECEMBER 2023.....11  
Recommendation: Approve as posted.

**6. NEW BUSINESS**

**A. CLASSIFICATION AND COMPENSATION AGREEMENT APPROVAL WITH RALPH ANDERSON AND ASSOCIATES (CM#2024.5) .....17**

**Presenter:** Edina Goode

**Recommendation:** That the Commission authorize the General Manager to execute the following:

1. General Services Agreement with Ralph Anderson and Associates, and
2. Task Order No. RAA100-02 with Ralph Anderson and Associates in the amount not to exceed \$42,800 for professional consulting services to conduct a Classification and Compensation Study.

**B. REGIONAL WATER QUALITY MONITORING TASK FORCE | SANTA ANA RIVER REGIONAL BACTERIA MONITORING PROGRAM (CM#2024.6) .....79**

**Presenter:** Rick Whetsel

**Recommendation:** That the Commission authorize the General Manager to execute the following:

1. General Services Agreement with GEI Consultants, Inc.; and,
2. Task Order No. GEI386-02 with GEI Consultants, a three-year task order with an option to exercise a two-year extension for an annual amount not to exceed \$397,018, totaling \$1,191,054 over the three-year period for FY 2024-25 through FY 2026-27 to oversee and implement the Santa Ana River Regional Bacteria Monitoring Program.

**7. INFORMATIONAL REPORTS**

**Recommendation:** Receive for information.

**A. OWOW QUARTERLY STATUS REPORT: OCTOBER – DECEMBER 2023 .....159**

**Presenter:** Rachel Gray

**B. ROUNDTABLES QUARTERLY STATUS REPORT: OCTOBER – DECEMBER 2023 .....167**

**Presenter:** Rachel Gray

**C. COMMUNICATIONS REPORT .....179**

**Presenter:** Jeff Mosher

**D. CHAIR’S COMMENTS/REPORT**

**E. COMMISSIONERS’ COMMENTS**

**F. COMMISSIONERS’ REQUEST FOR FUTURE AGENDA ITEMS**

**8. CLOSED SESSION**

There were no Closed Session items anticipated at the time of the posting of this agenda.

**9. ADJOURNMENT**

**PLEASE NOTE:**

Americans with Disabilities Act: If you require any special disability related accommodations to participate in this meeting, call (951) 354-4220 or email [svilla@sawpa.gov](mailto:svilla@sawpa.gov). 48-hour notification prior to the meeting will enable staff to make reasonable arrangements to ensure accessibility for this meeting. Requests should specify the nature of the disability and the type of accommodation requested.

Materials related to an item on this agenda submitted to the Commission after distribution of the agenda packet are available for public inspection during normal business hours at the SAWPA office, 11615 Sterling Avenue, Riverside, and available at [www.sawpa.gov](http://www.sawpa.gov), subject to staff's ability to post documents prior to the meeting.

**Declaration of Posting**

I, Sara Villa, Clerk of the Board of the Santa Ana Watershed Project Authority declare that on February 1, 2024, a copy of this agenda has been uploaded to the SAWPA website at [www.sawpa.gov](http://www.sawpa.gov) and posted at SAWPA's office at 11615 Sterling Avenue, Riverside, California.

**2024 SAWPA Commission Meetings/Events**

First and Third Tuesday of the Month

(NOTE: All meetings begin at 9:30 a.m., unless otherwise noticed, and are held at SAWPA.)

<b>January</b>	<b>February</b>
1/2/24 <del>Commission Workshop</del> [cancelled]	2/6/24 Commission Workshop
1/16/24 Regular Commission Meeting	2/20/24 Regular Commission Meeting
<b>March</b>	<b>April</b>
3/5/24 Commission Workshop	4/2/24 Commission Workshop
3/19/24 Regular Commission Meeting	4/16/24 Regular Commission Meeting
<b>May</b>	<b>June</b>
5/7/24 Commission Workshop	6/4/24 Commission Workshop
5/21/24 Regular Commission Meeting	6/18/24 Regular Commission Meeting
5/7 – 5/9/24 ACWA Spring Conference, Sacramento, CA	
<b>July</b>	<b>August</b>
7/2/24 Commission Workshop	8/6/24 Commission Workshop
7/16/24 Regular Commission Meeting	8/20/24 Regular Commission Meeting
<b>September</b>	<b>October</b>
9/3/24 Commission Workshop	10/1/24 Commission Workshop
9/17/24 Regular Commission Meeting	10/15/24 Regular Commission Meeting
<b>November</b>	<b>December</b>
11/5/24 Commission Workshop	12/3/24 Commission Workshop
11/19/24 Regular Commission Meeting	12/17/24 Regular Commission Meeting
	12/3 – 12/5/24 ACWA Fall Conference, Palm Springs, CA

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## SAWPA COMPENSABLE MEETINGS

In addition to Commission meetings, Commissioners and Alternate Commissioners will receive compensation for attending the meetings listed below, pursuant to the Commission Compensation, Expense Reimbursement, and Ethics Training Policy.

**IMPORTANT NOTE:** These meetings are subject to change. Prior to attending any meetings listed below, please confirm meeting details by viewing the website calendar using the following link:

<https://sawpa.gov/sawpa-calendar/>

### MONTH OF: FEBRUARY 2024

DATE	TIME	MEETING DESCRIPTION	LOCATION
2/6/24	8:30 AM	PA 23 Committee Mtg	CANCELLED
2/6/24	10:00 AM	PA 24 Committee Mtg	Hybrid (SAWPA & Virtual/Teleconference)
2/15/24	4:00 PM	LESJWA Board of Directors Mtg	Hybrid (Elsinore Valley MWD, 31315 Chaney Street, Lake Elsinore, CA 92530 & Virtual/Teleconference)
2/27/24	9:00 AM	Lake Elsinore/Canyon Lake TMDL Task Force Mtg	Hybrid (SAWPA & Virtual/Teleconference)

### MONTH OF: MARCH 2024

DATE	TIME	MEETING DESCRIPTION	LOCATION
3/4/24	2:30 PM	Basin Monitoring Program Task Force Mtg	Virtual/Teleconference
3/5/24	10:00 AM	PA 24 Committee Mtg	Hybrid (SAWPA & Virtual/Teleconference)
3/12/24	8:30 AM	PA 22 Committee Mtg	Hybrid (SAWPA & Virtual/Teleconference)
3/18/24	1:00 PM	MSAR TMDL Task Force Mtg	Virtual/Teleconference
3/28/24	11:00 AM	OWOW Steering Committee Mtg	Hybrid (SAWPA & Virtual/Teleconference)

*Please Note : We strive to ensure the list of Compensable Meetings set forth above is accurate and up-to-date; the list is compiled based on input from SAWPA staff and Department Managers regarding meeting purpose and content.*

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**SAWPA COMMISSION  
REGULAR MEETING MINUTES  
January 16, 2024**

**COMMISSIONERS PRESENT**

Bruce Whitaker, Chair, Orange County Water District  
Mike Gardner, Vice Chair, Western Municipal Water District  
T. Milford Harrison, Secretary-Treasurer, San Bernardino Valley Municipal Water District  
David J. Slawson, Eastern Municipal Water District  
Jasmin A. Hall, Inland Empire Utilities Agency

**COMMISSIONERS ABSENT**

None

**ALTERNATE COMMISSIONERS  
PRESENT; NON-VOTING**

Gil Botello, San Bernardino Valley Municipal Water District  
Denis Bilodeau, Orange County Water District

**STAFF PRESENT**

Jeff Mosher, Edina Goode, Karen Williams, Rachel Gray, Melissa Bustamonte, Zyanya Ramirez, Sara Villa, Dean Unger, John Leete, Marie Jauregui

**OTHERS PRESENT**

Joe Mouawad, Eastern Municipal Water District; Ken Tam, Inland Empire Utilities Agency; Shivaji Deshmukh, Inland Empire Utilities Agency; John Kennedy, Orange County Water District; Craig Miller, Western Municipal Water District; Mallory O'Connor, Western Municipal Water District; Beth Olhasso, West Coast Advisors

The Regular Meeting of the Santa Ana Watershed Project Authority Commission was called to order at 9:30 a.m. by Chair Bruce Whitaker on behalf of the Santa Ana Watershed Project Authority, 11615 Sterling Avenue, Riverside, California.

**1. CALL TO ORDER**

**2. ROLL CALL**

An oral roll call was duly noted and recorded by the Clerk of the Board.

**3. WELCOME NEW SAWPA COMMISSIONER**

Bruce Whitaker acknowledged the recent appointment of Denis Bilodeau as Alternate Commissioner of Orange County Water District.

**4. PUBLIC COMMENTS**

There were no public comments; there were no public comments received via email.

**5. ITEMS TO BE ADDED OR DELETED**

There were no items to be added or deleted.

**6. CONSENT CALENDAR**

**A. APPROVAL OF MEETING MINUTES: DECEMBER 19, 2023**

**Recommendation:** Approve as posted.

**MOVED**, to approve the Consent Calendar as posted.

Result:	Adopted by Roll Call Vote
Motion/Second:	Harrison/Hall
Ayes:	Gardner, Hall, Harrison, Slawson, Whitaker
Nays:	None
Abstentions:	None
Absent:	None

## **7. WORKSHOP DISCUSSION AGENDA**

### **A. LEGISLATIVE REPORT**

Beth Olhasso of West Coast Advisors provided a presentation on the Sacramento Update. Regarding the Drought/Water Supply, it is very fortunate to have a lot of carryover storage in the reservoirs from the heavy precipitation of last year since it has been a slow start of the water year and not a lot of snowpack. Ms. Olhasso noted that it is the beginning of a two-year session and there are new members coming in after an election cycle. The following Committee Chair changes are referenced below:

- Water, Parks & Wildlife – Diane Pappan (Democrat – San Mateo)
- Environmental Safety & Toxic Materials – Eduardo Garcia (Democrat – Coachella)
- Natural Resources – Issac Bryan (Democrat – Culver City)
- Appropriations – Buffy Wicks (Democrat – Oakland)
- Budget – Jessie Gabriel (Democrat – Encino)

Ms. Olhasso highlighted a few items under the legislative update; all Bills that are in the second year of a two-year session.

- SB 366 (Caballero) CA Water Plan: Long-Term Supply Targets
- AB 460 (Bauer-Kahan) Water Rights
- AB 1337 (Wicks) Diversion or Curtailment
- Bonds AB 1567 (E. Garcia) & SB 867 (Allen) \$15B
- Newly Introduced SB 903 (Skinner) PFAS, CASA & NRDC to ban all non-essential uses of PFAS by 2034

The Legislative Budget proposal is \$291.5 billion, and the governor is predicting a \$38 billion deficit, though the Legislative Analyst Office (LAO) states the budget deficit is \$68 billion. The governor's proposal is to take \$10.4 Billion from "Rainy Day Fund" and \$2.9 billion in cuts to Climate Programs and \$1.9 billion towards delays. Ms. Olhasso noted that specifically for SAWPA, \$88.4 million will be taken from Watershed Climate Resilience Programs, \$174.4 million from Recycled Water, and \$71.6 million from PFAS Support. The Urban Water Use Efficiency Regulations draft came out October 2023, and a meeting took place with the State Board to go over the regulations, the next draft is expected to be released February 2024.

This item is to receive and file; no action was taken on agenda item no. 7.A.

## **8. NEW BUSINESS**

### **A. COMMISSIONER COMPENSATION (CM#2024.1)**

Karen Williams provided a verbal update on Commissioner Compensation. The current per day of service compensation amount is \$250. In accordance with Resolution No. 2017-01, the compensation amount will automatically increase by 5% (from \$250 to \$260) effective January 2024. Alternatively, the Commission could adopt Resolution No. 2024-1 prohibiting



the automatic increase of 5% in the per day of service rate effective January 2024 and maintain the current rate of \$250.

No action was taken, allowing the per day of service rate to increase automatically from \$250 to \$260 effective January 2024.

**B. RESOLUTION RECOGNIZING MIKE R. MARKUS FOR HIS SERVICE (CM#2024.2)**

Jeff Mosher provided a verbal report commending Mike Markus, the Orange County Water District's (OCWD) General Manager for his 30-plus years of service within the watershed and region. Mr. Mosher provided a list of accomplishments and projects which have strengthened all the collaborative efforts between SAWPA and OCWD.

The Commission thanked Mr. Markus for his years of leadership, service, and professionalism, dedication, and wished him well as he begins his next chapter of retirement. Additionally, the member agency General Managers, Craig Miller, Shivaji Deshmukh, and Joe Mouawad commended Mr. Markus for all his efforts in all the years of collaborating with him. Commissioner Jasmin Hall recommended naming the OWOW Room in Mr. Markus' honor to the "Mike Markus Room." Mike Markus thanked the Commission and his colleagues and stated it has been an honor to work with SAWPA and the talented staff he has worked alongside during his career. Mr. Markus noted that John Kennedy, new appointed General Manager that has been with OCWD for 27 years will bring seamless as far OCWD's participation as well as Lisa Haney, OCWD's Executive Director of Planning and Natural Resources.

**MOVED**, to adopt Resolution 2024-2 to recognize Mike R. Markus for his contributions and service to SAWPA.

Result:	Adopted by Roll Call Vote
Motion/Second:	Whitaker/Unanimous (4)
Ayes:	Gardner, Hall, Harrison, Slawson, Whitaker
Nays:	None
Abstentions:	None
Absent:	None

**9. INFORMATIONAL REPORTS**

Recommendation: Receive for Information.

**A. CASH TRANSACTIONS REPORT – NOVEMBER 2023**

**B. INTER-FUND BORROWING – NOVEMBER 2023 (CM#2024.3)**

**C. PERFORMANGE INDICATORS/FINANCIAL REPORTING – NOVEMBER 2023 (CM#2024.4)**

**D. PROJECT AGREEMENT 25 – OWOW FUND – FINANCIAL REPORT, OCTOBER 2023**

**E. PROJECT AGREEMENT 26 – ROUNDTABLE FUND – FINANCIAL REPORT, OCTOBER 2023**

**F. GENERAL MANAGER REPORT**

Jeff Mosher informed the Commission that the Weather Modification Pilot Program is moving along, and a Press Release article was distributed providing more in-depth information. A Communications Report is anticipated to be included in the Commission Agenda packets.

**G. STATE LEGISLATIVE REPORT**

**H. CHAIR'S COMMENTS/REPORT**

There were no comments/reports from the Chair.

**I. COMMISSIONERS' COMMENTS**

There were no Commissioner comments.

**J. COMMISSIONERS' REQUEST FOR FUTURE AGENDA ITEMS**

There were no Commissioner requests for future agenda items.

**10. CLOSED SESSION**

There was no Closed Session.

**11. ADJOURNMENT**

There being no further business for review, Chair Bruce Whitaker adjourned the meeting at 10:32 a.m.

**Approved at a Regular Meeting of the Santa Ana Watershed Project Authority Commission on Tuesday, February 6, 2024.**

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Bruce Whitaker, Chair

Attest:

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Sara Villa, Clerk of the Board

# *Santa Ana Watershed Project Authority*



## Finance Department

### Santa Ana Watershed Project Authority **TREASURER'S REPORT**

**December 2023**

During the month of December 2023, the Agency's actively managed temporary idle cash earned a return of 3.293%, representing interest earnings of \$38,994. Additionally, the Agency's position in overnight funds L.A.I.F. generated \$179,858 in interest, resulting in \$218,852 of interest income from all sources. Please note that this data represents monthly earnings only and does not indicate actual interest received. There were zero (0) investment positions purchased, zero (0) positions sold, zero (0) position matured, and zero (0) positions were called.

This Treasurer's Report is in compliance with SAWPA's Statement of Investment Policy. Based upon the liquidity of the Agency's investments, this report demonstrates the ability to meet customary expenditures during the next six months.

January 17, 2023

Prepared and submitted by:

A handwritten signature in black ink, which appears to read 'Karen Williams', is positioned above a horizontal line.

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*Karen L. Williams, Deputy GM/Chief Financial Officer*

*Santa Ana Watershed Project Authority*

**INVESTMENT PORTFOLIO - MARKED TO MARKET - UNREALIZED GAINS & LOSSES**

*December 31, 2023*

SAWPA primarily maintains a "Buy and Hold" investment philosophy, with all investments held by US Bank via a third-party safekeeping contract.

Investment	Security		Purchase	Maturity	Call	Date		Yield To	Investment	Market Value	Unrealized	Coupon	Interest
Type	Type	CUSIP	Dealer	Date	Date	(if appl)	Par Value	Maturity	Cost	Current Month	Gain / (Loss)	Rate	Earned
Agency	FHLB	3130A3GE8	MBS	02-04-20	12-13-24	No Call	\$ 500,000.00	1.414%	\$ 531,250.00	\$ 490,225.30	\$ (41,025)	2.750%	\$ 600.51
Agency	FHLB	3130ASDS5	MBS	06-21-22	06-28-24	No Call	\$ 1,000,000.00	3.204%	\$ 991,130.00	\$ 987,716.30	\$ (3,414)	2.750%	\$ 2,721.09
Agency	FHLB	3130ASWP0	MBS	08-30-22	11-27-24	No Call	\$ 1,000,000.00	3.652%	\$ 1,000,000.00	\$ 988,923.29	\$ (11,077)	3.650%	\$ 3,101.70
Agency	FHLB	3130ATT31	MBS	10-28-22	10-03-24	No Call	\$ 1,000,000.00	4.500%	\$ 998,910.00	\$ 995,862.05	\$ (3,048)	4.500%	\$ 3,821.92
Agency	FHLB	3130ATHWC	WMS	11-04-22	09-10-27	No Call	\$ 1,000,000.00	4.125%	\$ 991,965.00	\$ 1,003,329.46	\$ 11,364	4.125%	\$ 3,503.42
Agency	FHLB	3130ATUR6	MBS	06-06-23	12-13-24	No Call	\$ 500,000.00	4.629%	\$ 499,966.50	\$ 498,233.57	\$ (1,733)	4.625%	\$ 1,965.74
Agency	FHLB	3130AWC24	MBS	06-06-23	06-09-28	No Call	\$ 500,000.00	3.889%	\$ 502,505.00	\$ 501,729.07	\$ (776)	4.000%	\$ 1,278.58
Agency	FNMA	3135G0X24	MBS	02-04-20	01-07-25	No Call	\$ 500,000.00	1.398%	\$ 505,380.00	\$ 484,052.65	\$ (21,327)	1.625%	\$ 593.71
Agency	FNMA	3135G05X7	WMS	10-30-20	08-25-25	No Call	\$ 1,000,000.00	0.460%	\$ 995,952.00	\$ 935,207.50	\$ (60,745)	0.375%	\$ 390.68
Agency	USTN	91282CAZ4	WMS	04-19-21	11-30-25	No Call	\$ 1,000,000.00	0.761%	\$ 982,500.00	\$ 927,734.38	\$ (54,766)	0.375%	\$ 646.04
Agency	USTN	912828ZTO	WMS	09-15-21	05-31-25	No Call	\$ 1,000,000.00	0.530%	\$ 989,726.56	\$ 940,976.56	\$ (48,750)	0.250%	\$ 450.29
CD	American Express Natl Bank	02589ADS8	MBS	08-17-22	08-19-24	No Call	\$ 245,000.00	3.350%	\$ 245,000.00	\$ 242,217.63	\$ (2,782)	3.350%	\$ 697.08
CD	Beal Bank USA	07371DEV5	MBS	08-17-22	08-12-26	No Call	\$ 245,000.00	3.200%	\$ 245,000.00	\$ 235,027.50	\$ (9,973)	3.200%	\$ 665.86
CD	Synchrony Bank	87164XP34	MBS	08-12-22	08-12-25	No Call	\$ 245,000.00	3.350%	\$ 245,000.00	\$ 238,951.72	\$ (6,048)	3.350%	\$ 74.44
CD	Capital One Bank USA NA	14042TGJ0	MBS	05-25-22	05-25-27	No Call	\$ 246,000.00	3.200%	\$ 246,000.00	\$ 233,554.19	\$ (12,446)	3.200%	\$ 668.58
CD	Morgan Stanley Private Bank	61768UAT4	MBS	11-15-22	11-15-27	11-15-23	\$ 248,000.00	5.000%	\$ 248,000.00	\$ 248,178.21	\$ 178	5.000%	\$ 1,053.15
CD	Prime Alliance Bank	74160NJF8	MBS	11-17-22	11-17-27	05-17-23	\$ 248,000.00	4.950%	\$ 248,000.00	\$ 247,996.78	\$ (3)	4.950%	\$ 1,042.62
CD	Cooperative Center FSU	21686MAA6	MBS	12-29-22	12-29-25	No Call	\$ 249,000.00	4.650%	\$ 249,000.00	\$ 248,364.48	\$ (636)	4.650%	\$ 983.38
CD	Affinity Bank	00833JAU4	MBS	03-17-23	03-17-28	No Call	\$ 248,000.00	4.900%	\$ 248,000.00	\$ 250,284.90	\$ 2,285	4.900%	\$ 1,032.09
CD	Discover Bank	2546732V7	MBS	03-22-23	03-23-27	No Call	\$ 243,000.00	5.050%	\$ 243,000.00	\$ 244,362.77	\$ 1,363	5.050%	\$ 1,042.24
CD	Global Fed CR UN Alaska	37892MAF1	MBS	05-12-23	05-12-27	No Call	\$ 249,000.00	4.600%	\$ 249,000.00	\$ 247,222.31	\$ (1,778)	4.600%	\$ 972.81
CD	UBS Bank USA	90355GDJ2	MBS	05-17-23	05-17-27	No Call	\$ 249,000.00	4.550%	\$ 249,000.00	\$ 246,848.79	\$ (2,151)	4.550%	\$ 962.23
CD	BMW Bank of North Americ	05580A2G8	MBS	06-16-23	06-16-26	No Call	\$ 244,000.00	4.600%	\$ 244,000.00	\$ 242,567.94	\$ (1,432)	4.600%	\$ 953.27
CD	Barclays Bank Delaware	06740KRW9	MBS	07-26-23	07-28-25	No Call	\$ 243,000.00	5.100%	\$ 243,000.00	\$ 243,488.14	\$ 488	5.100%	\$ 1,052.56
CD	Farmers Insurance Group	30960QAS6	MBS	07-26-23	07-27-26	No Call	\$ 248,000.00	5.100%	\$ 248,000.00	\$ 249,464.99	\$ 1,465	5.100%	\$ 1,074.21
CD	Chartway Federal Credit Unio	16141BAQ4	MBS	09-08-23	09-08-27	No Call	\$ 248,000.00	5.000%	\$ 248,000.00	\$ 249,976.94	\$ 1,977	5.000%	\$ 1,053.15
CD	Greenstate Credit Union	39573LEM6	MBS	09-26-23	09-26-28	No Call	\$ 248,000.00	5.000%	\$ 248,000.00	\$ 252,723.73	\$ 4,724	5.000%	\$ 1,053.15
CD	Empower Fed Cedit Union	291916AA2	MBS	09-29-23	09-29-27	No Call	\$ 248,000.00	5.100%	\$ 248,000.00	\$ 250,955.55	\$ 2,956	5.100%	\$ 1,074.21
CD	US Alliance Fed Credit Union	90352RDF9	MBS	09-29-23	09-29-28	No Call	\$ 248,000.00	5.100%	\$ 248,000.00	\$ 253,806.74	\$ 5,807	5.100%	\$ 1,074.21
CD	Numerica Credit Union	67054NBN2	MBS	11-10-23	11-10-26	No Call	\$ 248,000.00	5.550%	\$ 248,000.00	\$ 252,369.73	\$ 4,370	5.550%	\$ 1,169.00
CD	Heritage Community Cr Un	42728MAB0	MBS	11-15-23	11-16-26	No Call	\$ 248,000.00	5.450%	\$ 248,000.00	\$ 251,747.48	\$ 3,747	5.450%	\$ 1,147.93
CD	Alliant Credit Union	01882MAD4	MBS	12-30-22	12-30-25	No Call	\$ 248,000.00	5.100%	\$ 248,000.00	\$ 249,500.59	\$ 1,501	5.100%	\$ 1,074.21
<b>Total Actively Invested Funds</b>							<b>\$ 14,186,000.00</b>		<b>\$ 14,175,285.06</b>	<b>\$13,933,601.24</b>	<b>\$ (241,684)</b>	<b>3.293%</b>	<b>\$ 38,994.07</b>

**Total Local Agency Investment Fund** \$ 53,898,853.43 3.929% \$179,858.26

<b>Total Invested Cash</b>	<b>\$ 14,186,000.00</b>	<b>\$ 68,074,138.49</b>	<b>3.796%</b>	<b>\$218,852.33</b>
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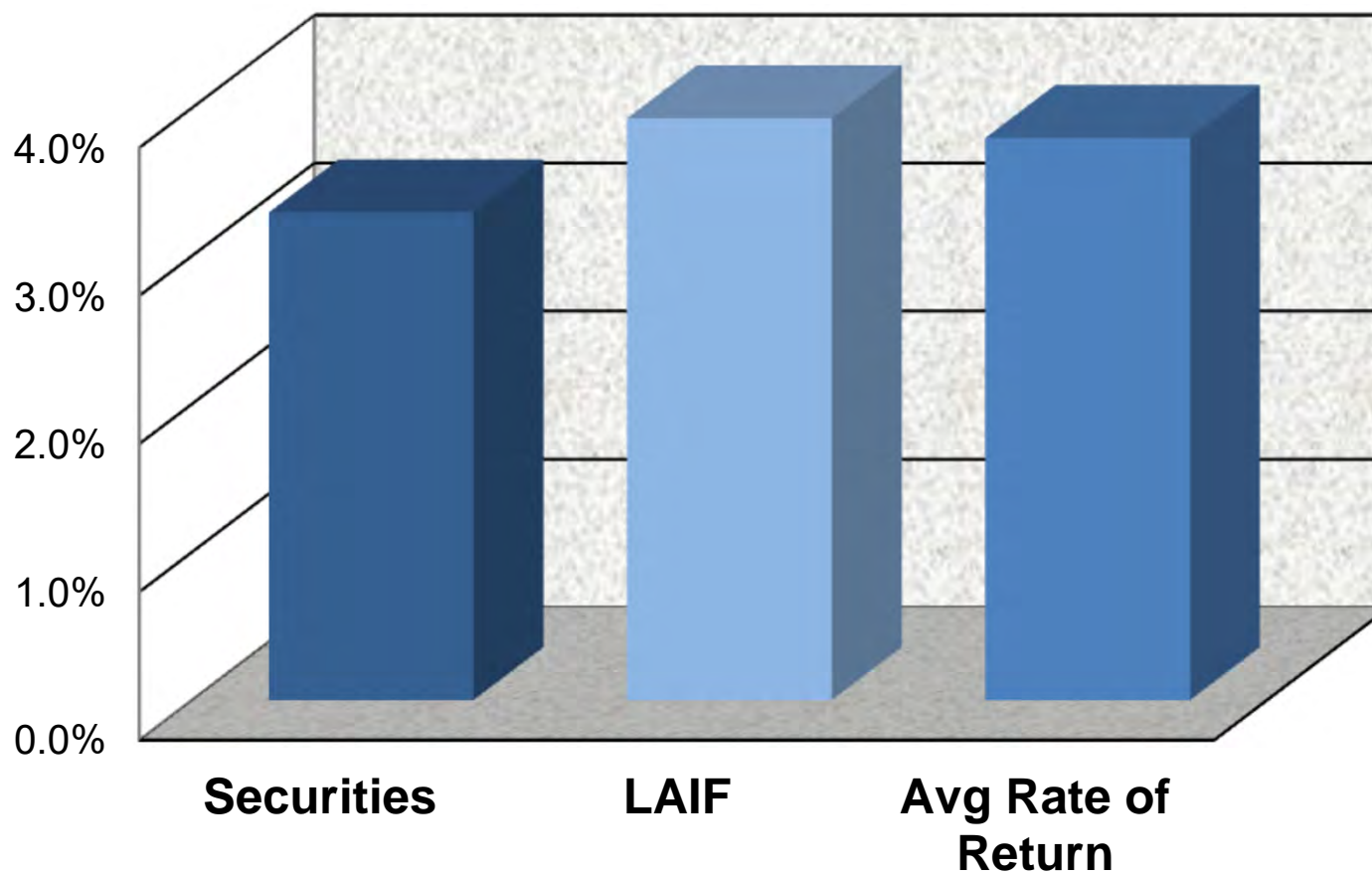
**Key to Security Type:**

FHLB	= Federal Home Loan Bank
FHLMC	= Federal Home Loan Mortgage Corporation
FNMA	= Federal National Mortgage Association
USTN	= US Treasury Note
CORP	= Corporate Note
CD	= Certificate of Deposit
GDB	= Goldman Sachs Bank
AEC	= American Express Centurion

\$ 5,500,000.00 **Key to Dealers:**

FCS	= FinaCorp Securities
MBS	= Multi-Bank Securities
MS	= Mutual Securities
RCB	= RBC Dain Rauscher
SA	= Securities America
TVI	= Time Value Investments
WMS	= Wedbush Morgan Securities

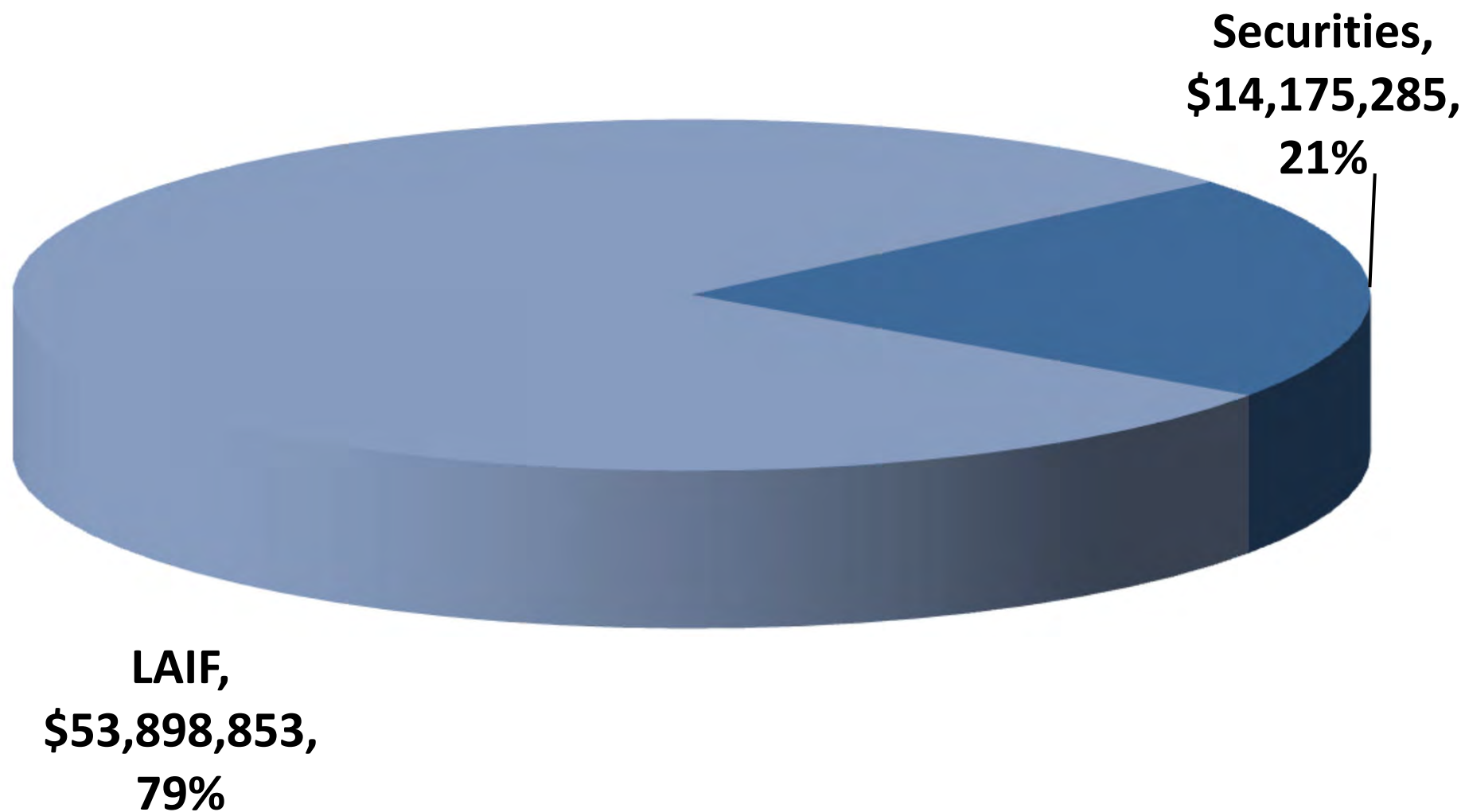
## Interest Rate Analysis



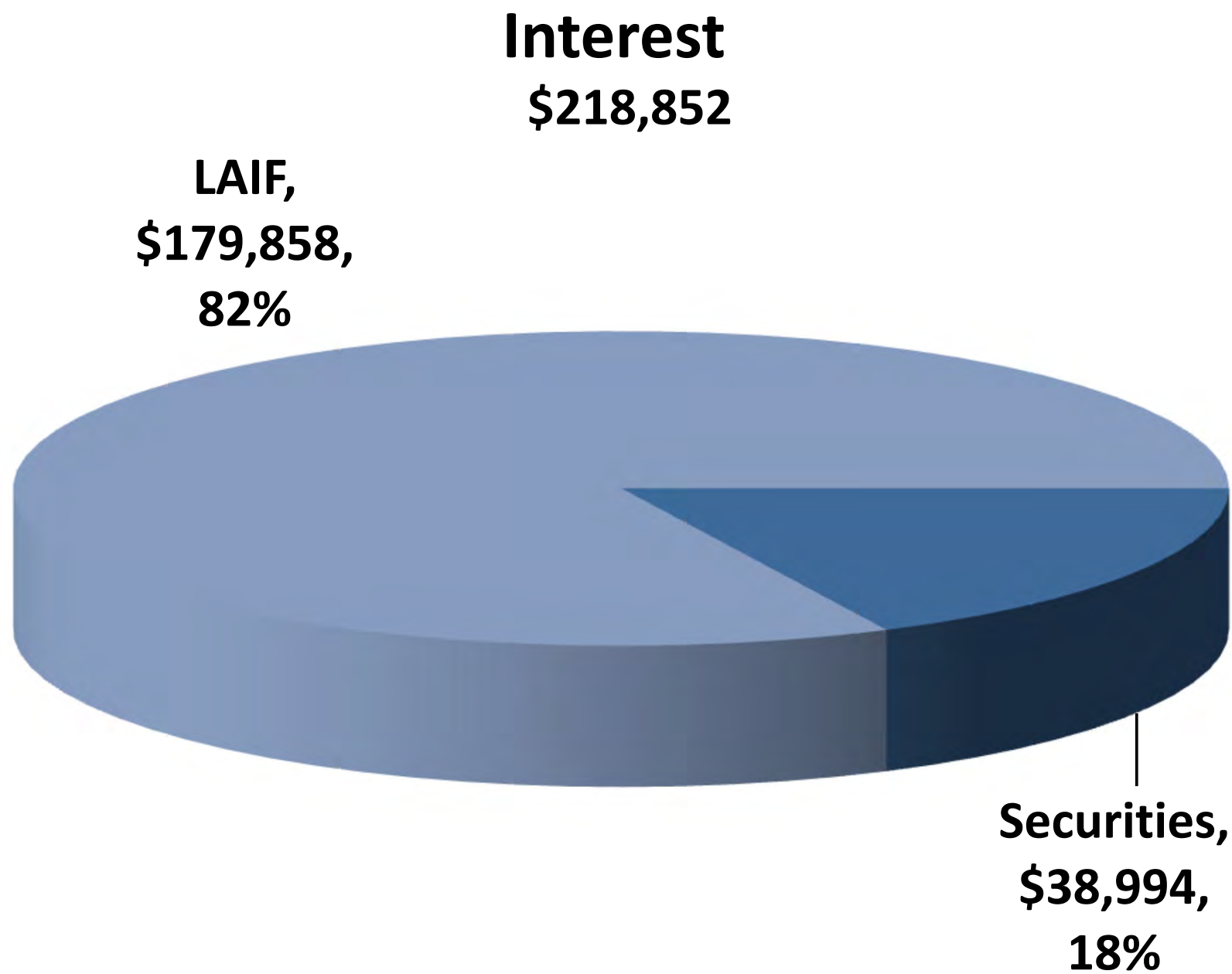
*Dec'23*

# Investments

**\$68,074,138**



*Dec'23*



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## COMMISSION MEMORANDUM NO. 2024.5

**DATE:** February 6, 2024

**TO:** SAWPA Commission

**SUBJECT:** Classification and Compensation Agreement Approval with Ralph Anderson and Associates

**PREPARED BY:** Edina Goode, Administrative Services Manager

### RECOMMENDATION

That the Commission authorize the General Manager to execute the following:

1. General Services Agreement with Ralph Anderson and Associates, and
2. Task Order No. RAA100-02 with Ralph Anderson and Associates in the amount not to exceed \$42,800 for professional consulting services to conduct a Classification and Compensation Study (Study).

### DISCUSSION

On November 21, 2023, the SAWPA Commission approved the issuance of a request for proposals to engage a consultant for the Study. Proposals were received by the deadline of December 21, 2023, from Ralph Anderson and Associates, JER HR, RS Squared LLC (Hive), Uncomplicate HR, Cooperative Personnel Services (CPS), and Transformance Consulting. An Ad Hoc Committee consisting of SAWPA staff and the HR/Risk Manager from San Bernardino Valley reviewed and rated the proposals shown in table 1 below. The specific ratings of the other five firms are kept confidential and coded as Firms A through E in the table. The firms were rated on responsiveness to the RFP (pass/fail), experience and qualifications of the assigned individuals and firm (30%), project approach and understanding of needs (20%), anticipated value and quality of services received (20%), appropriateness of fee structure (15%), and project schedule (15%).

**Table 1: RFP Review Results by Ad Hoc Committee**

	<b>Firm A</b>	<b>Firm B</b>	<b>Firm C</b>	<b>Firm D</b>	<b>Firm E</b>	<b>RA Assoc</b>
<b>Point Sums</b>	<b>12.28</b>	<b>7.50</b>	<b>9.70</b>	<b>10.85</b>	<b>8.55</b>	<b>13.70</b>
Point Averages	4.09	2.5	3.23	3.62	2.85	4.57

With Ralph Anderson and Associates being the highest ranked and their record of past performance, the ad hoc committee is recommending the Commission approve the Task Order and General Services Agreement with Ralph Anderson and Associates, including a three-month scope of work and budget of \$42,800 as follows:

- Conduct a meeting with Authority representatives at project initiation to confirm the study goals, objectives, and deliverables.
- Conduct briefing sessions with employees at the beginning of the study to explain the study process and answer questions.
- Conduct an extensive review of background documents.
- Distribute job analysis questionnaires and conduct supplemental interviews with a

sampling of employees in the study.

- Develop classification recommendations, FLSA designations, and update job descriptions.
- Review historical practices and confirm survey agencies, survey job classifications, and identify data collection needs.
- Conduct a custom salary and benefit survey and analyze the market data.
- Conduct internal relationship analyses, survey benchmarking, and develop salary range recommendations for all Authority job classifications.
- Develop draft and final reports incorporating all study recommendations and supporting data including implementation plans.
- Conduct a classification and compensation review and appeal process to fully resolve all classification issues and recommendations.
- Present the findings to managers, employees, and the Commission.

## BACKGROUND

The work is divided into 16 tasks which are scheduled to occur over a 12-week period. The classification and compensation phases of the study are scheduled to be staggered, beginning with the classification phase and commencing the compensation phase after approximately one month. The major tasks and deliverables are outlined in Table 2.

**Table 2: Major Tasks and Deliverables**

Major Tasks	Deliverable
Collection and analysis of market survey data <ul style="list-style-type: none"> <li>• Base salary, benefits, add pays, and special compensation</li> <li>• All job classifications</li> </ul>	Compensation Report with: <ul style="list-style-type: none"> <li>• Recommended survey agencies and data sources</li> <li>• Graphs and tables</li> <li>• Base salary data sheets</li> <li>• Benefits data</li> <li>• Leave data</li> </ul>
Internal relationship analysis <ul style="list-style-type: none"> <li>• Identification of benchmark classes</li> <li>• Internal relationships analysis and documentation</li> <li>• Recommended salary range changes</li> </ul>	Table of job classifications along with: <ul style="list-style-type: none"> <li>• Current salary range</li> <li>• Recommended salary range</li> <li>• Dollar and percentage change</li> <li>• Rationale for salary placement</li> </ul>
Implementation cost analysis <ul style="list-style-type: none"> <li>• Identify implementation options</li> <li>• Cost analysis based on current employee salary placements and/or budgeted positions</li> </ul>	List of implementation options and costs in tabular form  Dynamically set up to allow for “what if” analyses

Job classifications and descriptions <ul style="list-style-type: none"><li>• Employees complete Job Analysis Questionnaire</li><li>• Employee Interviews</li><li>• FLSA Analysis</li></ul>	Updated job descriptions Recommended title changes FLSA designations
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### **CRITICAL SUCCESS FACTORS**

The following critical success factors are addressed by this action:

1. The classification descriptions will be reviewed and updated.
2. Compensation and benefits will be compared to the market to create a competitive compensation structure to empower SAWPA to successfully recruit new talent and retain existing talent.

### **RESOURCE IMPACTS**

Sufficient funding is available in the FY 2023/24 budget.

Attachments:

1. PowerPoint Presentation
2. General Services Agreement
3. Task Order RAA100-02
4. Ralph Anderson and Associates Proposal

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# Classification and Compensation Study Agreement

February 6, 2024  
Agenda Item 6.A  
Edina Goode  
Administrative Services Manager

# Recommendation

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Authorize the General Manager to execute the following:

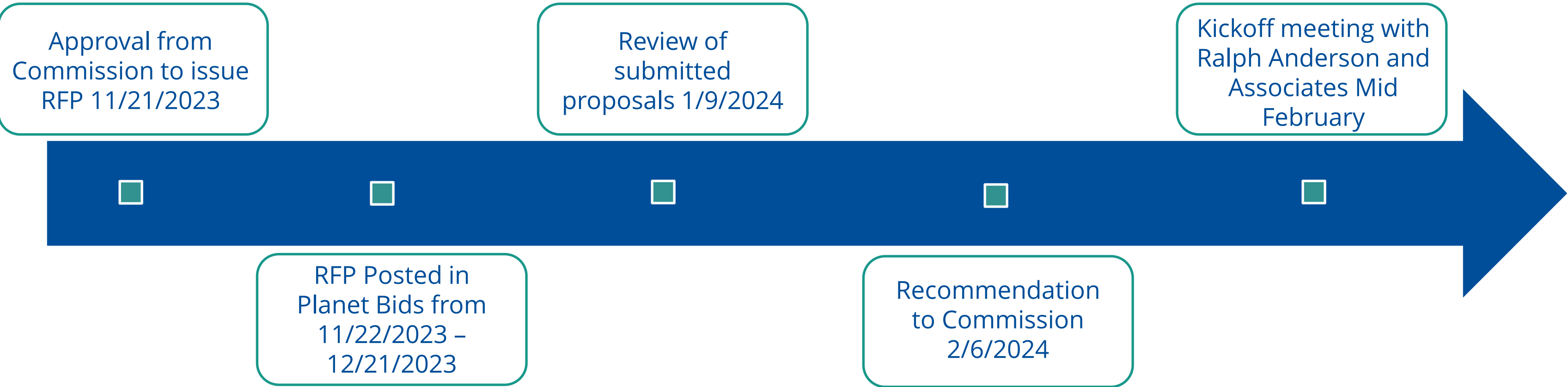
1. General Services Agreement with Ralph Anderson and Associates; and,
2. Task Order No. RAA100-02 with Ralph Anderson and Associates for an amount not to exceed \$42,800 for professional consulting services to conduct a Classification and Compensation Study

# Background

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- SAWPA's last classification and compensation study was completed in 2014
- It is a best practice to routinely assess classification and compensation. Appropriate compensation and classification alignment enhances employee engagement and satisfaction, and helps to attract and retain a diverse, highly qualified workforce.

