

**BOARD MEETING AGENDA  
REGULAR MEETING OF THE BOARD OF DIRECTORS OF  
CITRUS HEIGHTS WATER DISTRICT (CHWD)  
AUGUST 17, 2022 beginning at 6:30 PM**



**DISTRICT ADMINISTRATIVE OFFICE  
6230 SYLVAN ROAD, CITRUS HEIGHTS, CA**

**PHONE CALL IN: (253) 215-8782**

**PHONE MEETING ID: 895 8624 4803**

**COMPUTER AUDIO/LIVE MEETING PRESENTATIONS:** <https://us06web.zoom.us/j/89586244803>

In compliance with the Americans with Disabilities Act, if you have a disability and need a disability-related modification or accommodation to participate in this meeting, please contact the General Manager at (916) 725-6873. Requests must be made as early as possible, and at least one full business day before the start of the meeting.

Members of the public may attend the meeting in person at the District headquarters or remotely through the phone number and link above.

**CALL TO ORDER:**

Upon request, agenda items may be moved to accommodate those in attendance wishing to address that item. Please inform the General Manager.

**ROLL CALL OF DIRECTORS:**

**PLEDGE OF ALLEGIANCE:**

**VISITORS:**

**PUBLIC COMMENT:**

The Public shall have the opportunity to directly address the Board on any item of interest to the public before or during the Board's consideration of that item pursuant to Government Code Section 54954.3. Public comment on items of interest within the jurisdiction of the Board is welcome. The Presiding Officer will limit comments to three (3) minutes per speaker.

(A) Action Item

(D) Discussion Item

(I) Information Item

**CONSENT CALENDAR: (I/A)**

All items under the Consent Calendar are considered to be routine and will be approved by one motion. There will be no separate discussion of these items unless a member of the Board, Audience, or Staff request a specific item be removed for separate discussion/action before the motion to approve the Consent Calendar.

CC-1a. Minutes of the Special Meeting – June 15, 2022 (A)

CC-1b. Minutes of the Regular Meeting – June 15, 2022 (A)

CC-1c. Minutes of the Special Meeting – June 28, 2022 (A)

CC-1d. Minutes of the Special Meeting – August 8, 2022 (A)

**Recommendation:**

Approve the minutes of the June 15, 2022 Special and Regular Meetings, minutes of the June 28, 2022 Special Meeting, and the minutes of the August 8, 2022 Special Meeting.

- CC-2. Revenue Analysis Report for June and July 2022 (I)
- CC-3. Assessor/Collector's Roll Adjustment for June and July 2022 (I)
- CC-4. Treasurer's Report for June and July 2022 (I)
- CC-5. Treasurer's Report of Fund Balances for June and July 2022 (I)
- CC-6. Operating Budget Analysis for June and July 2022 (I)
- CC-7. Capital Projects Summary for June and July 2022 (I)
- CC-8. Warrants for June and July 2022 (I)
- CC-9. Purchase Card Distributions for June and July 2022 (I)
- CC-10. Employee Recognitions (I)
- CC-11. Long-Range Agenda (I)
- CC-12. Engineering Department Report (I)
- CC-13. Operations Department Report for June and July 2022 (I)
- CC-14. 2022 Water Supply (I)
- CC-15a. Water Supply Reliability for July (I)
- CC-15b. Water Supply Reliability for August (I)
- CC-16. Water Efficiency and Safety Program Update (I)
- CC-17. Discussion and Possible Action to Extend Resolution 07-2021 Authorizing Remote Public Meetings (A)
  - Recommendation:  
Extend Resolution 07-2021 to permit future hybrid remote public meetings by the Board of Directors.
- CC-18. Discussion and Possible Action to Approve Amendments to the Citrus Heights Water District Conflict of Interest Code Pursuant to the Political Reform Act of 1974 (A)
  - Recommendation:
    1. Adopt Resolution 11-2022 and Updated Policy 1035 Appendix A and Appendix B to amend the Conflict of Interest Code pursuant to the Political Reform Act of 1974
    2. Authorize the General Manager to Execute the CEO Declaration
- CC-19. 2022 Compensation Study
  - Recommendation:  
Received and file the 2022 Total Compensation Study
- CC-20. Discussion and Possible Action to Adopt Information Technology Policy 10101.00 (A)
  - Recommendation:  
Adopt the Information Technology policy (Exhibit A) accompanying this Board report.
- CC-21. 2022 Strategic Plan Update and 2023 Strategic Plan Approval (A)
  - Recommendation:
    1. Receive and file an update of the 2022 Strategic Plan.
    2. Approve the 2023 Strategic Plan, and direct that Strategic Planning Objectives be included in the 2023 proposed budget, which will be considered by the Board of Directors for adoption later in 2022 for the 2023 budget year.

## **PRESENTATIONS:**

- P-1 Capital Improvement Program (CIP) Update (I/D)

**PUBLIC HEARINGS:**

None.

**STUDY SESSION:**

None.

**BUSINESS:**

- B-1. Agreement with