# RFP Process and Consultant Selection





# Proposals Received and Reviewed

- Six Proposals were received in Planet Bids on November 21, 2023
- The proposals were ranked based on:
  - Responsiveness to the RFP (pass fail)
  - Experience and qualifications of the assigned individuals and firm (30%)
  - Project approach and understanding of needs (20%)
  - Anticipated value and quality of services received (20%)
  - Appropriateness of proposed fee structure (15%)
  - Project schedule (15%)
- Review committee included DGM/CFO Karen Williams, Admin Services Manager Edina Goode, and San Bernardino Valley HR/Risk Manager Karen Resendez

# Proposal Rankings

	Firm A	Firm B	Firm C	Firm D	Firm E	Ralph Anderson
Point Sums	12.28	7.5	9.7	10.85	8.55	13.7
Point Averages	4.09	2.5	3.23	3.62	2.85	4.57
Price	\$101,109	\$26,650	\$64,284	\$94,500	\$31,650	\$42,800
Time to Complete	50 weeks	13 weeks	13 weeks	25 weeks	15 weeks	12 weeks

# Selected Milestones

Project initiation meetings	Week 1
Job analysis interviews	Weeks 4-5
Prepare classification specifications	Weeks 7-9
Finalize classification plan	Week 12
Discuss compensation policy	Weeks 4-5
Compile Compensation data	Weeks 7-8
Develop salary recommendations	Weeks 10-11
Present final reports	Week 12

# Recommendation

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Authorize the General Manager to execute the following:

1. General Services Agreement with Ralph Anderson and Associates; and,
2. Task Order No. RAA100-02 with Ralph Anderson and Associates for an amount not to exceed \$42,800 for professional consulting services to conduct a Classification and Compensation Study

# Questions?

# Thank You

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Edina Goode  
Santa Ana Watershed Project Authority  
Office (951) 354-4230  
egoode@sawpa.gov  
sawpa.gov





## **SANTA ANA WATERSHED PROJECT AUTHORITY**

### **GENERAL SERVICES AGREEMENT FOR SERVICES BY INDEPENDENT CONSULTANT**

This Agreement is made this **6<sup>th</sup> day of February, 2024** by and between the Santa Ana Watershed Project Authority ("SAWPA") located at 11615 Sterling Avenue, Riverside, CA 92503 and Ralph Anderson and Associates ("Consultant") whose address is 5800 Stanford Ranch Road, Suite 410, Rocklin, CA 95765.

#### **RECITALS**

This Agreement is entered into on the basis of the following facts, understandings, and intentions of the parties to this Agreement:

- SAWPA desires to engage the professional services of Consultant to perform such professional consulting services as may be assigned, from time to time, by SAWPA in writing;
- Consultant agrees to provide such services pursuant to, and in accordance with, the terms and conditions of this Agreement and has represented and warrants to SAWPA that Consultant possesses the necessary skills, qualifications, personnel, and equipment to provide such services; and
- The services to be performed by Consultant shall be specifically described in one or more written Task Orders issued by SAWPA to Consultant pursuant to this Agreement.

#### **AGREEMENT**

Now, therefore, in consideration of the foregoing Recitals and mutual covenants contained herein, SAWPA and Consultant agree to the following:

#### **ARTICLE I**

##### **TERM OF AGREEMENT**

**1.01** This agreement shall become effective on the date first above written and shall continue until **December 31, 2027**, unless extended or sooner terminated as provided for herein.

#### **ARTICLE II**

##### **SERVICES TO BE PERFORMED**

**2.01** Consultant agrees to provide such professional consulting services as may be assigned, from time to time, in writing by the Commission and the General Manager of SAWPA. Each assignment shall be made in the form of a written Task Order. Each such Task Order shall include, but shall not be limited to, a description of the nature and scope of the services to be performed by Consultant, the amount of compensation to be paid, and the expected time of completion.

**2.02** Consultant may at Consultant's sole cost and expense, employ such competent and qualified independent professional associates, subcontractors, and consultants as Consultant deems necessary to perform each assignment; provided that Consultant shall not subcontract any work to be performed without the prior written consent of SAWPA.

#### **ARTICLE III**

##### **COMPENSATION**

**3.01** In consideration for the services to be performed by Consultant, SAWPA agrees to pay Consultant as provided for in each Task Order.

**3.02** Each Task Order shall specify a total not-to-exceed sum of money and shall be based upon the regular hourly rates customarily charged by Consultant to its clients.

**3.03** Consultant shall not be compensated for any services rendered nor reimbursed for any expenses incurred in excess of those authorized in any Task Order unless approved in advance by the Commission and General Manager of SAWPA, in writing.

**3.04** Unless otherwise provided for in any Task Order issued pursuant to this Agreement, payment of compensation earned shall be made in monthly installments after receipt from Consultant of a timely, detailed, corrected, written invoice by SAWPA's Project Manager, describing, without limitation, the services performed, when such services were performed, the time spent performing such services, the hourly rate charged therefore, and the identity of individuals performing such services for the benefit of SAWPA. Such invoices shall also include a detailed itemization of expenses incurred. Upon approval by an authorized SAWPA employee, SAWPA will pay within 30 days after receipt of a valid invoice from Consultant.

#### **ARTICLE IV**

##### **CONSULTANT OBLIGATIONS**

**4.01** Consultant agrees to perform all assigned services in accordance with the terms and conditions of this Agreement including those specified in each Task Order. In performing the services required by this Agreement and any related Task Order Consultant shall comply with all local, state and federal laws, rules and regulations. Consultant shall also obtain and pay for any permits required for the services it performs under this Agreement and any related Task Order.

**4.02** Except as otherwise provided for in each Task Order, Consultant will supply all personnel and equipment required to perform the assigned services.

**4.03** Consultant shall be solely responsible for the health and safety of its employees, agents and subcontractors in performing the services assigned by SAWPA.

**4.04** Insurance Coverage: Consultant shall procure and maintain for the duration of this Agreement insurance against claims for injuries or death to persons or damages to property which may arise from or in connection with the performance of the work hereunder and the results of that work by the Consultant, its agents, representatives, employees or sub-contractors.

**4.04(a) Coverage** - Coverage shall be at least as broad as the following:

- 1. Commercial General Liability (CGL)** - Insurance Services Office (ISO) Commercial General Liability Coverage (Occurrence Form CG 00 01) including products and completed operations, property damage, bodily injury, personal and advertising injury with limit of at least two million dollars (\$2,000,000) per occurrence or the full per occurrence limits of the policies available, whichever is greater. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (coverage as broad as the ISO CG 25 03, or ISO CG 25 04 endorsement provided to SAWPA) or the general aggregate limit shall be twice the required occurrence limit.
- 2. Automobile Liability** – (if necessary) Insurance Services Office (ISO) Business Auto Coverage (Form CA 00 01), covering Symbol 1 (any auto) or if Consultant has no owned autos, Symbol 8 (hired) and 9 (non-owned) with limit of one million dollars (\$1,000,000) for bodily injury and property damage each accident.
- 3. Workers' Compensation Insurance** - as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease.
- 4. Professional Liability** - (Also known as Errors & Omission) Insurance appropriate to the Consultant profession, with limits no less than \$1,000,000 per occurrence or claim, and \$2,000,000 policy aggregate.
- 5. Cyber Liability Insurance (Technology Professional Liability – Errors and Omissions)** – If Consultant will be providing technology services, limits not less than \$2,000,000 per occurrence or claim, and \$2,000,000 aggregate or the full per occurrence limits of the policies available, whichever is greater. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by Consultant in this Agreement and shall include, but not be limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress,



invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion and network security. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations.

If the Consultant maintains broader coverage and/or higher limits than the minimums shown above, SAWPA requires and shall be entitled to the broader coverage and/or higher limits maintained by the Consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to SAWPA.

**4.04(b) If Claims Made Policies:**

1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.
2. Insurance must be maintained and evidence of insurance must be provided **for at least five (5) years after completion of the contract of work.**
3. If coverage is canceled or non-renewed, and not **replaced with another claims-made policy form with a Retroactive Date** prior to the contract effective date, the Consultant must purchase "extended reporting" coverage for a minimum of **five (5) years** after completion of contract work.

**4.04(c) Waiver of Subrogation:** The insurer(s) named above agree to waive all rights of subrogation against SAWPA, its elected or appointed officers, officials, agents, authorized volunteers and employees for losses paid under the terms of this policy which arise from work performed by the Named Insured for the Agency; but this provision applies regardless of whether or not SAWPA has received a waiver of subrogation from the insurer.

**4.04(d) Other Required Provisions -** The general liability policy must contain, or be endorsed to contain, the following provisions:

1. **Additional Insured Status:** SAWPA, its directors, officers, employees, and authorized volunteers are to be given insured status (at least as broad as ISO Form CG 20 10 10 01), with respect to liability arising out of work or operations performed by or on behalf of the Consultant including materials, parts, or equipment furnished in connection with such work or operations.
2. **Primary Coverage:** For any claims related to this project, the Consultant's insurance coverage shall be primary at least as broad as ISO CG 20 01 04 13 as respects to SAWPA, its directors, officers, employees and authorized volunteers. Any insurance or self-insurance maintained by the Member Water Agency its directors, officers, employees and authorized volunteers shall be excess of the Consultant's insurance and shall not contribute with it.

**4.04(e) Notice of Cancellation:** Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to SAWPA.

**4.04(f) Self-Insured Retentions -** Self-insured retentions must be declared to and approved by SAWPA. SAWPA may require the Consultant to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or SAWPA.

**4.04(g) Acceptability of Insurers -** Insurance is to be placed with insurers having a current A.M. Best rating of no less than A: VII or as otherwise approved by SAWPA.

**4.04(h) Verification of Coverage –** Consultant shall furnish SAWPA with certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by SAWPA before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them. SAWPA reserves the right to require complete, certified copies of all required insurance policies, including policy Declaration pages and Endorsement pages.

**4.04(i) Subcontractors** - Consultant shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Consultant shall ensure that SAWPA, its directors, officers, employees and authorized volunteers are additional insureds on Commercial General Liability Coverage.

**4.05** Consultant hereby covenants and agrees that SAWPA, its officers, employees, and agents shall not be liable for any claims, liabilities, penalties, fines or any damage to property, whether real or personal, nor for any personal injury or death caused by, or resulting from, or claimed to have been caused by or resulting from, any negligence, recklessness, or willful misconduct of Consultant. To the extent permitted by law, Consultant shall hold harmless, defend at its own expense, and indemnify SAWPA, its directors, officers, employees, and authorized volunteers, against any and all liability, claims, losses, damages, or expenses, including reasonable attorney's fees and costs, arising from all acts or omissions of Consultant or its officers, agents, or employees in rendering services under this Agreement and any Task Order issued hereunder; excluding, however, such liability, claims, losses, damages or expenses arising from SAWPA's sole negligence or willful acts.

**4.06** In the event that SAWPA requests that specific employees or agents of Consultant supervise or otherwise perform the services specified in each Task Order, Consultant shall ensure that such individual(s) shall be appointed and assigned the responsibility of performing the services.

**4.07** In the event Consultant is required to prepare plans, drawings, specifications and/or estimates, the same shall be furnished with a registered professional engineer's number and shall conform to local, state and federal laws, rules and regulations. Consultant shall obtain all necessary permits and approvals in connection with this Agreement, any Task Order or Change Order. However, in the event SAWPA is required to obtain such an approval or permit from another governmental entity, Consultant shall provide all necessary supporting documents to be filed with such entity, and shall facilitate the acquisition of such approval or permit.

**4.08** Consultant shall comply with all local, state and federal laws, rules and regulations including those regarding nondiscrimination and the payment of prevailing wages, if required by law.

## **ARTICLE V**

### **SAWPA OBLIGATIONS**

**5.01** SAWPA shall:

**5.01a** Furnish all existing studies, reports and other available data pertinent to each Task Order that are in SAWPA's possession;

**5.01b** Designate a person to act as liaison between Consultant and the General Manager and Commission of SAWPA.

## **ARTICLE VI**

### **ADDITIONAL SERVICES, CHANGES AND DELETIONS**

**6.01** During the term of this Agreement, the Commission of SAWPA may, from time to time and without affecting the validity of this Agreement or any Task Order issued pursuant thereto, order changes, deletions, and additional services by the issuance of written Change Orders authorized and approved by the Commission of SAWPA.

**6.02** In the event Consultant performs additional or different services than those described in any Task Order or authorized Change Order without the prior written approval of the Commission of SAWPA, Consultant shall not be compensated for such services.

**6.03** Consultant shall promptly advise SAWPA as soon as reasonably practicable upon gaining knowledge of a condition, event, or accumulation of events, which may affect the scope and/or cost of services to be provided pursuant to this Agreement. All proposed changes, modifications, deletions, and/or requests for additional services shall be reduced to writing for review and approval or rejection by the Commission of SAWPA.

**6.04** In the event that SAWPA orders services deleted or reduced, compensation shall be deleted or reduced by a comparable amount as determined by SAWPA and Consultant shall only be compensated for services actually performed. In the event additional services are properly authorized, payment for the same shall be made as provided in Article III above.

## **ARTICLE VII**

### **CONSTRUCTION PROJECTS: CONSULTANT CHANGE ORDERS**

**7.01** In the event SAWPA authorizes Consultant to perform construction management services for SAWPA, Consultant may determine, in the course of providing such services, that a Change Order should be issued to the construction contractor, or Consultant may receive a request for a Change Order from the construction contractor. Consultant shall, upon receipt of any requested Change Order or upon gaining knowledge of any condition, event, or accumulation of events, which may necessitate issuing a Change Order to the construction contractor, promptly consult with the liaison, General Manager and Commission of SAWPA. No Change Order shall be issued or executed without the prior approval of the Commission of SAWPA.

## **ARTICLE VIII**

### **TERMINATION OF AGREEMENT**

**8.01** In the event the time specified for completion of an assigned task in a Task Order exceeds the term of this Agreement, the term of this Agreement shall be automatically extended for such additional time as is necessary to complete such Task Order and thereupon this Agreement shall automatically terminate without further notice.

**8.02** Notwithstanding any other provision of this Agreement, SAWPA, at its sole option, may terminate this Agreement at any time by giving 10 day written notice to Consultant, whether or not a Task Order has been issued to Consultant.

**8.03** In the event of termination, the payment of monies due Consultant for work performed prior to the effective date of such termination shall be paid after receipt of an invoice as provided in this Agreement.

## **ARTICLE IX**

### **CONSULTANT STATUS**

**9.01** Consultant shall perform the services assigned by SAWPA in Consultant's own way as an independent contractor, in pursuit of Consultant's independent calling and not as an employee of SAWPA. Consultant shall be under the control of SAWPA only as to the result to be accomplished and the personnel assigned to perform services. However, Consultant shall regularly confer with SAWPA's liaison, General Manager, and Commission as provided for in this Agreement.

**9.02** Consultant hereby specifically represents and warrants to SAWPA that the services to be rendered pursuant to this Agreement shall be performed in accordance with the standards customarily applicable to an experienced and competent professional consulting organization rendering the same or similar services. Furthermore, Consultant represents and warrants that the individual signing this Agreement on behalf of Consultant has the full authority to bind Consultant to this Agreement.

## **ARTICLE X**

### **AUDIT AND OWNERSHIP OF DOCUMENTS**

**10.01** All draft and final reports, plans, drawings, specifications, data, notes, and all other documents of any kind or nature prepared or developed by Consultant in connection with the performance of services assigned to it by SAWPA are the sole property of SAWPA, and Consultant shall promptly deliver all such materials to SAWPA. Consultant may retain copies of the original documents, at its option and expense. Use of such documents by SAWPA for project(s) not the subject of this Agreement shall be at SAWPA's sole risk without legal liability or exposure to Consultant. SAWPA agrees to not release any software "code" without prior written approval from the Consultant.

**10.02** Consultant shall retain and maintain, for a period not less than four years following termination of this Agreement, all time records, accounting records, and vouchers and all other records with respect to all matters concerning services performed, compensation paid and expenses reimbursed. At any time during normal business hours and as often as SAWPA may deem necessary, Consultant shall make available to SAWPA's agents for examination of all such records and will permit SAWPA's agents to audit, examine and reproduce such records.

## **ARTICLE XI**

### **MISCELLANEOUS PROVISIONS**

**11.01** This Agreement supersedes any and all previous agreements, either oral or written, between the parties hereto with respect to the rendering of services by Consultant for SAWPA and contains all of the covenants and agreements between the parties with respect to the rendering of such services in any manner whatsoever. Any modification of this Agreement will be effective only if it is in writing signed by both parties.

**11.02** Consultant shall not assign or otherwise transfer any rights or interest in this Agreement without the prior written consent of SAWPA. Unless specifically stated to the contrary in any written consent to an assignment, no assignment will release or discharge the assignor from any duty or responsibility under this Agreement.

**11.03** In the event Consultant is an individual person and dies prior to completion of this Agreement or any Task Order issued hereunder, any monies earned that may be due Consultant from SAWPA as of the date of death will be paid to Consultant's estate.

**11.04** Time is of the essence in the performance of services required hereunder. Extensions of time within which to perform services may be granted by SAWPA if requested by Consultant and agreed to in writing by SAWPA. All such requests must be documented and substantiated and will only be granted as the result of unforeseeable and unavoidable delays not caused by the lack of foresight on the part of Consultant.

**11.05** SAWPA expects that Consultant will devote its full energies, interest, abilities and productive time to the performance of its duties and obligations under this Agreement, and shall not engage in any other consulting activity that would interfere with the performance of Consultant's duties under this Agreement or create any conflicts of interest. If required by law, Consultant shall file a Conflict of Interest Statement with SAWPA.

**11.06** Any dispute which may arise by and between SAWPA and the Consultant, including the Consultants, its employees, agents and subcontractors, shall be submitted to binding arbitration. Arbitration shall be conducted by a neutral, impartial arbitration service that the parties mutually agree upon, in accordance with its rules and procedures. The arbitrator must decide each and every dispute in accordance with the laws of the State of California, and all other applicable laws. Unless the parties stipulate to the contrary prior to the appointment of the arbitrator, all disputes shall first be submitted to non-binding mediation conducted by a neutral, impartial mediation service that the parties mutually agree upon, in accordance with its rules and procedures.

**11.07** During the performance of the Agreement, Consultant and its subcontractors shall not unlawfully discriminate, harass, or allow harassment against any employee or applicant for employment because of sex, race, color, ancestry, religious creed, national origin, physical disability (including HIV and AIDS), mental disability, medical condition (cancer), age (over 40), marital status and denial of family care leave. Consultant and its subcontractors shall insure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment. Consultant and its subcontractors shall comply with the provisions of the Fair Employment and Housing Act (Government Code, Section 12290 et seq.) and the applicable regulations promulgated there under (California Code of Regulations, Title 2, Section 7285 et seq.). The applicable regulations of the Fair Employment and Housing Commission implementing Government Code Section 12990 et seq., set forth in Chapter 5 of Division 4 of Title 2 of the California Code of Regulations, are incorporated into this Agreement by reference and made a part hereof as if set forth in full. Consultant and its subcontractors shall give written notice of their obligations under this clause to labor organizations with which they have a collective bargaining or other agreement. Consultant shall include the



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**SANTA ANA WATERSHED PROJECT AUTHORITY  
TASK ORDER NO. RAA100-02**

**CONSULTANT:** Ralph Anderson and Associates  
5800 Stanford Ranch Road, Suite 410  
Rocklin, CA 95765

**VENDOR NO.:** 2047

**COST:** \$42,800.00

**PAYMENT:** Upon Receipt of Proper Invoice

**REQUESTED BY:** Edina Goode, Administrative Services Manager February 6, 2024

**FINANCE:** \_\_\_\_\_  
Karen Williams, Deputy GM/CFO Date

**FINANCING SOURCE:** Acct. Coding: 100-00-60121-01  
Acct. Description: Consulting – General

**COMMITTEE AUTHORIZATION REQUIRED FOR THIS TASK ORDER:** YES (X) NO ( )  
Authorization: February 6, 2024; CM#2024.5

This Task Order is issued upon approval and acceptance by the Santa Ana Watershed Project Authority (SAWPA) and Ralph Anderson and Associates (Consultant) pursuant to the General Services Agreement between SAWPA and Consultant, entered into on February 6, 2024, expiring December 31, 2027.

**I. PROJECT NAME OR DESCRIPTION**

Classification and Compensation Study

**II. SCOPE OF WORK / TASKS TO BE PERFORMED**

Consultant shall provide all labor, materials, and equipment for the Classification and Compensation Study services. The scope of work includes delivery of a compensation report including base salary data, benefits and leave data for a defined group of agencies (the market). A table of SAWPA job classifications with recommended salary ranges, updated job descriptions, recommended title changes, and FLSA designations. Proposal is attached.

**III. PERFORMANCE TIME FRAME**

Consultant shall begin work February 6, 2024, and shall complete performance of such services by **July 31, 2024**.

**IV. SAWPA LIAISON**

Edina Goode shall serve as liaison between SAWPA and Consultant.

**V. COMPENSATION**

For all services rendered by Consultant pursuant to this Task Order, Consultant shall receive a total not-to-exceed sum of **\$42,800.00**. Payment for such services shall be made monthly upon receipt of timely and proper invoices from Consultant, as required by the above-mentioned Agreement. Each such invoice shall be provided to SAWPA by Consultant within 15 days after the end of the month in which the services were performed.

**VI. CONTRACT DOCUMENTS PRECEDENCE**

In the event of a conflict in terms between and among the contract documents herein, the document item highest in precedence shall control. The precedence shall be:

- a. The General Services Agreement by Independent Consultant/Consultant.
- b. The Task Order or Orders issued pursuant to the Agreement, in numerical order.
- c. Exhibits attached to each Task Order, which may describe, among other things, the Scope of Work and compensation therefore.
- d. Specifications incorporated by reference.
- e. Drawings incorporated by reference.

In witness whereof, the parties have executed this Task Order on the date indicated below.

**SANTA ANA WATERSHED PROJECT AUTHORITY**

\_\_\_\_\_  
Jeffrey J. Mosher, General Manager                      Date

**RALPH ANDERSON AND ASSOCIATES**

\_\_\_\_\_  
(Signature)                      Date

\_\_\_\_\_  
Print/Type Name and Title





5800 Stanford Ranch Road  
Suite 410  
Rocklin, California 95765  
916.630.4900

December 21, 2023

Santa Ana Watershed Project Authority

Via PlanetBids

RE: Classification and Compensation Study

We are pleased to submit our proposal to conduct a Classification and Compensation Study. The scope of the study will include all of the Authority's positions (26 FTEs and 27 job classifications). To facilitate your review, the proposal includes the following:

- Executive Summary – Our understanding of the requirements of the project and our ability to provide the services required.
- Agents and Experience – A summary of the firm, proposed staff, and our expertise in conducting classification and compensation studies.
- Statement of Methods and Procedures – A summary of methodologies and proposed **tasks to accomplish the study's objectives** and anticipated end-products.
- Structure and Content of Work Product – Anticipated project deliverables.
- Work Schedule – Our proposed work schedule.
- References – References for similar studies conducted by the firm.
- Fee – A fixed cost for the proposed project as well as hourly rates.

I am certain that you will find our work plan is responsive to each of your study objectives, and our reputation and experience are unmatched in successfully completing consulting engagements of this nature. Ralph Andersen & Associates is a leader in providing local government consulting services and has successfully completed hundreds of classification and compensation studies.

The full resources of the firm will be available to perform consulting services for the duration of the project. Doug Johnson, Vice President, will be the Project Manager for this engagement and will have the assistance of an experienced consulting team.

If you have any questions or need additional information, please do not hesitate to contact Mr. Doug Johnson at (916) 630-4900. We look forward to the opportunity to work with you again on this important assignment. This proposal will remain valid for 90 days.

Sincerely,

Heather Renschler  
President/CEO

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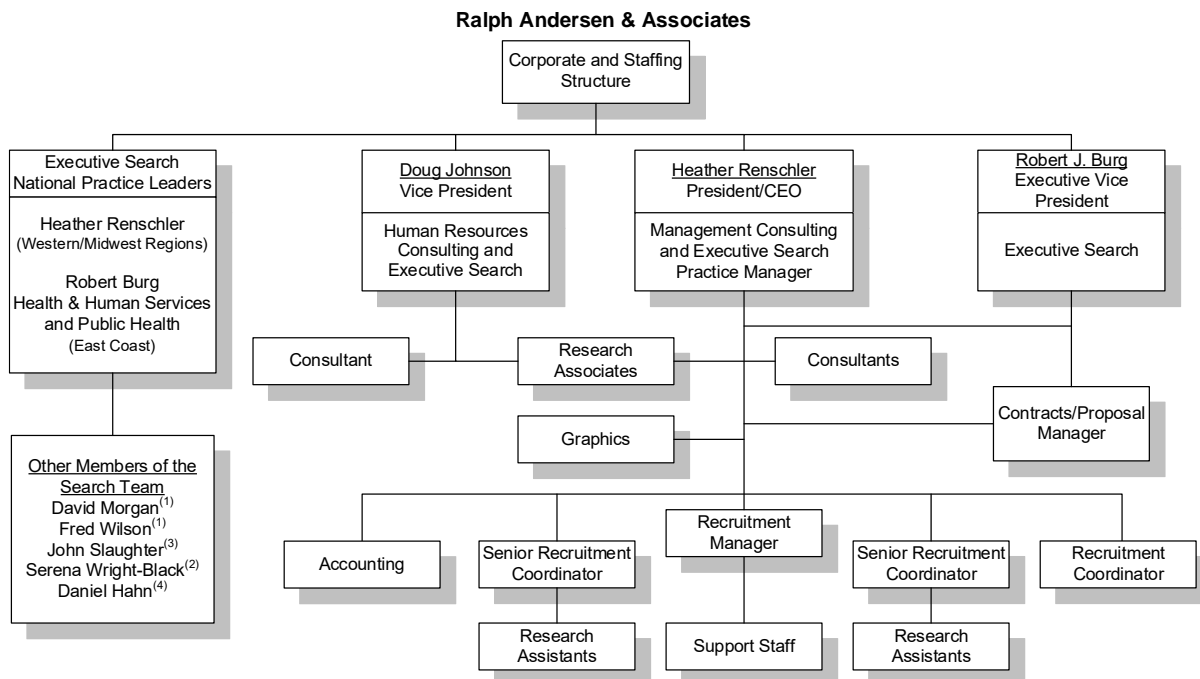
# Agents and Experience

## Firm Background

Ralph Andersen & Associates has over 51 years of local government consulting experience serving the needs of cities, counties, utilities, special districts, community colleges, schools, non-profit organizations, and state governments. Key service areas of the firm include:

- Human Resources Consulting
- Executive Search
- Management Consulting.

Ralph Andersen & Associates serves a nationwide clientele through its Corporate Office in the Sacramento area (Rocklin, California). A multi-disciplined, full-service local government consulting organization, Ralph Andersen & Associates is dedicated to helping our clients improve operating efficiency and organizational effectiveness. The firm employs 14 full-time staff, 3 part-time staff, and has additional contractors and affiliations as needed to provide a full range of services.



(1) Former City Manager  
(2) Former Assistant City Manager  
(3) Former County Manager  
(4) Former Chief of Police

**For this project, staff from the firm's human resources practice will provide the** consulting services. The human resource practice focuses on those services that are not easily provided by in-house human resources staff. Key services include:

- Classification Studies – These projects include job analysis, class plan development, position allocation, career ladders, class specifications, FLSA analysis, ADA compliance, and related analysis.
- Compensation Studies – The firm provides a full range of compensation services including labor market selection, base salary and benefit surveys, private-public data comparisons, benchmark selection, and internal relationship analysis.
- Expert Testimony and Arbitration Support – The firm has had significant experience providing technical support in arbitration and mediation hearings and has significant experience working with labor and management groups. This expertise includes the selection of comparable agencies and the elements of compensation appropriate for labor market surveys.
- Job Evaluation Systems – In addition to having a copyrighted Point Factor Job Evaluation System, the staff of Ralph Andersen & Associates have significant **expertise in developing customized job evaluation systems and “hybrid” solutions.**
- Performance Management Programs – Performance management serves as a foundation for measuring/tracking organization and employee performance. We have several standard systems that have demonstrated success in a variety of public agencies. In addition, Ralph Andersen & Associates can develop tailored performance management systems to fit the unique needs of our clients.
- Pay-for-Performance/Incentive Programs – Ralph Andersen & Associates is a leader in developing effective pay-for-performance programs for public agencies including merit progression systems, lump sum and incentive programs, and other mechanisms tied to employee or organizational measurement criteria.
- Technical Assistance – Ralph Andersen & Associates also provides a full range of hourly technical assistance including conducting job audits, support for labor relations, and expert testimony.

The firm has no conflict of interest with the staff or officials of the Santa Ana Watershed Project Authority and is independent of the Authority as defined by generally accepted auditing standards. **Additional information about the firm's services and background can** be found at our web site at [www.ralphandersen.com](http://www.ralphandersen.com).

## Project Approach

The approach our firm uses to conduct classification and compensation studies is customized to the specific needs and objectives of each client. While the work plan we have provided in this proposal is proven, we are happy to adapt our work plan and approach as needed during project initiation meetings and throughout the process. Our firm has an outstanding reputation working with elected officials, managers, and labor representatives. Our goal is to provide products and deliverables that ensure implementation by the Authority. Highlights of our approach include:

- A transparent and collaborative process. We have significant experience working with diverse stakeholders and ensuring that the project deliverables meet the objectives of the Authority. Our efforts include briefing sessions, meetings, workshops, and a comprehensive and interactive review of draft reports. We are confident in our ability to research and respond to issues that require clarification and to provide information and data that responds to issues of disagreement.
- Custom data presentations including base salary and benefits data. We do not rely on **“canned” data analysis tools. The firm uses dynamic Excel spreadsheets and can** prepare total compensation datasheets for all survey jobs.
- We are one of the few firms that has experience with private sector data analysis. We subscribe to the largest private sector database in North America, which is updated quarterly. This data can be regionalized to fit the recruitment region of the Authority.
- Extensive review and input by managers, employees, labor representatives, and elected officials. We provide easy to review draft reports and work with the Authority to ensure that the final reports meet or exceed all study objectives.

We will review our recommended approach including communication and stakeholder interaction plans with the Authority at the beginning of the project to ensure the Authority’s **requirements are fully incorporated into the work plan.**

## Project Staffing

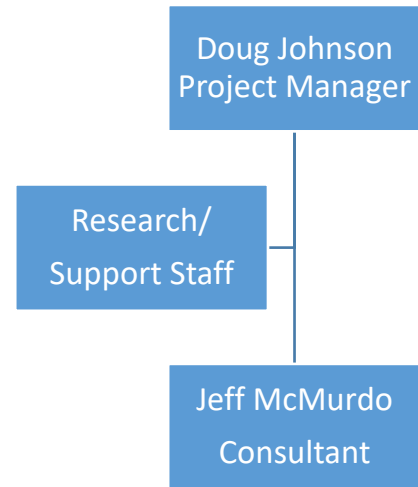
Consultants, complemented by consulting firms, define the difference between success and failure in projects of this nature. Ralph Andersen & Associates understands that selection of a project team with the right mix of skills and experience is the most important decision that will be made during the study. The team must be well led and the project well managed if the study objectives are to be achieved.

In defining the project team for this engagement, consideration of the current workload of all consulting staff was taken into account to ensure our ability to fully meet your stated needs and objectives. Doug Johnson, Vice President, will serve as the Project Manager and will have responsibility for all primary contact with the Authority as well as all on-site review meetings and presentations. Mr. Johnson has managed hundreds of consulting engagements including large public agencies throughout California and the United States.

As Project Manager, Mr. Johnson will not only lead the study but will also be responsible for key analyses and deliverables including management interviews, the proposed classification plan, the analysis and reporting of the survey data, salary range analysis and recommendations, and all reports and presentations. He will be involved in all project tasks and will account for 45% of the total work. He will be assisted by Jeff McMurdo who will be responsible for initial reviews of completed questionnaires, employee interviews, the preparation of updated class specifications, and survey data collection. His work will account for 55% of the total hours/effort.

The staffing for this project will include:

- Doug Johnson, Vice President – Mr. Johnson will serve as the Project Manager and will conduct all on-site meetings, prepare all written reports, and serve as chief analyst **on the project. He is the firm's most experienced Project Manager** and has expertise in working with special districts, cities, and other local government agencies similar to the Authority involving complex classification and compensation issues.
- Jeff McMurdo, Consultant – Mr. McMurdo is the most experienced consultant at the firm and has extensive experience conducting employee interviews, developing classification recommendations, developing job descriptions, and collecting and analyzing market data.



All staff members are available for the scheduled duration of the project. Anticipated **workloads for all staff have been considered in assigning staff to this project. The firm's** staffing and project management systems allow for multiple studies to be conducted simultaneously without impacting the completion dates of the project. Brief staff resumes are provided below.

## Staff Resumes

### *Doug Johnson, Vice President*

Mr. Johnson is currently a Vice President with Ralph Andersen & Associates and has 34 years of local government consulting experience. Mr. Johnson has 20 years of experience with Ralph Andersen & Associates in addition to 13 years as President of Johnson & Associates, some human resources consulting firm. Mr. Johnson is **the firm's expert in job analysis, market comparability, compensation, benefits, and related matters.** He has served as an expert witness in arbitration proceedings and mediation sessions, mostly involving police and fire issues. He has extensive experience working with elected officials, public executives, staff members, labor organizations, and ad-hoc committees. **He leads the firm's human resource consulting services and participates in all facets of the firm's recruitments.**



**Mr. Johnson's expertise includes consulting experience with public agencies throughout the United States including special districts, cities, counties, utilities, community colleges, school districts, nonprofit organizations, and private companies.** Mr. Johnson has provided consulting assistance to hundreds of public sector agencies and is a recognized expert in compensation issues. Specific areas of expertise include:

- Job classification studies
- Job evaluation system design and implementation
- Pay plan development and administration
- Market comparability research and analysis
- Total compensation analysis
- Private sector data analysis
- Performance management.

**Mr. Johnson's experience includes serving as project manager and chief analyst for** hundreds of local government agencies. Recent municipal projects include the cities of Auburn, Union City, Hollister, Indio, Arcadia, Carson, Hermosa Beach, Simi Valley, Carlsbad, Paramount, Signal Hill, Redondo Beach, Hermosa Beach, Port Hueneme, Modesto, Monterey, Sacramento, Lake Forest, and Petaluma. Special district projects include Sac Sewer, Turlock Irrigation District, Nevada Irrigation District, Alameda County Water Authority, Mesa Water, South Lake Tahoe PUD, East Bay MUD, South Placer MUD, Olivenhain Water District, Sweetwater Authority, San Diego Water District, Orange County Sanitation District, Valley of the Moon Water District, and Otay Water District.

Mr. Johnson holds a Bachelor of Arts degree in Psychology with a minor in Communication Studies from California State University, Sacramento. His course work emphasized organizational development and performance incentives. He is an active member of WorldAtWork, The Total Rewards Association.

### *Jeff McMurdo, Consultant*

Mr. McMurdo has over 20 years of human resources consulting experience and serves on a variety of project consulting teams focusing on classification and compensation plan development. He is an experienced classification analyst and has developed hundreds of classification plans in addition to ad-hoc reclassification and targeted classification studies for large and small organizations. His duties also include leading and participating in total compensation studies including comprehensive market research, data collection, data analysis, and data presentation. Key responsibilities of Mr. McMurdo include:



- Conducting job analysis interviews, analyzing positions and job classifications, and preparing job descriptions.
- Designing survey data collection forms, questionnaires, and related instruments.
- Market survey research including the review and analysis of budgets, organization charts, MOUs, job descriptions, salary schedules, and benefit documents.
- Data compilation including job comparability, range structure analysis, benefit data, and related survey information.

He has conducted over a hundred compensation surveys including recent surveys for the cities of Anaheim, Arcadia, Paramount, Temple City, Ketchikan, Laguna Hills, Reno, Sacramento, Monterey, Irwindale, Palm Springs, Tracy, and Sunnyvale. He has also worked with a number of special districts including Olivenhain Municipal Water District, Otay Water District, South Placer MUD, San Diego Water Authority, Mesa Water, Sweetwater Authority, and Alameda County Water District. Mr. McMurdo holds a Bachelor of Science degree in Business Administration from California State University, Sacramento. His course work emphasized human resource management.

Additional firm resources, including support staff and project consultants, will be available to ensure successful and timely completion of the study.



# Statement of Methods and Procedures

## Project Understanding

The Santa Ana Watershed Project Authority is interested in conducting a Classification and Compensation Study involving all Authority employees and job classifications.

To ensure that the Authority's **objectives are met, the following key study components and** anticipated end-products are included in the work plan developed by Ralph Andersen & Associates.

- Conduct a meeting with Authority representatives at project initiation to confirm the study goals, objectives, and deliverables
- Conduct briefing sessions with employees at the beginning of the study to explain the study process and answer questions
- Conduct an extensive review of background documents
- Distribute job analysis questionnaires and conduct supplemental interviews with a sampling of employees in the study
- Develop classification recommendations, FLSA designations, and update job descriptions
- Review historical practices and confirm survey agencies, survey job classifications, and identify data collection needs
- Conduct a custom salary and benefit survey and analyze the market data
- Conduct internal relationship analyses, survey benchmarking, and develop salary range recommendations for all Authority job classifications
- Develop draft and final reports incorporating all study recommendations and supporting data including implementation plans
- Conduct a classification and compensation review and appeal process to fully resolve all classification issues and recommendations
- Present the findings to managers, employees, labor representatives, project committees, and the Board of Directors, as needed.

Ralph Andersen & Associates has a strong commitment to develop and implement customized and tailored classification and compensation systems. While we have broad expertise and experience from hundreds of successful consulting assignments, we are committed to a **“customer service” approach to all of our client engagements. This assures** the preparation of study end-products that are uniquely customized to the Santa Ana Watershed Project Authority.

## Project Tasks

### Task 1 – Project Kick-off Meetings

The consultants will begin all administrative and coordinative efforts in support of the project initiation meetings and briefings. Among other things, this will include:

- Preparation of a project schedule
- Identification and review of background data including existing class specifications, organization charts, budgets, employee listings, salary schedules, and related information
- Identification of scheduling parameters for meetings and interaction with various Authority employee groups.

This initial step in the study process will be used to identify significant classification and compensation concerns that should be addressed during the course of the study. The consultants will discuss the best approach for identifying issue areas including an independent assessment of the current classification plan by the consultant, input by human resources staff, and input from managers, labor representatives, and other stakeholders.

The consultants will meet with the Authority's **project manager and other staff** as appropriate to ensure a full understanding of project objectives and deliverables. The project work plan and schedule will be adapted to achieve the objectives.

Initial project meetings will also include employee orientation and briefing sessions in relation to the study process, timing, and objectives.

### Task 2 – Employees Complete Questionnaires

The JAQ provides employees with an opportunity to describe the duties and responsibilities of their positions with an emphasis on job related information such as knowledge, skills, abilities, and physical capabilities required to perform the work assigned. Space is also provided on the questionnaire for employees to make any additional comments they wish. The completed questionnaires are reviewed by supervisory and managerial staff, with space provided for their comments. A short form questionnaire will be available to all employees to provide updated information regarding assigned duties. A more detailed questionnaire will be used for positions and classifications where specific issues or questions have been identified. A sample JAQ is provided in Appendix B.

### Task 3 – Conduct Job Analysis Interviews

Prior to conducting interviews, the consultants will thoroughly review the completed questionnaires. The consultants will evaluate position duties and responsibilities, classification series, class titles, job families, reporting relationships, and internal

relationships. Based on this preliminary analysis, the project team will identify areas of concern that will be clarified or probed during the job analysis interviews.

The consultants will assume responsibility for the preparation of the employee interview schedule. The Authority's **Project Manager, or designee, will be responsible for scheduling** interview rooms, notifying employees, and related coordinative activities. We anticipate interviewing at least one person from each job classification, all employees where significant position classification issues exist, and a sampling of employees beyond the issue areas.

#### Task 4 – Prepare and Review Preliminary Classification Report

With the completion of the employee interviews, a preliminary classification report will be prepared. Key components of the preliminary report will include:

- Identification of all key issues identified in the classification analysis
- Recommended job titles
- Employee allocations.

In preparing the preliminary classification report, each position is analyzed according to the criteria set forth at initial review meetings. Such criteria typically will include factors relating to job knowledge, experience, training, decision making, management control, working conditions, and outside contacts. Like positions are grouped into tentative classes forming the basis for initial class definition.

The preliminary classification report will be reviewed with key management staff prior to preparing class specifications. Because the concepts provide the foundation for the resulting classification plan, management review of the recommendations in their respective areas of responsibility is essential.

#### Task 5 – Prepare Class Specifications

Once the preliminary classification recommendations have been reviewed, the project consultants will revise, update, or create new class specifications based on the issues identified in previous tasks. The Authority's **current job description format will be** maintained as appropriate. The class specifications will be drafted and undergo a management/employee review process to ensure they accurately and adequately describe the scope of responsibilities. Once finalized, they will be provided to the Authority in both an electronic and hard-copy format. This process will include FLSA analysis and designation.

#### Task 6 – Undertake Management/Employee Review Process

As an important component of the overall classification study, the project consultant team will provide additional opportunities for employee participation and input through the conduct of an employee review process. These steps will (1) build and facilitate the Authority's **understanding of the newly developed classification plan**, (2) **enhance** employee commitment and understanding of the recommended system by giving each employee the opportunity to comment on the system and (3) ensure that the consultants

receive as much information as possible regarding the nature and responsibilities of the various positions in order to make appropriate and equitable final classification recommendations. The various subtasks within this portion of the project are as follows.

Task 6.1 – Distribute class specifications to all employees included within the study scope – Each employee will receive an individual copy of the specification for the class to which his/her position has been allocated along with a Position Allocation Notice and Employee Review Form. This will provide employees with an opportunity to review and comment on their proposed classification and allocation. These comments will then be forwarded to management for review and comment.

Task 6.2 – Review written comments received from employees – All written comments or suggestions from employees regarding the recommended class plan will be thoroughly reviewed and analyzed by the project consultants. Based upon written responses received, the consultant team will incorporate appropriate suggested revisions into the final classification plan.

Task 6.3 – Conduct follow-up telephone interviews as necessary – Based upon the analysis of written comments forwarded to the project consultants and where consultant staff needs further information prior to finalizing recommendations, follow-up interviews will be conducted by the project consultants with individual employees. This step will further clarify and refine any remaining problems or issues.

This task will further include any additional informal appeal processes/steps established or desired by the Authority.

## Task 7 – Finalize the Classification Recommendations

With the completion of the employee appeal process, the consultants will finalize all classification study recommendations. Supporting the finalization of the classification plan, each employee who submitted a notice for review will receive a direct response from **the project consultants. This response will specifically outline the consultant's understanding of the employee's concern, specify the steps taken to resolve the concern, and indicate to the employee the substance of the consultant's final recommendation.**

## Task 8 – Discuss and Document Compensation Policy

The Authority's **compensation policy directly impacts all study end-products** resulting from the compensation components of the analysis. As a starting point for this phase of the study, therefore, we propose that the consulting team meet with key management staff to clarify and confirm the Authority's **compensation policy. Important considerations** to be discussed include historical practices, recruitment and retention issues, pros and cons of the current compensation system, and reliance on external market data versus internal equity for purposes of setting salaries. The consultants will work with appropriate Authority representatives to determine comparison agencies and the scope of

compensation data to be collected. Our proposal includes the tasks necessary to identify comparable employers and conduct a custom market survey.

Our analysis of the potential and recommended survey employers will be documented in a memorandum report after consultation with appropriate Authority representatives. If desired, the consultants can conduct a workshop session that identifies labor market selection parameters, options, and pros/cons of different market approaches. The draft labor market recommendations will be reviewed by appropriate Authority representatives so that all questions and issues are resolved. In that these decisions directly impact the parameters of the market survey, as well as the design and structure of the resulting compensation plan, our suggested approach recommends that these study tasks occur prior to the collection and analysis of the market data.

### Task 9 – Collect Compensation Data

After the compensation policy discussion, the consultant team will collect and analyze the compensation data. Our proposed approach would include:

- An initial contact to each labor market employer included in the study to explain the purpose and scope of the survey and confirm cooperation.
- The collection and analysis of source documents from each survey agency including position control documents, job descriptions, salary schedules, benefit summaries, and MOUs.
- The confirmation of all compensation data through telephone calls, email, and other means. This will assure that comparability is established and that all compensation data is factual and complete.

The compensation survey elements will be discussed and confirmed with the Authority before the survey is initiated.

### Task 10 – Compile and Format Compensation Data

The salary data, once collected and thoroughly reviewed for completeness and accuracy, will be appropriately formatted and the results tabulated in a consistent and uniform manner by the project consultants. The analysis will include pay structure trends and base salary analysis to ensure all appropriate comparison criteria is available for developing recommendations. Through the use of spreadsheet applications developed by our office, it is anticipated that standard formulas will be applied in the calculation of the survey data mean, median, and selected percentiles, with the corresponding percentage relationship to the market data also calculated. Data presentation will be customized to fit the Authority's **objectives**.

### Task 11 – Audit and Finalize Compensation Data

Prior to developing specific salary recommendations, the consultants will thoroughly review and audit the collected survey data. This will include a detailed analysis of data reliability, comparability, statistical validity, and consistency. This audit will be conducted by the Project Manager independent of the consultant who collected that data. This will ensure that the most accurate and defensible survey data is utilized in comparing

the Authority's **compensation plan to the pay practices of the labor market**. This analysis will also include the preparation of graphs and other presentation materials to aide in understanding the market relationships broken down by employee/bargaining group.

### Task 12 – Conduct Internal Relationship Analysis

This task will include the development and application of an appropriate job evaluation methodology in order to meet with the Authority's **policy objectives and comply with local** laws, rules, and regulations. The firm has a number of job evaluation systems available and will recommend and adapt the methodology that best aligns with the Authority's historical practices and policy objectives.

Using the results of the job evaluation analysis, the consultants will analyze internal pay relationships. The internal pay relationship analysis will involve a number of steps in order to arrive at sound and equitable relationships for the new compensation plan. Among others, the most important of these will include:

- Analysis of existing and historical pay relationships
- Development of consistent, uniform, and realistic guidelines for determining internal relationships
- Recommendation of equitable and appropriate internal relationship differentials based on the above.

In developing consistent internal relationship guidelines, the results of the job evaluation tasks will be used to determine an equitable pay structure. Since the balance of market values versus internal values can be a policy issue, options and methodologies for achieving an appropriate balance of internal and external salary equity will be reviewed with the Authority before developing the salary range recommendations.

### Task 13 – Develop Salary Recommendations

Based upon the results of the internal relationships analysis and the labor market survey, the project consultants will develop salary recommendations for all job classes included as a part of the study process. These salary recommendations will clearly document the means of determining the appropriate pay range and the computation of the dollar and percentage difference between the current maximum salary and the recommended maximum salary.

Before finalizing the recommendations, a careful audit of the results will be undertaken to ensure that internal salary compression or compaction does not result.

### Task 14 – Develop Implementation Strategy Options and Compute Implementation Costs

Recognizing that public agencies often have limited funds available for implementation, the project consultants will develop several strategies for implementing the recommended salary structure. Such strategies will address:

- The placement of individual employees into ranges and steps

- Implementation phasing according to the needs and priorities of the Authority
- Integration of the study recommendations with the balance of the Authority's human resource management system including recruitment, selection, and performance appraisal.

The cost estimates will reflect Authority-wide impacts, as well as impacts on individual employees. The cost estimates will serve as a basis for the Authority to make necessary policy decisions to implement the compensation system in an orderly and effective manner.

### Task 15 – Prepare and Review Preliminary Report

The Preliminary Report documents all classification and compensation study recommendations and the supporting information used for developing the recommendations. Specifically, the Preliminary Report will include the following:

- The Authority's **documented compensation policy including survey agencies and** survey classifications
- Results of the labor market salary survey using tables and graphs
- Documentation of selected benchmark classifications and the related job families
- Appendices containing detailed labor market data sheets, recommended salary schedules, and supporting documentation.

The project consultants will conduct an in-depth review of the Preliminary Compensation Report with the Authority. Any needed corrections, clarifications, or modifications will be discussed at this time.

Review of the Draft Compensation Report will also include an appeal process that meets the Authority's **objectives. Employees, managers, and/or labor representatives will be** able to submit specific issues and comments which will be researched, analyzed, and documented by the consultants. The consultants will provide the Authority with a written response to these issues as well as any changes in our draft recommendations.

### Task 16 – Prepare and Submit Final Reports

The Final Reports will incorporate any appropriate revisions identified and submitted during the review of the preliminary reports and will serve as the administrative and procedural manuals for updating and maintaining the classification and compensation plans. The submittal of final reports will also include on-site presentations to managers, labor representatives, and the Board of Directors. It is not uncommon for a series of draft reports to be prepared, each incrementally addressing feedback and policy direction by the Authority. Submittal of the final reports will also include training of Authority staff as needed.



## Structure and Work Product

Based on our review of the Authority's **RFP**, we understand the scope of services includes the collection and analysis of market survey data, the review and analysis of internal relationships, and recommendations for updating job descriptions. The specific scope addressed in our proposal includes the following tasks and deliverables.

Major Tasks	Deliverable
Collection and analysis of market survey data <ul style="list-style-type: none"> <li>• Base salary, benefits, add pays, and special compensation</li> <li>• All job classifications</li> </ul>	Compensation Report with: <ul style="list-style-type: none"> <li>• Recommended survey agencies and data sources</li> <li>• Graphs and tables</li> <li>• Base salary data sheets</li> <li>• Benefits data</li> <li>• Leave data</li> </ul>
Internal relationship analysis <ul style="list-style-type: none"> <li>• Identification of benchmark classes</li> <li>• Internal relationships analysis and documentation</li> <li>• Recommended salary range changes</li> </ul>	Table of job classifications along with: <ul style="list-style-type: none"> <li>• Current salary range</li> <li>• Recommended salary range</li> <li>• Dollar and percentage change</li> <li>• Rationale for salary placement</li> </ul>
Implementation cost analysis <ul style="list-style-type: none"> <li>• Identify implementation options</li> <li>• Cost analysis based on current employee salary placements and/or budgeted positions</li> </ul>	List of implementation options and costs in tabular form  <b>Dynamically set up to allow for “what if” analyses</b>
Job classifications and descriptions <ul style="list-style-type: none"> <li>• Employees complete Job Analysis Questionnaire</li> <li>• Employee Interviews</li> <li>• FLSA Analysis</li> </ul>	Updated job descriptions  Recommended title changes  FLSA designations

**All of the above deliverables will be provided in a format that meets the Authority's objectives.** Our analyses and work products are conducted using Microsoft Excel, Word, and PowerPoint with some proprietary analysis conducted using Excel. We can provide source documents and PDF files as required by the Authority.



# Work Schedule

## Proposed Schedule

Projects of this nature are highly sensitive. Because of this sensitivity and the anxiety experienced by many employees when going through this type of process, it is beneficial to complete the analysis in the most expedient manner feasible. Assuming full cooperation of the Authority and the survey agencies, our schedule assumes that all study activities can be completed within twelve (12) weeks which ensures completion by the Authority's desired completion date.

	1	2	3	4	5	6	7	8	9	10	11	12
Task 1-Conduct project initiation meetings *	■											
Task 2-Employees complete questionnaires	■		■									
Task 3-Conduct job analysis interviews *				■	■							
Task 4-Prepare and review preliminary classification report						■	■					
Task 5-Prepare class specifications							■	■	■			
Task 6-Undertake review process *								■	■	■	■	
Task 7-Finalize classification plan												■
Task 8-Discuss and document compensation policy *				■	■							
Task 9-Collect compensation data							■	■				
Task 10-Compile and format data								■	■			
Task 11-Audit and finalize compensation data									■	■		
Task 12-Conduct internal relationship analysis										■	■	
Task 13-Develop salary recommendations											■	■
Task 14-Develop implementation strategies												■
Task 15-Prepare/review preliminary reports *												
Task 16-Prepare and present final reports *												■

\* Anticipated on-site meetings; key milestones shown in blue

## References

These references represent a small sample of similar projects conducted by the firm. Doug Johnson served as project manager and Jeff McMurdo served as the primary consultant.

### City of Auburn, CA

*Scope of Work:* Classification and Compensation Study 2022-2023.

*Contact:* Nathan Bagwill, Director of Administrative Services  
1225 Lincoln Way, Auburn, CA 95603  
(530) 823-4211, Ext 110  
[nbagwill@auburn.ca.gov](mailto:nbagwill@auburn.ca.gov)

### City of Reno/City of Sacramento/Sloan Sakai Law Firm Support

*Scope of Work:* Classification and Compensation Studies and Expert Witness Services.\* Various projects totaling over \$500,000.

*Contact:* Mr. Mark Gregersen  
(775) 556-3000  
[markgregersen@gmail.com](mailto:markgregersen@gmail.com)

*\*Mr. Gregersen can speak to a number of projects conducted by the firm.*

### Municipal Water District of Orange County

*Scope of Work:* Classification and Compensation Studies (2017, 2020, 2023).

*Contact:* Cathleen Harris, Director of Human Resources and Administration  
18700 Ward Street, Fountain Valley, CA 92708  
(714) 593-5007  
[charris@mwdoc.com](mailto:charris@mwdoc.com)

### Olivenhain Municipal Water District

*Scope of Work:* Total Compensation Studies in 2015, 2018, 2021, and 2023.

*Contact:* Jennifer Joslin, Human Resources Manager  
1966 Olivenhain Rd, Encinitas, CA 92024  
(760) 632-4210  
[jjoslin@olivenhain.com](mailto:jjoslin@olivenhain.com)

### Otay Water District

*Scope of Work:* Total Compensation Studies in 2012, 2014, 2016, and 2017-18 in support of labor negotiations.

*Contact:* Suzie Lawson, Human Resources Manager  
2554 Sweetwater Springs, Spring Valley, CA 91978  
(619) 670-2227  
[slawson@otaywater.gov](mailto:slawson@otaywater.gov)

## Fee

The total fixed cost for professional service fees and non-travel expenses to conduct the Classification and Compensation Study, as proposed, amounts to \$42,800. The cost of professional services is based upon the project as described in the work plan and is a **“fixed fee” regardless of which consultant performs the task and/or the number of hours** needed to complete a particular element of the study.

The proposed professional services costs are based on the following hourly rates:

- Project Manager - \$155
- Project Consultant - \$140
- Research/Support Staff - \$85

Due to continued Covid-19 restrictions, the firm has completed almost 50 classification and compensation studies using virtual meeting platforms such as Zoom and Microsoft Teams. For efficiency, our proposed cost assumes virtual meetings will be used for kick-off meetings, employee briefing sessions, employee interviews, and the review and presentation of draft and final reports. There is no limit to the number of virtual meetings.

If on-site meetings are required, the additional cost would be \$2,500 per day which includes professional fees and expenses.

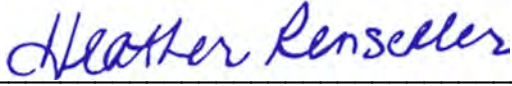
Project invoicing will be done monthly based on the percentage completion of the project. If the scope of the analysis creates budget problems for the Authority, or if additional analysis is desired, we are willing to review the work plan and adjust it and the cost so that it is mutually satisfactory.

# Required Forms

## SECTION 3 – FORMS

### PROPOSAL SIGNATURE FORM

Your signature on this document below, should you be awarded a contract as defined in this RFP, signifies that you have fully read and understood this proposal and will comply with all specifications, conditions, unit prices, terms, and delivery of the proposal unless otherwise noted on the Exception Form.



Signature

Ralph Andersen & Associates

Company Name

Heather Renschler

Printed Name

003103 (City of Rocklin, California)

Business License Number

President/CEO

Title

December 21, 2023

Date

## CONSULTANT IDENTIFICATION

1. Legal Name of Consultant: Ralph Andersen & Assocaites
  2. Street Address: 5800 Stanford Ranch Road, Suite 410, Rocklin, CA 95765
  3. Mailing Address: 5800 Stanford Ranch Road, Suite 410, Rocklin, CA 95765
  4. Business Telephone: (916) 630-4900
  5. Facsimile Telephone: (916) 630-4911
  6. Type of Business:
    - ☐ Sole Proprietor
    - ☐ Partnership
    - ☒ Corporation
    - ☐ LLC
    - ☐ LLP
    - ☐ Other: \_\_\_\_\_
- Indicate State of formation: California
7. Business License number issued by the City where the Consultant's principal place of business is located.  
  
License Number: 003103  
  
Issuing City: City of Rocklin, California
  8. Federal Tax Identification Number: 94-2299383
  9. Consultant's Contact Person: Doug Johnson

## EXCEPTION FORM

Should your firm take exception to **ANY** of the terms and conditions or other contents provided in the "Request for Proposals," list the exceptions below. **THIS COMPLETED FORM MUST BE RETURNED WITH YOUR PROPOSAL.** If no exception(s) are taken, enter "***NONE***" for the first item. (*Make additional copies of this form as necessary*)

Page Number: \_\_\_\_\_ Section Title: None \_\_\_\_\_

Paragraph Number: Exception Taken: \_\_\_\_\_

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Page Number: \_\_\_\_\_ Section Title: \_\_\_\_\_

Paragraph Number: Exception Taken: \_\_\_\_\_

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Page Number: \_\_\_\_\_ Section Title: \_\_\_\_\_

Paragraph Number: Exception Taken: \_\_\_\_\_

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## Appendix A

### Five-Year Listing of Clients



# Appendix A

## Five Year Client Listing

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
<b>Cities</b>			
City of Albany 1000 San Pablo Ave. Albany, CA 94706	Classification & Compensation Study Compensation Study Update	Melissa Rojas Human Resources Director	(510) 528-5714 MRojas@albanyca.org
City of Arcadia 240 W. Huntington Drive Arcadia, CA 91066	Classification & Compensation Study	Tracey Hause Administrative Services Director	(626) 574-5425 thause@ci.arcadia.ca.us
City of Auburn 1225 Lincoln Way Auburn, CA 95603	Classification & Compensation Study	Nathan Bagwill Director of Administrative Services	(530) 823-4211, ext. 110 nbagwill@auburn.ca.gov
City of Baldwin Park 14403 E. Pacific Avenue Baldwin Park, CA 91706	Salary Compensation Survey	Laura J. Thomas Human Resources/Risk Manager	(626) 960-4011 ext. 355 lthomas@baldwinpark.com
City of Beaumont 550 E 6 <sup>th</sup> Street Beaumont, CA 92223	Classification & Compensation Study Compensation Study Survey Update 2022	Kari Mendoza Administrative Services Director	(951) 572-3228 karim@beaumont-ca.gov
City of Big Bear Lake 39707 Big Bear Blvd. P.O. Box 10000 Big Bear Lake, CA 92315	Salary Survey – Chief Operations Officer	Erica Stephenson Administrative Services Manager	(909) 866-5831 x120 estephenson@citybigbearlake.com
City of Carlsbad 1635 Faraday Ave. Carlsbad, CA 92008	Compensation Study – Management CSEA Survey Update 2021 Range Structure Analysis CCEA Compensation/Benefits Study Benefits Update 2022	Drew Cook Human Resources Department	(760) 602-7536 drew.cook@carlsbadca.gov
City of Carson 701 E. Carson Street Carson, CA 90749	Compensation Survey	Faye Moseley Director of Human Resources and Risk Management	(310) 952-1735 fmoseley@carson.ca.us

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Chico 411 Main Street Chico, CA 95928	Compensation Study	Chelsea D. Phebus Director of Human Resources and Risk Management	(530) 879-7901 Chelsea.phebus@chicoca.gov
City of Coachella 1515 Sixth Street Coachella, CA 92236	Compensation Study	Sandy Krause Human Resources Manager	(760) 398-3502 ext. 132 skrause@coachella.org
Cordova Recreation & Park District 2729 Prospect Park Drive, Suite 230 Rancho Cordova, CA 95670	Classification and Compensation Study	Andrea White, SPHR Human Resource Manager	(916) 842-3315 awhite@crpd.com
City of Coronado 1825 Strand Way Coronado, CA 92118	Executive and Division Manager Compensation Analysis	Jim Krueger Administrative Services Director	(619) 522-7309 jkrueger@coronado.ca.us
City of Cupertino 10300 Tore Avenue Cupertino, CA 95014	Compensation Survey	Kristina Alfaro Director of Administrative Services	(408) 777-3220 KristinaA@cupertino.org
City of Hercules	Classification and Compensation Study	Jenny E. Smith Human Resources Specialist	(510) 799-8214 jenny.smith@ci.hercules.ca.us
City of Hermosa Beach 1315 Valley Drive Hermosa Beach, CA 90254	City Council Compensation Survey Compensation Survey 2023 Base Salary Update	Vanessa Godinez Human Resources Manager	(310) 318-0202 vgodinez@hermosabch.org
City of Hollister 327 Fifth Street Hollister, CA 95023	Total Compensation Study	Diana Hillstock Human Resources Manager	(831) 636-4301 ext. 1124 diana.hillstock@hollister.ca.gov
City of Indio 100 Civic Center Mall Indio, CA 92201	Classification and Compensation Study	Terry Derringer Director of Human Resources & Risk Management	(760) 391-4009 tderringer@indio.org
City of Irwindale 5050 North Irwindale Avenue Irwindale, CA 91706	Compensation Study	Mary Hull Human Resources Manager	(626) 430-2204 mhull@IrwindaleCA.gov
City of Ketchikan, AK 334 Front Street Ketchikan, AK 99901	Compensation Study and Technical Assistance on Related Matters Technical Assistance	Marie Miller Human Resources Manager	(907) 228-5623 mariem@city.ketchikan.ak.us
City of La Mirada 13700 La Mirada Blvd. La Mirada, CA 90638	Total Compensation Study	Cristina Cota Human Resources Manager	(562) 943-0131 ccota@cityoflamirada.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Laguna Hills 24035 El Toro Road Laguna Hills, CA 92653	Classification and Compensation Study	Melissa Au-Yeung Deputy City Manager	(949) 707-2621 mau-yeung@ci.laguna-hills.ca.us
City of Lake Forest 25550 Commercentre Drive, Suite 100 Lake Forest, CA 92630	Classification and Compensation Study City Manager Survey Technical Assistance Class Analysis Memo Classification and Compensation 2022-23	Debra Rose Director of Management Services	(949) 461-3414 drose@lakeforestca.gov
City of Menlo Park 428 J Street, Ste. 400 Sacramento, CA 95814	Police Chief Compensation Survey	Mark Gregersen Former Director of Human Resources, City of Reno Former Consultant with Sloan Sakai	(916) 300-8441 mark@mgregersen.com
City of Merced 678 West 18 <sup>th</sup> Street Merced, CA 95340	Classification Study	Deneen Proctor Director of Support Services	(209) 385-4780 proctord@cityofmerced.org
City of Mercer Island 9611 SE 36 <sup>th</sup> Street Mercer Island, WA 98040	Classification & Compensation Study	Ali Spietz Chief of Administration	(206) 275-7667 ali.spiez@mercerisland.gov
City of Modesto 1010 10 <sup>th</sup> Street Modesto, CA 95354	Classification & Compensation Study	Joseph P. Lopez Assistant City Manager	(209) 571-5809 joelopez@modestogov.com
City of Monterey 735 Pacific Street, Suite B Monterey, CA 93940	FFMA Survey Update	Allyson Hauck Human Resources Director	(831) 646-3767 hauck@monterey.org
City of Monterey 735 Pacific Street, Suite B Monterey, CA 93940	Compensation Study MPA Update (February 2020)	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com
City of Monterey Park 320 West Newmark Avenue Monterey Park, CA 91754	Classification & Compensation Study	Christine Tomikawa Director of Human Resources and Risk Management	(626) 307-1345 ctomikawa@montereypark.ca.gov
City of National City 1243 National City Blvd. National City, CA 91950	Compensation Survey	Eddie Kreisberg Attorney	(650) 248-2125 eddie@kreisberg-law.com
City of Oakland 1220 7 <sup>th</sup> Street Berkeley, CA 94710	Fire Arbitration	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Palm Springs 3200 E. Tahquitz Canyon Way Palm Springs, CA 92262	Total Compensation Survey Total Compensation Survey (Police) Compensation Survey – Airport Operations Supervisor	Perry Madison Director of Human Resources	(760) 323-8215 Perry.Madison@palmspringsca.gov
City of Palo Alto 250 Hamilton Avenue Palo Alto, CA 94303	Compensation Survey – POA / IAFF / FCA Compensation Survey – UMPAPA Market Study – SEIU – Inspector Field Services Management and Professional Group Market Study	Rumi Portillo Chief People Officer	(650) 329-2376 rumi.portillo@cityofpaloalto.org
City of Paramount 16400 Colorado Avenue Paramount, CA 90723	Compensation Study Minimum Wage Compression Study 2022 Compensation Study Update Community Services Superior Survey Water Department Survey	Jonathan Masannat Human Resources Manager	(562) 220-2022 jmasannat@paramountcity.com
City of Petaluma 11 English Street Petaluma, CA 94952	Classification and Compensation Study – Full-time Miscellaneous Non-Sworn Positions POA Non-Sworn Survey Update	Amy Reeve Director of Human Resources	(707) 778-4343 areeve@ci.petaluma.ca.us
City of Piedmont 120 Vista Avenue Piedmont, CA 94611	Community Service Officer Classification / Compensation Survey	Stacy A. Jennings Human Resources Administrator	(510) 420-3047 sjennings@piedmont.ca.gov
City of Port Hueneme 250 N. Ventura Road Port Hueneme, CA 93041	Classification & Compensation Study 2021	Melanie Hanisco Human Resources Manager	(805) 986-6501 mhanisco@ci.port-hueneme.ca.us
City of Rancho Cordova 2729 Prospect Park Drive Rancho Cordova, CA 95670	Classification & Compensation Study	Brenda L. Roach Human Resources Manager	(916) 851-8741 broach@cityofranchocordova.org
City of Red Bluff 555 Washington St. Red Bluff, CA 96080	Compensation Study	Scott Garrison Human Resources Administrator	(530) 527-2605 ext. 3051 sgarrison@cityofredbluff.org
City of Redondo Beach 415 Diamond Street Redondo Beach, CA 90277	Targeted Classification & Compensation Study	Diane Strickfaden Director of Human Resources	(310) 318-0659 ext. 2832 Diane.strickfaden@redondo.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Reno, NV P.O. Box 1900 Reno, NV 89505	Labor Market Analysis Police and Fire Compensation Study	Mark Gregersen Former Director of Human Resources	(916) 300-8441 mark@mgregersen.com
City of Reno, NV 1 E. First Street, 11 <sup>th</sup> Fl Reno, NV 89501	Total Compensation Survey	Jesse Puett Management Analyst	(775) 348-6901 puettj@reno.gov
City of Sacramento, CA 428 J Street, Ste. 400 Sacramento, CA 95814	Compensation Services Police Officers Association Arbitration EMT/Paramedic 2022 Fire Survey 2021 Fire Survey 2022 POA Survey 2021 Mayor and City Council Survey 2022 Survey – Deputy Attorney	Mark Gregersen Former Director of Human Resources, City of Reno Former Consultant with Sloan Sakai	(916) 300-8441 mark@mgregersen.com
City of Sacramento 915 I Street Sacramento, CA 95814	Salary Surveys 2017-18 Fire and Locksmith Survey Salary Surveys (4 positions) Fire Survey Update 2018 6 Class Survey May 2019 Sacramento Fire Local 2019 Treasury Study – Salary Survey 2 Positions POA Survey 2019 LOC 39 – 5 Classes Survey POA Local Market Survey July 2019 Fire Retiree Health Survey 2019 Fire Arbitration Compensation Survey – Procurement Services Manager Salary Survey – Fire 2020 POA 2020 Survey Update POA 2021 Survey Mayor and City Council Survey 2022 Police Shift Differential	Shelley Banks-Robinson Labor Relations Manager	(916) 808-5541 SMBanks-Robinson@cityofsacramento.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of St. Helena 1480 Main Street St. Helena, CA 94574	Classification & Compensation and Organization Review of the Public Works Department  Technical Assistance – Human Resources Technician  Compensation Study Update  Base Salary Survey	Kathy Robinson, SPHR Human Resources & Information Technology Director	(707) 968-2741  krobinson@cityofstheleena.org
City of Santa Barbara 735 Anacapa Street Santa Barbara, CA 93101	Supervisor's Association Salary Survey	Sam Ramirez Administrative Analyst III, Labor Relations	(805) 564-5304  scramirez@santabarbaraca.gov
City of Santa Clara 1500 Warburton Avenue Santa Clara, CA 95050	Compensation Study  Fire Survey Update  2019 Survey Update (3 classes)	Julia Hill Assistant Director of Human Resources	(408) 615-2161  JHill@santaclaraca.gov
City of Santa Rosa 350 Sansome Street, Suite 300 San Francisco, CA 94104	Fire Arbitration	Jonathan Holtzman Partner	(415) 848-7235  jholtzman@publiclawgroup.com
City of Santee 10601 Magnolia Avenue Santee, CA 92071	Classification Study	Erica Hardy Director of Human Resources	(619) 258-4100 ext. 132  EHarding@CityofSanteeCa.gov
City of Shoreline 17500 Midvale Ave. N Shoreline, WA 98133	Compensation Study	Melissa Muir Human Resources Director	(206) 801-2241  mmuir@shorelinewa.gov
City of Signal Hill 2175 Cherry Avenue Signal Hill, CA 90755	Compensation Study  Comprehensive Compensation Study of City-wide Job Classes	Sylvia Soong Human Resources Manager	(562) 989-7307  ssoong@cityofsignalhill.org
City of Simi Valley 2929 Tapo Canyon Road Simi Valley, CA 93063	Job Analysis (Waterworks Meter Reader and Water system Supervisor  Classification Study – Emergency Services Manager  Technical Assistance – Classification and Compensation  Survey (4 Positions) and Purchasing Agent Technical Assistance  Purchasing Agent Survey and Job Description  4 Class Survey  Assistant Public Works Director Survey	Elizabeth Foushee Deputy Director/Human Resource	(805) 583-6741  EFoushee@simivalley.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
City of Snoqualmie, WA 38624 SE River Street Snoqualmie, WA 98065	Classification and Compensation Study of all Management and Professional Positions	Debra Vigil Director of Administrative Services	(425) 888-8004 dvigil@ci.snoqualmie.wa.us
City of South Lake Tahoe 1901 Airport Road, S Lake Tahoe, CA 96150	Classification & Compensation Study On-going Technical Assistance	Ember E. Buckman Human Resources Manager	(530) 542-6050 ebuckman@cityofslt.us
City of South Pasadena 1414 Mission Street South Pasadena, CA 91030	Technical Assistance on Classification and Compensation Matters	Tara Schultz Interim Human Resources Director	(626) 403-7312 tschultz@southpasadenaca.gov
City of Stockton 22 E. Weber Ave., Suite 150 Stockton, CA 95202	Department Head Survey Update 2017 Technical Assistance	Teresia Zadroga-Haase Human Resources Director	209-937-8344 Teresia.Haase@stocktongov.com
City of Suisun City 701 Civic Center Blvd. Suisun City, CA 94585	Compensation Study	Joe Dingman Administrative Services Director	(707) 421-7300 jdingman@suisun.com
City of Sunnyvale P.O. Box 3707 Sunnyvale, CA 94088	Technical Assistance (Master Contract) Survey Update – COA (Dispatchers) Fire Protection Classification and Compensation Study PSOA Annual Survey IT Structure and Survey 2022 COA Survey 2023 PSOA Survey 2023	Tammy Parkhurst Human Resources Manager	(408) 730-7498 tparkhurst@ci.sunnyvale.ca.us
City of Tracy 333 Civic Center Plaza Tracy, CA 95376	Total Compensation Study	Midori Lichtwardt Director of Human Resources	(209) 831.6159 midori.lichtwardt@ci.tracy.ca.us
City of Tulare 411 E. Kern Avenue Tulare, CA 93274	Total Compensation Survey Sworn Fire Total Compensation Survey	Irene M. Santos Management Analyst	(559) 684-4204 isantos@tulare.ca.gov
City of Union City 34009 Alvarado Niles Rd. Union City, CA 94587	Total Compensation Survey	Lilybell Nakamura Director of Human Resources	(510) 675-5381 <a href="mailto:lilybelln@Unioncity.org">lilybelln@Unioncity.org</a>
City of Watsonville 1220 7 <sup>th</sup> Street Berkeley, CA 94710	Fire Arbitration	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com



Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
<b>Counties</b>			
Mono County P.O. Box 696 Bridgeport, CA 93517	Salary and Compensation Analysis	Dave Butters Human Resources Director	(760) 932-5413 dbutters@mono.ca.go
Napa County 1195 Third Street Napa, CA 94559	SEIU Limited Compensation and Internal Alignment Management Survey Update – 2018 PSE Compensation Survey 2019 SEIU Compensation Survey Update 2020 PSE Survey Update October 2021 Management Conf. Benchmark Survey 2021 Union Survey (2022) Fire Compensation Cost Study Management Compensation Study	Christine M. Briceno Director of Human Resources	(707) 259-8341 Christine.briceno@countyofnapa.org
Sacramento County 700 H Street, Room 7650 Sacramento, CA 95814	Unrepresented Management Compensation Survey Compensation Survey – Board of Supervisor Class Total Compensation Study – Unrepresented Job Classifications	Karen Farrel Senior Personnel Analyst	(916) 874-7974 farrelk@sacounty.gov
San Benito County 481 4 <sup>th</sup> Street Hollister, CA 95023	Classification & Compensation Study	Edgar Nolasco Deputy County Administrative Officer	(831) 636-4000 ext. 16 Enolasco@cosb.us
San Joaquin County 24 South Hunter Street Stockton, CA 95202	Multiple classification and compensation studies of various employee groups conducted since 1998	Marilyn Maskell Principal Human Resources Analyst	(209) 468-3276 mmaskell@sjgov.org
San Joaquin County 428 J Street, Ste. 400 Sacramento, CA 95814	SEIU Factfinding 2019	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com
San Luis Obispo County 1220 7 <sup>th</sup> Street Berkeley, CA 94710	Factfinding SLOCEA – Technical Assistance Factfinding SDSA – Technical Assistance Compensation Study	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com



Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Santa Barbara County 1226 Anacapa Street Santa Barbara, CA 93101	Executive Salary Study (SBCERS)	Stefan Brewer Workforce Planning Manager	(805) 56802806 sbrewer@countyofsb.org
Solano County 675 Texas Street Fairfield, CA 94533	Compensation & Benefits Studies	Marc A. Fox Director of Human Resources	(707) 784-2552 MAFox@SolanoCounty.com
Sonoma County 575 Administration Drive #116B Santa Rosa, CA 95403	Total Compensation Survey – Phase I (18 Job Classes)  Total Compensation Survey – Phase II (141 Job Classes)  Total compensation Survey – Phase III (9 Water Agency Job Classes)  Human Resources Classification Study  EFS Manager  2018 Compensation Survey Update  Classification Study Community Development Commission	Lisa Conner Human Resources Analyst III	(707) 565-5119 Lisa.conner@sonoma-county.org
<b>Higher Education</b>			
Mendocino College 1000 Hensley Creek Road Ukiah, CA 95482	Technical Assistance on Classification and Compensation Matters	Nicole Marin, SHRM-CP Director of Human Resources	(707) 468-3056 nmarin@mendocino.edu
Southwestern Community College District  900 Otay Lakes Rd. Chula Vista, CA 91910	Ad-Hoc Technical Assistance	Rose C. DelGaudio Executive Assistant Superintendent/Vice President for Human Resources	(619) 482-6328 rdelgaudio@swccd.edu
<b>Water Districts</b>			
Alameda County Water District 43885 S. Grimmer Blvd. Fremont, CA 94538	Classification and Compensation Study	Jennifer Solito, M.A., SPHR Human Resources & Risk Manager	(510) 668-4220 Jennifer.solito@acwd.com
East Bay Regional Park District P.O. Box 5381 Oakland, CA 94605- 0381	Classification and Compensation for Management, Confidential, POA, and Seasonal Employees  Technical Assistance	Dr. Ana M. Alvarez Deputy General Manager	(510) 544-2011 AAAlvarez@ebparks.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
East Bay Regional Park District 2225 E Bayshore Road, Suite 200 Palo Alto, CA 94303	AFSCME Survey Update 2021 Survey Update 2021 Management, Confidentials, Police Association	Eddie Kreisberg Attorney	(650) 248-2125 eddie@kreisberg-law.com
Irvine Ranch Water District 15600 Sand Canyon Avenue Irvine, CA 92618	2014/2015 Compensation Survey Compensation Study 2018 Compensation Survey 2021	Gretchen C. Ronin Human Resources Manager	(949) 453-5438 Maswadeh@irwd.com
Mesa Water District 1965 Placentia Avenue Contra Costa, CA 92627	Technical Assistance on Classification and Compensation Matters	Coleen L. Monteleone Administrative Services Manager	(949) 631-1205 coleenm@mesawater.org
Municipal Water District of Orange County 18700 Ward Street Fountain Valley, CA 92728	Classification and Compensation Study	Cathleen Harris Director of Human Resources and Administration	(714) 593-5007 charris@mwdoc.com
Nevada Irrigation District 1036 West Main Street Grass Valley, CA 95945	Salary Survey	Jana Kolakowski Human Resources Manager	(530) 271-6825 kolakowskij@nidwater.com
Olivenhain Municipal Water District 1966 Olivenhain Road Encinitas, CA 92024	Compensation Survey Salary Survey	Thomas Wood Human Resources Manager	(760) 632-4211 twood@olivenhain.com
Otay Water District 2554 Sweetwater Springs Spring Valley, CA 91978	Compensation and Benefits Study Technical Assistance Compensation Study	Kelli Williamson Human Resources Manager	(619) 670-2227 kwilliamson@otaywater.gov
Sacramento Suburban Water District 3701 Marconi Avenue, Suite 100 Sacramento, CA 95821	2018 Compensation Study	Dan Bills Finance Director	(916) 679-3970 dbills@sswd.org
South Coast Water District 31592 West Street Laguna Beach, CA 92651	Classification, Compensation, and Benefits Study Additional Classification and Compensation Study 2021	Robin Wiessner, CPBA, HCS HR & Risk Manager	(949) 499-4555 ext. 3118 RWiessner@scwd.org
South Placer Municipal Utility District 5807 Springview Drive Rocklin, CA 95677	Classification and Compensation Study	Emilie Costan, CRM Administrative Services Manager	(916) 786-8555 ecostan@spmud.ca.gov

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Sweetwater Authority 505 Garrett Avenue Chula Vista, CA 91910	Salary and Benefits Survey	Jennifer Sabine Assistant General Manager	(619) 409-6702 jsabine@sweetwater.org
Trabuco Canyon Water District 32003 Dove Canyon Drive Trabuco Canyon, CA 92679	Classification and Compensation Matters	Fernando Paludi General Manager	(949) 709-5721 fpaludi@tcwd.ca.gov
Turlock Irrigation District 333 East Canal Drive Turlock, CA 95381	Compensation Study	Jorian Reed Director of Human Resources	(209) 883-8252 jhreed@tid.org
Vallecitos Water District 201 Vallecitos de Oro San Marcos, CA 92069	Classification and Compensation Study 2022 Compensation Study	Rhondi Emmanuel Administrative Services Manager	(760) 744-0460 ext. 240 remmanuel@vwd.org
Valley of the Moon Water District P.O. Box 280 El Verano, CA 95433	Compensation Study	Matthew Fullner General Manager	(707) 996-1037 x10 mfullner@vomwd.org
West Basin Municipal Water District 17140 S. Avalon Blvd., Suite 210 Carson, CA 90746	Classification and Compensation Study	Michelle Green Human Resources Officer	(310) 660-6228 michelleg@westbasin.org
Other Districts and Authorities			
Housing Authority of the City of Alameda 701 Atlantic Avenue Alameda, CA 94501	Total Compensation Study Compensation Study – Exempt Positions Compensation Study of Non-Exempt Positions Management Compensation Review (Amended Scope) Compensation Study – Executive Director Compensation Study for AHA Director Positions	Vanessa M. Cooper Executive Director	(510) 747-4320 vcooper@alamedahsg.org
Alameda County Housing Authority 22941 Atherton Street Hayward, CA 94541	Management Compensation Study	Thomas Makin Deputy Director for Operations	(510) 727-8516 TomM@haca.net
Aptos-La Selva Fire Protection District 428 J Street, Ste. 400 Sacramento, CA 95814	Business Manager Survey	Charles Sakai Managing Partner	(415) 299-0856 csakai@publiclawgroup.com

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Association of Regional Center Agencies (ARCA) 980 9 <sup>th</sup> Street, Ste. 1450 Sacramento, CA 95814	Compensation Analysis – Executive Director	Kathy Hebert ARCA Board of Directors President	(916) 446-7961 Mom2gjc@gmail.com
Black Gold Cooperative Library System 580 Camino Mercado Arroyo Grande, CA 93420	Classification Study and Total Compensation Survey	Glynis Fitzgerald Director of Operations	(805) 543-6082 gfitzgerald@blackgold.org
Conejo Recreation and Park District 403 West Hillcrest Drive Thousand Oaks, CA 91360	Technical Assistance – Class & Compensation Matters	Phyllis Bluhm Human Resources Supervisor	(805) 381-1221 pbluhm@crpd.org
Contra Costa County Schools Insurance Group 550 Ellinwood Way Pleasant Hill, CA 94523	Compensation Study	Erica Williamson Human Resources Manager	(866) 922-2744 ewilliamson@cccsig.org
Costa Mesa Sanitary District 290 Paularino Avenue Costa Mesa, CA 92626	Classification and Compensation Study	Dyana Bojarski Management Analyst II	(949) 645-8400 ext. 226 DBojarski@cmsdca.gov
El Dorado County Transit Authority 6565 Commerce Way Diamond Springs, CA 95619	Compensation & Benefits Study	Maria Harris Human Resources Manager	(530) 642-5383 ext. 2909 mharris@eldoradotransit.com
Hayward Area Recreation and Park District 1099 E Street Hayward, CA 94541	Classification & Compensation Study General Manager Survey Update	Natalie Wong Human Resources Manager	510-455-1124 wonn@haywardrec.org
Menlo Park Fire Protection District 170 Middlefield Road Menlo Park, CA 94025	AFSCME Compensation Survey Classification & Compensation Study	Brenna Rowe Human Resources Manager	(650) 688-8400 browe@menlofire.org
Montecito Sanitary District 1042 Monte Cristo Lane Santa Barbara, CA 93108	Salary Study	Stephen Williams District Administrator	(805) 969-4200 swilliams@montsa.org
North Bay Schools Insurance Group 380A Chadbourne Road Fairfield, CA 94534	Compensation Study	Jan DeGracia Executive Director	(707) 428-1830 ext. 105 jand@nbsia.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Oakland School of the Arts 1220 7 <sup>th</sup> Street Berkeley, CA 94710	Compensation Study and Research	Jeff Sloan Partner	(415) 678-3800 jsloan@sloansakai.com
Orange County Fire Authority 1 Fire Authority Road Irvine, CA 92602	Classification and Compensation As Needed	Debbie Casper, C.P.M., CPPB Purchasing & Materials Manager	(714) 573-6641 debbiecasper@ocfa.org
Redwood Empire Schools' Insurance Group 5760 Skylane Blvd., Suite 100 Windsor, CA 95492	Compensation Survey	Ronda Bergesen Business Manager	(707) 836-0779 x105 rbergesen@resig.org
Sacramento County Employees' Retirement System 980 9 <sup>th</sup> Street, Suite 750 Sacramento, CA 95812	CEO Compensation Analysis CEO Performance Evaluation System Management Compensation Survey Update 2017 Compensation Study	Kathy Ragalia Chief Operations Officer	(916) 874-9119 regaliak@sacounty.net
Sacramento County Regional Sanitation District & Sacramento Area Sewer District 10060 Goethe Road Sacramento, CA 95827	Classification Compensation Survey	Candice Mabra Human Resources Manager 2	(916) 875-2418 mabrac@sacsewer.com
San Diego County Water Authority 4677 Overland Avenue San Diego, CA 92123	Classification and Compensation Study Survey Update – 14 Positions	Ashley Kite Senior Human Resources Analyst	(858) 522-6667 akite@sdewa.org
Santa Barbara County Air Pollution Control District 260 North San Antonio Road, Suite A Santa Barbara, CA 93110	Compensation Study	Kristina Aguilar, CPA Administrative Manager	(805) 961-8800 AguilarK@sbcapcd.org
Santa Clara County Central Fire Protection District 14700 Winchester Blvd. Los Gatos, CA 95032	Total Compensation Survey – Firefighter / Engineer Compensation Survey Services for the Fire Prevention Division Fire Survey Update 2018 Total Compensation Study Salary Survey Wage Compensation Study for EMS Coordinator Position	Rebecca Lo Management Analyst	(408) 341-4457 Rebecca.lo@sccfd.org

Agency	Scope of Services	Contact Name Contact Title	Telephone Number E-mail Address
Schools Insurance Authority P.O. Box 276710 Sacramento, CA 95827	Compensation Study	Todd Cheli Human Resources Manager	(916) 364-1281 tcheli@sia-jpa.org
South Tahoe Public Utility District 1275 Meadow Crest Dr. South Lake Tahoe, CA 96150	Compensation Study One (1) Class Survey Director of Operations Survey	Liz Kauffman Human Resources Director	(530) 543-6222 lkauffman@stpud.us
State Bar of California 180 Howard St. San Francisco, CA 94105	Salary Survey and Related Services	Steve Mazer Chief Administrative Officer	(415) 538-2326 steve.mazer@calbar.ca.gov
Sweetwater Authority 505 Garrett Avenue Chula Vista, CA 91910	2023 Compensation Study	Carlos Quintero General Manager	(619) 420-1413 equintero@sweetwater.org
Tahoe Truckee Unified School District 11603 Donner Pass Road Truckee, CA 96161	Management Classification and Compensation Study	Thomas Gemma Executive Director of Administrative Services	(530) 582-2500 tgemma@ttusd.org
Teton County Fire Protection District 911 North Highway 33 PO Box 474 Driggs, ID 83422	Compensation Study and Analysis	Bret Campbell Fire Chief	(208) 715-5201 bcampbell@tetoncountyfire.com
Ventura County Employees' Retirement Association 1190 South Victoria Avenue, Suite 200 Ventura, CA 93003	Market-based Compensation Analysis	Chris Ayala Program Assistant	(805) 339-4261 Chris.Ayala@ventura.org
Whatcom Transportation Authority 2011 Young Street Bellingham, WA 98225	Compensation Study	Kimberly Somers	(360) 738-4588 kimberlys@ridewta.com

## COMMISSION MEMORANDUM NO. 2024.6

**DATE:** February 6, 2024

**TO:** SAWPA Commission

**SUBJECT:** Regional Water Quality Monitoring Task Force | Santa Ana River  
Regional Bacteria Monitoring Program

**PREPARED BY:** Rick Whetsel, Senior Watershed Manager

### RECOMMENDATION

It is recommended that the Commission authorize the General Manager to execute the following:

1. General Services Agreement with GEI Consultants; and,
2. Task Order No. GEI386-02 with GEI Consultants, a three-year task order with an option to exercise a two-year extension for an annual amount not to exceed \$397,018, totaling \$1,191,054 over the three-year period for FY 2024-25 through FY 2026-27 to oversee and implement the Santa Ana River Regional Bacteria Monitoring Program.

### DISCUSSION

In response to a Request for Proposals (RFP) issued through Planet Bids on November 2, 2023, the stakeholders of the Regional Water Quality Monitoring Task Force unanimously recommend GEI Consultants to oversee and implement the Santa Ana River Regional Bacteria Monitoring Program through FY 2024-27.

On December 14, 2023, SAWPA received two proposals in response to the RFP. These included proposals from CDM Smith and GEI Consultants.

Following staff's selection evaluation process, a proposal technical review committee composed of SAWPA staff and staff members from the Regional Water Quality Monitoring Task Force member agencies was formed to review and score proposals using a proposal rating form and conduct consultant interviews (if necessary). This panel included the following:

Rebekah Guill – Riverside County Flood Control & Water Conservation District  
Richard Boon – Riverside County Flood Control & Water Conservation District  
Christopher Bland – San Bernardino County Flood Control District  
Arlene Chun – San Bernardino County Flood Control District  
Michael Mori – County of Orange - OC Environmental Resources  
Rick Whetsel – Santa Ana Watershed Project Authority

On January 8, 2024, staff reviewed the proposal technical review committee's comments, compiled the scores, and based upon the results of this evaluation, prepared a recommendation for the proposal technical review committee to approve the selection of GEI Consultants to oversee and implement the Santa Ana River Regional Bacteria Monitoring Program. As part of this recommendation, it was suggested that, based upon the Task Force stakeholders' familiarity with each of these consulting firms and clarity of proposals that consultant interviews were not necessary.

On January 9, 2024, the proposal technical review committee confirmed the results and the recommendation to select GEI Consultants to oversee and implement the Santa Ana River Regional Bacteria Monitoring Program. This recommendation to select GEI Consultants was based upon a top proposal rating reflecting the consultant's experience and knowledge of the

program goals and objectives, technical expertise, and working relationship with Task Force and Regional Board staff.

The attached Task Order with GEI Consultants provides support services to oversee and implement the Santa Ana River Regional Bacteria Monitoring Program. Included with this Task Order is a scope of work and budget providing a detailed description of support services to be performed by the consultant, GEI Consultants through FY 2024-27 as highlighted below:

- Coordinate with stakeholders to assess the level of support required by each entity to implement the SAR Regional Bacteria Monitoring Program.
- Provide any required updates to the SAR Regional Bacteria Monitoring Plan and QAPP.
- Prepare a final project schedule for each sampling location based on the final Monitoring Plan and QAPP.
- Contract with laboratories to facilitate the monitoring program.
- Implement all aspects of the SAR Bacteria Monitoring Program as directed by the responsible agencies.
- Prepare Annual Report.
- Update and maintain online water quality reporting dashboard tool.
- Assemble all field data and laboratory results and fulfill all annual reporting and data management requirements for the monitoring program following the Americans with Disabilities Act (ADA) Standards for Accessible Design.

### **CRITICAL SUCCESS FACTORS**

SAWPA has a strong reputation as watershed-wide, knowledgeable, neutral, and trusted facilitator, leader, and administrator of contracted activities.

Goals, scope, costs, resources, timelines, and the contract term are approved by the Commission before executing an agreement to participate in a roundtable group.

Report and use results of roundtable's work, leverage information and involvement for the benefit of SAWPA, its members, and other stakeholders.

Adequate professional staff and resources to effectively provide facilitation, management, administrative and technical support to collaborative work efforts.

### **RESOURCE IMPACTS**

The Regional Water Quality Monitoring Task Force FY 2024-25 Budget provides a budget of \$400,000 to conduct the Santa Ana River Regional Bacteria Monitoring Program and will budget accordingly to fully cover monitoring program costs for the term of the agreement. All staff contract administration time for this contract will be taken from the Regional Water Quality Monitoring Task Force budget and funded by the Task Force Stakeholders.

Attachments:

1. PowerPoint Presentation
2. GEI Consultants General Services Agreement (in track changes)
3. GEI Consultants Task Order GEI386-02
4. GEI Consultants Proposal





SANTA ANA WATERSHED  
PROJECT AUTHORITY

# Regional Water Quality Monitoring Task Force

## Consultant Task Order

Rick Whetsel, Senior Watershed Manager  
SAWPA Commission | February 6, 2024  
Item No. 6.B

# Recommendation

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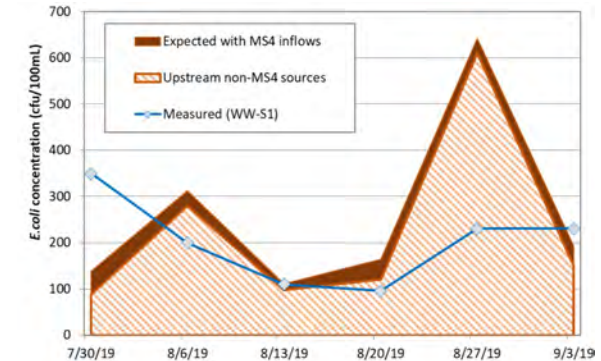
It is recommended that the Commission authorize the General Manager to execute the following:

1. General Services Agreement with GEI Consultants; and,
2. Task Order No. GEI386-02 with GEI Consultants, a three-year task order with an option to exercise a two-year extension for an annual amount not to exceed \$397,018, totaling \$1,191,054 over the three-year period, for FY 2024-25 through FY 2026-27 to oversee and implement the Santa Ana River Regional Bacteria Monitoring Program.

# Regional Water Quality Monitoring Task Force

## Scope of Activities

- Implements a coordinated regional surface water quality (bacteria) monitoring program:
  - Meet the bacterial indicator monitoring requirements of the Basin Plan
  - Support consolidation and standardization of regional programs such as the Middle Santa Ana River Bacteria TMDL
- Annual reporting to Regional Board (June)
- Assist Regional Board with future triennial reviews and future amendments of the Basin Plan



# History / Timeline

## Stormwater Quality Standards Task Force

- **May 2003** – SAWPA approved Agreement
- **June 2012** – Regional Board adopts Basin Plan Amendment Revising Recreation Standards for Inland Freshwaters
- **April 2015** – EPA Approves Basin Plan Amendment Revising Recreation Standards for Inland Freshwaters

## Middle Santa Ana River Pathogen TMDL Task Force

- **January 2006** – SAWPA approved Agreement
- **May 2007** – EPA Approves MSAR TMDLs

## Regional Water Quality Monitoring Program

- **March 2016** – Regional Board approves Santa Ana Watershed Bacteria Monitoring Program and Quality Assurance Project Plan reflecting a need for a new Task Force
- **May 2016** – Regional Water Quality Monitoring Task Force Implements Santa Ana River Regional Bacteria Monitoring Program



# Benefits to SAWPA

- Supports continuing mission to improve regional water quality.
- Utilizes staff experience and expertise in managing and administering multi-agency Task Forces.
- Continues partnership with Santa Ana Regional Board in providing regional facilitation and support services.
- Provides data, studies and project plans to support SAWPA's One Water One Watershed Plan.
- Consolidates multiple monitoring efforts to achieve economies of scale.
- Additionally, it is anticipated to expand to include other monitoring as the need arises.

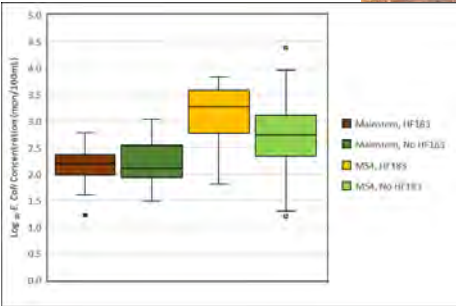




# Santa Ana River Regional Bacteria Monitoring Program 2023 Request for Proposals

## Timeline:

November 2, 2023	Staff Issues Request for Proposals
December 14, 2023	Two Proposals Received: <a href="#">1. CDM Smith</a> <a href="#">2. GEI Consultants</a>
January 8, 2023	Proposal Review Committee unanimous in their recommendation of GEI Consultants.
January 18, 2024	RWQM Task Force recommends that SAWPA execute an agreement with GEI Consultants.



# Proposal Scoring

- **Proposal Technical Review Committee:**

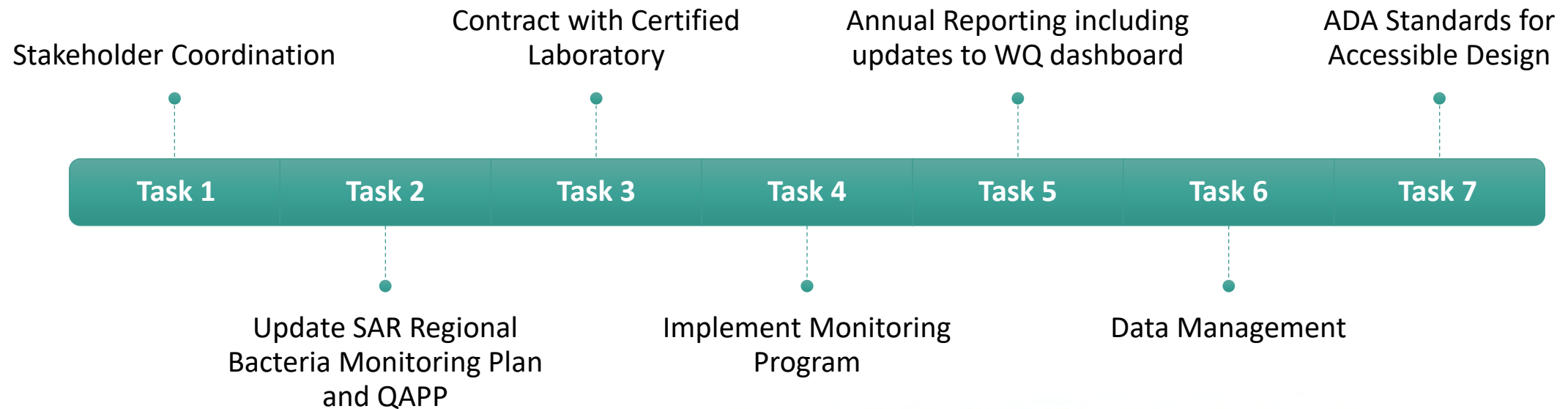
- SAWPA
- RCFC&WCD
- SBCFCD
- County of Orange

## Key Factors in selection of GEI Consultants:

- Experience and knowledge of the program goals and objectives
- Technical Expertise
- Working Relationship with Task Force and Regional Board

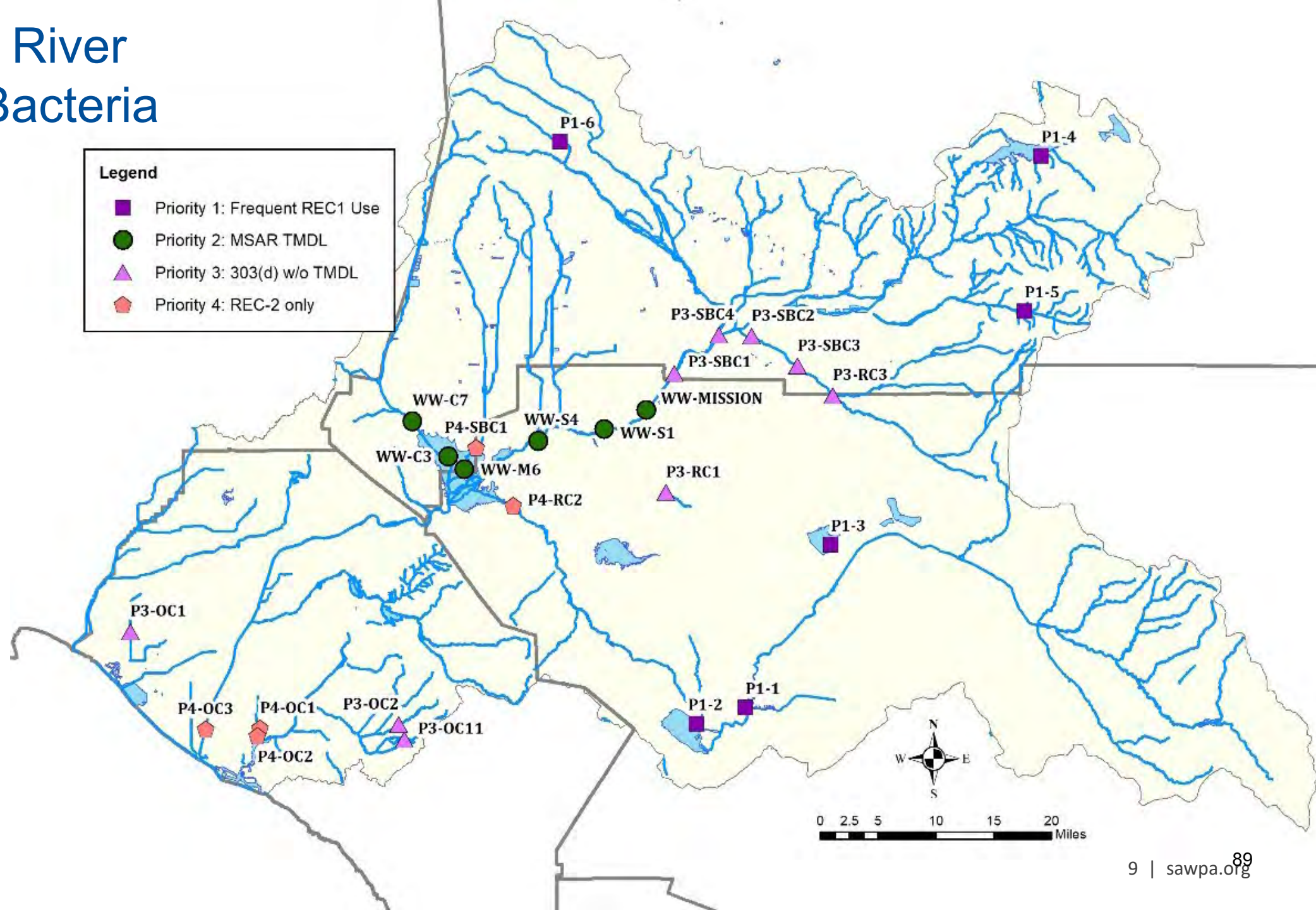
Proposal Evaluation Worksheet	Rate each on scale of 1 to 10 (10 being the highest)		Scoring Weights	Weighted Score (Automatically Computes)	
	CDM Smith	GEI Consultants		CDM Smith	GEI Consultants
Experience and qualifications of the assigned individuals/firm	8.3	10.0	30	25.0	30.0
Project approach and understanding of needs	8.0	9.7	30	24.0	29.0
Anticipated value and quality of services	8.3	9.0	30	25.0	27.0
Project Schedule	8.3	8.3	5	4.2	4.2
Appropriateness of proposed fee structure	8.7	8.0	5	4.3	4.0
Responsiveness to RFP (Pass / Fail)					
<b>TOTAL POINTS</b>	<b>41.7</b>	<b>45.0</b>	<b>100</b>	<b>82.5</b>	<b>94.2</b>
	Annual Budget				
<b>Proposal Budgets</b>	<b>\$ 374,461</b>	<b>\$ 397,018</b>			

# Santa Ana River Regional Bacteria Monitoring Program

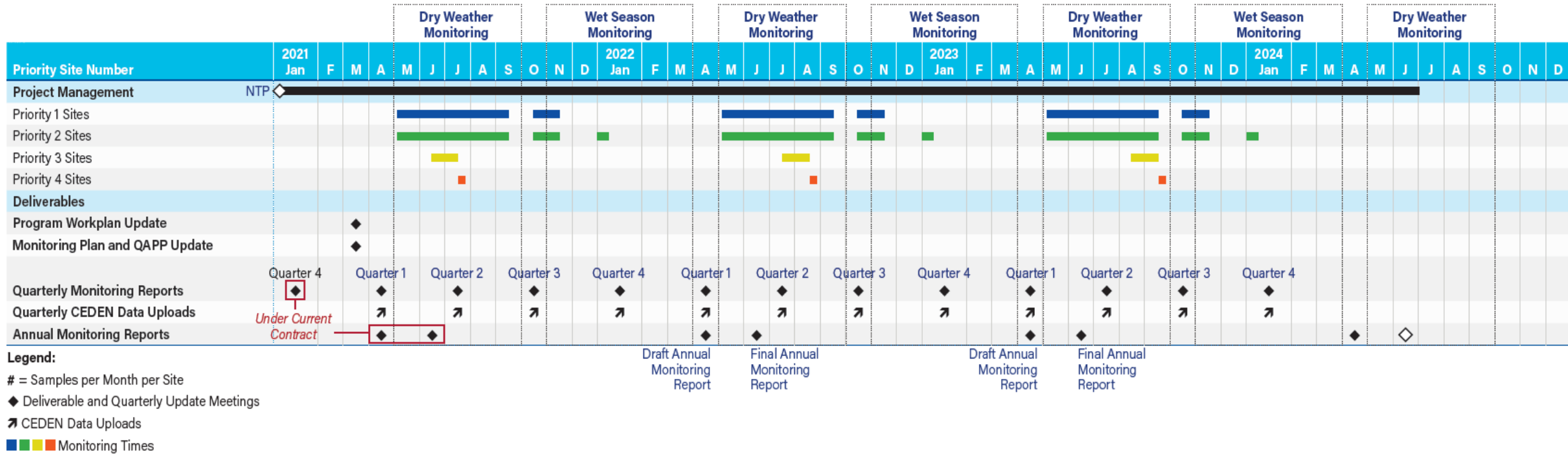




# Santa Ana River Regional Bacteria Monitoring Sites



# Project Schedule



# Santa Ana River Regional Bacteria Monitoring Program Cost Estimate

Task	Description	Budget
1	Project Management and Stakeholder Coordination	\$32,484
2	Update Monitoring Plan and QAPP	\$26,542
3	Laboratory Services	\$29,548
4	Implement Field Monitoring Program	\$207,366
5	Annual Reporting	\$54,240
6	Data Management	\$42,906
7	Document to meet ADA Standards	\$3,932

**Total Annual**      **\$397,018**  
**Total Agreement**      **\$1,191,054**

San Bernardino County	Riverside County	Orange County	Total RBMP
\$18,261	\$12,642	\$1,580	\$32,484
\$14,921	\$10,330	\$1,291	\$26,542
\$17,460	\$12,088	-	\$29,548
\$122,534	\$84,832	-	\$207,366
\$30,492	\$21,110	\$2,639	\$54,240
\$24,120	\$16,699	\$2,087	\$42,906
\$2,210	\$1,530	\$191	\$3,932

**\$229,999**      **\$159,230**      **\$7,789**      **\$397,018**  
**\$689,997**      **\$477,690**      **\$23,367**      **\$1,191,054**

# Funding Partners

## Regional Water Quality Monitoring Task Force

- County of Orange
- Riverside County Flood Control & Water Conservation District
- San Bernardino County Flood Control District

## Middle Santa Ana River Bacteria TMDL Task Force

- San Bernardino County Flood Control District representing the Cities of Chino, Chino Hills, Fontana, Montclair, Ontario, Rancho Cucamonga, Rialto, and Upland
- County of Riverside
- City of Claremont
- City of Corona
- City of Norco
- City of Pomona
- City of Riverside
- Agricultural Operators represented by Chino Basin Watermaster Agricultural Pool



# Recommendation

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It is recommended that the Commission authorize the General Manager to execute the following:

1. General Services Agreement with GEI Consultants; and,
2. Task Order No. GEI386-02 with GEI Consultants, a three-year task order with an option to exercise a two-year extension for an annual amount not to exceed \$397,018, totaling \$1,191,054 over the three-year period, for FY 2024-25 through FY 2026-27 to oversee and implement the Santa Ana River Regional Bacteria Monitoring Program.

# Questions?



# Thank You

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Rick Whetsel  
Santa Ana Watershed Project Authority  
Office (951) 354-4222 | Cell (951) 662-3653  
[rwhetsel@sawpa.gov](mailto:rwhetsel@sawpa.gov)  
[sawpa.gov](http://sawpa.gov)



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## **SANTA ANA WATERSHED PROJECT AUTHORITY**

### **GENERAL SERVICES AGREEMENT FOR SERVICES BY INDEPENDENT CONSULTANT**

This Agreement is made this **6<sup>th</sup> day of February, 2024** by and between the Santa Ana Watershed Project Authority ("SAWPA") located at 11615 Sterling Avenue, Riverside, CA 92503 and GEI Consultants, Inc. ("Consultant") whose address is P.O. Box 843005, Boston, MA 02284-3005.

#### **RECITALS**

This Agreement is entered into on the basis of the following facts, understandings, and intentions of the parties to this Agreement:

- SAWPA desires to engage the professional services of Consultant to perform such professional consulting services as may be assigned, from time to time, by SAWPA in writing;
- Consultant agrees to provide such services pursuant to, and in accordance with, the terms and conditions of this Agreement and has represented and warrants to SAWPA that Consultant possesses the necessary skills, qualifications, personnel, and equipment to provide such services; and
- The services to be performed by Consultant shall be specifically described in one or more written Task Orders issued by SAWPA to Consultant pursuant to this Agreement.

#### **AGREEMENT**

Now, therefore, in consideration of the foregoing Recitals and mutual covenants contained herein, SAWPA and Consultant agree to the following:

#### **ARTICLE I**

##### **TERM OF AGREEMENT**

**1.01** This agreement shall become effective on the date first above written and shall continue until **December 31, 2027**, unless extended or sooner terminated as provided for herein.

#### **ARTICLE II**

##### **SERVICES TO BE PERFORMED**

**2.01** Consultant agrees to provide such professional consulting services as may be assigned, from time to time, in writing by the Commission and the General Manager of SAWPA. Each assignment shall be made in the form of a written Task Order. Each such Task Order shall include, but shall not be limited to, a description of the nature and scope of the services to be performed by Consultant, the amount of compensation to be paid, and the expected time of completion.

**2.02** Consultant may at Consultant's sole cost and expense, employ such competent and qualified independent professional associates, subcontractors, and consultants as Consultant deems necessary to perform each assignment; provided that Consultant shall not subcontract any work to be performed without the prior written consent of SAWPA.

#### **ARTICLE III**

##### **COMPENSATION**

**3.01** In consideration for the services to be performed by Consultant, SAWPA agrees to pay Consultant as provided for in each Task Order.

**3.02** Each Task Order shall specify a total not-to-exceed sum of money and shall be based upon the regular hourly rates customarily charged by Consultant to its clients.

**3.03** Consultant shall not be compensated for any services rendered nor reimbursed for any expenses incurred in excess of those authorized in any Task Order unless approved in advance by the Commission and General Manager of SAWPA, in writing.

**3.04** Unless otherwise provided for in any Task Order issued pursuant to this Agreement, payment of compensation earned shall be made in monthly installments after receipt from Consultant of a timely, detailed, corrected, written invoice by SAWPA's Project Manager, describing, without limitation, the services performed, when such services were performed, the time spent performing such services, the hourly rate charged therefore, and the identity of individuals performing such services for the benefit of SAWPA. Such invoices shall also include a detailed itemization of expenses incurred. Upon approval by an authorized SAWPA employee, SAWPA will pay within 30 days after receipt of a valid invoice from Consultant.

#### **ARTICLE IV**

##### **CONSULTANT OBLIGATIONS**

**4.01** Consultant agrees to perform all assigned services in accordance with the terms and conditions of this Agreement including those specified in each Task Order. In performing the services required by this Agreement and any related Task Order Consultant shall comply with all local, state and federal laws, rules and regulations. Consultant shall also obtain and pay for any permits required for the services it performs under this Agreement and any related Task Order.

**4.02** Except as otherwise provided for in each Task Order, Consultant will supply all personnel and equipment required to perform the assigned services.

**4.03** Consultant shall be solely responsible for the health and safety of its employees, agents and subcontractors in performing the services assigned by SAWPA.

**4.04** Insurance Coverage: Consultant shall procure and maintain for the duration of this Agreement insurance against claims for injuries or death to persons or damages to property which may arise from or in connection with the performance of the work hereunder and the results of that work by the Consultant, its agents, representatives, employees or sub-contractors.

**4.04(a) Coverage** - Coverage shall be at least as broad as the following:

- 1. Commercial General Liability (CGL)** - Insurance Services Office (ISO) Commercial General Liability Coverage (Occurrence Form CG 00 01) including products and completed operations, property damage, bodily injury, personal and advertising injury with limit of at least two million dollars (\$2,000,000) per occurrence or the full per occurrence limits of the policies available, whichever is greater. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (coverage as broad as the ISO CG 25 03, or ISO CG 25 04 endorsement provided to SAWPA) or the general aggregate limit shall be twice the required occurrence limit.
- 2. Automobile Liability** – (if necessary) Insurance Services Office (ISO) Business Auto Coverage (Form CA 00 01), covering Symbol 1 (any auto) or if Consultant has no owned autos, Symbol 8 (hired) and 9 (non-owned) with limit of one million dollars (\$1,000,000) for bodily injury and property damage each accident.
- 3. Workers' Compensation Insurance** - as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease.
- 4. Professional Liability** - (Also known as Errors & Omission) Insurance appropriate to the Consultant profession, with limits no less than \$1,000,000 per occurrence or claim, and \$2,000,000 policy aggregate.
- 5. Cyber Liability Insurance (Technology Professional Liability – Errors and Omissions)** – If Consultant will be providing technology services, limits not less than \$2,000,000 per occurrence or claim, and \$2,000,000 aggregate or the full per occurrence limits of the policies available, whichever is greater. Coverage shall be sufficiently broad to respond to the duties and obligations as is undertaken by Consultant in this Agreement and shall include, but not be limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress,

invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion and network security. The policy shall provide coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations.

If the Consultant maintains broader coverage and/or higher limits than the minimums shown above, SAWPA requires and shall be entitled to the broader coverage and/or higher limits maintained by the Consultant. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to SAWPA.

**4.04(b) If Claims Made Policies:**

1. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.
2. Insurance must be maintained and evidence of insurance must be provided **for at least five (5) years after completion of the contract of work.**
3. If coverage is canceled or non-renewed, and not **replaced with another claims-made policy form with a Retroactive Date** prior to the contract effective date, the Consultant must purchase "extended reporting" coverage for a minimum of **five (5) years** after completion of contract work.

**4.04(c) Waiver of Subrogation:** The insurer(s) named above agree to waive all rights of subrogation against SAWPA, its elected or appointed officers, officials, agents, authorized volunteers and employees for losses paid under the terms of this policy which arise from work performed by the Named Insured for the Agency; but this provision applies regardless of whether or not SAWPA has received a waiver of subrogation from the insurer.

**4.04(d) Other Required Provisions -** The general liability policy must contain, or be endorsed to contain, the following provisions:

1. **Additional Insured Status:** SAWPA, its directors, officers, employees, and authorized volunteers are to be given insured status (at least as broad as ISO Form CG 20 10 10 01), with respect to liability arising out of work or operations performed by or on behalf of the Consultant including materials, parts, or equipment furnished in connection with such work or operations.
2. **Primary Coverage:** For any claims related to this project, the Consultant's insurance coverage shall be primary at least as broad as ISO CG 20 01 04 13 as respects to SAWPA, its directors, officers, employees and authorized volunteers. Any insurance or self-insurance maintained by the Member Water Agency its directors, officers, employees and authorized volunteers shall be excess of the Consultant's insurance and shall not contribute with it.

**4.04(e) Notice of Cancellation:** Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to SAWPA.

**4.04(f) Self-Insured Retentions -** Self-insured retentions must be declared to and approved by SAWPA. SAWPA may require the Consultant to provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or SAWPA.

**4.04(g) Acceptability of Insurers -** Insurance is to be placed with insurers having a current A.M. Best rating of no less than A: VII or as otherwise approved by SAWPA.

**4.04(h) Verification of Coverage –** Consultant shall furnish SAWPA with certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by SAWPA before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive the Consultant's obligation to provide them. SAWPA reserves the right to require complete, certified copies of all required insurance policies, including policy Declaration pages and Endorsement pages.

**4.04(i) Subcontractors** - Consultant shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Consultant shall ensure that SAWPA, its directors, officers, employees and authorized volunteers are additional insureds on Commercial General Liability Coverage.

**4.05** Consultant hereby covenants and agrees that SAWPA, its officers, employees, and agents shall not be liable for any claims, liabilities, penalties, fines or any damage to property, whether real or personal, nor for any personal injury or death caused by, or resulting from, or claimed to have been caused by or resulting from, any negligence, recklessness, or willful misconduct of Consultant. To the extent permitted by law, Consultant shall hold harmless, ~~defend at its own expense,~~ and indemnify SAWPA, its directors, officers, employees, and authorized volunteers, against any ~~and all~~ liability, claims, losses, damages, or expenses, including reasonable attorney's fees and costs, ~~arising from to the extent caused by~~ all acts or omissions of Consultant or its officers, agents, or employees in rendering services under this Agreement and any Task Order issued hereunder; excluding, however, such liability, claims, losses, damages or expenses ~~arising from to the extent caused by~~ SAWPA's ~~sole~~ negligence or willful acts.

**4.06** In the event that SAWPA requests that specific employees or agents of Consultant supervise or otherwise perform the services specified in each Task Order, Consultant shall ensure that such individual(s) shall be appointed and assigned the responsibility of performing the services.

**4.07** In the event Consultant is required to prepare plans, drawings, specifications and/or estimates, the same shall be furnished with a registered professional engineer's number and shall conform to local, state and federal laws, rules and regulations. Consultant shall obtain all necessary permits and approvals in connection with this Agreement, any Task Order or Change Order. However, in the event SAWPA is required to obtain such an approval or permit from another governmental entity, Consultant shall provide all necessary supporting documents to be filed with such entity, and shall facilitate the acquisition of such approval or permit.

**4.08** Consultant shall comply with all local, state and federal laws, rules and regulations including those regarding nondiscrimination and the payment of prevailing wages, if required by law.

## **ARTICLE V**

### **SAWPA OBLIGATIONS**

**5.01** SAWPA shall:

**5.01a** Furnish all existing studies, reports and other available data pertinent to each Task Order that are in SAWPA's possession;

**5.01b** Designate a person to act as liaison between Consultant and the General Manager and Commission of SAWPA.

## **ARTICLE VI**

### **ADDITIONAL SERVICES, CHANGES AND DELETIONS**

**6.01** During the term of this Agreement, the Commission of SAWPA may, from time to time and without affecting the validity of this Agreement or any Task Order issued pursuant thereto, order changes, deletions, and additional services by the issuance of written Change Orders authorized and approved by the Commission of SAWPA.

**6.02** In the event Consultant performs additional or different services than those described in any Task Order or authorized Change Order without the prior written approval of the Commission of SAWPA, Consultant shall not be compensated for such services.

**6.03** Consultant shall promptly advise SAWPA as soon as reasonably practicable upon gaining knowledge of a condition, event, or accumulation of events, which may affect the scope and/or cost of services to be provided pursuant to this Agreement. All proposed changes, modifications, deletions, and/or requests for additional services shall be reduced to writing for review and approval or rejection by the Commission of SAWPA.

**6.04** In the event that SAWPA orders services deleted or reduced, compensation shall be deleted or reduced by a comparable amount as determined by SAWPA and Consultant shall only be compensated for services actually performed. In the event additional services are properly authorized, payment for the same shall be made as provided in Article III above.

## **ARTICLE VII**

### **CONSTRUCTION PROJECTS: CONSULTANT CHANGE ORDERS**

**7.01** In the event SAWPA authorizes Consultant to perform construction management services for SAWPA, Consultant may determine, in the course of providing such services, that a Change Order should be issued to the construction contractor, or Consultant may receive a request for a Change Order from the construction contractor. Consultant shall, upon receipt of any requested Change Order or upon gaining knowledge of any condition, event, or accumulation of events, which may necessitate issuing a Change Order to the construction contractor, promptly consult with the liaison, General Manager and Commission of SAWPA. No Change Order shall be issued or executed without the prior approval of the Commission of SAWPA.

## **ARTICLE VIII**

### **TERMINATION OF AGREEMENT**

**8.01** In the event the time specified for completion of an assigned task in a Task Order exceeds the term of this Agreement, the term of this Agreement shall be automatically extended for such additional time as is necessary to complete such Task Order and thereupon this Agreement shall automatically terminate without further notice.

**8.02** Notwithstanding any other provision of this Agreement, SAWPA, at its sole option, may terminate this Agreement at any time by giving 10 day written notice to Consultant, whether or not a Task Order has been issued to Consultant.

**8.03** In the event of termination, the payment of monies due Consultant for work performed prior to the effective date of such termination shall be paid after receipt of an invoice as provided in this Agreement.

## **ARTICLE IX**

### **CONSULTANT STATUS**

**9.01** Consultant shall perform the services assigned by SAWPA in Consultant's own way as an independent contractor, in pursuit of Consultant's independent calling and not as an employee of SAWPA. Consultant shall be under the control of SAWPA only as to the result to be accomplished and the personnel assigned to perform services. However, Consultant shall regularly confer with SAWPA's liaison, General Manager, and Commission as provided for in this Agreement.

**9.02** Consultant hereby specifically represents and warrants to SAWPA that the services to be rendered pursuant to this Agreement shall be performed in accordance with the standards customarily applicable to an experienced and competent professional consulting organization rendering the same or similar services. Furthermore, Consultant represents and warrants that the individual signing this Agreement on behalf of Consultant has the full authority to bind Consultant to this Agreement.

## **ARTICLE X**

### **AUDIT AND OWNERSHIP OF DOCUMENTS**

**10.01** All draft and final reports, plans, drawings, specifications, data, notes, and all other documents of any kind or nature prepared or developed by Consultant in connection with the performance of services assigned to it by SAWPA are the sole property of SAWPA, and Consultant shall promptly deliver all such materials to SAWPA. Consultant may retain copies of the original documents, at its option and expense. Use of such documents by SAWPA for project(s) not the subject of this Agreement shall be at SAWPA's sole risk without legal liability or exposure to Consultant. SAWPA agrees to not release any software "code" without prior written approval from the Consultant.

**10.02** Consultant shall retain and maintain, for a period not less than four years following termination of this Agreement, all time records, accounting records, and vouchers and all other records with respect to all matters concerning services performed, compensation paid and expenses reimbursed. At any time during normal business hours and as often as SAWPA may deem necessary, Consultant shall make available to SAWPA's agents for examination of all such records and will permit SAWPA's agents to audit, examine and reproduce such records.

## **ARTICLE XI**

### **MISCELLANEOUS PROVISIONS**

**11.01** This Agreement supersedes any and all previous agreements, either oral or written, between the parties hereto with respect to the rendering of services by Consultant for SAWPA and contains all of the covenants and agreements between the parties with respect to the rendering of such services in any manner whatsoever. Any modification of this Agreement will be effective only if it is in writing signed by both parties.

**11.02** Consultant shall not assign or otherwise transfer any rights or interest in this Agreement without the prior written consent of SAWPA. Unless specifically stated to the contrary in any written consent to an assignment, no assignment will release or discharge the assignor from any duty or responsibility under this Agreement.

**11.03** In the event Consultant is an individual person and dies prior to completion of this Agreement or any Task Order issued hereunder, any monies earned that may be due Consultant from SAWPA as of the date of death will be paid to Consultant's estate.

**11.04** Time is of the essence in the performance of services required hereunder. Extensions of time within which to perform services may be granted by SAWPA if requested by Consultant and agreed to in writing by SAWPA. All such requests must be documented and substantiated and will only be granted as the result of unforeseeable and unavoidable delays not caused by the lack of foresight on the part of Consultant.

**11.05** SAWPA expects that Consultant will devote its full energies, interest, abilities and productive time to the performance of its duties and obligations under this Agreement, and shall not engage in any other consulting activity that would interfere with the performance of Consultant's duties under this Agreement or create any conflicts of interest. If required by law, Consultant shall file a Conflict of Interest Statement with SAWPA.

**11.06** Any dispute which may arise by and between SAWPA and the Consultant, including the Consultants, its employees, agents and subcontractors, shall be submitted to binding arbitration. Arbitration shall be conducted by a neutral, impartial arbitration service that the parties mutually agree upon, in accordance with its rules and procedures. The arbitrator must decide each and every dispute in accordance with the laws of the State of California, and all other applicable laws. Unless the parties stipulate to the contrary prior to the appointment of the arbitrator, all disputes shall first be submitted to non-binding mediation conducted by a neutral, impartial mediation service that the parties mutually agree upon, in accordance with its rules and procedures.

**11.07** During the performance of the Agreement, Consultant and its subcontractors shall not unlawfully discriminate, harass, or allow harassment against any employee or applicant for employment because of sex, race, color, ancestry, religious creed, national origin, physical disability (including HIV and AIDS), mental disability, medical condition (cancer), age (over 40), marital status and denial of family care leave. Consultant and its subcontractors shall insure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment. Consultant and its subcontractors shall comply with the provisions of the Fair Employment and Housing Act (Government Code, Section 12290 et seq.) and the applicable regulations promulgated there under (California Code of Regulations, Title 2, Section 7285 et seq.). The applicable regulations of the Fair Employment and Housing Commission implementing Government Code Section 12990 et seq., set forth in Chapter 5 of Division 4 of Title 2 of the California Code of Regulations, are incorporated into this Agreement by reference and made a part hereof as if set forth in full. Consultant and its subcontractors shall give written notice of their obligations under this clause to labor organizations with which they have a collective bargaining or other agreement. Consultant shall include the

**11.09** This contract may be executed in any number of counterparts, each of which so executed shall be deemed to be an original, and such counterparts shall together constitute one and the same Contract. The parties shall be entitled to sign and transmit an electronic signature of this Contract (whether by facsimile, PDF or other email transmission), which signature shall be binding on the party whose name is contained therein. Each party providing an electronic signature agrees to promptly execute and deliver to the other party an original signed Contract upon request.

**In witness whereof**, the parties hereby have made and executed this Agreement as of the day and year first above-written.

**SANTA ANA WATERSHED PROJECT AUTHORITY**

---

Jeffrey J. Mosher, General Manager
Date

**GEI CONSULTANTS, INC.**

(Signature) \_\_\_\_\_ Date \_\_\_\_\_

Typed/Printed Name

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**SANTA ANA WATERSHED PROJECT AUTHORITY  
TASK ORDER NO. GEI386-02**

**CONSULTANT:** GEI Consultants, Inc.  
P.O. Box 843005  
Boston, MA 02284-3005

**VENDOR NO.:** 2213

**COST:** \$1,191,054.00

**PAYMENT:** Upon Receipt of Proper Invoice

**REQUESTED BY:** Rick Whetsel, Senior Watershed Manager

February 6, 2024

**FINANCE:** \_\_\_\_\_  
Karen Williams, Deputy GM/CFO Date

**FINANCING SOURCE:** Acct. Coding: 386MONIT-6113-01  
Acct. Description: General Consulting

**COMMITTEE AUTHORIZATION REQUIRED FOR THIS TASK ORDER:** YES (X) NO ( )  
Authorization: February 6, 2024; CM#2024.6

This Task Order is issued upon approval and acceptance by the Santa Ana Watershed Project Authority (SAWPA) and GEI Consultants, Inc. (Consultant) pursuant to the General Services Agreement between SAWPA and Consultant, entered into on February 6, 2024, expiring December 31, 2027.

**I. PROJECT NAME OR DESCRIPTION**

Santa Ana River Regional Bacteria Monitoring Program

**II. SCOPE OF WORK / TASKS TO BE PERFORMED**

Consultant shall provide all labor, materials, and equipment for services to oversee and implement the Santa Ana River Regional Bacteria Monitoring Program through FY 2024-27. The scope of work includes coordinating with stakeholders, provide updates to the Santa Ana River Regional Bacteria Monitoring Plan and QAPP, contract with laboratories, implement Santa Ana River Regional Bacteria Monitoring Program, prepare Annual Report, update and maintain on-line water quality reporting dashboard tool, assemble field data and laboratory results, and fulfill annual reporting and data management requirements following the Americans with Disabilities Act (ADA) Standards for Accessible Design. Proposal is attached.

**III. PERFORMANCE TIME FRAME**

Consultant shall begin work February 7, 2024, and shall complete performance of such services by **June 30, 2027**.

**IV. SAWPA LIAISON**

Rick Whetsel shall serve as liaison between SAWPA and Consultant.

**V. COMPENSATION**

For all services rendered by Consultant pursuant to this Task Order, Consultant shall receive a total not-to-exceed sum of **\$1,191,054.00**. Payment for such services shall be made monthly upon receipt of timely and proper invoices from Consultant, as required by the above-mentioned Agreement. Each such invoice shall be provided to SAWPA by Consultant within 15 days after the end of the month in which the services were performed.

## VI. CONTRACT DOCUMENTS PRECEDENCE

In the event of a conflict in terms between and among the contract documents herein, the document item highest in precedence shall control. The precedence shall be:

- a. The General Services Agreement by Independent Consultant/Consultant.
- b. The Task Order or Orders issued pursuant to the Agreement, in numerical order.
- c. Exhibits attached to each Task Order, which may describe, among other things, the Scope of Work and compensation therefore.
- d. Specifications incorporated by reference.
- e. Drawings incorporated by reference.

**In witness whereof**, the parties have executed this Task Order on the date indicated below.

**SANTA ANA WATERSHED PROJECT AUTHORITY**

Jeffrey J. Mosher, General Manager \_\_\_\_\_ Date \_\_\_\_\_

**GEI CONSULTANTS, INC.**

(Signature) \_\_\_\_\_ Date \_\_\_\_\_

---

Print/Type Name and Title

**FEE SCHEDULE**

<u>Personnel Category</u>	<u>Hourly Billing Rate \$ per hour</u>
Staff Professional – Grade 1	\$ 134
Staff Professional – Grade 2	\$ 151
Project Professional – Grade 3	\$ 156
Project Professional – Grade 4	\$ 180
Senior Professional – Grade 5	\$ 211
Senior Professional – Grade 6	\$ 242
Senior Professional – Grade 7	\$ 280
Senior Consultant – Grade 8	\$ 300
Senior Consultant – Grade 9	\$ 335
-----	
Senior Drafter / Designer / GIS	\$ 139
Drafter / Designer / GIS	\$ 118
Field Professional	\$ 124
Technician 4	\$ 108
Technician 3	\$ 103
Technician 2	\$ 98
Technician 1	\$ 93
Word Processor, Administrative Staff	\$ 127
Office Aide	\$ 98

These rates are billed for both regular and overtime hours in all categories.  
Rates for Deposition and Testimony are increased 1.5 times.

**OTHER PROJECT COSTS**

**Third Party Project Charges** – All third party project charges will be billed at cost plus a 5% service charge. Examples of such charges include chemical laboratory charges; rented or leased equipment; printing and communication costs; shipping and mailing costs; sample disposal costs; transportation costs, project permits, and licenses.

**Field Equipment Charges** – GEI-owned field equipment will be billed at the following rates:

Backpack and shoreline electro-fishers	\$ 175/day	Invertebrate equipment package	\$ 60/day
Boat electro-fisher	\$ 450/day	Flow meter	\$ 90/day
Boat only	\$ 280/day	Multi-probe	\$ 170/day
IFIM equipment package	\$ 90/day		

**Transportation Charges** - Automobile expenses for GEI or employee owned cars will be charged at the rate per mile set by the Internal Revenue Service for tax purposes plus tolls and parking charges or at a rate negotiated for each project. When required for a project, four-wheel drive vehicles owned by GEI or the employees will be billed at a daily rate appropriate for those vehicles. Travel costs including airfare, rental vehicles, taxis, parking, tolls, and other transportation charges will be billed at cost plus 5% service charge.

**Subsistence** – Lodging and meal costs at job sites, and in transit to and from job sites, will be billed at cost plus 5% service charge.

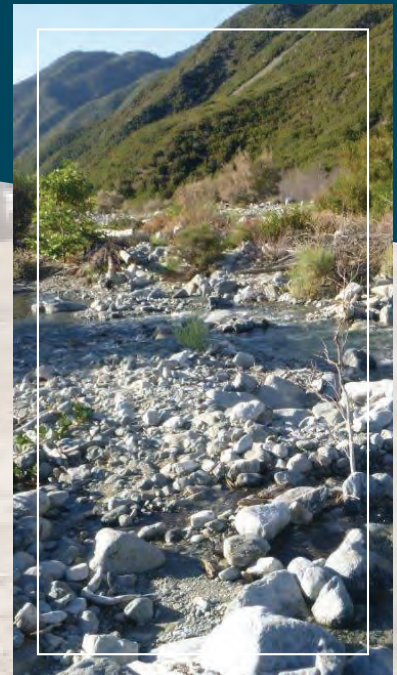
**PAYMENT TERMS**

Invoices will be submitted monthly or upon completion of a specified scope of service, as described in the accompanying contract (proposal, project, or agreement document that is signed and dated by GEI and CLIENT). Payment is due upon receipt of the invoice. Interest will accrue at the rate of 1% of the invoice amount per month, for amounts that remain unpaid more than 30 days after the invoice date. All payments will be made by either check or electronic transfer to the address specified by GEI and will include reference to GEI's invoice number.

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# Implementation of the Santa Ana River Regional Bacteria Monitoring Program

Proposal prepared for: Santa Ana Watershed Project Authority  
December 14, 2023



December 14, 2023 (submitted via PlanetBids)

Consulting  
Engineers and  
Scientists

Ms. Rachel Gray  
Water Resources and Planning Manager  
Santa Ana Watershed Project Authority

**Subject: Proposal for Implementation of the Santa Ana River Regional Bacteria Monitoring Program**

Dear Ms. Gray:

GEI Consultants, Inc. (GEI) is pleased to provide the Santa Ana Watershed Project Authority (SAWPA) its proposal to implement the Regional Bacteria Monitoring Program (RBMP). The RBMP is a multi-objective monitoring program with sites located across the entire Santa Ana River Basin that satisfies requirements set forth in the 2012 Basin Plan Amendment (BPA), which adopted revised Recreational Use Water Quality Standards. Data collected by the RBMP is used to satisfy four objectives: (1) monitor bacteriological water quality for inland waters where there is existing recreation use; (2) assess progress toward compliance with the Middle Santa Ana River (MSAR) bacteria total maximum daily loads (TMDL); (3) evaluate trends for waters that have been added to the 303(d) impaired waters list; and (4) determine whether water quality degradation is occurring in waters where the REC1 use has been de-designated by an approved use attainability analysis.

GEI's team will be led by Project Manager, Steve Wolosoff, and Project Director, Richard Meyerhoff. Steve and Richard have experience leading the RBMP since its inception in 2016 as well as leading the work that led to the adoption of the BPA. Implementation of the RBMP involves a significant field component (~90 days per year with teams in the field) and over 400 samples collected for laboratory analysis. GEI has teamed with CWE to deliver this field program based on their successful performance carrying out this field program since 2016. In recent years, Steve oversaw development of the RBMP online dashboard. This innovative strategy improved the dissemination of program related data providing stakeholders, Regional Board staff, and the public with the vast capability to explore station information and monitoring results interactively. GEI's digital solutions team, led by Donghai Wang, has developed over 100 similar online data dashboards and has the expertise needed to continue to upload RBMP data, refresh the dashboard, and expand its functionality as directed by the Task Force.

In addition to supporting the RBMP implementation since 2016, Steve and Richard in coordination with the RBMP have supported other Task Forces and Workgroups to identify, design, and conduct multiple special studies to support implementation actions by the stakeholders that strive to improve water quality to protect recreational uses in the Santa Ana River Basin. Looking forward, there are multiple opportunities for stakeholders in the Santa Ana Region to use new scientific studies to protect water quality more effectively, e.g., use of more direct measures of risk to swimmers from different sources of fecal bacteria, new fecal bacteria sensor technologies to provide real-time information, and source tracking tools to allow for high-risk sources to be identified and eliminated. If selected, we will continue to be proactive in collaborating with watershed stakeholders, Regional Board staff, and other industry leading experts and technologies to allow for the data from the RBMP to support the most reasonable and effective management strategies to protect recreational uses of inland surface waters.

Together, GEI and CWE have an in-depth understanding of the waterbodies included in the RBMP as well as the key regulatory drivers that led to the formation, and ongoing evolution, of the RBMP making our team highly qualified to seamlessly deliver the RBMP in 2024 and beyond.

Thank you for the opportunity to provide our team's qualifications to complete this project. We look forward to supporting SAWPA's ongoing implementation of the RBMP in the region.

Sincerely,

**GEI Consultants, Inc.**



Steven Wolosoff, BCES, PMP  
Project Manager  
Phone: 781.721.8110 (D); 781.430.915 (C)  
Email: [swolosoff@geiconsultants.com](mailto:swolosoff@geiconsultants.com)



Richard Meyerhoff, Ph.D.  
Project Director  
Phone: 303.264.1013 (D); 303.345.3083(C)  
Email: [rmeyerhoff@geiconsultants.com](mailto:rmeyerhoff@geiconsultants.com)

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Appendix – Resumes



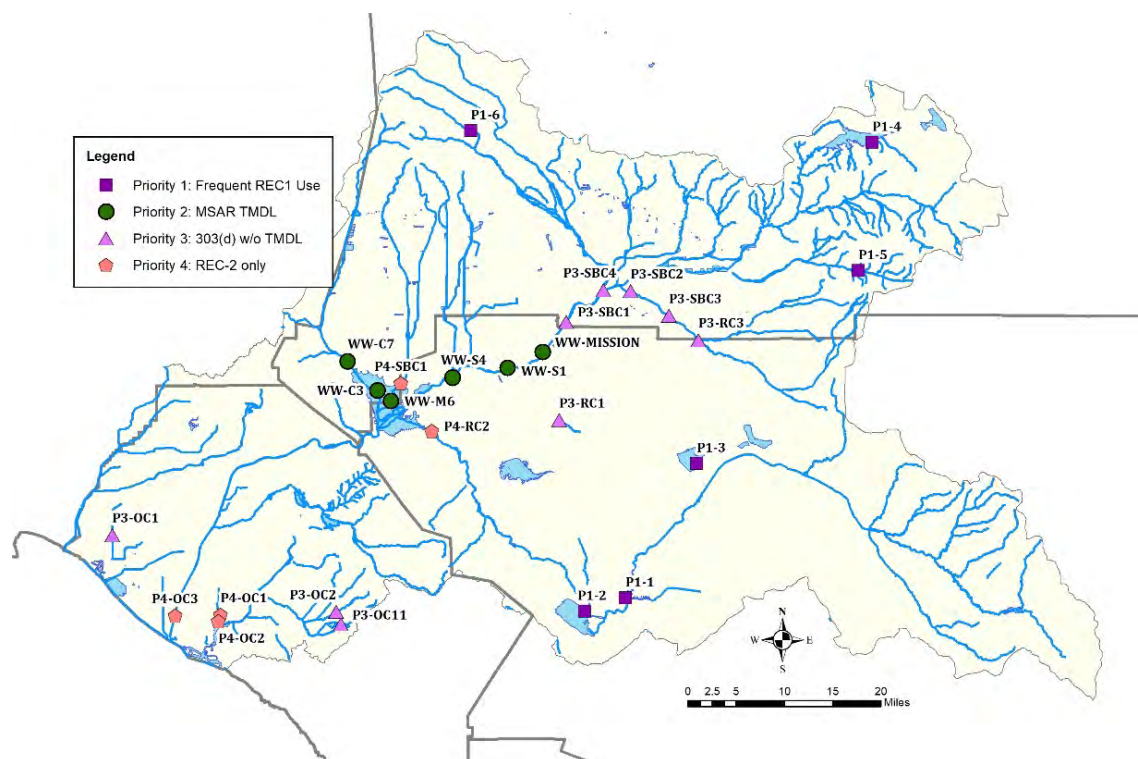
# Understanding of the Project

## Understanding

The Santa Ana Regional Water Quality Control Board (Santa Ana Water Board) adopted a Basin Plan Amendment (BPA) in 2012 revising water quality standards to protect recreational uses in inland waters in the Santa Ana Region (Resolution R8-2012-0001; June 15, 2012). The approved BPA required establishment of a comprehensive Regional Bacteria Monitoring Program (RBMP) for implementation throughout the Santa Ana Region to support implementation of the revised water quality standards (see Basin Plan, page 5-112). Following the 2015 United States Environmental Protection Agency (USEPA) approval of the 2012 BPA, the Regional Water Quality Monitoring Task Force (RWQM Task Force), administered by SAWPA, developed the RBMP's original Monitoring Plan (MP) and Quality Assurance Project Plan (QAPP) (approved by Santa Ana Water Board Resolution R8-2016-0022; March 11, 2016). Consistent with the Basin Plan, the Monitoring Plan established a priority-based RBMP structured around the following general principles:

- Monitor most rigorously in waterbodies where the expectation for recreational activity is the highest, i.e., under dry conditions when REC1 recreation is most likely to occur (Priority 1 waters).
- Incorporate TMDL-related monitoring to support efforts to evaluate progress towards achieving attainment with water quality objectives (and better coordinate regional monitoring efforts) (Priority 2 waters).
- Implement periodic monitoring in waterbodies listed as impaired on the 303(d) List (but no TMDL has been adopted) to provide additional data regarding the impairment status of these waters (Priority 3 waters).
- Assess compliance with antidegradation requirements (as required by BPA) in waterbodies where the REC1 use has been removed through an approved Use Attainability Analysis (Priority 4 waters).

**Figure 1** shows the current monitoring sites for each of these four Priority groups.



The approved RBMP, which was initiated in May 2016, is implemented on an annual basis with most sample collection occurring during dry weather conditions primarily from May to October. Wet weather sample collection is limited to TMDL monitoring requirements associated with the Middle Santa Ana River (MSAR) TMDLs. Findings are reported in annual program reports completed by June 30 each year.

The RBMP is a dynamic program requiring occasional updates to ensure the program collects data that support Basin Plan implementation in the region (**Figure 2, upper portion**). For example, since the program began in 2016, updates have included: (a) modifications to sample site locations; (b) changes in the Priority 3 sample sites due to changes in the impairment status of waterbodies; and (c) changes in statewide bacteria provisions (adopted in 2018). To keep the program current, the RBMP's MP and QAPP have been periodically updated.

Throughout its implementation, the RBMP has been coordinated with other water quality program activities in the watershed, including those related to the implementation of bacterial indicator TMDLs, e.g., in the MSAR watershed and Newport Bay watershed (**Figure 2, lower portion**). This coordination, which often occurs through SAWPA-administered Task Forces, helps ensure that data collection efforts across the watershed are conducted in a consistent, holistic manner. This need for collaboration across the watershed is expected to increase in the future as the Santa Ana Water Board adopts a new regional MS4 permit and completes planned limited revisions to the MSAR TMDLs, and the State Water Board completes the 2024 Integrated Report, which may include additional waterbodies listed as impaired for bacterial indicators.

## Project Approach and Scope of Work

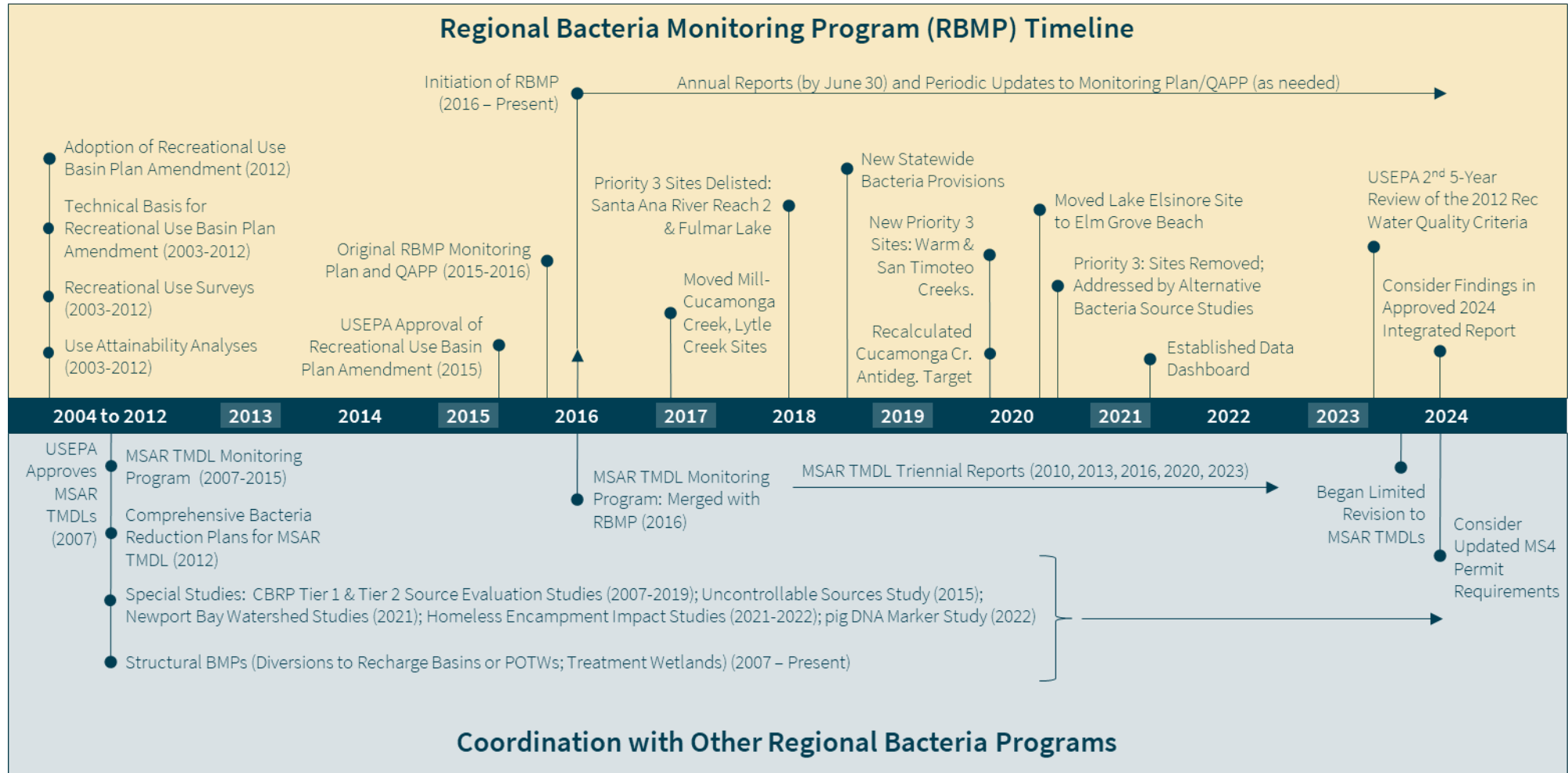
The overall approach to implement the RBMP is detailed in the MP and QAPP; GEI will closely adhere to these plans when managing the program. To be successful, GEI recognizes that the project requires routine attention to successfully coordinate the field sampling program, manage data, including conducting required QA/QC, upload data to the dashboard and California Environmental Data Exchange Network (CEDEN), provide regular updates to the RWQM Task Force, and create an informative annual program report with interpretive findings. GEI and CWE will leverage our collective experience directly with the RBMP to effectively deliver the various elements of the program maintaining continuity of past efforts. Tasks describing these activities and deliverables are presented below.

### Task 1. Stakeholder Coordination

GEI will support the SAWPA administered RWQM Task Force in multiple ways throughout the course of the project. The RWQM Task Force includes a diverse group of stakeholders including the Regional Board, MS4 permittees, other local and state agencies, agricultural operators, and environmental NGOs. Through participation in the RWQM Task Force (formerly known as the Stormwater Quality Standards Task Force, SWQSTF) since 2003, GEI personnel have successfully collaborated with this large stakeholder group to advance work to facilitate data collection that best supports the objectives of the RBMP.

Under this task, GEI will create a detailed update to the existing project work plan and host a kick-off meeting to make new introductions, review the objectives of the program, discuss the overall scope, present roles and responsibilities, and identify any logistical needs to support effective delivery of the field and reporting efforts. While the GEI team has been integral to the successful implementation of this program since inception, we also understand there is a need for careful attention to detail in the upcoming years of RBMP implementation even if changes are anticipated to be small. Specific activities that will be conducted under this task include:

**FIGURE 2. RBMP TIMELINE AND COORDINATION WITH OTHER REGIONAL BACTERIA PROGRAMS**



- Work Plan Update – A detailed work plan will be developed based on the current MP and QAPP that provides more specificity with regard to roles and responsibilities and the day-to-day flow of work to ensure the project is completed as described in the MP and QAPP.
- Kick-Off Meeting – A standalone project kick off meeting will be held with SAWPA, representatives from each of the county stormwater programs, Regional Board staff, field team manager, and any other parties at SAWPA’s request. This meeting will occur at least one month prior to the beginning of sample collection in the 2024 dry season to allow time for any key action items to be completed prior to the beginning of the field program.
- Task Force Meetings – GEI will participate in all RWQM Task Force meetings over the course of the monitoring program (assumed to be 4 per year for budgeting purposes). Prior to each meeting, GEI will coordinate with SAWPA and other stakeholders to develop agendas and gather input on types of information to be presented. At each meeting, GEI’s project manager Steve Wolosoff will provide an informative presentation that describes observed bacteriological conditions across all sites and focuses attention on spatial and temporal trends, compliance with surface water quality standards and evolving regulations, and potential supplemental scientific studies that may be implemented more efficiently by coordinating field efforts with the existing RBMP (e.g., in 2022, a microbial source tracking study of feral pigs was conducted by simple addition of a sample container for RBMP field teams to collect and deliver to the expert laboratory).
- Coordination Meetings – Through service to the RWQM Task Force since its inception, we have learned that ad-hoc meetings may occasionally be needed with individual Task Force member agencies or Regional Board staff in order to (1) understand issues of interest to these stakeholders and (2) develop strategies to implement action items in the time between Task Force meetings. GEI will participate in these meetings as needed when requested by SAWPA or other Task Force members.

*Task Deliverables:*

Work plan update to serve as the primary meeting material for the project kick-off meeting, presentation materials for all RWQM Task Force meetings.

**Task 2. Update SAR Regional Bacteria Monitoring Plan and QAPP**

The RBMP’s MP and QAPP was originally developed in 2015-2016 when the 2012 BPA was approved by USEPA. When developed, the existing MP and QAPP for the MSAR bacteria TMDL watershed-wide compliance program were incorporated into the RBMP’s MP and QAPP. Since Santa Ana Water Board approval of these documents in 2016, they have been periodically updated. The most recent revision occurred in 2022 to change reporting to include an online digital dashboard and remove, add, and move multiple site locations, update names and roles, and extend schedules. When the State Water Board’s 2024 Integrated Report is finalized and approved, another set of changes to the MP and QAPP may be needed to account for new impairment listings and/or de-listings. Within the first year of the RBMP, if directed by the RWQM Task Force, GEI will prepare a revised MP and QAPP for review. Several items that may be considered by the RWQM Task Force which would require revision to the current RBMP MP and QAPP include:

- Location of lake monitoring sites – Multiple swimming beaches exist along the shoreline of lakes included in the priority 1 monitoring. In 2021, sampling at Lake Elsinore was moved from the Boat Launch to Elm Grove Beach to provide better spatial coverage and to coordinate sampling with the Riverside County Health Department. The RWQM Task Force may consider a change to the RBMP that would provide for a periodic rotation of sites at Lake Elsinore, Canyon Lake, Lake Perris, and Big Bear Lake.
- Expanded wet weather sampling at MSAR TMDL sites – The MSAR TMDL Task Force may benefit from additional information on bacteria loads during wet weather at the Priority 2 sites to support the development and implementation of future watershed plans. In addition, data collection from Priority 1 flowing waters, Lytle Creek and Mill Creek, could be used to characterize the load of bacteria that may be attributed to natural sources in the watershed.

- Coordination with other core MS4 program monitoring – Stormwater programs within the Santa Ana Region in Riverside, San Bernardino, and Orange counties all conduct monitoring outside of the RBMP to meet MS4 permit requirements. Changes to the RBMP could be considered that would improve coordination with these other monitoring programs.
- Other updates needed to keep the documents up to date, e.g., laboratory and contact information for program participants.

Lastly, there have been multiple recent updates to the California Surface Water Ambient Monitoring Program (SWAMP) QAPP (2022) and associated guidance, e.g., standard operating procedures for verification of indicator bacteria (2021). GEI will review these key updates from SWAMP and make recommendations for revisions to the RBMP MP and QAPP as needed for the program to be consistent with SWAMP requirements.

#### *Task Deliverables*

Draft and final revisions to MP and QAPP and all associated attachments for RWQM Task Force review.

### **Task 3. Contract with Certified Laboratory**

GEI has obtained pricing from three certified laboratories for the analysis required per the existing MP and QAPP. At the start of the project, GEI team will coordinate with SAWPA and the RWQM Task Force to select the laboratory to be used over the period of the monitoring contract. Once selected, GEI will develop a subcontract agreement with the laboratory. Throughout the monitoring program, GEI will coordinate with the contracted laboratory on important logistics such as getting sampling bottles to field teams, chains of custody, delivery instructions, data review and validation, and administration. GEI will implement QA/QC procedures identified in the QAPP applicable to laboratories. Pricing from three certified laboratories within close vicinity of the monitoring sites are provided in **Table 1**.

**Table 1. Lab Quotes for Water Quality Analysis for the 3-Year Duration of the Monitoring Program**

LAB	E. coli (SM9223B)	Enterococcus (Enterolert)	TSS (SM2540D)
WECK	\$45	\$85	\$35
ENTHALPY	\$50	\$70	\$34
BABCOCK	\$40	\$65	\$26

#### *Task Deliverables*

Laboratory recommendation, subcontract with selected laboratory, reporting of quality control with regard to laboratory analysis to be included in the annual program report.

### **Task 4. Implement Monitoring Program**

The GEI team will implement the monitoring program as specified in the MP and QAPP. This task involves planning and conduct of all field sampling activities, maintenance of equipment such as sensors, sampling devices, flow meters, procurement of other materials needed such as gloves, ice, coolers, and distilled water, and tracking weather to adjust field schedules to ensure samples meet required conditions for dry and wet events. The monitoring program involves collection of samples over multiple days in a week for 26 weeks over the course of a year (25 dry weather events; 1 wet weather event). A detailed sample collection schedule is provided in **Figure 3** to indicate the number of priority sites that will be sampled in each week. Other information such as when QA/QC samples will be collected to meet the target of 5% of grab samples in the QAPP will be detailed in the updated workplan and communicated to field teams. **Table 2** provides a summary of sites and number of grab samples according to the county where each station is located (to be used in parsing program implementation cost proportional to the number of samples collected). The GEI team is familiar with all of the monitoring sites having implemented the program since 2016 and will be able to seamlessly begin monitoring in May 2024 without any preliminary site visits or access coordination needed.



Figure 3. RBMP Schedule of Sample Collection

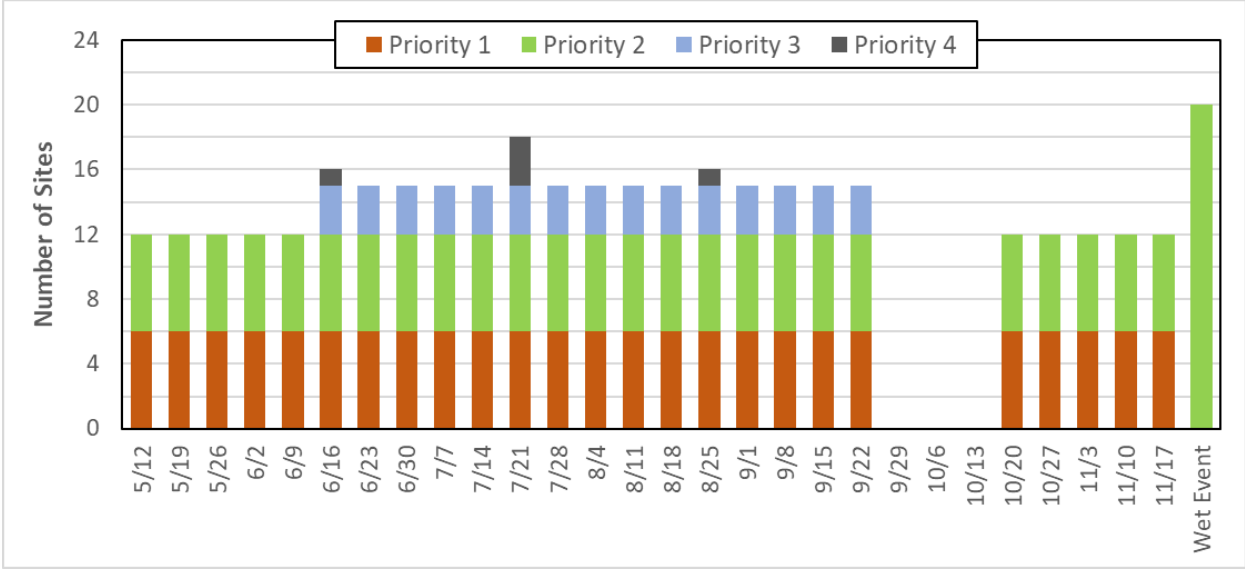


Table 2. Summary of GRAB and QA/QC Sample Collection for 2024-25 Monitoring Program

Orange	18
Riverside	144
San Bernardino	208
<b>Number of Grab Samples</b>	<b>370</b>
Field Equipment Blanks (1 per sample week)	21
Field Duplicates (5% Per Week ~ 1 per week)	21
<b>Total Sample Count</b>	<b>412</b>

Task Deliverables

Collection and delivery of samples to the selected laboratory in accordance with procedures in the MP and QAPP.

Task 5. Annual Reporting

GEI will prepare an annual report of all data collected from the program that characterizes status and trends during the monitoring period, analyzes long-term trends based on other data from the program since its inception in 2016, and provides interpretive findings based on flow, field measured parameters, and knowledge of other conditions to further the scientific understanding of fecal bacteria sources at each site. The annual monitoring program report will include:

- Executive summary with the key information and findings for each year, including recommendations for program refinement or supplemental special studies in the future.
- Summary tables and charts for flow, field measured parameters and bacteriological analysis.
- Comparisons to statewide recreational use standards at all sites.
- Compliance assessment with numeric target and allocations for the MSAR TMDL sites.
- Assessment of status regarding antidegradation thresholds for REC2 only sites.
- Interpretative findings that consider spatial and temporal trends, relationships between variables, and conceptual models for bacteria sources to be investigated with potential supplement special studies.
- Appendix with all field data sheets, photographs, laboratory reports, complete set of tabular data.
- Data quality assessment consistent with SWAMP guidance.

### *Task Deliverables*

Draft Annual Monitoring Program Report to be submitted to the RWQM Task Force by April 1 of each year (beginning 4/1/25). A Final Monitoring Program Report addressing all comments will be submitted to the RWQM Task Force to meet the regulatory submittal deadline of June 30 (beginning 6/30/25).

## **Task 6. Data Management**

Consistent with the RBMP QAPP, GEI will compile and conduct quality control review of all data collected as part of the RBMP. Data validation will be conducted for values that fall outside of expected ranges to investigate potential errors in reported units of measure, classification of data, or electronic data entry, or problems with the proper application of field or laboratory SOPs. Validated data will be compiled into chemical and field databases in formats needed for upload to CEDEN. GEI team members are currently providing technical support to the RBMP which includes data review and validation and overseeing the preparation of files for submittal to CEDEN. In addition to numerical values, other data collected by the RBMP will be compiled and prepared for inclusion as appendices or attachments to the annual report such as field data sheets, site photographs, equipment maintenance records, and raw laboratory reports.

In 2021, an online water quality reporting dashboard tool was developed to support data reporting and public access to bacteriological condition information. The data dashboard is accessed through SAWPA's webpage for the RWQM Task Force. At the start of the project, GEI will coordinate with SAWPA and the current monitoring program contractor to obtain the source code of the existing dashboard and its back-end database or data files. GEI will refresh the existing data dashboard prior to the beginning of sample collection in May 2024 to replicate configurations, environment variables, and settings from the current platform and ensure that security settings and access controls are appropriately configured. Thorough testing will be conducted to validate the migration. In this process, GEI will support any interface modifications or feature additions that are requested by SAWPA or the Task Force. GEI will establish a standardized procedure to provide data in a format required by the dashboard and its source data, incorporating rigorous QA/QC steps that are created and tested for reliability of data entry. QA/QC will identify any discrepancies in data formats, cleaning and formatting the data to ensure compatibility, and implementing necessary transformations or format adjustments. In terms of application operation and maintenance, GEI will keep the system software current, regularly backing up data, and addressing any issues identified by end users through troubleshooting.

As an optional task, the functionality of the dashboard could be improved by migration to a cloud-based hosting provider. GEI has extensive expertise in web application migration to cloud environments involving containerizing the dashboard application using technologies such as Docker to enhance portability. As part of this task, GEI would rigorously verify compatibility with the container orchestration services of the target cloud platform, review the application codebase for any platform-specific dependencies, and make necessary adjustments to ensure seamless integration with the new cloud environment. Lastly, data collected by other SAWPA-administered monitoring programs could be included in the cloud-based water quality data dashboard such as ongoing monitoring programs for nitrogen and TDS in the Santa Ana River and nutrients and other eutrophication measures in the San Jacinto River, Lake Elsinore, and Canyon Lake.

### *Task Deliverables*

Files provided in data upload to CEDEN; routine upload of data to the online dashboard; data validation reporting to be submitted as an appendix to the annual report

## **Task 7. Americans with Disabilities Act (ADA) Standards for Accessible Design**

GEI will generate project deliverables that comply with ADA standards making documents and their respective content accessible to screen readers, allowing the visually impaired to hear an auditory version of the text and images within the document. GEI will follow procedures that comply with Federal Section 508 (of the Rehabilitation Act) standards.

### *Task Deliverables*

Final reports formatted to meet ADA requirements.

## Schedule

**Figure 4** below provides the schedule for implementation of the RBMP. The GEI team will begin startup activities in March 2024 to prepare for initiation of the 2024 dry weather sampling program in May 2024. GEI understands that the timing of RWQM Task Force meetings may differ from the estimated dates in the table below. Lastly, GEI understands the time sensitive nature of the regulatory deliverable of the final annual report and is committed to on time delivery of the draft prior to April 1st and final document prior to June 30th in each year of the RBMP.

**Figure 4. RBMP Project Delivery Schedule**

Task		2024 Startup Period				Annual RBMP Schedule (2024-25, 2025-26, 2026-27)											
		Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
<b>Task 1</b>	<b>Stakeholder Coordination</b>	W	K		T			T			T			T			T
<b>Task 2</b>	<b>Update Monitoring Plan and QAPP</b>			Q													
<b>Task 3</b>	<b>Laboratory</b>																
<b>Task 4</b>	<b>Implement Monitoring Program</b>																
<b>Task 5</b>	<b>Annual Reporting</b>													F			F
<b>Task 6</b>	<b>Data Management</b>															C	
<b>Task 7</b>	<b>Meet ADA Standards</b>															A	

LEGEND	
K	Kick-off Meeting
Q	Monitoring Plan and QAPP
W	Work Plan
C	CE DEN Uploads
T	TF Presentations
D	Draft Report
A	Format for ADA Standards
F	Final Report

## Cost Proposal [Exhibit B format]

Costs for the project to implement the Santa Ana RBMP were developed in detailed tabular form by task and subtask including labor hours and billing rates for GEI personnel, estimated travel cost for Steve or Richard to attend up to four in-person meetings, subcontractor costs, and laboratory costs in **Table 3** on the following page. Table 3 is based on RBMP implementation for a single year and reflect GEI's rates for 2023 and 3-year fixed rates for CWE and laboratory services. GEI prioritizes this project opportunity and seeks to continue a long history of work in the Santa Ana watershed; therefore, we have decided to propose no escalation of the 2023 rates in this budget over the 3-year contract period providing SAWPA with a 1-year discount in 2024 up to a 3-year discount in 2026.

An approximate breakdown of the task budgets by County is provided in **Table 4**. County specific cost breakout was based on the number of grab sample events within each of the three counties as presented in Table 2 above for Tasks 1, 2, 5, 6, and 7. For Tasks 3 and 4 (laboratory and field services), the cost breakdown involves the number of grab sample events within San Bernardino and Riverside counties. Field and laboratory services for Orange County grab samples have historically been conducted by Orange County Public Works staff and labs, therefore costs for field and laboratory services incurred by OCPW for samples collected in Orange County were not included in the baseline budget estimation. Additional cost to include these services for Orange County sites were estimated and are included in Table 3 as an optional task.



# Implementation of the Santa Ana River Regional Bacteria Monitoring Program

**Table 3. Annual RBMP Proposed Estimate**

Role	Project Manager		In-House Review		Lab Quality Control		Engineering Support		Senior Scientist		Senior Engineer		Admin/ADA		GEI Labor Total	Laboratory <sup>1</sup>	CWE <sup>1</sup>	Expenses / Travel	Total Fees & Expenses/ Disbursements	Top Task Totals
Assigned Individual(s)	Wolosoff		Meyerhoff		Romero		Riedel		Moua		Wang		Myers							
Hourly Rate	\$280		\$300		\$151		\$156		\$151		\$300		\$127							
Task	Hrs.	Fee	Hrs.	Fee	Hrs.	Fee	Hrs.	Fee	Hrs.	Fee	Hrs.	Fee	Hrs.	Fee	Fee	Fee	Fee	Fee	Fee	Fee
1 PM and Stakeholder Coordination																				\$ 32,484
Program Management including Ad	30	\$ 8,400		\$ -		\$ -		\$ -		\$ -		\$ -		\$ -	\$ 8,400			\$ 6,000	\$ 14,400	
Kick-Off Meeting and Workplan	16	\$ 4,480	4	\$ 1,200	2	\$ 302	8	\$ 1,248	2	\$ 302	2	\$ 600		\$ -	\$ 8,132				\$ 8,132	
Task Force Meetings	16	\$ 4,480	12	\$ 3,600		\$ -	12	\$ 1,872		\$ -		\$ -		\$ -	\$ 9,952				\$ 9,952	
2 Update MP and QAPP																				\$ 26,542
Identify Revisions	20	\$ 5,600	4	\$ 1,200		\$ -		\$ -		\$ -		\$ -		\$ -	\$ 6,800				\$ 6,800	
Document Updates	30	\$ 8,400	16	\$ 4,800	2	\$ 302	40	\$ 6,240		\$ -		\$ -		\$ -	\$ 19,742				\$ 19,742	
3 Laboratory Services																				\$ 29,548
Conduct analyses	8	\$ 2,240		\$ -	8	\$ 1,208		\$ -		\$ -		\$ -		\$ -	\$ 3,448	\$ 26,100			\$ 29,548	
4 Implement Field Program																				\$ 207,366
Field Services	6	\$ 1,680		\$ -		\$ -	6	\$ 936		\$ -		\$ -		\$ -	\$ 2,616		\$ 204,750		\$ 207,366	
5 Annual Reporting																				\$ 54,240
Data Analysis	40	\$ 11,200		\$ -		\$ -	8	\$ 1,248		\$ -		\$ -		\$ -	\$ 12,448				\$ 12,448	
Draft Report	60	\$ 16,800	40	\$ 12,000		\$ -	24	\$ 3,744		\$ -		\$ -		\$ -	\$ 32,544				\$ 32,544	
Final Report	20	\$ 5,600	8	\$ 2,400		\$ -	8	\$ 1,248		\$ -		\$ -		\$ -	\$ 9,248				\$ 9,248	
6 Data Management																				\$ 42,906
CEDEN	20	\$ 5,600		\$ -		\$ -	60	\$ 9,360		\$ -		\$ -		\$ -	\$ 14,960				\$ 14,960	
Dashboard	8	\$ 2,240		\$ -		\$ -	16	\$ 2,496	66	\$ 9,966	8	\$ 2,400		\$ -	\$ 17,102				\$ 17,102	
Annual Report Appendices	10	\$ 2,800	4	\$ 1,200	4	\$ 604	40	\$ 6,240		\$ -		\$ -		\$ -	\$ 10,844				\$ 10,844	
7 Document to meet ADA Standards																				\$ 3,932
Word processing for ADA	2	\$ 560	2	\$ 600		\$ -	8	\$ 1,248		\$ -		\$ -	12	\$ 1,524	\$ 3,932				\$ 3,932	
	286	\$ 80,080	90	\$ 27,000	16	\$ 2,416	230	\$ 35,880	68	\$ 10,268	10	\$ 3,000	12	\$ 1,524	\$ 160,168	\$ 26,100	\$ 204,750	\$ 6,000	\$ 397,018	\$ 397,018
													<sup>1</sup> Optional Scope: CWE collects samples at OCPW Sites plus Lab Cost						\$ 9,800	

**Table 4. Budget Summary by Task and County (Tasks 1,2,5,6,7 based on fraction of grab samples in program, assumes field and lab effort for Orange County sites is provided in-kind by OCPW)**

Task	San Bernardino County	Riverside County	Orange County	Total RBMP
1 PM and Stakeholder Coordination	\$ 18,261	\$ 12,642	\$ 1,580	\$ 32,484
2 Update MP and QAPP	\$ 14,921	\$ 10,330	\$ 1,291	\$ 26,542
3 Laboratory Services	\$ 17,460	\$ 12,088	\$ -	\$ 29,548
4 Implement Field Program	\$ 122,534	\$ 84,832	\$ -	\$ 207,366
5 Annual Reporting	\$ 30,492	\$ 21,110	\$ 2,639	\$ 54,240
6 Data Management	\$ 24,120	\$ 16,699	\$ 2,087	\$ 42,906
7 Document to meet ADA Standards	\$ 2,210	\$ 1,530	\$ 191	\$ 3,932
	<b>\$ 229,999</b>	<b>\$ 159,230</b>	<b>\$ 7,789</b>	<b>\$ 397,018</b>

# Project Team and Qualifications



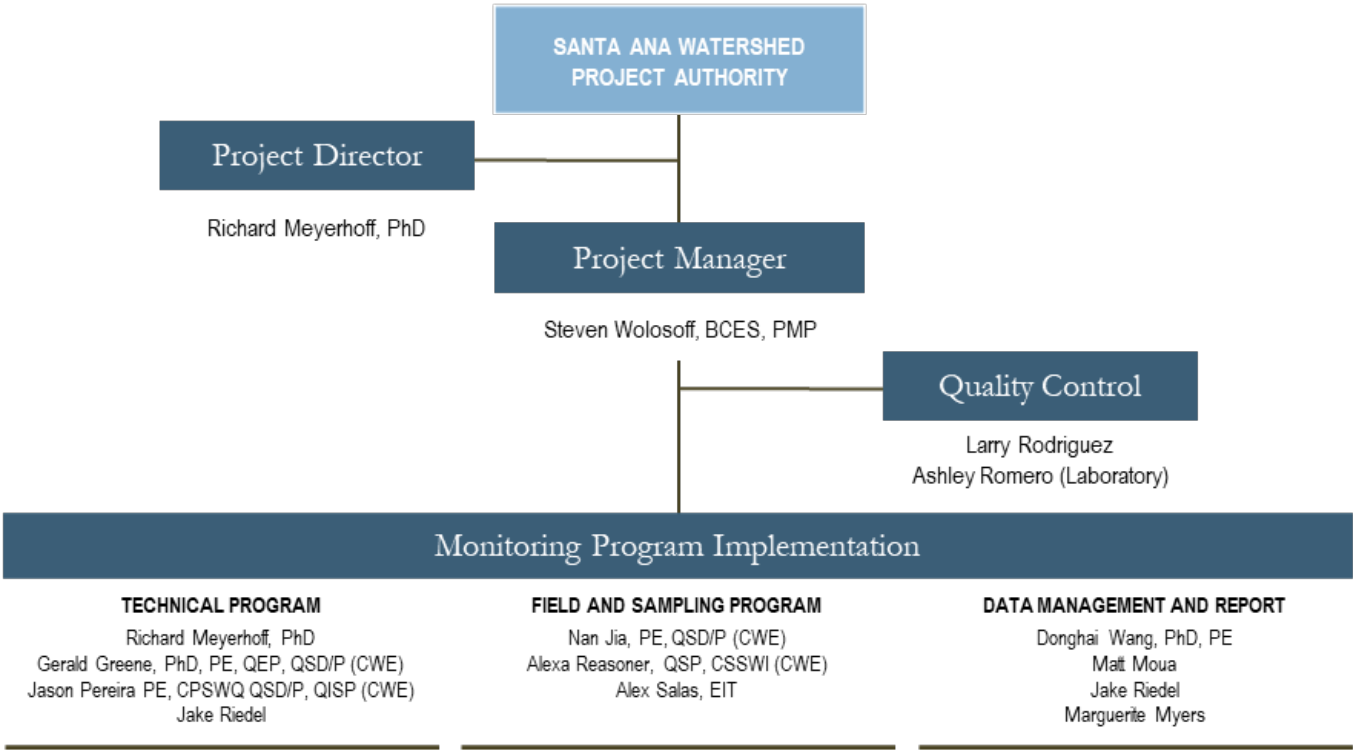
GEI Consultants, Inc. (GEI) has extensive technical and regulatory experience working with clients to assess surface water quality conditions. This experience integrates many aspects of bacteriological monitoring, water quality modeling, stream and lake/reservoir ecology, laboratory methods, and statistical analyses to understand potential sources of fecal bacteria impacting recreational beneficial uses. Recognized as an expert in the evaluation of water quality and ecological standards across the United States, GEI's watershed and water quality practice routinely develops site-specific water quality standards, TMDL implementation plans, bacteria source tracking special studies, and conducts laboratory tests to develop technical reports or provide expert testimony, where needed, to support regulatory decisions. GEI staff have supported SAWPA in the Stormwater Quality Standards Study from 2003 up to the adoption of the Basin Plan amendment in 2015, followed by the creation of the RBMP in 2016, and have either managed or provided technical guidance to the ongoing monitoring program through 2023 working closely with CWE.



Founded in 2006, CWE is a consistent leader in water quality monitoring for Southern California clients. With over 14,000 wet- and dry-weather samples collected, their dedication to managing our clients' water resources needs is backed by our experts with years of experience in hydrology, hydraulic analysis and design, and river restoration. Their staff is accomplished and seasoned at collecting and processing water samples for tests of bacteria, metals, nutrients, pesticides, and turbidity. CWE is currently conducting monitoring for the RBMP and is working with SAWPA to begin sampling for total dissolved solids and total inorganic nitrogen in the Santa Ana River watershed in 2024. Previously, they conducted monitoring for SAWPA's Homeless Encampment Impacts Assessment.

**Figure 5** illustrates the organization of our project team. Below under Key Staff Qualifications we provided brief biographies, including their planned role for this project, qualifications, and experience. Our key staff have considerable experience working on water quality-related monitoring projects in the Santa Ana River watershed and elsewhere. Resumes for each of these key personnel are provided in the **Appendix**.

**Figure 5. Project Team Organization**



## Key Staff Qualifications



### RICHARD MEYERHOFF – PROJECT DIRECTOR

*Education: Ph.D., Aquatic Ecology; M.S./B.S., Biology*

Dr. Meyerhoff is a senior water quality resource specialist with more than 30 years of experience assisting clients with the management of water resources in an integrated and sustainable manner, including achieving compliance with often challenging water quality regulations. He previously served as the Technical Director for the SWQSTF (2003-2015) and oversaw preparation of the RBMP's first MP and QAPP in 2016 and directed the first year of RBMP implementation. He has also worked closely with the MSAR Task Force and Riverside and San Bernardino County MS4 permittees for more than 15 years to support efforts to comply with the MSAR TMDLs. He is currently working with the MSAR Task Force on the preparation of the Technical Report to provide the basis for limited revisions to the MSAR TMDLs.



### STEVE WOLOSOFF, BCES, PMP – PROJECT MANAGER

*Education: M.P.S., Watershed Management; B.A., Environmental Studies*

*Registration: Board Certified Environmental Scientist; Project Management Professional*

Mr. Wolosoff has 22 years of experience in water quality, stormwater, and TMDL implementation planning. Since 2003, he has supported SAWPA Task Forces including Stormwater Quality Standards Study, Regional Water Quality Monitoring, MSAR TMDL, and Lake Elsinore/Canyon Lake TMDL. He currently is providing technical support to the implementation of the Santa Ana River RBMP and was technical lead for the 2019 MSAR Bacteria Synoptic Study, and 2020 and 2023 Triennial TMDL Reports. Steve has built a strong relationship with SAWPA and works closely with regional stakeholders and regulators, which facilitates continuity, efficiency, and maximum responsiveness. For this project, he will connect the study approach and interpretation of results with the ongoing work of other Task Forces to facilitate impactful outcomes.



### LARRY RODRIGUEZ – QUALITY REVIEW

*Education: B.S., Soil and Water Science*

Mr. Rodriguez is a principal water resources manager with expertise in the areas of strategic water resources planning, groundwater management, conjunctive use planning, water rights, floodplain resources management planning, and watershed planning. With more than 30 years of experience he is a proven leader in the development of water supply studies and feasibility assessments. As a senior leader for GEI in Southern California, he provides guidance and support to project and client management teams to ensure that GEI is delivering high quality products that meet the needs of clients, stakeholders, and are in compliance with regulatory requirements.



### ASHLEY ROMERO – LABORATORY QA/QC

*Education: M.S., Ecology; B.S., Erythropoietin Biology*

Ms. Romero is a Water Quality Scientist with a variety of laboratory operational experience including WET laboratory technical and management experience consisting of the supervision and training of laboratory technicians, performing WET and TIE testing, bioassay data analysis and interpretation, reporting, and the formulation of QA/QC procedures. Ms. Romero also has experience with macroinvertebrate sorting and sediment studies. She has assisted with NPDES permitting requirements for renewal and modification.



### DONGHAI WANG, PH.D., P.E. – DATA MANAGEMENT LEAD

*Education: Ph.D., Hydrology and Water Resources; M.S., Civil/Environmental Engineering*

*Registration: Professional Engineer, CA No. 69491*

Dr. Wang is a principal water resources software architecture designer and a registered civil engineer in California. With 28 years of experience, he is well-versed in the design, development and operation of water resource and environmental information systems, as well as modeling and decision support system. As manager of the information management group at GEI, Dr. Wang has a proven track record of delivering comprehensive water resource and environmental data management systems and dashboards for local, State, and federal agencies. His areas of expertise include software architecture, user

interface design, hydrology and hydraulics modeling, SCADA system design and management, data integration and exchange, data visualization, and quality control.



**GERRY GREENE, PH.D., P.E., QEP, QSD/P – TECHNICAL PROGRAM LEAD**

*Education: D.Env., Environmental Science and Engineering; M.S., Biology; B.A., Biology and Economics*  
*Registration: Professional Engineer, CA No. 5597; Qualified Environmental Professional, 11960237;*  
*Qualified SWPPP Developer/Practitioner, 00176*

Dr. Greene has provided comprehensive water quality services to Southern California public agencies for 31 years. His experience includes the development of monitoring plans, conducting water quality sampling, providing water quality monitoring plan reviews, performing feasibility studies, assisting agencies with environmental compliance and permitting, and designing landmark urban runoff treatment facilities. Dr. Greene is also a seasoned biologist with three decades of experience. His impressive background in wildlife biology and habitat restoration ensures his water quality projects are constructed and implemented in a sustainable manner that enhances the local environment. His expansive knowledge of local, societal, and physical conditions adds a valuable dimension to the assistance he provides to Orange County clients.



**JASON PEREIRA, P.E., CPSWQ, QSD/P, QISP – TECHNICAL PROGRAM SUPPORT**

*Education: B.S., Civil Engineering*  
*Registration: Professional Engineer, CA No. 61509; Certified Professional in Stormwater Quality, 527;*  
*Qualified SWPPP Developer/Practitioner, 21; Qualified Industrial Stormwater Practitioner, 090*

Mr. Pereira is a founding Principal of CWE with 27 years of experience in developing and implementing stormwater management programs for compliance with NPDES Permit requirements and has prepared numerous documents for the implementation of pollution prevention practices including WQMPs, SWPPPs, Erosion Control Plans, SPCC Plans, and TMDL Implementation Plans. He has worked extensively on projects to obtain tangible, cost-effective improvements in water systems and urban runoff water quality through proactive initiatives in regulatory compliance. As a technical expert, Mr. Pereira has presented numerous workshops on critical water-related issues at CASQA Annual Conferences and other events.



**NAN JIA, P.E., QSD/P – MONITORING LEAD**

*Education: M.S., Civil Engineering; B.S., Environmental Sciences*  
*Registration: Professional Civil Engineer, CA No. 92333; Qualified SWPPP Developer/Practitioner, CA No. 27876*

Ms. Jia has six years of experience in water quality monitoring, water quality data analysis, database management, and technical report writing. Her duties have ranged from preparing compliance documents like SWPPPs, Exceedance Response Action Plans, and MS4 Program Effectiveness Assessment Annual Reports to assisting municipalities on developing inspection programs and conducting over 600 I/C inspections. Other duties that she is well-versed in include preparing water quality monitoring data into CEDEN format, leading water quality studies such as pollutant load analysis for runoff diversion projects and BMP effectiveness for green streets projects, performing water sampling for various watershed groups and construction projects, conducting CGP inspections for linear projects under the supervision of a QSP, compiling and reviewing data on SMARTS, and using Excel to conduct statistical analysis.



**ALEXA REASONER, QSP, CESSWI – MONITORING SUPPORT**

*Education: B.S., Environmental Science and Policy*  
*Registration: Qualified SWPPP Practitioner, 28177; Certified Erosion, Sediment, and Stormwater Inspector, 00007267*

Ms. Reasoner is an environmental scientist with broad experience conducting research for environmental, aerial, and topographic reports; assisting on environmental planning projects; fire insurance map development; SWPPP development and reporting; inputting data into clients' desired databases; conducting field sampling; and completing chain-of-custody paperwork for sampling events. She recently received a GIS accreditation, making her well-equipped to handle data set collection and mapping responsibilities using existing software and applications.

## Relevant Experience

### Santa Ana Regional Bacteria Monitoring Program Implementation

SANTA ANA WATERSHED PROJECT AUTHORITY

#### Client Contact

##### **RICK WHETSEL**

Senior Watershed  
Manager

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##### **RACHEL GRAY**

Water Resources and  
Planning Manager

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#### Project Completion

2016-2023

#### GEI Staff

Steve Wolosoff  
Richard Meyerhoff

#### CWE Staff

Gerry Greene  
Jason Pereira  
Nan Jia

CWE and GEI worked as a joint team to implement the Santa Ana Regional Bacteria Monitoring Program (RMBP). In 2023, GEI provided technical expertise to the prime firm (CDM Smith) involving data analysis and interpretation, recommendations for RBMP refinements, report preparation, and stakeholder coordination. Prior to joining GEI, Steve Wolosoff and Richard Meyerhoff collaborated on the creation of the original RBMP in 2016 including site identification, sampling program design, new database creation, and development of a QAPP to meet California Surface Water Ambient Monitoring Program (SWAMP) guidelines. Steve served as the project manager of the program from 2016 – 2022. Over this period, he guided the RWQM Task Force in creative ways to use existing data, or conduct supplemental special studies, to provide more useful information to serve the program's objectives as well as to advance source control strategies in the MSAR TMDL waters.

Since the RBMP inception in 2016, CWE has led the field program component of the program. CWE's tasks included calibrating and maintaining field meters; preparing Chain of Custody (CoC) forms; obtaining and labeling sample containers; decontaminating sample collection materials using the disinfection/rinse method; collecting grab samples at

various creeks, rivers, lakes, and channels during dry- and wet-weather events; making field observations, providing photo documentation, and recording observational data; operating field meters for measuring field parameters for temperature, dissolved oxygen, conductivity, turbidity, and pH; and delivering the samples under CoC to the laboratory within limited sample hold times. CWE field teams have performed the field component of the RBMP in a consistent and timely manner, collecting ~400 bacteriological samples per year over ~90 field days across a large geographic range, with no missed samples or hold time exceedances.





## Middle Santa Ana River Bacteria TMDL Implementation Support

### SANTA ANA WATERSHED PROJECT AUTHORITY

#### Client Contact

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Manager

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##### **RACHEL GRAY**

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Manager

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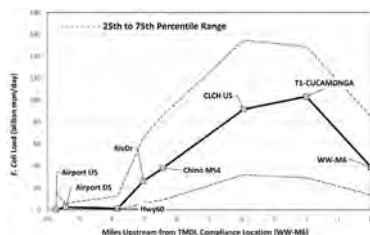
#### Project Completion

2019-2020

#### GEI Staff

Richard Meyerhoff

Steven Wolosoff



The MSAR TMDLs became effective May 16, 2007. Stakeholders work collaboratively through the MSAR Task Force to implement the TMDLs and comply with waste load and load allocations (WLA/LA). The TMDLs require preparation of a Triennial Report every three years to assess the data collected for the preceding three-year period and evaluate progress towards achieving the WLAs/LAs in the MSAR TMDLs. GEI led the development of the fifth Triennial Report in 2023, which synthesized 15 years of work to implement the TMDLs, including historical bacteria source control activities at Tier 1 MS4 outfalls and upstream within MS4 networks (i.e., Tier 2 sites), structural BMP effectiveness assessment (e.g., Mill Creek Wetlands), non-structural BMP deployments, and other key special studies in the MSAR watershed. The 2023 Report demonstrated that dry weather bacteria load reductions have met targets set in the MS4 Program Comprehensive Bacteria Reduction Plans (CBRP) and presented a refined prioritization of subwatersheds for focused bacteria source investigation based on multiple factors including dry weather flow, *E. coli* load, and human HF183 *Bacteroides* marker. Most recently, GEI prepared an update on the status of CBRP implementation that was included in the Riverside MS4 Program's Annual Report.

Prior to joining GEI, Richard Meyerhoff and Steve Wolosoff supported the MSAR bacteria TMDL Task Force dating back to 2007 as follows:

- Creation of the multi-element CBRPs, which led to successful identification and elimination of bacteria sources (approved by the Santa Ana Water Board in 2012).
- Managed synoptic studies to measure flowrate, field parameters, and bacterial indicators including *E. coli* and HF183 at all major inputs to the MSAR impaired waters in 2007, 2012 and 2019. At each iteration, data were used to evaluate the status of compliance with CBRP bacteria load reduction goals and to update Tier 1 (MS4 outfall) site prioritization.
- Design and provide interpretive findings related to multiple other special studies in the MSAR watershed to advance scientific understanding of uncontrollable sources of fecal bacteria (2016), importance of residential property irrigation excess runoff to downstream bacteria loads (2015), track sources of fecal bacteria from within MS4 systems (Tier 2 efforts in 2014, 2020-21), evaluate whether feral pigs are an important source of fecal bacteria to the MSAR (2022).
- Document progressive knowledge gained from CBRP implementation and other supplemental special studies in past TMDL Triennial Reports (2010, 2013, 2016 and 2020) and to generate valuable technical material leading to a positive outcome from the Santa Ana Water Board's audit of the CBRPs in 2018.

## Evaluation of Impacts of Homeless Encampments on Water Quality, Riparian and Aquatic Habitat in Upper Santa Ana River Watershed

### SANTA ANA WATERSHED PROJECT AUTHORITY

#### Client Contact

##### **RICK WHETSEL**

Senior Watershed

Manager, SAWPA

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#### Project Completion

Initial Research Study (2019-2020)

Dry Weather Water Quality Study  
(2021-2022)

#### GEI Staff

Richard Meyerhoff

Steven Wolosoff

#### CWE Staff

Jason Pereira

Gerry Greene



Homeless encampments may potentially impact water quality, e.g., through elevated bacterial indicator concentrations from human waste and buildup of trash, which may contain pollutants. Homeless encampments also may impact the integrity of riparian and aquatic habitats and aquatic and terrestrial species that rely on those habitats. Potential impacts can be documented, at least anecdotally. For example, for constituents such as trash, just the presence of the trash is itself an impact. However, for other constituents, such as bacteria or toxic chemicals, data that directly links homeless encampment activity to lower water quality is limited or unavailable.

Given this background, GEI and CWE began working with SAWPA and its member agencies in 2019 to evaluate homeless encampments in the upper Santa Ana River watershed. This effort included several elements. First, to develop a better understanding of potential impacts of homeless encampments in the watershed, the team assessed available information to evaluate potential impacts of encampments on water quality and riparian/aquatic habitats. In addition, the team identified key areas within the upper Santa Ana River watershed where encampments were currently concentrated. Finally, the team developed a phased preliminary monitoring program that could potentially be implemented in the watershed to gather local data on homeless encampment impacts.

Following completion of the initial evaluation in 2020, GEI and CWE implemented an element of the preliminary monitoring program to evaluate potential impacts of homeless encampments located in the riverbed of Santa Ana River Reaches 3 and 4 during dry weather conditions. Four discrete sample events were completed from September 2021 through January 2022. Each event included sampling for selected parameters (*Escherichia coli* (*E. coli*), human source marker HF183 and field parameters) and completion of rapid trash assessments upstream and downstream of three areas of concentrated homeless encampments. In addition, the study assessed additional bacteria source markers (dog and pigs) during two sample events. Ultimately, the study found that trash impacts were significant at all sample locations. However, water quality analyses found that human and dog sources of fecal matter were not important contributor to observed *E. coli* concentrations. In contrast, wild pigs were found to be potentially important contributors of fecal matter, at least at certain locations. Overall, the study findings provided critical input to understandings of potential sources of bacteria in the watershed.

## Limited Revision to the Middle Santa Ana River Bacterial Indicator TMDLs

### SANTA ANA WATERSHED PROJECT AUTHORITY

#### Client Contact

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##### **RACHEL GRAY**

Water Resources and Planning  
Manager  
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#### Project Completion

October 2022-Ongoing

#### GEI Staff

Richard Meyerhoff  
Steven Wolosoff



The MSAR Bacterial Indicator TMDLs for Dry Summer and Wet Winter Conditions were adopted in 2005 and became effective in 2007. During the TMDL adoption process, it was recognized that protection of recreational uses during dry weather conditions, when most recreational activity was occurring, was a higher priority than protection of recreational uses during wet weather conditions. As a consequence, TMDL implementation since 2007 has focused on investigating and mitigating bacterial sources during dry weather conditions. The result has been significant progress on compliance with the Dry Summer Condition TMDLs, but only limited progress on compliance with Wet Winter Condition TMDLs.

In 2012, the Santa Ana Water Board adopted revised water quality standards for inland waters to protect recreational beneficial uses. Some of the revised standards are relevant to the TMDLs, including adoption of regulations to define “controllable” and “uncontrollable” bacterial indicator sources and provisions to temporarily suspend recreational uses under specified unsafe flow conditions. Given these regulatory changes, the focus to date on protecting recreational uses during dry weather conditions, and the significant knowledge gained through the work of the MSAR Task Force and stakeholder implementation of bacteria reduction plans, it has been determined that limited revisions to the MSAR TMDLs are necessary.

Proposed revisions to the MSAR TMDLs include the following elements: (a) extending the compliance date for the Wet Winter Condition TMDLs; (b) adopting a Phase 2 TMDL Implementation Plan to establish specific milestones for completion during the extended schedule; and (c) clarifying how changes in Basin Plan regulations, e.g., adoption of the high flow suspension provision, may be applied to the TMDLs during wet weather conditions. To support the development of these limited revisions to the MSAR TMDLs, GEI has been working with the MSAR TMDL Task Force and Santa Ana Water Board staff to develop the Technical Report and Substitute Environmental Document which will be used support the Basin Plan amendment process. The proposed revisions to the TMDLs are expected to be adopted in 2024.

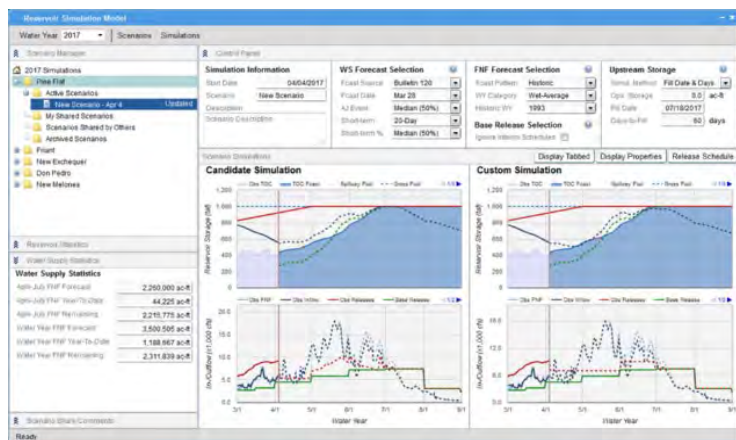


GEI Staff  
Donghai Wang  
Matt Moua

The GEI information team comprises a skilled ensemble of professionals, including software engineers, web programmers, specialists in Plotly dashboard, ESRI dashboard, Power BI dashboard, and Tableau dashboard, as well as experts in GIS, database management, and administration. With a proven track record, our team excels in dashboard development and maintenance, encompassing front-end and back-end design, database system management, support, system improvement, enhancement, and dashboard migration assistance. Exhibiting expertise in delivering comprehensive solutions, we specialize in tailoring dashboards for water resources and performance measurement systems. Our capabilities encompass the management of cloud-based web applications, ensuring smooth routine data updates, seamless integration of external data, and facilitating the migration and deployment of web applications on cloud platforms.

GEI has led the development of more than 100 water resources, environmental, and engineering data management systems and web portals. These successful deliveries have been made to a range of water agencies at the local, state, and federal levels. The following showcases projects of a similar nature executed in the past three years:

- California Department of Water Resources - Snow Dashboards, <https://snow.water.ca.gov/page/15>
- California Department of Water Resources – Bulletin 120 Forecast Dashboards <https://snow.water.ca.gov/page/10>
- California Department of Water Resources – Water Watch Dashboard, <https://cww.water.ca.gov/>
- California Department of Water Resources – Flood Operation DSS Dashboard
- USACE Enterprise GIS – Dashboard <https://spk408.sec.usace.army.mil/permit/>
- Madison DSS Dashboard <https://www.madisondss.com/page/dashboard.php>



# Mass Emissions and Tributary Station Water Quality Monitoring

LOS ANGELES COUNTY PUBLIC WORKS

## Client Contact

**FRED GONZALEZ**

Civil Engineer

626.458.5948

fgonzal@dpw.lacounty.gov

## Project Completion

2020-Ongoing

## CWE Staff

Nan Jia

Gerry Greene

Jason Pereira

Alexa Reasoner

CWE assisted LACFCD in furnishing MES Monitoring Program implementation services, with the work consisting of sampling preparation, pre-storm season equipment blank sampling, storm tracking and sampling team coordination, wet-weather sampling, dry-weather sampling, data analysis, and semi-annual data reporting for one year. In accordance with NPDES MS4 Permit Order No. R4-2012-0175, the receiving water monitoring program determines whether RWLs are being achieved, assesses trends in pollutant concentrations over time or during specified conditions, and determines whether the designated beneficial uses are fully supposed as determined by water chemistry, aquatic toxicity, and bioassessment monitoring. CWE is currently performing the same work for the 2021-2022 and 2022-2023 fiscal years. Laboratories including Aquatic Bioassay and Consulting Laboratories, Enthalpy Analytical, and Eurofins Calscience helped finish the project with data being organized in California Environmental Data Exchange Network (CEDEN) format.



## Coordinated Integrated Monitoring Program Implementation

### LOS ANGELES RIVER UPPER REACH 2 WATERSHED MANAGEMENT AREA

#### Client Contact

##### **GINA NILA**

City of Commerce Deputy  
Director of Public Works  
Commerce, CA 90040  
323.722.4805  
ginan@ci.commerce.ca.us

#### Project Completion

2015-Ongoing

#### CWE Staff

Gerry Greene  
Jason Pereira  
Nan Jia  
Alexa Reasoner  
Alex Salas

CWE provided LAR UR2 WMA with MS4 National Pollutant Discharge Elimination System (NPDES) Permit CIMP implementation services. Services provided include QAPP preparation, USACE, LACFCD, and municipal Access and Encroachment Permit procurement, receiving and stormwater outfall water quality monitoring, GIS-based outfall inventory preparation, and non-stormwater discharge outfall screening. Ongoing services include project management, meeting coordination, weather tracking, monitoring event coordination, water quality sample collection from two fixed and six rotating stormwater outfall sites for two dry events and three storm events per year, preparing field logs and site assessment photos, laboratory coordination and Quality Assurance/Quality Control (QA/QC), data management, semi-annual data reporting in CEDEN format, and draft and final MS4 Permit consolidated annual report preparation.



## References

### EXHIBIT C

REFERENCE #1	
NAME OF FIRM	City of Riverside Public Works
ADDRESS	3900 Main Street
CITY, STATE, ZIP CODE	Riverside, CA 92522
TELEPHONE #	951.351.6310
E-MAIL ADDRESS	<a href="mailto:MDRoberts@riversideca.gov">MDRoberts@riversideca.gov</a>
CONTACT	Mike Roberts
PROJECT NAME	MSAR TMDL Triennial Reports, RBMP Implementation, CBRP and CNRP implementation support, LECL Nutrient TMDL Revision, Limited Revision for MSAR Bacteria TMDL
COMPLETION DATE	2023
APPROX. COST	\$500,000 (through SAWPA Task Forces)
REFERENCE #2	
NAME OF FIRM	Riverside County Flood Control and Water Conservation District
ADDRESS	1995 Market Street
CITY, STATE, ZIP CODE	Riverside, CA 92501
TELEPHONE #	951.955.1273
E-MAIL ADDRESS	<a href="mailto:rboon@rivco.org">rboon@rivco.org</a>
CONTACT	Richard Boon
PROJECT NAME	CBRP and CNRP implementation support, MSAR TMDL Triennial Reports, RBMP Implementation, LECL Nutrient TMDL Revision, Limited Revision for MSAR Bacteria TMDL
COMPLETION DATE	2023
APPROX. COST	\$500,000
REFERENCE #3	
NAME OF FIRM	Orange County Public Works
ADDRESS	2301 N. Glassell Street
CITY, STATE, ZIP CODE	Orange, CA 92865
TELEPHONE #	714.955.0650
E-MAIL ADDRESS	<a href="mailto:James.fortuna@ocpw.ocgov.com">James.fortuna@ocpw.ocgov.com</a>
CONTACT	James Fortuna
PROJECT NAME	RBMP Implementation, Modeling support for NOC watersheds, LAMP
COMPLETION DATE	2023
APPROX. COST	\$200,000 (working directly with County and SAWPA Task Forces)

## Proposer's Business Information

### EXHIBIT D

1.	Length of time your firm has been in business:	54 years
2.	Length of time at current location:	13 years in Los Angeles County
3.	List types and business license number(s):	City of Pasadena No. 53433 California Business License No. C1835910
4.	California State Contractor's License number:	N/A
5.	Names and titles of all officers of the firm:	GEI is an employee-owned firm. Ron Palmieri, President Larry Rodriguez, Vice President Jon Mahoney, Secretary Thomas Kahl, Treasurer
6.	Is your firm a sole proprietorship doing business under a different name?	No
7.	If yes, please indicate sole proprietorship name and the name you are doing business under:	N/A
8.	Please indicate your Federal Tax Number:	04-2468348
9.	Is your firm incorporated?	Yes
10.	Name and remittance address that will appear on invoices:	GEI Consultants, Inc. P.O. Box 843005 Boston, MA 02284-3005
11.	Physical address:	35 North Lake Avenue, Suite 220 Pasadena, CA 91101

## Additions, Deletions and/or Exceptions

After careful review of the General Services Agreement for Services by Independent Consultant provided in the RFP, GEI respectfully requests the opportunity to discuss the following proposed revisions to Section 4.05 of that Agreement.

**4.05** Consultant hereby covenants and agrees that SAWPA, its officers, employees, and agents shall not be liable for any claims, liabilities, penalties, fines or any damage to property, whether real or personal, nor for any personal injury or death caused by, or resulting from, or claimed to have been caused by or resulting from, any negligence, recklessness, or willful misconduct of Consultant. To the extent permitted by law, Consultant shall hold harmless, ~~defend at its own expense,~~ and indemnify SAWPA, its directors, officers, employees, and authorized volunteers, against any ~~and all~~ liability, claims, losses, damages, or expenses, including reasonable attorney's fees and costs, ~~arising from to the extent caused by~~ all acts or omissions of Consultant or its officers, agents, or employees in rendering services under this Agreement and any Task Order issued hereunder; excluding, however, such liability, claims, losses, damages or expenses ~~arising from to the extent caused by~~ SAWPA's ~~sole~~ negligence or willful acts.



# Appendix - Resumes



## Richard D. Meyerhoff, Ph.D.

Senior Water Quality Specialist



Dr. Richard Meyerhoff is a Senior Water Quality Specialist with GEI Consultants, Inc. With over 30 years of experience, he provides technical and regulatory support to clients with emphasis on water quality program implementation and regulatory development, compliance with Municipal Separate Storm Sewer System (MS4) Permits, in particular Total Maximum Daily Load (TMDL) requirements, and surface water and groundwater quality management. Through much of his career he has worked with stakeholder groups on extended projects focused on critical water quality issues, including serving as (a) Project Manager or Technical Director for stakeholder-led efforts to comply with urban runoff requirements in the Middle Santa Ana River (MSAR) Bacteria TMDLs (2007-present) and revise the Lake Elsinore and Canyon Lake (LECL) Nutrient TMDLs (2016-present); (b) Technical Director for the Stormwater Quality Standards Task Force to revise freshwater bacteria recreational standards in the Santa Ana Region (2004-2015); and (c) Technical Project Manager for California's Central Valley Salinity Alternatives for Long-term Sustainability (CV-SALTS) to develop and implement Salt and Nitrate Control Program regulations (2012-present).

### EDUCATION

Ph.D., Aquatic Ecology, Oregon State University  
M.S., Biology, Baylor University  
B.S., Biology, Baylor University

EXPERIENCE IN THE INDUSTRY  
34 years

EXPERIENCE WITH GEI  
6 years

### PROJECT EXPERIENCE

**Santa Ana River Regional Bacteria Monitoring Program (RBMP), Santa Ana Watershed Project Authority (SAWPA), Santa Ana River Watershed, CA.** Following approval of the Santa Ana Region's recreational use Basin Plan amendment in 2015, worked with regional stakeholders to develop the original Monitoring Plan and QAPP for the Santa Ana River watershed RBMP. Development of the RBMP included incorporating the existing MSAR Watershed Bacteria TMDL compliance monitoring program (established in 2007) and other monitoring needs in the Santa Ana River watershed for waters identified as impaired for bacteria. Following 2016 approval by the Santa Ana Regional Water Quality Control Board (Santa Ana Water Board), worked with a team to begin implementation of the RBMP in May 2016.

**Stormwater Quality Standards Study, SAWPA, Santa Ana River Watershed, CA.** From 2003 to 2015, served as the Technical Director to revise freshwater bacteria water quality standards applicable to waterbodies in the Santa Ana River watershed. He assisted SAWPA and a Task Force (including Orange, Riverside and San Bernardino County MS4 permittees, Environmental Protection Agency (EPA), and Santa Ana Water Board) with an evaluation of the REC-1 beneficial use designation and applicable bacteria water quality objectives. Study included development of six use attainability analyses (UAAs) to support reclassification of recreational uses in selected waterbodies in the watershed. Work of the Task Force resulted in the adoption of a Basin Plan amendment in June 2012 that was approved by the EPA in 2015.

**MSAR TMDLs Revision, SAWPA and MSAR TMDL Task Force, MSAR Watershed, CA.** Working with the MSAR TMDL Task Force and Santa Ana Water Board to make limited revisions to the MSAR TMDLs to extend the wet winter condition compliance date. Extension of the compliance date will provide opportunity to: (a) develop a better understanding of wet weather sources of bacteria; and (b) identify and implement needed special studies to support efforts to comply with the wet winter conditions WLAs. Preparing the TMDL Technical Report and Substitute Environmental Document to support the planned Basin Plan amendment to revise the TMDLs, currently planned for adoption in 2024.

**MSAR TMDLs 2023 Triennial Report, SAWPA and MSAR Task Force, MSAR Watershed, CA.** The MSAR TMDLs require submittal of a Triennial Report every three years to evaluate progress towards achieving compliance with wasteload allocations and load allocations in the TMDLs. As the fifth Triennial Report prepared



since approval of the TMDLs in 2007, worked with a team of scientists and watershed stakeholders to prepare the 2023 TMDL compliance assessment based on data collected from 2020 to 2022. Previously assisted with the preparation of Triennial Reports in 2010, 2013, 2016 and 2020.

**MSAR Bacteria Synoptic Study and 2020 TMDL Triennial Report, SAWPA and MSAR Task Force, MSAR Watershed, CA.** Managed the implementation of a focused comprehensive study to update understanding of dry weather flow conditions, sources of human bacteria and fecal bacterial indicator concentrations and loadings in waters impaired by bacteria and major tributaries that receive inputs of urban runoff from area MS4s. The findings from this study were used to support TMDL revision planning activities and preparation of the 2020 MSAR TMDL Triennial Report.

**Impacts of Homeless Encampments in the Santa Ana River (SAR) Watershed, SAWPA.** Prepared an assessment of the current nature and extent of stream and waterbody-adjacent homeless encampments in the upper SAR watershed. Purpose of the assessment was to provide the best available information about potential relationships between the presence of homeless encampments and impacts to water quality and riparian and aquatic habitats. Subsequently, managed a study to evaluate homeless encampment impacts in the riverbed of SAR Reaches 3 and 4 on water quality during dry weather conditions. Water quality sampling (*E. coli*, human source marker HF183 and field parameters) and rapid trash assessments were conducted upstream and downstream of three areas of concentrated homeless encampments during four events in 2021-2022. Findings provided critical input to understandings of potential sources of bacteria in the MSAR watershed.

**MSAR TMDLs Implementation, SAWPA, Riverside and San Bernardino County MS4 Programs, Southern CA.** Has been providing TMDL implementation support to MSAR watershed stakeholders through the SAWPA-administered MSAR TMDL Task Force since 2007. Support has included: (a) implementation of the MSAR TMDL Watershed-wide Compliance Monitoring Program; (b) BMP Pilot Study (2008-2010) to evaluate effectiveness of selected BMPs for control of bacterial indicators in urban runoff; (c) development of a risk assessment approach to prioritize subwatersheds for bacteria source evaluation/mitigation studies; (c) various bacterial indicator urban source evaluation studies in from 2010 through 2020; and (d) preparation of TMDL Triennial Reports (2010, 2013, 2016, 2020 and 2023) to evaluate progress towards achieving compliance with TMDL wasteload and load allocations.

**Comprehensive Bacteria Reduction Plan (CBRP) Development/Implementation, Riverside and San Bernardino Counties, CA.** Provided services to both County MS4 Stormwater Programs to develop/implement CBRPs to fulfill dry weather bacteria TMDL implementation requirements in the MSAR watershed. Approved as the final effluent limit for the MS4s, CBRPs include: (a) ordinance requirements and BMPs to reduce urban sourced indicator bacteria; (b) inspection criteria used to identify and manage urban bacteria sources; (c) approach for identifying where regional treatment facilities might be built to reduce discharge of urban bacteria sources; and (d) compliance analysis to demonstrate that the CBRP, when implemented, would achieve compliance TMDLs. Since their approval in 2012, has worked with the MS4 Programs to implement the CBRPs, supporting numerous source evaluation studies to identify bacteria sources and development of mitigation solutions. The Santa Ana Water Board completed CBRP compliance audits in 2018 and found the MS4 Programs to be in full compliance with CBRP provisions.

**Regional MS4 Permit Development Support, Riverside and San Bernardino Counties, CA.** The Santa Ana Water Board has initiated the process to adopt a single Regional MS4 Permit that will cover all three counties in the Santa Ana Region: Orange, Riverside and San Bernardino (Tri-County Permittees). In early 2022, the Santa Ana Water Board released a “Staff Working Proposal” (SWP) for discussion with the Tri-County Permittees. Provided technical and regulatory support to the Riverside and San Bernardino County MS4 Programs, primarily on the TMDL and Watershed Management Plan provisions of the SWP. Permittees submitted comments on the SWP to the Santa Ana Water Board in October 2022. Will continue to provide as requested permit support through the permit development process.

## Steven Wolosoff, BCES, PMP

Senior Environmental Scientist

Steven Wolosoff is a water resources scientist with 23 years of experience involving water quality planning and project management. His work has covered a wide range of projects, including surface water monitoring, TMDL development and implementation planning, receiving water quality studies, integrated resources plan development, hydrologic analysis, hydraulic and hydrologic modeling, and stormwater permit support. Mr. Wolosoff has led multi-agency stakeholder groups in monitoring program oversight, regional project implementation, and TMDL development for inland streams and freshwater lakes. Mr. Wolosoff is an expert in microbial source tracking study design and analysis of results to support MS4 permit compliance. He also is an expert in the use of watershed models to simulate performance of source control and structural stormwater BMPs. He has developed many creative strategies to design special studies and interpret results to provide answers to complex scientific questions. His experience also has required an understanding of a wide range of environmental policies and regulations.

### PROJECT EXPERIENCE

**Santa Ana River Regional Bacteria Monitoring Program (RBMP), SAWPA, Southern CA.** The RBMP is administered by SAWPA on behalf of Orange, Riverside and San Bernardino County MS4 Programs to satisfy the surveillance/monitoring program requirements in the 2015-approved Recreation Standards for Inland Fresh Surface Waters Basin Plan amendment and the monitoring requirements included in the MSAR Bacteria TMDL. Served as technical lead in the development of the RBMP and managed [during time with previous employer] the annual program that includes both dry weather and wet weather sample collection and requires close coordination with the regional MS4 Programs, field sample collection teams and laboratories. In addition, leads the preparation of annual reports, updates to the RBMP Monitoring Plan and Quality Assurance Project Plan, creation of a new online data dashboard, and delivers presentations on various topics related to fecal bacteria in inland surface waters in the Santa Ana Basin to the RBMP Task Force.

**Middle Santa Ana River (MSAR) Bacteria TMDL Implementation, Santa Ana Watershed Project Authority (SAWPA), Riverside and San Bernardino County MS4 Programs, Southern CA.** Worked with SAWPA and the Counties of Riverside and San Bernardino to support implementation of TMDL requirements applicable to urban runoff, including stormwater. This effort has included preparation of Comprehensive Bacteria Reduction Plans (CBRPs) for both MS4 Programs, which involved development of estimates of bacteria reduction targets for the MS4s to meet the TMDL wasteload allocations. In addition, developed estimates of expected reductions of bacteria in urban runoff associated with implementation of various BMPs, e.g., outdoor water use conservation and street sweeping. Technical analyses required to develop bacteria reduction target estimates included a detailed assessment of dry weather hydrology throughout the watershed, compilation and characterization of spatial data for MS4 systems from jurisdictions within the watershed, and prioritization of key outfalls from the MS4 systems to receiving waterbodies. Supported implementation of the CBRPs through implementation of numerous special studies to assess sources of fecal bacteria in the watershed using microbial



### EDUCATION

M.P.S., Watershed Management, State University of New York (SUNY)

B.A., Environmental Studies, Binghamton University

### EXPERIENCE IN THE INDUSTRY

23 years

### EXPERIENCE WITH GEI

1 year

### REGISTRATIONS AND LICENSES

Project Management Professional (PMP)

Board Certified Environmental Scientist (BCES)

### CERTIFICATIONS

Certificate - Introduction to HEC-RAS, CDMU, 2006

Certificate - Introduction to SWMM, CDMU, 2004

### PROFESSIONAL AFFILIATIONS

Chair, Watershed Management Committee of New England Water Environment Association

American Academy of Environmental Engineers and Scientists

Stormwater Committee, Water Environment Federation

California Stormwater Quality Association

source tracking methods. The findings from these studies have been used to prepare a number of TMDL Triennial Reports (2013, 2016, 2020, 2023).

**Revision of the Canyon Lake and Lake Elsinore Nutrient TMDLs, Lake Elsinore and San Jacinto Watersheds Authority (LESJWA), Southern CA.** Manages a multi-stakeholder project to develop the technical basis for revisions to existing nutrient TMDLs in Canyon Lake and Lake Elsinore in the San Jacinto River watershed in the Santa Ana Region. The TMDL revisions include a combination of watershed and lake water quality modeling to (a) determine allowable external loads to the lakes; and (b) develop new numeric targets for dissolved oxygen, algae as chlorophyll-*a*, ammonia toxicity, and nutrients that when met will protect beneficial uses in each lake. To facilitate the TMDL revisions, developed a new watershed model for estimating external loads under multiple watershed development scenarios. A key factor in the success of the project has been facilitating coordination among numerous subject matter experts and stakeholders in the development of reasonable policies that are measurable, achievable, and protective of lake beneficial uses. In recent years, Lake Elsinore and Canyon Lake have experienced harmful algal blooms resulting in cyanotoxins at levels above health advisories. To help address this issue as part of the TMDL revision process, coordinated with the LESJWA-administered TMDL Task Force to identify the most effective approaches to monitoring and public notification related to risk of exposure to cyanotoxins.

**Watershed Model Development, Orange County Public Works, North Orange County Watersheds, CA.** Project lead working with OCPW on development of a watershed model for the North Orange County watersheds. The model is being used to evaluate value of potential projects to estimate water quality and other benefits (e.g., groundwater basin replenishment, environmental flow preservation) to support a watershed scale approach to TMDL implementation planning. The model was developed using the Stormwater Management Model and includes a continuous simulation of rainfall-runoff, pollutant buildup/washoff, key diversions and inputs. The model has provided a new watershed improvement project subcommittee (consisting of Orange County and all other watershed cities) with a quantitative analysis of runoff capture and associated pollutant load reduction in existing regional and distributed stormwater BMPs.

**Watershed-Scale PFAS Study, Santa Ana Watershed Project Authority (SAWPA), CA.** Project technical advisor for a watershed scale PFAS study involving data compilation, water quality modeling, and watershed scale solutions to protect the water supplies for millions of people. Technical guidance for surface water analysis of PFAS sources. Continuing to serve the project team as a watershed technical advisor and subject matter expert in watershed modeling.

**MS4 Permit Support, Riverside County Flood Control and Water Conservation District, Riverside County, CA.** Provided support to the Riverside County MS4 Program since 2011. Key activities have included serving as the lead modeler for preparation of the Comprehensive Nutrient Reduction Plan (CNRP) for Lake Elsinore and Canyon Lake and the dry weather CBRP for the MSAR watershed. This effort included preparing the necessary reasonable assurance analyses to support the efficacy of the implementation plans.

PREVIOUS PROJECT EXPERIENCE *[For projects BEFORE staff joined GEI]*

**San Bernardino County MS4 Program, San Bernardino, CA.** Led the technical development of updated guidance/template for water quality management plans (WQMP) for new development and significant redevelopment projects. New requirements in the areawide 2010 MS4 Permit involved prioritization of low impact development BMPs with on-site retention given consideration prior to biotreatment and release BMPs. Developed guidance and a template (which addressed requirements for both water quality volume and hydromodification, as applicable) to assist WQMP preparers in conducting a quantitative assessment of the volume mitigation expected from each category of BMP, specific criteria for making a determination that a BMP type is infeasible, allowing for consideration of the next BMP category in the hierarchy.

## Larry J. Rodriguez

Vice President – Water Resources

Larry Rodriguez is a Vice President at GEI with more than 31 years of experience water resources planning and groundwater management. He has been involved in the development of numerous feasibility studies for water resources management, supply, and flood protection projects. He has also led the development of groundwater sustainability plans in several of California's most actively managed groundwater basins, the Kern County and Kaweah subbasins of the Tulare Lake Basin. These efforts involve leading planning and technical efforts and facilitating stakeholder participation and decision-making process to achieve project objectives. Mr. Rodriguez works closely with clients to ensure projects are managed effectively and communication with clients is appropriate to meet the project's requirements.

Mr. Rodriguez's experience includes working within large stakeholder groups to facilitate collaborative solutions that meet the group's goals or alternatively as a representative of individual stakeholders to protect and advance their position.

### PROJECT EXPERIENCE

**Poso Creek Managed Aquifer Recharge Project Feasibility Study, Semitropic Water Storage District, Wasco CA.** Served as Project Manager for this feasibility study to investigate the potential of capturing flood flows from the ephemeral Poso Creek in Kern County. Analysis included evaluation of hydrologic conditions, diversion and recharge facility sizing, cost and benefits analysis, conceptual facilities design, and grant application support. The analysis identified an optimum diversion capacity from Poso Creek of 300 cubic feet per second, supported with 640 acres of new recharge basins. This project supports the District's Sustainable Groundwater Management Act (SGMA) sustainability strategy for development of local water supplies to offset reductions in imported and groundwater supplies.

**Tulare Lake Floodwater Storage and Recovery Project, Semitropic Water Storage District, Kings County, CA.** Serving as Program Manager for this project to capture and re-manage floodwaters from the Kings River to groundwater banking projects in Kern County. The project includes construction of temporary storage facilities in the historic Tulare Lake and conveyance facilities capable of delivering up to 1,200 of floodwater to the California Aqueduct and to banking projects in Kern County. Responsible for managing all consultant activities, including feasibility and alternatives analyses, CEQA and permitting compliance, water rights investigations and applications, facilities engineering and design and public outreach. The project team includes engineering, environmental and public relations consultants, with a projected planning budget of \$2-3M.

**Central Valley Flood Protection Plan – San Joaquin River Basin-Wide Feasibility Study, California Department of Water Resources, Sacramento, CA.** GEI led the development of a basin-wide feasibility study for the San Joaquin River basin to identify a preferred option for implementation of the State's Central Valley Flood Protection Plan (CVFPP). The project includes identifying and evaluating flood control measures that will meet the objectives of the CVFPP along the entire length of the San Joaquin River and its tributaries, including the southern portion of the San Joaquin Sacramento River Delta. Served as the Project Manager responsible for leading the plan formulation development, coordinating technical evaluations, coordinating progress and results with DWR managers, overseeing a multi-company consulting team, and tracking budget needs.

**Water Supply Acquisition Program, Upper San Gabriel Valley Municipal Water District, Monrovia, CA.** Led the District through an evaluation process to identify, evaluate and develop a supplemental water source for the District to help meet local long-term water supply demands. This analysis includes the determinate of available capacity in California Aqueduct to deliver potential supplies. The completed evaluation process



### EDUCATION

BS, Soil and Water Science, University of California, Davis

### EXPERIENCE IN THE INDUSTRY

31 years

### EXPERIENCE WITH GEI

10 years



identified several potential sources and is now completing a due diligence review and assist in the negotiation of purchase agreement.

**Groundwater Management Plan, City of San Diego and Sweetwater Authority, San Diego CA.** GEI is providing strategic assistance and technical support for the development of a groundwater management strategy for the San Diego Formation Aquifer in San Diego County. Currently evaluating and proposing management strategies for sustainable management of the aquifer and overlying alluvial groundwater basin that meeting the goals of the key stakeholders and provides coverage under the SGMA. GEI led the development of a white paper assessing the benefits of preparing a traditional AB3030 groundwater management plan versus a SGMA compliant plan. With the selection of a SGMA compliant approach by the stakeholders, GEI will be supporting the development of both a Groundwater Sustainability Agency, Sustainable Groundwater Plan and basin boundary modifications.

**Sustainable Groundwater Management Planning, Kern Groundwater Authority, Bakersfield CA.** Serving as the Technical Team Project Manager for development of a Groundwater Sustainability Plan for the Kern Sub-basin of the Tulare Lake Basin. The Kern Groundwater Authority (KGA) involves more than 20 districts that are dependent on the groundwater basin for all or a portion of their water supply or who manage groundwater banking and storage programs within the basin. The KGA is in the process of developing and defining the role and responsibilities of Groundwater Sustainability Agencies (GSA) within the Basin. The Technical Team is supporting this effort by preparing White Paper evaluations of the seven GSA coordination elements required by the SGMA, evaluating methods for more accurately determining groundwater uses in the urban and agricultural areas, conducting initial basin-wide Water Balance analyses, and working with KGA participants on defining basin boundary modifications. As the Project Manager, support and facilitate technical committees of the KGA and work closely with the Executive Management team to plan for and management to the goals of the KGA.

**Groundwater Sustainability Plan Development, Semitropic Water Storage District GSA, Wasco, CA.** Served as the Project Manager for development of the GSA's GSP in the critically over-drafted Kern Subbasin. As the Project Manager, was responsible for coordination of all technical analysis to support development of Sustainable Management Criteria, coordination with neighboring districts and the Kern Groundwater Authority. He also led numerous stakeholder outreach events targeting District landowners as well as other interested stakeholders. GEI prepared the draft GSP and addressed comments for the development of the Final GSP, submitted to DWR in January 2020.

**Groundwater Budget Allocations and Tiered Pricing Structure, Semitropic Water Storage District GSA, Wasco CA.** Led the development of landowner level groundwater budget allocations, recognizing individual landowner imported water supply contracts, local water supplies, native groundwater yield. Landowner water budgets established allocations to achieve compliance with required reductions in local groundwater use by 2040, consistent with the District's Groundwater Sustainability Plan. Compliance with landowner water budgets is supported with a tiered water pricing structure based on the individual landowner's total agricultural consumptive use versus water budget allocations.

**SGMA Implementation Support, Semitropic Water Storage District GSA, Wasco, CA.** Provides technical and strategic support to the GSA for implementation of various programs related to the GSAs Groundwater Sustainability Plan. Efforts have included; supporting annual SGMA reporting requirements to DWR; continued analysis of groundwater conditions relative to established minimum thresholds and measurable objectives; and providing technical and policy support for establishment of landowner water budgets.

**Strategic Support, Semitropic Water Storage District, Wasco, CA.** Provides strategic advice to water management policies and practices of the District. Assists the executive management and Board of Directors on matters related to State Water Project operations and deliveries, alternative water supplies opportunities, groundwater banking policies and management, and landowner water management strategies related to the SGMA.

**Ashley Romero**  
Water Quality Scientist



Ashley Romero is a Water Quality Scientist with a variety of experience including WET laboratory technical and management experience consisting of the supervision and training of laboratory technicians, performing WET and TIE testing, bioassay data analysis and interpretation, reporting, and the formulation of QA/QC procedures. Ms. Romero also has experience with macroinvertebrate sorting and sediment studies. Ms. Romero has assisted with NPDES permitting requirements for renewal and modification.

**PROJECT EXPERIENCE**

**Whole Effluent Toxicity Testing Permitting Support, Molson Coors – Golden Brewery, Golden, CO.** Laboratory Manager. Coordinated and assisted with the compilation and data analysis for the CDPS permit renewal application. Performed QA/QC measures on all data and maintained client communications.

**Confluence Park Apartments Sampling and Project Management, Denver, CO.** Laboratory Manager. Assisted and coordinated sample collection of the discharge for monthly, quarterly, and semi-annual parameters. Compiled data for entry into NetDMR and performed QA/QC measures on all data for sampling and data reporting.

**Whole Effluent Toxicity Testing, Molson Coors - Golden Brewery, Golden, CO.** Laboratory Manager. WET Study design and data interpretation to evaluate toxicity to *Ceriodaphnia dubia* reproduction. Design and implementation of numerous toxicity identification and toxicity reduction studies to evaluate a complex effluent.

**Water Effects Ratio Testing – Newmont Mining Corporation, Merian Gold Mine, Suriname, South America.** Laboratory Manager. Assisted in study design, and performed Quality Assurance measures on laboratory reports. Assisted laboratory with copper WER tests for various species.

**Whole Effluent Toxicity Testing and Reporting, Multiple Clients, Various Locations.** Laboratory Coordinator/Manager. Conducted WET tests and wrote NPDES permit compliance reports on acute and chronic WET test results for tests with *Ceriodaphnia dubia*, *Daphnia magna*, *Oncorhynchus mykiss*, *Pseudokirchneriella subcapitata*, and *Pimephales promelas* for various clients in Colorado, New Mexico, Idaho, Washington, Texas, California, and South Dakota.

**Toxicity Identification Evaluation and Investigations, Numerous Clients.** Laboratory Coordinator/Manager. Conducted various studies to investigate potential causes of toxicity. Studies include mock effluent testing, salt spiking and EPA TIE methods.

**PREVIOUS PROJECT EXPERIENCE**

**TRE Environmental Strategies, LLC, Fort Collins, CO.** Previously AECOM- Fort Collins Environmental Toxicology Laboratory, Fort Collins. Laboratory Coordinator 2014-2018; Laboratory Technician I-III 2009-2014. Maintained various culture organisms including aseptic maintenance of algae, *Selenastrum capricornutum*, invertebrates such as *Ceriodaphnia dubia*, *Daphnia magna*, and *Chironimus dilutes*, and vertebrates such as *Pimephales promelas* and *Oncorhynchus mykiss*. Performed specialized projects such as Toxicity Identification Experiments (TIEs) for toxic samples. Maintained, calibrated, and utilized testing equipment such as photometers and spectrophotometers. Summarized and provided quality assurance checks to test data for reports following guidelines outlined by the E.P.A. Performed statistical analysis and parametric/non-parametric hypothesis testing.

**EDUCATION**

B.A. Biology with a concentration in Biology, Colorado State University  
B.A. Environmental Health, Colorado State University  
M.S. Environmental Health specializing in Toxicology

**EXPERIENCE IN THE INDUSTRY**  
14 years

**EXPERIENCE WITH GEI**  
5 years

**PROFESSIONAL ASSOCIATIONS**  
Rocky Mountain Water Quality Analysts Association  
Society of Environmental Toxicology and Chemistry  
Consortium for Research and Education on Emerging Contaminants

**Colorado State University, Fort Collins, CO.** Student Scientist 2011 – 2013. Trained technicians in sterile cell culture techniques, protein assays, and general laboratory maintenance. Participated in international collaborative research at the National Institute of Radiological Sciences (NIRS) in Japan through the open laboratory. Conducted cell and tissue culture experiments with the High-Ion Medical Accelerator (HIMAC) in the particle therapy facility for cancer research. Independently conducted cytological assays such as fluorescence in situ hybridization (FISH) for analysis of chromosomal aberrations upon exposure to radiation. Coordinated daily laboratory tasks and scheduled WET testing for clients. Trained and supervised technicians on instrumentation, analytical, and test methods.

#### PUBLICATIONS AND PRESENTATIONS

Forty-Third Annual Meeting. Society of Environmental Toxicology and Chemistry. Presentation. “Assessment of Interlaboratory and Seasonality Impacts of Culturing *Ceriodaphnia dubia* with Light Emitting Diode (LED) Lights.” Regn, O., Love, N., and Romero, A.

Forty-Second Annual Meeting. Society of Environmental Toxicology and Chemistry. Presentation. “Novel Approach to Identifying Toxic Ionic Compounds.” Bowersox, M. and Romero, A.

Forty-First Annual Meeting. Society of Environmental Toxicology and Chemistry. Presentation. “Do Light Emitting Diode (LED) Lights Meet the Light “Quality” Requirements of the Current USEPA WET Methods?” Love, N. and Romero, A.

Forty-Second Annual Meeting. Society of Environmental Toxicology and Chemistry. Poster. “Use of the Zinc and Cadmium Biotic Ligand Model (BLM) to evaluate metals toxicity in Whole Effluent Toxicity (WET) Testing?” Romero, A.

Thirty-First Annual Meeting, Society of Environmental Toxicology and Chemistry. Poster. “How water hardness and alkalinity can unintentionally impact fathead minnow growth in whole effluent toxicity tests.” Naddy R., Romero, A., McNerney G., Pillard, D.

14th Annual CVMBS Research Day. Poster. “Mouse-dependent variations in sensitivity to induction of gamma-H2AX foci after continuous low dose-rate irradiation: The Atm+/+ vs. Atm-/- genotypes on Balb/c, 129S6, C57BL/6J, and A/J inbred strains. Romero, A., Bell, J. Brogan, J.R., Nagasawa, H., Fallgren, C., Wade, T., Genik, P., Little, J.B., Bedford, J.S., Weil, M.M., Kato, T.A.

Genet, S.C., Maeda, J. Fujisawa, H., Yurkon, C.R., Fujii, Y., Romero, A.M., Genik, P.C., Fujimori, A., Kitamura, H., Kato, T.A. “Comparison of cellular lethality in DNA repair-proficient or –deficient cell lines resulting from exposure to 70 MeV/n protons or 290 MeV/n carbon ions.” *Oncology Reports* (28); 2012; 1591-1596

## Donghai Wang, Ph.D., P.E.

Principal Water Resource Software Engineer

Dr. Donghai Wang is a principal water resources software architecture designer and a registered civil engineer in California. With 28 years of experience, he is well-versed in the design, development and operation of water resource and environmental information systems, as well as modeling and decision support system. As manager of the information management group at GEI, Dr. Wang has a proven track record of delivering comprehensive water resource and environmental data management systems to clients at the local, state, and federal level. His areas of expertise include software architecture, user interface design, H&H modeling, SCADA system design and management, data integration and exchange, data visualization, and quality control. He is proficient in various computer languages and software such as Java, JavaScript, jQuery, Python, IIS, VB.NET/.NET, Microsoft SQL Server, PHP, Python, FORTRAN, C, MATLAB, MODFLOW, HEC Software, and ArcGIS software.

### PROJECT EXPERIENCE

#### **Floodplain/Watershed Management Portal, California**

**Department of Water Resources, Statewide.** As the Project Manager and Lead Teacher, is responsible for overseeing project management, system design, and implementation efforts. The goal of this project is to develop a watershed management portal for the State of California, which will bring together a wealth of information related to flood planning, flood risk, river forecasts, reservoir storage, and emergency preparedness information from multiple sources, including CalOES, FEMA, and NWS. The portal is organized by watershed and features an integrated dashboard and map viewer, displaying basic information about each watershed, as well as details on dams, groundwater, agencies, contacts, activities, documents, and events. This platform is designed to enhance communication and outreach efforts between the Department of Water Resources and local agencies.

#### **USACE Levee Screening Tool (LST), U.S. Army Corps of**

**Engineers ACE Risk Management Center (RMC).** The LST is a web-based GIS enabled tool to evaluate, plan, and report the condition and associated risks of levees. The tool assists in determining the probability of the levee to perform as intend. It uses surface hydrologic models including HEC-RAS and HEC-LifeSim to simulate water depth and water travel time. It integrates data from various sources and uses GIS map as tool for users to define model input data, run models, view water control features, and visualize model results including animation of model results, hydrographs, tables, and charts. Project Manager and lead system developer responsible for system design, system integration and model calibration and analysis.

#### **Madison River Thermal Decision Support System (DSS), North**

**Western Energy, Madison, MT.** Serves as the technical leader for network architecture design and user interface improvement. The Madison River DSS integrates components from various data sources



### EDUCATION

Ph.D., Hydrology and Water Resources,  
The University of Arizona  
M.S., Civil and Environmental  
Engineering, Tsinghua University  
B.S., Chemical and Environmental  
Engineering, Beijing Technology and  
Business University

### EXPERIENCE IN THE INDUSTRY

28 years

### EXPERIENCE WITH GEI

15 years

### REGISTRATIONS AND LICENSES

Professional Engineer, CA No. 69491

### TECHNICAL SKILLS

Web Application: Java, ASP.NET/IIS,  
Ajax, Servlet, Java Server Pages  
(JSP), XHTML, XML, CSS and SOAP  
Web service  
Database: Enterprise SQL Server, Oracle,  
MySQL, Access, FoxPro  
Computer Language: Java,  
PHP, VB.NET/.NET, FORTRAN,  
MATLAB, C/C++, Java, C#, Python,  
Visual Basic, SQL, PHP, ASP,  
ASP.NET and JavaScript  
Software/Tool: Tableau, HEC-HMS, DSS,  
HEC-DSSVue, HYDRUS-2D,  
Flowpath, MODFLOW, GMS,  
SURFER, GEOEAS, GSLIB,  
MODFLOW, MT3D, GW Vistas and  
TECPLOT  
GIS: Enterprise ESRI ArcGIS, ArcGIS  
Server JavaScript API, ArcIMS, Java  
API, ArcObjects, ArcSDE, ArcInfo,  
ArcEditor, ArcView and AutoCAD



including external websites from USGS, NWS and USACE, and internal SCADA instruments. Designed a data collection/import system that collected data from various instruments/websites/databases, defined system hard and software specifications, and designed data process tools to integrate internal and external data system. Designed a public web view interface, created tools to streamline data import and upgraded hydrology and hydraulics (H&H) model and database structure.

**Sustainable Groundwater Management Act (SGMA) Portal, California Department of Water Resources, CA.** Project Manager. SGMA Portal was designed and developed for DWR to manage SGMA program data. It allows local agencies to submit SGMA required data and document and DWR to publish data.

**San Joaquin F-CO Decision Support System, California Department of Water Resources, CA.** As the Technical Lead, is responsible for the user interface design, network architecture design, and data integration design for SJ F-CO, a project aimed at enhancing flood prevention through improved data collection, river flow forecasting, and better coordination between reservoirs. Under his leadership, the team developed a web application specifically for the snowmelt season to help coordinate reservoir operations in the San Joaquin River System. Also established a framework for integrating components from various data sources, including NWS, USACE, and USGS. He designed data exchange protocols to integrate and disseminate hydraulic model results, instrument data, and reservoir operational data, ensuring that all stakeholders have access to the information they need.

**Sacramento County Web-Based Decision Tool, Sacramento County Office of Emergency Services, CA** As the Lead User Interface and Network Architecture Designer, was tasked with designing and developing an integrated, web-based emergency management tool that utilizes map technology. This tool, built on the National Incident Management System (NIMS) structure, provides users with remote access to real-time and forecasted hydrologic and hydraulic data, inundation flood mapping, critical facilities, and evacuation route information via cell phones and tablets. The goal of this tool is to enable remote monitoring, coordination, and reporting of incidents. The tool is being utilized by a range of stakeholders, including the National Weather Service, the State of California, Sacramento County, and local adjacent agencies.

**Dam Information Management System (DIMS), Southern California Edison (SCE), CA.** Network architecture designer responsible for designing and developing a web-based mapping and database software tool that allows SCE engineers, planners and emergency responders to easily access detailed H&H model data, instrument data and data imported from cooperative agencies. The GIS web mapping tool allows users to merge in real-time data for outside sources such as weather forecast, gage data, fire safety, transportation and real-time and historic seismic information. Having the most up-to-date and consistent data for their dams that is also easily assessable during emergency conditions greatly improves their ability to Prevent, Protect, Mitigate, Respond, and Recover for real-life events and training.

**Flood Emergency Response Information Exchange (FERIX), California Department of Water Resources, Statewide, CA.** Project Manager and Technical Lead for network architecture design, user interface design, and data integration design of FERIX which is a tool to help manage, disseminate, distribute, query, and visualize flood related data and maps. FERIX is a comprehensive web application that integrates, analyzes, and displays H&H and system operational data in a sophisticated data management infrastructure. FERIX integrates information, maps and documents from various sources. It increases efficiency on extraction, analysis, and representation of data existing in a variety of formats; enhances information accessibility, sharing, mapping and reporting. FERIX integrates and shares data among Real-Time Data, Local Maintaining Agency Reports, Levee Inspections and Logs, California Levee Database, Snow Courses Data and Documents, and Operation and Maintenance Manual Database.

**Matthew L Moua**  
Software Engineer



Matthew Moua is a software engineer and recent graduate of the University of California, Davis. He is proficient in developing web applications using Java, HTML, CSS, JavaScript, jQuery, Bootstrap, AJAX, Microsoft/Oracle SQL, ESRI ArcGIS, Leaflet GIS and other data management tools. He is also experienced with Integrated Development Environmental (IDE) software including ArcMap, NetBeans, Android Studio, Visual Studio, and XCode.

#### EDUCATION

B.S., Computer Science and Engineering,  
U.C. Davis, Davis

#### EXPERIENCE IN THE INDUSTRY

5 years

#### EXPERIENCE WITH GEI

5 years

#### PROJECT EXPERIENCE

##### **Soo Locks Approach Wall Construction - Web Application, U.S. Army Corps of Engineer, Sacramento, CA.**

Software Engineer. Create and design the full data pipeline and stack of the data collected by USACE to reconstruct the Soo Locks parallel locks that connect Lake Superior with the lower Great Lakes. Designed the database schema and data management system and constructed the backend and frontend interface for clients. Utilized ESRI ArcGIS for map viewer and GIS data collection and Microsoft SQL Server for field and lab test data. Continue maintaining web application and troubleshooting issues that are found in the application and managing field and lab data as well as client requests.

##### **California Water Watch (CWW) - Web Application, Department of Water Resources, Statewide, CA.**

Software Engineer, GIS Web Applications Developer. Software Engineer responsible for developing a Web Application to manage, view, and maintain drought and water information in California. Implement and design website based on client needs and expectations; created ESRI ArcGIS map viewer, landing, and dashboard pages. Created a REST backend service that queries an SQL Oracle-driven Database. Discussed and reviewed with clients and demo application.

##### **Headwaters to Floodplains Portal (H2F Portal) - Web Application, Department of Water Resources, Statewide, CA.**

Software Engineer, GIS Web Applications Developer. Software Engineer responsible for developing a Web Application to manage, view, and maintain watersheds in California. Created a REST backend service that queries an SQL Oracle-driven Database and implemented a friendly User Interface (UI) for clients to easily manage watersheds via the web. Utilized ESRI ArcGIS to publish map layers to map servers, created map viewers, watershed form editing, print/preview page, and setting up authentication services. Met with clients to demo and discuss tasks and worked with peers in distributing workload.

**Levee Screening Tool (LST) - Web Application, U.S. Army Corps of Engineer, Statewide, CA.** Software Engineer. Developed and designed web application interface for clients to easily screen levees found throughout California. Integrated web services with the National Levee Database (NLD), a public API service for levees throughout the United States. Created web map viewer with the Leaflet GIS API and loaded shapefiles and GeoJson to the map.

##### **Encroachment Permits (EP) - Web Application, Department of Water Resources, Statewide, CA.**

Software Engineer, GIS Web Applications Developer. Software Engineer for developing a GIS Web Application to view encroachment permits in California. Reviewed database schema and set up REST backend service to query data efficiently and effectively. Managed data structure efficiently and optimized data retrieval for complex queries. Integrated the data retrieved from SQL Oracle Database with the front end's ArcGIS ESRI map API to display permits and meet client needs and expectations. Met with client to discuss workflow, progress and next steps and worked with project manager to meet client needs and expectations. Worked closely with peers to resolve any issues and tested/debugged using JUnit.

**Environmental Compliance Module (ECM) - Web Application, Department of Water Resources, Statewide, CA.** Software Engineer, Web Applications Developer. Software Engineer for developing a Web Application for clients to create, manage, and review Environmental projects in California. Clients can compile a list of activities imported from the Maintenance Tracking System (MTS) into a project and fill out data to meet their environmental compliances. Full-Stack development of both front and back end, setting up the schema for the database, structuring and maintaining data, and implementing business logic per client requests.

**Channel Maintenance Module (CMM) - Web Application, Department of Water Resources, Statewide, CA.** Software Engineer, GIS Web Applications Developer. Software Engineer for developing a Web Application for DWR (Department of Water Resources) to inspect, manage, and maintain channels and levees in California. Implement the schema for the database, set up REST services, and created User Interface for clients to maintain a channel and simulate levee failures. Also implemented a levee mile calculator tool and a levee rating calculation tool. Met with clients to review changes, remaining tasks, and goals.

**Web Application, Department of Water Resources, Statewide, CA.** Software Engineer, GIS Web Applications Developer. Implement a GIS Web Application to manage all the dams located in California and their dam hazards, inundations, potential spills, and evacuations for users living within an inundation area. Created interface for public users, state workers, and admin users to create, read, update, and delete dam data. Created database schema using SQL Oracle to handle client expectations, a REST service using Spring Framework to handle data manipulations, and front-end web user interfaces using HTML, CSS, JavaScript, JQuery and various other front-end languages, libraries, and tools.

**Flood Emergency Response Information Exchange (FERIX) - Utility Crossing Inventory Program (UCIP) Application, Department of Water Resources, Statewide, CA.** Software Engineer, Web Applications Developer. Created data services to manipulate data from the database, checked integrity of data, set up requests to call specific data, and handled responses for user interface. Handled Map service data parsing and added various User Interface features per client request. Testing and fixed broken map layers and several map service features before deploying application onto FERIX server.

**Permits and Reports, U.S. Army Corps of Engineers (USACE), Statewide, CA.** Software Engineer, Web Application Developer. Implemented Coordination Report of all open permits received by USACE and not yet sent to sponsor. Wrote SQL queries to pull permit information and permit reviewer information, then connected SQL to Java to HTML, CSS, JavaScript to show data on a data table and display permits that still needed to be reviewed or have not have all criteria met. Created a graph of pending permits, average permits finished, average turnaround of permits, and number of permits reviewed by an agency. Added admin functionality to add and delete users and added downloading permits that were rendered onto google maps. Updated database per client request and checked data integrity.

**SGMA (Sustainable Groundwater Management Act) Data Viewer, Department of Water Resources, Statewide, CA.** Software Engineer and Web Application Developer. Improved the SGMA Data Viewer by continuing to add application enhancements, tools, and new features provided by DWR SGMA team. Update the map viewer and continue providing deployments for clients to test their latest data. Implemented several features to support different ArcGIS map layers. Accounted for many different types of ArcGIS Map layers and created save windows for each feature. Tested ArcGIS Map layers on each web application and debugged many issues with the project as well as reviewed code for improved efficiency.

**Jake Riedel**  
Staff Geologist



Jake Riedel is a staff geologist in GEI's Carlsbad office. His knowledge base revolves around an analytical approach towards hydrogeological characterization utilizing computer-based techniques such as numerical modeling and statistical computing. He also has comprehensive field experience in performing aquifer pump and slug tests, soil and water sample collection, processing and analysis, and stream gauging.

PROJECT EXPERIENCE

**Wilmington Refinery, Marine Terminal, Asphalt Plant, Valero, Wilmington, CA.** Performed routine and non-routine groundwater and soil sampling for both known and emergent contaminants on multiple sites. Oversaw soil boring drilling while conducting geologic soil logging. Conducted work in and around ongoing construction activities on the facilities. Obtain daily work permits and work authorization from site personnel. Familiar with strict sampling procedures for PFAS sampling in both groundwater and soil. Use of GIS to update maps and figures for routine and non-routine reporting.

**Aquifer Storage and Recovery (ASR) Model, Semitropic Water District, Kern County CA.** Assisted in expansion and refinement of MODFLOW model for 140,000-acre irrigation district to evaluate compliance with state water project agreements. Modeling of supply pumping and ASR recharge cycles. Modeled three-aquifer system extending 3,000 feet deep. Model runs four decades on monthly time-steps. Pumping inputs based on irrigation demands according to land use/crop type.

**Fate and Transport Model, Refinery, TX.** Designed a fate and transport model to predict the movement of select compounds through a complex network of paleochannels following a petroleum release. Model was used to support decision making on the use of refinery supply wells. Used GIS, Surfer, and R to support with data management and figure design.

**Former Refinery NSZD Analysis, Ultramar Former Refinery, Hanford CA.** Developed NSZD analysis spreadsheet using soil vapor monitoring data from wells with varying screened intervals across the site. Use of GIS to calculate area of well clusters for calculations.

**Enhanced NSZD Analysis, Refinery, TX.** Analyzed NSZD rates and efficiency of a bioventing system installed downgradient from a Refinery in Northern Texas.

**Annual DSSMP/R Updates, Confidential Client, CA.** Updated annual dam safety monitoring reports with new findings and data. Used Grapher and Excel to update figures.

**WRD Advanced Water Treatment Facility, Long Beach, CA.** Assist in aquifer pump test. Conduct water depth readings as groundwater is being pumped and recharging. Served as lead during pumping periods. Retrieved transducers and downloaded data post-test.

PUBLICATIONS

Riedel, Jake W., et al. "Investigating Thermal Controls on the Hyporheic Flux as Evaluated Using Numerical Modeling of Flume-Derived Data." *Hydrology* 9.9 (2022): 156.

EDUCATION

M.S., Hydrogeology, Illinois State University

B.S., Geological Sciences, University of Buffalo

EXPERIENCE IN THE INDUSTRY

1 year

EXPERIENCE WITH GEI

1 year

TRAINING AND CERTIFICATIONS

HAZWOPER 40

PROFESSIONAL AFFILIATIONS

Geological Society of America

Groundwater Resources Association of California

**Marguerite Ann Myers**  
Administrative Analyst



Marguerite Myers is an administrative analyst in GEI's Sacramento office and has 20 years of experience in supporting other staff in the management of the California Department of Water Resources (DWR) FloodSAFE California Program Management, Drought, and Flood ER Program contracts. Ms. Myers also had experience with various compliance requirements, such as Section 508 of the Rehabilitation Act, American with Disabilities Act.

EXPERIENCE IN THE INDUSTRY  
20 years

EXPERIENCE WITH GEI  
8 years

PROJECT EXPERIENCE

**Comprehensive Flood Management Services, California Department of Water Resources, Statewide, CA.**

GEI is the prime consultant assisting DWR with a multi-year contract designed to successfully implement flood management projects. Served as project analyst responsible for tracking task order budgets and subcontractor task order budgets; reviewing draft and final invoices from subcontractors and accounting prior to submittal to DWR to ensure compliance with DWR policies; tracking deliverables and maintaining project files, including deliverables for submittal to DWR and maintaining copies in GEI project files; and ensuring QC/QA policies are followed for all client deliverables. Assisted with the creation of graphics, brochures, and the editing and formatting of documentation. Ensured engineering and environmental documents and reports complied with Federal Section 508 ADA accessibility standards and performed PDF remediation.

**Environmental Services and Flood Risk Management Planning Services Projects, Sacramento Area Flood Control Agency (SAFCA), Sacramento, CA.** Ensured documents and reports complied with Federal Section 508 ADA accessibility standards and performed PDF remediation.

**Various Projects, Various Clients, Statewide, CA.** Ensured documents and reports complied with Federal Section 508 ADA accessibility standards and performed PDF remediation.

**Flood Management Program (FloodSAFE II), California Department of Water Resources, Statewide, CA.** GEI is the prime consultant assisting DWR with a multi-year contract designed to successfully implement the FloodSAFE II Program. Served as project analyst responsible for tracking task order budgets and subcontractor task order budgets; reviewing draft and final invoices from subcontractors and accounting prior to submittal to DWR to ensure compliance with DWR policies; tracking deliverables and maintaining project files, including deliverables for submittal to DWR and maintaining copies in GEI project files; and ensuring QC/QA policies are followed for all client deliverables. Assisted with the creation of graphics, brochures, and the editing and formatting of documentation.

**Drought Management Team Engineering & Environmental Support Services, California Department of Water Resources, Sacramento, CA.** GEI is the prime consultant assisting DWR with a multi-year program in support of drought emergency preparedness, response, and recovery efforts. Served as the project analyst, responsible for tracking deliverables and maintaining project files, including deliverables for submittal to DWR and maintaining copies in GEI project files. Also responsible for ensuring QC/QA policies are followed for all client deliverables. Assisted with the creation of graphics and brochures.

**Sustainable Groundwater Management Program Support, California Department of Water Resources, Sacramento, CA.** GEI is the prime consultant assisting DWR with a multi-year contract designed to successfully implement the Sustainable Groundwater Management Act. Served as project analyst, responsible for tracking task order budgets and subcontractor task order budgets; reviewing draft and final invoices from subcontractors and accounting prior to submittal to DWR to ensure compliance with DWR policies; tracking deliverables and maintaining project files, including deliverables for submittal to DWR and maintaining copies in GEI project files; and ensuring QC/QA policies are followed for all client deliverables. Assisted with the creation of graphics and brochures.



**FloodSAFE California Program Management, California Department of Water Resources, Statewide, CA.** GEI is the prime consultant assisting DWR with a multi-year contract designed to successfully implement the FloodSAFE Program. Served as project analyst, responsible for tracking task order budgets and subcontractor task order budgets; reviewing draft and final invoices from subcontractors and accounting prior to submittal to DWR to ensure compliance with DWR policies; tracking deliverables and maintaining project files, including deliverables for submittal to DWR and maintaining copies in GEI project files; and ensuring QC/QA policies are followed for all client deliverables. Assisted with the creation of graphics, brochures, and the editing and formatting of documentation.

**Flood Emergency Response Program (Phase II), California Department of Water Resources, Statewide, CA.** GEI is the prime consultant assisting DWR with a major, multi-year program to overhaul California's Flood Emergency Response Program. Served as project analyst, responsible for tracking deliverables and maintaining project files, including deliverables for submittal to DWR and maintaining copies in GEI project files. Also responsible for ensuring QC/QA policies are followed for all client deliverables. Assisted with the creation of graphics and brochures.

**2022 Central Valley Flood Protection Plan Update, California Department of Water Resources, Sacramento, CA.** Assisted with administration and the addition and category changes of staff.

**Sacramento River East Levee, Sacramento Area Flood Control Agency, Sacramento County, CA.** Performed Section 508 ADA Compliance, as well as document review and formatting.

**Lower Elkhorn Basin Levee Setback, Sacramento Area Flood Control Agency, Sacramento County, CA.** Performed Section 508 ADA Compliance, as well as document review and formatting.

**Southport Levee Improvement, West Sacramento Area Flood Control Agency, Sacramento County, CA.** Performed Section 508 ADA Compliance, as well as document review and formatting.

**New Bullards Bar ARC Spillway, Yuba County Water Agency, Marysville, CA.** Project analyst, responsible for assisting with tracking the budget and preparing the monthly invoices and progress reports. Assisted with the creation of graphics and the editing and formatting of documentation.

#### PREVIOUS EXPERIENCE

Worked previously for a civil engineering, landscape planning, and surveying firm in Sacramento as a receptionist and project assistant, working under the direction of the four principals. The main focus of the position was the front desk. Other responsibilities included coordinating the monthly billing for all projects with the corporate office; formatting and proofing correspondence, contracts, sub-contracts, task orders and change orders before being submitted to make sure that they were consistent with the company standards; and coordinating with the project manager when the signed documents were executed. Also responsible for managing all of the contract files and ensuring all paperwork was up to date.

# Nan Jia

PE, QSD/P

Project Manager

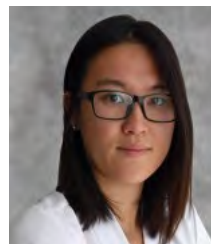
## RELEVANT EXPERIENCE

### Los Angeles County Mass Emissions Station Monitoring

Project Manager assisting LACPW and LACFCD with as-needed water quality monitoring and reporting services since the 2020-2021 fiscal year, as well as identifying potential grant funding opportunities and preparing grant applications. The MES Monitoring Program Implementation under this contract included sampling preparation, pre-storm season equipment blank sampling, storm tracking and sampling team coordination, wet- and dry-weather sampling, data analysis, and semi-annual data reporting. In accordance with NPDES MS4 Permit Order No. R4-2012-0175, the receiving water monitoring program determined whether RWLs are being achieved, assessed trends in pollutant concentrations over time or during specified conditions, and determined whether the designated beneficial uses are fully supposed as determined by water chemistry, aquatic toxicity, and bioassessment monitoring. After the initial sampling efforts, follow-up monitoring events were conducted to further assist with the source investigation effort. An analysis of the results was then reported in CEDEN format. Sampling sites included the County Island Outfall Site, Coyote Creek, Los Angeles River, Malibu Creek, San Gabriel River, and Santa Clara River Mass Emissions Station. CWE is currently developing a training video for LACPW on general water quality monitoring and monitoring equipment maintenance, including in-situ water quality meter, automated samplers with refrigerator unit, telemetry, rain gauges, and more.

**SAWPA Bacteria TMDL Monitoring Program Implementation** Monitoring support who performed water quality monitoring services to assist SAWPA with Bacteria TMDL compliance through implementing the Santa Ana River Watershed Bacteria Monitoring Plan and QAPP. The program covers the entire Santa Ana River Watershed, including the southwestern part of San Bernardino County, northwestern part of Riverside County, and a small portion of Los Angeles County. Tasks included: calibrating and maintaining field meters; preparing CoC forms; obtaining and labeling sample containers; decontaminating sample collection materials using the disinfection/rinse method; collecting grab samples at various creeks, rivers, and channels during dry- and wet-weather events; making field observations, photo documentation, and recording observational data; operating field meters for measuring field parameters for temperature, dissolved oxygen, conductivity, turbidity, and pH; and delivering the samples under CoC to the laboratory within limited sample hold times.

**Los Angeles River Upper Reach 2 CIMP Implementation** Monitoring Lead for CIMP implementation services provided for the LAR UR2 WMA, through the GWMA. This group is comprised of the Cities of Bell, Bell Gardens, Commerce, Cudahy, Huntington Park, Maywood, Vernon, and the LACFCD. Services provided have included preparing a project-specific HASP; QAPP preparation; obtaining access and encroachment permits from the USACE, LACFCD, and local municipalities; GIS outfall inventory; and non-stormwater discharge outfall screening. Ongoing services include meeting coordination, weather tracking, dry- and wet-weather water quality monitoring at two fixed and six



### Years of Experience

6

### Education

MS, Civil and Environmental Engineering,  
University of California,  
Irvine

BS, Environmental Sciences,  
University of Minnesota,  
Twin Cities

### Registrations

Civil Engineer, CA, 92333

Qualified SWPPP Developer/  
Practitioner, 27876



rotating stormwater outfall sites, preparing field logs and site assessment photos, laboratory coordination, QA/QC of results, data management, report preparation, semi-annual CEDEN format data submission, and draft and final annual report preparation.

**Rio Hondo San Gabriel River Water Quality Group CIMP** Assistant Project Manager for Rio Hondo/San Gabriel River Water Quality Group CIMP implementation services. This group is comprised of the cities of Arcadia, Bradbury, Duarte, Monrovia, and Sierra Madre; County of Los Angeles; and LACFCD. Services included preparing a project-specific HASP, obtaining access permits from the LACFCD, conducting Rio Hondo Pre-LRS monitoring, GIS outfall inventory, and non-stormwater outfall screening and monitoring. Ongoing services include meeting coordination; weather tracking; dry- and wet-weather water quality monitoring at five receiving water sites such as Peck Road Park Lake and five stormwater outfall sites; preparing field logs and site assessment photos; laboratory coordination; QA/QC of results; data management and report preparation; semi-annual data submission in CEDEN format; and draft and final consolidated annual report preparation.

**Orange County Public Works Los Patrones Monitoring** Project Manager for a wet weather monitoring program at Los Patrones Parkway following the construction of their basins. Water quality and flow monitoring was completed at the inflow and outflow stations of basins C, F and G to determine the concentration and mass-based pollutant removal efficiencies for each monitored constituent. A maximum of two wet-weather storm events were sampled each year, and an annual report was created that identified the effectiveness of the TSS removal as well as the water quality constituents with sediment. Tasks managed include assistance with QAPP development and sampling.

**City of Irwindale NPDES** Project Manager who helped revise the existing Integrated Management Plan to be consistent with the 2021 MS4 Permit requirements. The proposed updates included developing ArcGIS based maps delineating the City boundary, receiving waters, MS4 catchment drainage and outfalls, subwatershed boundaries, land use, and monitoring locations. Other updates encompassed reevaluating current receiving water and stormwater outfall monitoring locations, proposing new monitoring location(s) (if necessary), and explaining how and why monitoring at the proposed location(s) will provide representative measurement of the MS4 discharges' effects on the receiving water. Responsible for identifying constituents and monitoring frequency at each monitoring location based on TMDL and 303(d) requirements as well as updating the sampling protocol and suspended sediment and toxicity sampling requirements. These protocols and requirements included QA/QC protocols and the non-stormwater outfall monitoring program.

### **City of Los Angeles Proposition O BMP Optimization Water Quality Monitoring**

Environmental Scientist providing monitoring for eight wet-weather and seven dry-weather monitoring events, over three years, at up to thirty-five sites spread among eleven Proposition O BMP project locations that included: Echo Park Lake, Grand Boulevard Tree Wells, Hansen Dam Wetlands Restoration, Imperial Highway Sunken Median, Mar Vista Recreation Center, Oros Green Street, Peck Park Canyon Enhancement, Penmar Water Quality Improvement, South LA Wetlands, Westminster Dog Park, and Westside Park Irrigation. Tasks include: development of a Monitoring Plan and QAPP, weather forecasting and tracking, coordination of sampling events with the City of Los Angeles' EMD, sample bottle preparation, field analytical analysis, field observation logging, collection and delivery of samples, data processing and analysis, and event summary technical memorandums. Various sites provide safety challenges, including lakes, median strips, underground vaults, and vehicle traffic. Monitoring includes analysis of constituents such as nutrients, metals, algae, bacteria, and pesticides. Results are analyzed in comparison with applicable limitations due to TMDLs, CTR, the basin plan, and MS4 permit requirements. Results are utilized to assess BMP functionality and effectiveness in order to make recommendations and coordinates with the City and other consultants to identify program challenges and accomplishments.



# Gerald "Gerry" Greene

DEnv, PE, QEP, QSD/P

Technical Advisor

## RELEVANT EXPERIENCE

### Rio Hondo San Gabriel River Water Quality Group Coordinated Integrated Monitoring Program

**Implementation** Project Manager providing the Rio Hondo/ San Gabriel River Water Quality Group with CIMP implementation services. This group is comprised of the Cities of Arcadia, Azusa, Bradbury, Duarte, Monrovia, and Sierra Madre, County of Los Angeles, and LACFCD. Services provided include preparing a project-specific Health and Safety Plan; recommending, specifying, and procuring/leasing monitoring equipment; obtaining permits from the LACFCD; installing receiving water, TMDL, and stormwater outfall sampling stations; and conducting Rio Hondo Pre-LRS monitoring, GIS outfall inventory, and non-stormwater outfall screening and monitoring. Ongoing services include: project management, coordination and meetings, pre-sampling event preparation, tracking inclement weather and activating sampling teams, collecting and analyzing dry- and wet-weather samples from five receiving water and TMDL sites (including Peck Road Park Lake and five stormwater outfall sites), preparing field logs and site assessment photos, coordination with multiple laboratories and QA/QC of water quality results, data management and report preparation, semi-annual data reporting, water quality data submission in CEDEN format, and draft and final annual report preparation.

### Los Angeles River Upper Reach 2 Coordinated Integrated Monitoring Program Implementation

**Project** Manager providing the Los Angeles River Upper Reach 2 Watershed Group, through the GWMA, with CIMP implementation services. This group is comprised of the Cities of Bell, Bell Gardens, Commerce, Cudahy, Huntington Park, Maywood, and Vernon, and LACFCD. Services provided included preparing a project-specific Health and Safety Plan, QAPP preparation, recommending, specifying, and procuring/leasing monitoring equipment, obtaining permits from the LACFCD, installing receiving water, TMDL, and stormwater outfall sampling stations, GIS outfall inventory, and non-stormwater outfall screening and monitoring. Ongoing services include project management, coordination and meetings, pre-sampling event preparation, tracking inclement weather and activating sampling teams, collecting and analyzing dry- and wet-weather samples from one receiving water and TMDL site, and one fixed and six rotating stormwater outfall sites, preparing field logs and site assessment photos, coordination with multiple laboratories and QA/QC of water quality results, data management and report preparation, semi-annual data reporting, water quality data submission in CEDEN format, draft and final annual report preparation, and CIMP evaluation and revision.



### Years of Experience

31

### Education

DEnv, Environmental Science and Engineering, University of California, Los Angeles

MS, Biology, California State University, Long Beach

BA, Biology and Economics, University of California, Los Angeles

### Registrations

Civil Engineer, CA, 55597

Qualified Environmental Professional, 11960237

Qualified SWPPP Developer/ Practitioner, 00176

### Awards and Recognition

*Storm Water Solutions* magazine, "Industry Icon", 2015



**City of Los Angeles Proposition O BMP Optimization Water Quality Monitoring** Project Manager responsible for coordinating eight wet-weather and seven dry-weather monitoring events, over three years, at up to thirty-five sites spread among 11 Proposition O BMP project locations that included: Echo Park Lake, Grand Boulevard Tree Wells, Hansen Dam Wetlands Restoration, Imperial Highway Sunken Median, Mar Vista Recreation Center, Oros Green Street, Peck Park Canyon Enhancement, Penmar Water Quality Improvement, South LA Wetlands, Westminster Dog Park, and Westside Park Irrigation.. Tasks managed include development of a Monitoring Plan and QAPP, weather forecasting and tracking, coordination of sampling events with the City of Los Angeles' EMD, sample bottle preparation, field analytical analysis, field observation logging, collection and delivery of samples, data processing and analysis, and event summary technical memorandums. Various sites provide safety challenges, including lakes, median strips, underground vaults, and vehicle traffic. Monitoring included analysis of constituents such as nutrients, metals, algae, bacteria, and pesticides. Results were analyzed in comparison with applicable limitations due to TMDLs, CTR, the basin plan, and MS4 permit requirements. Results also helped assess BMP functionality and effectiveness in order to make recommendations and coordinate with the City and other consultants to identify program challenges and accomplishments.

**Caltrans District 7 Water Sampling in Los Angeles and Ventura Counties** Project Manager for water sampling services provided to Caltrans. Tasks managed include establishing effluent sampling stations for a total of 10 sampling sites, identifying and implementing sampling stations, collecting influent and effluent samples, collecting water and wastewater samples and sending them to the laboratory for pollutant analysis, following appropriate chain-of-custody procedures, and preparing monitoring reports. This project included a dewatering system.

**City of Gardena MS4 Permit Monitoring Program Services** Project Manager for water and suspended sediment quality monitoring at the three sites in addition to permitting, interagency negotiations, dry-weather monitoring, outfall inventory, non-stormwater discharge assessment, annual reporting, hundreds of MS4 I/C inspections, scores of IGP Non-filer referrals, and submission of a State Trash Policy Implementation Plan to the Los Angeles RWQCB.

**City of Azusa Monitoring Plan Development** Project Lead for a MS4 NPDES Permit Monitoring Plan to comply with MS4 NPDES Permit and regional WQOs in a cost-effective manner. The immediate focus was on metals and then indicator bacteria, while trash was monitored through the installation of full capture system devices, like connector pipe screens, that would be undertaken through a separate, catch basin inventory based, tracking database effort. The Monitoring Program Plan was modelled after the original Rio Hondo/San Gabriel River CIMP Plan while monitoring "baseline" water quality compliance. This is because existing water quality data for metals in the Little Dalton Wash has been compliant, while meeting indicator bacteria WQOs has proven difficult for most as the water generally infiltrates when it reaches the downstream recreational receiving water.

**City of Hermosa Beach Water Quality Monitoring During the Repair of the Hermosa Beach Pier** Project Manager for professional water quality monitoring services in conjunction with the City of Hermosa Beach for the Hermosa Beach Pier Repair Project. The project involved the repair of six spalled concrete piles, replacement of a 32-foot by 5-foot section of pier deck, and other minor bracket and conduit repairs. While the deck work was over beach sand with little risk of marine contamination, most of the damaged piles sections were over or, in one case, in the ocean. Since there was a potential risk of marine contamination during construction, especially during repair of the piles, water quality monitoring to document pre-, during-, and post-project conditions was performed. Tasks managed included: drafting and submitting a water quality monitoring plan, implementing the approved monitoring plan, and preparing monthly and final monitoring reports.

# Jason Pereira

PE, CPSWQ, QSD/P, QISP

QA/QC Manager

## RELEVANT EXPERIENCE

### SAWPA Homelessness Preparation of Monitoring Plan and QAPP

Project Manager for the development of a preliminary monitoring plan to assess potential impacts to water quality, riparian areas, and aquatic habitats from the presence of homeless encampments in the Upper Santa Ana River Watershed. While homeless encampments have the potential to impact water quality in several ways, including through trash and wildfires, data that directly links homeless encampments to water quality impairment is limited. The monitoring plan was prepared in alignment with California State Water Resource Control Board protocols to quantify homelessness impacts on water quality. Jason presented the preliminary monitoring plan and approach to the SAWPA Commission and Middle Santa Ana River TMDL Task Force. Through the future implementation of this monitoring program, SAWPA and watershed stakeholders will be able to analyze collected data points and trends to make critical decisions and prioritize resources to reduce and/or eliminate the most significant contributors to water quality and habitat degradation.

### Rio Hondo San Gabriel River Water Quality Group Coordinated Integrated Monitoring Program

**Implementation** Principal-in-Charge for Rio Hondo/San Gabriel River Water Quality Group CIMP implementation services. This group is comprised of the cities of Arcadia, Bradbury, Duarte, Monrovia, and Sierra Madre; County of Los Angeles; and LACFCD. Services included preparing a project-specific HASP, obtaining access permits from the LACFCD, conducting Rio Hondo Pre-LRS monitoring, GIS outfall inventory, and non-stormwater outfall screening and monitoring. Ongoing services include: meeting coordination; weather tracking; dry- and wet-weather water quality monitoring at five receiving water sites, including Peck Road Park Lake and five stormwater outfall sites; preparing field logs and site assessment photos; laboratory coordination; QA/QC of results; data management and report preparation; semi-annual data submission in CEDEN format; and draft and final consolidated annual report preparation.

### Los Angeles County Mass Emissions and Tributary Station Water Quality Monitoring

Project Manager for providing mass emissions and tributary monitoring at eight stations, along with preparing the draft Annual Monitoring Report for the LACFCD. Storm event water quality samples were collected from improved and natural conveyances, using both grab and autosampler methods for over 1,140 square miles of tributary watershed area. Tasks managed included: SOP development, O&M of water quality sampling equipment; inclement weather forecasting and tracking; client, consultant, shift change, and laboratory coordination; preparing and mobilizing two-person sampling crews; collecting grab and composite water quality samples under inclement conditions; conducting field analytical



### Years of Experience

27

### Education

BS, Civil Engineering,  
University of California,  
Los Angeles

### Registrations

Civil Engineer, CA, 61509

Certified Professional in  
Storm Water Quality, 527

Qualified SWPPP Developer/  
Practitioner, 21

Qualified Industrial  
Stormwater Practitioner, 090

### Awards and Recognition

*Storm Water Solutions*  
magazine, "Industry Icon",  
2015



analyses; delivering samples under chain-of-custody to designated laboratories; and preparing stormwater event field logs and monitoring reports.

**Mojave River Water Group Monitoring Plan and Implementation** Project Manager assisting the County of San Bernardino, Town of Apple Valley, and Cities of Hesperia and Victorville with implementing the RWMP Plan as required by the Phase II Small MS4 General Permit. The RWMP was developed to evaluate the effects of new development on receiving water quality within the MRWG jurisdictional area and whether LID BMP efforts to control sources of pollution will help to maintain receiving water quality over time. A QAPP was developed to integrate the technical and quality aspects of the project to obtain reliable environmental data. Prior to annual monitoring, site access permits were obtained from the USACE, City of Victorville, and San Bernardino County Flood Control District. The RWMP requirements include flow measurements, photo documentation, aquatic life physical habitat assessment and channel cross sections, temperature, bacteria, nutrients, bioassessment/benthic macroinvertebrate assessment, pyrethroids, and dissolved oxygen. Dry-weather monitoring was conducted at two locations, the Urban/Rural Interface (Upstream Location), MR-URI, and the Urban Downstream Location, MR-UD, for 14 consecutive days in the spring, summer, and fall. In addition to monitoring implementation, RWMP baseline reports were prepared after the first year of monitoring to assess trends and changes.

**City of Los Angeles Bureau of Sanitation TMDL Specialized and Expert Services** Principal-in-Charge for providing TMDL Specialized and Expert Services to the City of Los Angeles' Bureau of Sanitation. TMDL support services included conducting technical analyses, organizing and conducting scientific studies, preparing technical packages, and providing hearing and testimony support. Tasks included providing expert, technical, regulatory, and support services in the review, analysis, and development of TMDLs for the Los Angeles River, Ballona Creek, Santa Monica Bay, Marina del Rey, and Dominguez Channel/Los Angeles Harbor Watersheds. Tasks included evaluating TMDLs; re-opener, modeling, biological and chemical assessments; source analysis; analysis of control options, load, and waste load allocations; review and draft comments for draft TMDLs released for public comment; and evaluation and development of approaches, options, and strategies. Additional assistance included conducting special studies in support of TMDL development for the various watersheds of the City. Studies included examining criteria exceedances; reviewing all applicable regulations, criteria and guidance; examining beneficial use designations; site-specific objectives studies; water effects ratios; source assessments; use attainability analyses; and other related investigations.

**City of Carson Machado Lake and TMDL and Monitoring QAPP** Project Manager for the development of a Nutrient TMDL Implementation Plan, MRP Plan, and QAPP for the City of Carson. The Implementation Plan outlined a strategy to address potential nutrient sources and included an iterative adaptive program to comply with the Machado Lake Nutrient TMDL requirements for nutrient load reduction. The MRP was developed to monitor and assess the water quality of discharges from the City's MS4, evaluate the effectiveness of TMDL implementation measures, and assess compliance with waste load allocations. A QAPP was developed to integrate the technical and quality aspects of the project in order to obtain reliable environmental data.

**Ballona Creek Metals and Estuary Toxics TMDL Coordinated Monitoring Plan** Technical Advisory Committee Member for the development of the Ballona Creek Metals and Estuary Toxics TMDL Coordinated Monitoring Plan. The plan was designed to measure compliance with the Waste Load Allocations of the Metals and Estuary Toxics TMDLs and to provide data supporting the re-evaluations of the TMDLs when they are reconsidered by the Los Angeles RWQCB. Provided technical guidance on the selection of special studies for the evaluation of low detection level techniques to assess water quality concentrations.

# Alexa Reasoner

QSP, CESSWI

Monitoring Support

## RELEVANT EXPERIENCE

### Los Angeles River Upper Reach 2 CIMP Implementation

Environmental Scientist providing sampling, draft and final annual report preparation, semi-annual CEDEN format data submission, and a SCWP annual plan as part of CIMP implementation services provided for the LAR UR2 WMA, through the GWMA. Services provided include preparing a project-specific HASP; QAPP preparation; obtaining access and encroachment permits from the USACE, LACFCD, and local municipalities; GIS outfall inventory; and non-stormwater discharge outfall screening. Additional services included meeting coordination, weather tracking, dry- and wet-weather water quality monitoring at two fixed and six rotating stormwater outfall sites, preparing field logs and site assessment photos, laboratory coordination, QA/QC of results, and data management.

### City of La Habra Heights MS4 Permit Water Quality

**Monitoring** Environmental Scientist providing dry- and wet-weather water quality monitoring, sample collection services, and data preparation in CEDEN format. Prepared sample containers and collection equipment; calibrated field parameter measurement instruments (YSI, ProDSS); interpreted weather forecasts; coordinated staff schedules; access difficult to reach monitoring locations during inclement conditions; photographically record observed field conditions; collected water quality samples, duplicates, and blanks; collected and verified field parameter measurements; completed water quality monitoring safety and field logs; and reviewed and interpreted analytical laboratory data reports.

### SAWPA Homelessness Study Phase 1A Water Quality Monitoring and Trash Assessment

Environmental Scientist providing dry-weather event sampling and trash assessment. Tasks performed include leading the MRP and QAPP based on what was prepared for the previous Homeless Study, conducting two preliminary field visits and providing a draft technical memorandum to summarize findings, manage data, and deliver annual draft and final reports. In 2020, five reaches with homeless encampments were identified to provide the best available information about the homeless and their impact on water quality and riparian and aquatic habitats. The study found no evidence that homeless encampments caused increases in the concentration of microbial pollutants in receiving waters during dry weather conditions. Understanding regarding the direct impacts of homeless encampments on water quality as measured by bacterial indicators remains limited in the upper Santa Ana River watershed. While findings from the data collected by the Middle Santa Ana TMDL Task Force indicate the likelihood of in-river sources of *E. coli*, no conclusions can be drawn regarding impacts from homeless encampments on water quality. A Preliminary Monitoring Program was developed for future monitoring activity that included physical habitat assessments and bioassessments. Implementation of this monitoring program through this project will support SAWPA's efforts to develop a clearer understanding of the impacts of homeless encampments on water quality in the Santa Ana River region.



### Years of Experience

6

### Education

BS, Environmental Science and Policy, California State University, Long Beach

### Registrations

Qualified SWPPP Practitioner, CA, 28177

Certified Erosion, Sediment, and Stormwater Inspector, 00007267



# Alex Salas

EIT

Monitoring Support

## RELEVANT EXPERIENCE

### Mojave River Water Group Water Monitoring

**Implementation** Monitoring lead assisting with the implementation of MRWG's RWMP Plan as required by the Phase II MS4 Permit. CWE coordinated with the United States Army Corps of Engineers and City of Victorville Community Services Department to conduct the receiving water monitoring. Project reporting consisted of compiling field photo logs, performing quality control on laboratory data received, entering analytical laboratory data into a consolidated spreadsheet, and retrieving USGS stream gage data.

**SAWPA Bacteria TMDL Monitoring** Field crew member to furnish water quality monitoring services for Middle Santa Ana River Bacteria TMDL compliance by implementing the Santa Ana River Watershed Bacteria Monitoring Plan and QAPP. Generated data and project documentation alongside contracted laboratories that included sample collection records (field logs and photographs), analytical records, (laboratory results and CoC forms), and reports (laboratory results and QA/QC reports).

**Rio Hondo San Gabriel River Water Quality Group Water Quality Monitoring** Provided monitoring for the Rio Hondo/San Gabriel River Water Quality Group to implement the Watershed Control Measures identified in the revised Watershed Management Plan to meet water quality objective milestones. CWE completed water monitoring via sample collection of bacteria (E. coli) samples and wet-chemistry samples in accordance with the CIMP.

### Los Angeles County Mass Emissions Station and Tributary Station Water Quality

**Monitoring** Monitoring Support to assist with MES Monitoring Program Implementation Services. Work consisted of sampling preparation, pre-storm season equipment blank sampling, storm tracking and sampling team coordination, wet- and dry-weather sampling, data analysis, and semi-annual data reporting for the MRP in accordance with NPDES MS4 Permit Order, where the following objectives were fulfilled: determining whether the receiving water limitations were being achieved, assessing trends in pollutant concentrations over time, or during specified conditions, and determining whether the designated beneficial uses were fully supported as determined by water chemistry, as well as aquatic toxicity and bioassessment monitoring.

**City of Irwindale NPDES** Monitoring Support who helped identify constituents and monitoring frequency at each monitoring location based on TMDL and 303(d) requirements as well as update the sampling protocol and suspended sediment and toxicity sampling requirements. These protocols and requirements included QA/QC protocols and the non-stormwater outfall monitoring program.



### Years of Experience

1

### Education

BS, Mechanical Engineering  
California State Polytechnic  
University, Pomona

### Registrations

Engineer-in-Training, CA,  
180558

# OWOW Quarterly Report

October – December 2023

Rachel Gray, Water Resources and Planning  
Manager

**SAWPA OWOW Status Report**  
**10/1/23 thru 12/31/23**

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## SAWPA OWOW Status Report 10/1/23 thru 12/31/23



PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETING DATES
<b>OWOW Planning</b>	Integrated Regional Water Management Planning and Grant Application Support for the Santa Ana River Watershed	<ul style="list-style-type: none"> <li>Staff worked with the Roundtable of IRWM Regions Network Coordinator to facilitate bi-monthly meetings with Roundtable members that include DWR staff to discuss pertinent topics.</li> <li>Staff worked with the Roundtable of Regions to develop an IRWM transition plan which requires meeting with staff from State agencies such as the State Water Board and Department of Water Resources.</li> <li>Staff worked with the Roundtable of Regions to plan the March 2024 Integrated Regional Water Management Conference in Sacramento.</li> <li>The Governor's Office of Planning and Research awarded the Santa Ana River Watershed Project Authority \$644,190 for the Santa Ana River Watershed Climate Adaptation and Resilience Plan through the Regional Resilience Grant Program (RRGP).</li> </ul>	<ul style="list-style-type: none"> <li>Update the Roundtable of Regions website on a continual basis.</li> <li>Develop and finalize the IRWM transition plan.</li> <li>Amend OWOW Plan to include Santa Ana River Watershed Climate Adaptation and Resilience Plan.</li> </ul>	<p>Conference on March 11, 2024</p> <p>Roundtable of Regions Meeting on March 20, 2024</p>
<b>Santa Ana River Watershed Weather Modification Pilot Project</b>	Conduct a pilot project with validation and stormwater capture analysis for weather modification (cloud seeding) program for the Santa Ana River Watershed	<ul style="list-style-type: none"> <li>Coordinated with the Desert Research Institute (DRI), SAWPA's consultant validating the four-year seeding pilot. DRI and SAWPA staff discussed the need for streamflow data from the Santa Ana River Watershed and a comparative watershed, as well as the pre-seeding snow surveys to determine the presence of silver iodine in the field.</li> <li>Final biological survey before equipment installation (October 2-3, 2023)</li> <li>Finalization of the Operations Plan on October 23, 2023.</li> <li>Finalization and distribution of Communication Plan.</li> <li>Equipment set-up and testing (October 5-31, 2023).</li> <li>Operator training (October 31, 2023).</li> <li>Start of Year 1 Operations (November 15, 2023).</li> <li>Notifications to local fire departments.</li> </ul>	<ul style="list-style-type: none"> <li>Future presentations about the SAWPA weather modification pilot project to interested parties.</li> <li>Provide update to funding parties.</li> <li>Work on validation component of Pilot Program.</li> <li>Send notifications to all local fire departments.</li> <li>Develop request for proposals for surface water modeling.</li> </ul>	Update to SAWPA Commission targeted for February 2024.
<b>Santa Ana River Watershed Sustainability Assessment</b>	Conduct a Watershed Sustainability Assessment	<ul style="list-style-type: none"> <li>The latest Santa Ana River Watershed Sustainability Assessment was completed in 2019. The next one is anticipated to be updated in Fiscal Year Ending 2024.</li> </ul>	<ul style="list-style-type: none"> <li>Update Watershed Sustainability Assessment in FY2023-2024.</li> </ul>	None at this time.

**SAWPA OWOW Status Report**  
**10/1/23 thru 12/31/23**

PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETING DATES
<b>Prop 1 IRWM Disadvantaged Community Involvement (DCI) Program Implementation</b>	Needs assessment, education and outreach, and technical assistance for disadvantaged, economically distressed and under- represented communities in the watershed	<ul style="list-style-type: none"> <li>SAWPA staff continued to maintain the DCI Program webpage on the SAWPA website.</li> <li>SAWPA staff participated in the November Roundtable of Regions DACTI Workgroup meeting.</li> </ul>	<ul style="list-style-type: none"> <li>None at this time.</li> </ul>	None at this time.
	Proposition 1 IRWM Disadvantaged Communities Involvement (DCI) Grant Set-Aside funding made available through the 2021 Urban and Multibenefit Drought Relief Grant Program	<ul style="list-style-type: none"> <li>SAWPA staff working with California Rural Water Association and the City of Colton coordinated on the identification of a replacement project for the abandon the well 32 Project.</li> <li>SAWPA staff coordinated with CRWA and the City of Fullerton on the need for an amendment to extend the DWR grant agreement.</li> <li>SAWPA staff will continue to coordinate with the CRWA and the City of Fullerton to track the progress of the projects and next steps.</li> </ul>	<ul style="list-style-type: none"> <li>SAWPA to petition DWR to amend grant Agreement to address requests by CRWA and the City of Fullerton to revise final project completion dates and City of Colton to approve a replacement project for the abandoned Well 32 project.</li> <li>Submit 5th quarterly progress report and invoice to DWR in January 2024.</li> </ul>	Status reports on this effort will be provided by staff at future OWOW Steering Committee and SAWPA Commission meetings as appropriate.
	Proposition 1 Round 2 IRWM Implementation Grant Program DAC Grant Writing Assistance	<ul style="list-style-type: none"> <li>SAWPA staff is working to finalize a grant agreement with DWR.</li> <li>SAWPA staff initiated work on a three party sub-agreement with CRWA and Box Springs Mutual Water Company for the Box Springs MWC Well Improvements project.</li> </ul>	<ul style="list-style-type: none"> <li>Finalize agreement with DWR /and sub-agreement with CRWA and Box Springs MWC.</li> <li>Begin work on the Box Springs MWC Well Improvements project</li> </ul>	Coordination meetings will be planned once agreements are in place for the Grant projects to be funded.

**SAWPA OWOW Status Report**  
**10/1/23 thru 12/31/23**

<b>PROJECT</b>	<b>DESCRIPTION</b>	<b>STATUS</b>	<b>FUTURE TASKS/DEADLINES</b>	<b>FUTURE MEETING DATES</b>
<b>Santa Ana River Conservation and Conjunctive Use Program (SARCCUP) Implementation</b>	Implementation of SARCCUP (which includes conjunctive use, fish habitat, invasive weed removal, and water use efficiency programs) through the PA 23 Committee.	<ul style="list-style-type: none"> <li>SAWPA is working to implement the water use efficiency task, so it is completed by March 2024. The consultant, NV5, is working with eight different retail water agency partners to complete this work. Work was completed with five of the retail water agencies; the remaining three will be completed by March 2024.</li> <li>SAWPA worked with the SAWPA member agencies to submit the Grant Agreement Amendment No. 4 request to the Department of Water Resources, so it reflected the changes approved by the PA 23 Committee on August 1, 2023. These changes include moving funding between budget categories and replacing the Cannon-Cambell Pump Station with the Magnolia Interconnection.</li> </ul>	<ul style="list-style-type: none"> <li>Finish water use efficiency task by March 2024.</li> <li>Work with the member agencies to answer any of DW's questions related to Amendment No. 4.</li> </ul>	Bi-weekly SARCCUP Planning Manager meetings.
<b>Prop 84 IRWM Round 1</b>	Grant administration of Prop 84 IRWM Round 1	<ul style="list-style-type: none"> <li>This round of funding is complete</li> </ul>	<ul style="list-style-type: none"> <li>None.</li> </ul>	
<b>Prop 84 IRWM Round 2</b>	Grant administration of Prop 84 IRWM Round 2	<ul style="list-style-type: none"> <li>All projects are complete</li> </ul>	<ul style="list-style-type: none"> <li>All grant administration will continue until the final Round 2 project is implemented and continues with annual monitoring for 3 years after the completion of the projects.</li> </ul>	
<b>Prop 84 IRWM 2015 Round</b>	Grant administration of Prop 84 IRWM 2015 Round	<ul style="list-style-type: none"> <li>Staff prepared and reviewed the grant invoice and progress report for the third reporting period of 2023 that was due to DWR on November 30, 2023.</li> </ul>	<ul style="list-style-type: none"> <li>Submit the 4th quarterly report/invoice of 2023 to DWR by February 29, 2024.</li> </ul>	Bi-weekly SARCCUP Planning Manager meetings.

**SAWPA OWOW Status Report**  
**10/1/23 thru 12/31/23**

PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETING DATES
<b>Prop 1 IRWM Round 1</b>	Enhancements to Watershed-Wide Water Budget Decision Support Tool	<ul style="list-style-type: none"> <li>• <b>Task 1 Aerial Imagery</b> - complete.</li> <li>• <b>Task 2 - Landscape Analysis</b> – Reclamation successfully completed the Landscape analysis and QA/QC of Orange County Retail water agency service areas and has submitted these data and corresponding QA/QC results to SAWPA for review.</li> <li>• Reclamation informed SAWPA that they were successful in acquiring additional grant funds to complete the analysis and QA/QC for the upper watershed and have finalized an agreement for the additional grant funding.</li> <li>• SAWPA discontinued discussion with consultants regarding the development of a method and process to provide 3rd party validation of Reclamation's modeled landscape data. This was based upon determination by SAWPA staff that Reclamation's QA/QC process to verify the accuracy of their landscape analysis is more than satisfactory in verifying the accuracy of Reclamations Landscape analysis.</li> <li>• <b>Task 3 – Decision Support Tool</b>, SAWPA staff does not anticipate additional work on the decision Support Tool until USBR is further along in completing their landscape modeling.</li> </ul>	<ul style="list-style-type: none"> <li>• SAWPA to continue efforts to develop a report to present to DWR to support the use of Reclamation's modeled landscape measurements by water retailers in the Santa Ana Watershed for regulatory compliance.</li> <li>• Staff to initiate efforts to develop the framework for the decision Support Tool. This may include collaboration with Eagle View of the possibility using their Water View tool to share the results of Reclamation's landscape analysis and validation results.</li> </ul>	
<b>Prop 1 IRWM Round 1</b>	Grant administration of Prop 1 IRWM Round 1	<ul style="list-style-type: none"> <li>• Staff continues to work with the agencies involved in the 9 projects under the first round of Prop 1 IRWM program to undertake all labor associated with interaction with DWR staff; project invoices processing including review, verification and submittal to DWR; project reporting review, verification and submittal to DWR; all DWR agreements, SAWPA Sub-agreements and Amendments preparation, processing and execution; DWR payment processing; project implementation inspection and verification; assembling, reviewing and submittal of Financial Statements; coordination and review of all Labor compliance; review and verification of all certifications, permits, and CEQA; project deliverables review, verification and submittal to DWR; project benefit assessment; review and verification of project monitoring plan; review and verification of project signage; review, verification and preparation of all documentation for audit review; grant administration budget preparation, monitoring, projections and assessment; SAWPA management review, oversight and direction regarding these defined tasks.</li> </ul>	<ul style="list-style-type: none"> <li>• Submit the 4<sup>th</sup> quarterly report/invoice of 2023 to DWR by March 1, 2024</li> </ul>	

**SAWPA OWOW Status Report**  
**10/1/23 thru 12/31/23**

<b>PROJECT</b>	<b>DESCRIPTION</b>	<b>STATUS</b>	<b>FUTURE TASKS/DEADLINES</b>	<b>FUTURE MEETING DATES</b>
<b>Prop 1 IRWM Round 2</b>	Grant administration of Prop 1 IRWM Round 2	<ul style="list-style-type: none"> <li>Staff is awaiting the fully executed grant agreement from DWR.</li> </ul>	<ul style="list-style-type: none"> <li>Work with agencies to get fully executed sub-agreements</li> </ul>	

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# Roundtables Quarterly Report

October – December 2023

Rachel Gray, Water Resources and Planning  
Manager

**SAWPA Roundtables Status Report**  
**10/1/23 thru 12/31/23**

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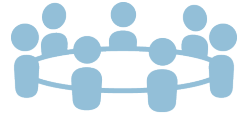
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## SAWPA Roundtables Status Report

10/1/23 thru 12/31/23



PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETINGS
<b>Middle Santa Ana River (MSAR) Pathogen TMDL Task Force</b>	Implement TMDLs to address impairments to water quality relating to the fecal coliform objective established to protect the REC-1 use for waterbodies located within the Middle Santa Ana River Watershed.	<ul style="list-style-type: none"><li>• SAWPA continued Task Force Administration including management and review of consultant contracts, project invoices, and annual Task Force budget.</li><li>• Stakeholders approved the FY 2024-25 Task Force Budget.</li><li>• Task Force consultant, Tess Dunham continued her effort to orchestrate the TMDL Implementation strategy for the MSAR TMDL Task Force, with the support of Steve Wolosoff and Richard Meyerhoff (GEI Consultants).</li><li>• Final Draft Basin Plan language and updated TMDL technical report under review by Task Force stakeholders.</li></ul>	<ul style="list-style-type: none"><li>• Consultant team is expected to finalize the draft limited revisions to update the MSAR TMDLs Basin Plan Amendment in preparation of a Spring 2024 Regional Board Public Workshop.</li><li>• Distribute FY 2024-25 stakeholder invoices in July 2024.</li></ul>	A Task Force Meeting (virtual meeting) is scheduled for January 18, 2024.
	TMDL Task 3 Watershed Monitoring Program	<ul style="list-style-type: none"><li>• MSAR TMDL Compliance monitoring is conducted as a component of the Santa Ana River Bacteria monitoring program implemented through the Regional Water Quality Monitoring (RWQM) Task Force.</li><li>• Completed Dry Weather Monitoring for 2023-24.</li></ul>	<ul style="list-style-type: none"><li>• Conduct Wet Weather Monitoring for 2023-24.</li></ul>	

## SAWPA Roundtables Status Report

10/1/23 thru 12/31/23

PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETINGS
	TMDL Task 4 Source Evaluation and Management	<ul style="list-style-type: none"><li>MSAR TMDL Task Force meetings continued to be used as a forum for stakeholders to update Regional Board staff on their CBRP implementation activities.</li><li>SAWPA continued to act as the contracting party for the benefit of Task Force agencies to implement specific studies and projects to support each County's Comprehensive Bacteria Reduction Plan implementation activities.</li><li>All current source implementation work relating to the bacteria indicator TMDLs is being conducted through the individual Counties MS4 program to implement their respective Comprehensive Bacteria Reduction Plans.</li></ul>	The MSAR Task force to discuss a special study to investigate strategies for dry weather TMDL compliance.	

## SAWPA Roundtables Status Report

10/1/23 thru 12/31/23

PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETINGS
<b>Lake Elsinore and Canyon Lake Nutrient TMDL Task Force</b>	Implement TMDLs to address water quality issues relating to excess nutrients in Lake Elsinore and Canyon Lake.	<ul style="list-style-type: none"> <li>• LESJWA continued Task Force administration including management and review of consultant contracts, project invoices, and annual Task Force budget.</li> <li>• Staff continued to coordinate issues relating to stakeholder load/cost allocations, in-lake modeling, and the design of in-lake treatment projects with various consultants.</li> <li>• Stakeholders approved the FY 2024-25 Task Force Budget.</li> <li>• Task Force consultant, Tess Dunham continued her role of working with stakeholders on a long-term plan to revise and update the Lake Elsinore and Canyon Lake nutrient TMDLs.</li> <li>• GEI Consultants continued their efforts to support the Task Force in the process by Regional Board to amend the Basin Plan to update the LE&amp;CL TMDLs and provide technical support to the Task Force.</li> <li>• Final Draft Basin Plan language and revisions to the TMDL Technical document under review by Task Force stakeholders.</li> <li>• Regional Board continued their process to amend the Basin Plan to update the Lake Elsinore and Canyon Lake nutrient TMDLs.</li> </ul>	<ul style="list-style-type: none"> <li>• Task Force to conduct a workshop to review the final draft Basin Plan language and updated TMDL Technical document.</li> <li>• Regional Board Public Workshop to adopt the Revised LE&amp;CL TMDLs has been tentatively scheduled for February 2024.</li> <li>• Distribute FY 2024-25 stakeholder invoices in July 2024.</li> </ul>	Task Force Meeting (virtual meeting) is scheduled for January 30, 2024.
	TMDL Task 4 Monitoring Program	<ul style="list-style-type: none"> <li>• Final FY 2022-23 Annual TMDL Compliance Monitoring Program submitted to Regional Board on November 7, 2023.</li> <li>• WSP USA continued to implement the TMDL Compliance Monitoring Program for FY 2023-24.</li> <li>• The City of Lake Elsinore continues implement FHAB monitoring for Lake Elsinore.</li> </ul>	• .	

## SAWPA Roundtables Status Report

**10/1/23 thru 12/31/23**

PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETINGS
	TMDL Task 9 Lake Elsinore TMDL Compliance Implementation Activities	<ul style="list-style-type: none"> <li>• Work relating to the implementation of Lake Elsinore In-Lake Sediment Nutrient Reduction Plan performed in conjunction with the RCFC&amp;WCD MS4 Comprehensive Nutrient Reduction Plan continued.</li> <li>• LEAMS Operators selected a consultant to conduct study to Evaluate Future Options for the Lake Elsinore Aeration and Mixing System .</li> <li>• Final 2022 LEAMS Nutrient Offset Accounting Report submitted to Regional Board on November 9, 2023.</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>	No LEAMS Operators meeting (virtual meeting) Scheduled.
	TMDL Task 10 Canyon Lake TMDL Compliance Implementation Activities	<ul style="list-style-type: none"> <li>• Work relating to the implementation of Canyon Lake In-Lake Sediment Treatment Evaluation performed in conjunction with the RCFC&amp;WCD MS4 program Comprehensive Nutrient Reduction Plan continues.</li> <li>• Successfully completed the Fall 2023 Canyon Lake alum during the week of October 2, 2023.</li> </ul>	<ul style="list-style-type: none"> <li>• Spring 2024 Canyon Lake alum application to be scheduled for mid to late March through early April..</li> </ul>	
	TMDL Task 11 Model Update	<ul style="list-style-type: none"> <li>• No update.</li> </ul>		

## SAWPA Roundtables Status Report

10/1/23 thru 12/31/23

PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETINGS
<b>Basin Monitoring Program Task Force</b>	Annual Santa Ana River Surface Water Quality Monitoring Report, Periodic Ambient (Groundwater) Water Quality Update Report, and related Basin Plan Amendments	<ul style="list-style-type: none"> <li>The Draft 2022 Annual Report of the Santa Ana River Surface Water Quality submitted to Regional Board and stakeholders for review and comment.</li> <li>Submitted the Final 2023 Data Gap Framework to the Regional Board on October 31, 2023.</li> <li>Held a meeting with Southern California Coastal Water Research Project (SCCWRP) staff on their recent draft manuscript focused on ionic concentrations in the Santa Ana River Watershed.</li> </ul>	<ul style="list-style-type: none"> <li>Submit a draft basin plan amendment package focused on several items, including the new SAR water quality monitoring work plan, to the Regional Board by January 2024.</li> <li>Finalize Santa Ana River Surface Water Monitoring Quality Assurance Project Plan (QAPP) in January 2024.</li> <li>Conduct monitoring per the QAPP in late January 2024.</li> <li>A comment letter to SCCWRP on their draft manuscript, due by February 7, 2024.</li> </ul>	<p>January 29, 2024, Task Force meeting (virtual and in-person mtg).</p> <p>March 5, 2024 Task Force meeting (virtual only mtg).</p>
	Santa Ana River Watershed/Basin Integrated Report	<ul style="list-style-type: none"> <li>No action. The State Water Board to release a Proposed Final 2024 California Integrated Report and Summary of Comments and Responses in January 2024.</li> </ul>	<ul style="list-style-type: none"> <li>Response to proposed final Integrated Report with formal comments and/or meetings with regulatory staff.</li> </ul>	Meetings with upper management of the Regional Board and State Board.
	Imported Water Rechargers Subcommittee	<ul style="list-style-type: none"> <li>The Imported Water Recharger Subcommittee last held a meeting on May 25, 2022.</li> </ul>	<ul style="list-style-type: none"> <li>Recharge reports are now required every five years and modeling every ten years through a stairstep process. The next cycle of reporting will not be due until 2026 with recharge summary reports due then.</li> </ul>	No separate meetings of the Imported Water Rechargers Subcommittee are deemed necessary in 2024.

## SAWPA Roundtables Status Report

10/1/23 thru 12/31/23

PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETINGS
<b>Emerging Constituents Program Task Force</b>	Provide emerging constituents sampling report and watershed water quality outreach program	<ul style="list-style-type: none"> <li>The EC Program Task Force meets on a quarterly basis and met on October 23, 2023. During the meeting, the task force received updates on PFAS and microplastic regulations, and the work the public relations consultant.</li> <li>At the meeting, Alvina Mehinto of the Southern California Coastal Water Research Project presented the Santa Ana River Watershed Bioassay Draft Study.</li> <li>SAWPA coordinated with the regulatory consultant, KSC Inc. (Tess Dunham), on emerging issues related to microplastics.</li> </ul>	<ul style="list-style-type: none"> <li>Work with guest speakers from the State Water Board and consulting firm WSP to speak on PFAS at the upcoming January 22, 2024, meeting.</li> </ul>	January 22, 2024, Task Force meeting (virtual mtg).
<b>PFAS Regional Analysis</b>	Investigate the impacts of PFAS in the surface water of the upper Santa Ana River Watershed and evaluate and prioritize measures to address PFAS contamination.	<ul style="list-style-type: none"> <li>SAWPA Commission approved a scope of work, and executed an Agreement with CDM Smith to conduct the Phase 2 PFAS Regional Analysis Project.</li> <li>SAWPA staff conducted coordination meetings with CDM Smith to discuss a schedule for the Phase 2 Project.</li> <li></li> </ul>	<ul style="list-style-type: none"> <li>SAWPA to formally Kick-Off the Phase 2 Project with CDM Smith and our project partners.</li> <li>SAWPA to conduct the first of a series of project stakeholder Workshops.</li> <li>SAWPA staff to initiate Engagement Plan to identify additional potential project partners and acquire additional local PFAS data.</li> </ul>	Workshop (to be scheduled).
<b>Reclamation So Cal Studies</b>	Support regional studies with Bureau of Reclamation	<ul style="list-style-type: none"> <li>SAWPA continued to coordinate with Bureau of Reclamation staff on the Water Management Options Pilot/Decision Support Tool regarding analyzing high resolution imagery across the watershed, Southern Orange County, and the southern ends of the WMWD/EMWD services areas.</li> <li>Imagery for Orange County has been sent to USBR in July 2021 for analysis as provided by SCAG.</li> <li>All aerial imagery for the upper watershed was completed this quarter by Geophex and has been provided to SAWPA and US Bureau of Reclamation staff for review.</li> </ul>	<ul style="list-style-type: none"> <li>SAWPA staff will continue to coordinate with Reclamation on grant funding opportunities supporting the watershed.</li> </ul>	

## SAWPA Roundtables Status Report

10/1/23 thru 12/31/23

PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETINGS
<b>Santa Ana River Fish Conservation Task Force</b>	Determine the reasons for the decline of the Santa Ana sucker fish ( <i>Catostomus santaanae</i> ) in the Santa Ana Watershed and implement projects that will benefit the species.	<ul style="list-style-type: none"> <li>Staff is working on updating the Riverwalk ranking methodology that is used to score each of the Riverwalk data points' habitat quality.</li> <li>Staff and volunteers held the 2023 Riverwalk to gather habitat data in the Santa Ana River on October 26, 2023.</li> <li>Staff worked with SAWA to replant/manage 0.3 acres of vegetation as part of the mitigation for the habitat project constructed by the Team near the Van Buren Blvd. Bridge in October 2018.</li> <li>Staff worked on the final report due to California Department of Fish and Wildlife summarizing the work done in the 0.3 acres over the last five years.</li> </ul>	<ul style="list-style-type: none"> <li>Finish Riverwalk data ranking methodology in the first quarter 2024.</li> <li>Finalize the final report for the California Department of Fish and Wildlife in January 2024.</li> </ul>	Hold Team meeting in first quarter 2024.
<b>Regional Water Quality Monitoring Task Force</b>	Implement a coordinated regional water quality monitoring program in the Santa Ana River watershed to meet the requirements of the amended Recreational Use Water Quality Standards and Implementation Plan requirements of the Santa Ana Basin Plan, and to assist Regional Board with future triennial reviews of the Basin Plan.	<ul style="list-style-type: none"> <li>SAWPA continued Task Force Administration including management and review of consultant contracts, project invoices and annual Task Force budget.</li> <li>Stakeholders approved the FY 2024-25 Task Force Budget.</li> <li>Tess Dunham through her role as regulatory consultant to the MSAR TMDL Task Force will support the Task Force in regulatory efforts related to bacteria.</li> <li>Completed 2023-24 warm season monitoring.</li> <li>Consultant continued efforts to update the Monitoring Program QAPP.</li> </ul>	<ul style="list-style-type: none"> <li>Distribute FY 2024-25 stakeholder invoices in July 2024.</li> <li>Task Force to work with Tess Dunham to consider submitting a Request to Regional Board to modify the SAR Regional bacteria Monitoring Program Monitoring Program Plan and QAPP to address issues relating to lake Elsinore and Priority 3 Monitoring sites/results.</li> </ul>	A Task Force Meeting (virtual meeting) is scheduled for January 18, 2024.

## SAWPA Roundtables Status Report

10/1/23 thru 12/31/23

PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETINGS
<b>Lake Elsinore and San Jacinto Watersheds Authority (LESJWA)</b>	Support lake quality improvement projects at Lake Elsinore and Canyon Lake	<ul style="list-style-type: none"> <li>Staff issued Request for Proposals for a LESJWA Strategic Plan.</li> <li>The LESJWA Board last met in a Board meeting on October 16, 2023, at EVMWD Offices, Board Room. The Board approved: <ul style="list-style-type: none"> <li>Accept the proposal from Water Systems Consulting, Inc. for Strategic Plan Facilitation services.</li> <li>Informational item: <ul style="list-style-type: none"> <li>City of Lake Elsinore Lake Management Plan</li> <li>California Resilience Challenge grant application.</li> </ul> </li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>Develop LESJWA Strategic Plan</li> </ul>	LESJWA Board Meeting: February 15, 2024.
	Provide education and outreach	<ul style="list-style-type: none"> <li>Liselle DeGrave of DeGrave Communications continues her support to LESJWA through the LESJWA Education and Outreach Committee. Joint meetings with the consultant, LESJWA member agency PR staff, and the SAWPA staff are held on a quarterly basis for coordination. The last meeting held was on December 14, 2023.</li> <li>LESJWA awarded \$1.5M from DWR in IRWM Prop 1 Round 2 grant funding to implement the AECOM Lake Elsinore Algae Harvesting and Nutrient Removal Pilot Project.</li> <li>DeGrave Communications to plan 2024 LESJWA Summit.</li> </ul>	<ul style="list-style-type: none"> <li>DeGrave Communications will be presenting up update based on new social media platforms to the LESJWA Board on February 15, 2024.</li> <li>2024 LESJWA Summit.</li> </ul>	<p>January 22, 2024 LESJWA Education &amp; Outreach Meeting (virtual mgt).</p> <p>LESJWA Summit: Tuesday, April 30, 2024.</p>



## SAWPA Roundtables Status Report

10/1/23 thru 12/31/23

PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETINGS
<b>Southern California Salinity Coalition (SCSC)</b>	Support regional salt management and practices in Southern California	<ul style="list-style-type: none"> <li>• The SCSC held its quarterly Board virtual meeting on December 7, 2023. Kevin Hardy, SCSC Administrator, officiated the Zoom meeting.</li> <li>• 2024 Roster of Directors and Alternate Directors.</li> <li>• Discuss research opportunities for salinity regulations as it relates to one-water framework, climate adaptation, or the human right to clean water.</li> </ul>	<ul style="list-style-type: none"> <li>• Operations Committee meeting: February 29, 2024.</li> <li>• MSSC Annual Conference: February 28-March 1, 2024.</li> </ul>	The next SCSC Board of Directors meeting is scheduled for March 7, 2024.
<b>Santa Ana River Parkway and Open Space Plan Technical Advisory Committee</b>	<ul style="list-style-type: none"> <li>• Help identify priorities and values for the Santa Ana River Parkway and Open Space Plan</li> <li>• Identify project selection criteria and projects for inclusion in the Parkway Plan</li> <li>• Provide input and feedback on the Plan throughout its development</li> </ul>	<ul style="list-style-type: none"> <li>• Staff coordinated with the Santa Ana River Conservancy staff on the quarterly Local Advisory Group meetings. A meeting was held on October 26, 2023.</li> </ul>	<ul style="list-style-type: none"> <li>• Not applicable.</li> </ul>	<p>Santa Ana River Trail – Prado Area Coordination Meeting – January 2024 (virtual mtg).</p> <p>Upcoming Local Advisory Group meeting March 2024.</p>

## SAWPA Roundtables Status Report

10/1/23 thru 12/31/23

PROJECT	DESCRIPTION	STATUS	FUTURE TASKS/DEADLINES	FUTURE MEETINGS
<b>Water Energy Community Action Network (WECAN)</b>	Support water and energy efficiency on disadvantaged communities in the watershed.	<ul style="list-style-type: none"> <li>EcoTech Services, Inc. continued to oversee and implement the City of Riverside Eastside Climate Collaborative WECAN Turf Removal / Drought-Tolerant Landscaping Project funded through the California Strategic Growth Council Transformative Climate Communities grant program.</li> <li>SAWPA staff continued participation in community outreach events to highlight the Water Energy Community Action Network Turf Removal project led by SAWPA.</li> <li>SAWPA submitted to the City of Riverside bi-monthly progress reports for the WECAN Eastside Climate Collaborative Program, this included the November report #15.</li> <li>SAWPA staff met with EcoTech Services, Inc. to discuss outreach efforts and workload capacity moving forward.</li> </ul>	<ul style="list-style-type: none"> <li>Supporting outreach events hosted by program partners with flyers and materials to distribute to promote the program within the community.</li> <li>Submit bi-monthly progress reports for the Eastside Climate Collaborative Program by January 15, 2024.</li> <li>Continue to meet and correspond with grant administrators regarding pending grant amendment.</li> </ul>	Bi-Weekly meetings with the City of Riverside.
<b>Forest First</b>	Support collaborative partnership among Forest Service and downstream stakeholders to develop methods to ensure the resiliency of the forests and headwaters within the Santa Ana River Watershed	<ul style="list-style-type: none"> <li>Staff coordinated with SBVMWD on a partnership with the agency regarding the Headwaters Resiliency Partnership Task Force.</li> </ul>	<ul style="list-style-type: none"> <li>Utilize the results from the Dr. Underwood research to evaluate the economic benefits of water supply/quality of forest projects in the watershed.</li> <li>Meet with Cleveland and San Bernardino National Forest staff to launch the next phase of the Forest First MOU in January/February 2024.</li> </ul>	
<b>Arundo Removal</b>	Remove non-native plant species, particularly Arundo donax, using SAWPA's Arundo Removal mitigation bank credit funding	<ul style="list-style-type: none"> <li>Staff coordinated with the Riverside County Regional Park and Open-Space District (County Parks) on exploring options to improve the Santa Ana River Mitigation Bank so that customers with various mitigation needs can receive bank credit.</li> <li>Staff continued working with Inland Empire Resource Conservation District on the Headwaters Arundo Removal Project.</li> </ul>	<ul style="list-style-type: none"> <li>Research the other mitigation banks in the Santa Ana River Watershed.</li> <li>Determine reasons for current lack of interest from potential customers in the Santa Ana River Mitigation Bank.</li> <li>Map past Arundo removal projects led by SAWPA.</li> </ul>	Bi-monthly Santa Ana River Watershed Weed Management Area mtg to update them on the upper watershed project as well as the outreach material.



## SAWPA Communications Report

**Date:** February 6, 2024  
**To:** Commission  
**From:** Melissa Bustamonte  
**Subject:** Communications Highlights – January 1, 2024 – January 31, 2024

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### Communications

- Staff launched SAWPA's new and improved digital e-newsletter, [SAWPA's Watershed Watch](#).
- Staff distributed two press releases on behalf of SAWPA:
  - [Santa Ana Watershed Project Authority Begins First Year of Cloud Seeding Pilot Program to Increase Local Water Supply](#)
  - [Santa Ana Watershed Project Authority Receives Grant for Regional Climate Resilience Program](#)
- SAWPA's Weather Modification Pilot Program was featured on ABC7 News on Friday, January 19. SAWPA's GM, Jeff Mosher, and SAWPA's Commissioner, Mike Gardner, were interviewed on the segment to expand SAWPA's outreach efforts and raise awareness of the program. Watch the full interview [here](#).



- SAWPA was mentioned in the following press articles:

## **Project - Weather Modification Pilot Program**

### News Article

- [LA Times Daily Pilot](#)

### Opinion

- [Raincross Gazette](#)

### Press Release Mentions

- [Water Education Foundation](#)
- [ACWA's Innovation News](#)
- [California Water News Daily](#)

### Feature Article

- [News Break](#)

### Broadcast News

- [ABC7](#)

## **Project – Integrated Climate Adaptation and Resiliency Program (ICARP)**

### Press Release Mentions

- [ACWA'S Innovation News](#)
- [California Water News Daily](#)

## **Miscellaneous Agency Mentions**

### Feature Article

- [Voice of San Diego](#)

- Staff designed door hangers and flyers in both English and Spanish for outreach purposes for the upcoming Brine Line Reach 4D Pipeline Inspection project, which will be held on February 27 and 28. Additionally, they updated the Brine Line project [webpage](#) to provide information about the inspection project.



- Staff hired Zhappo Studios, an on-demand graphic design service, to assist with communications needs.
- Staff attended the webinar “What to Watch Out for in PR in 2024” hosted by PRSSA - Inland Empire Chapter.
- Staff attended the webinar “Communicating Solo: Essential Tips and Tools for One-Person Teams” hosted by CAPIO.
- Updates were posted to the Authority’s social media channels. Follow SAWPA on social media:
  - X: [https://twitter.com/SAWPA\\_Water](https://twitter.com/SAWPA_Water)
  - Instagram: [https://www.instagram.com/sawpa\\_water/](https://www.instagram.com/sawpa_water/)
  - LinkedIn: <http://www.linkedin.com/company/santa-ana-watershed-project-authority>
  - YouTube: <https://www.youtube.com/@SAWPATUBE>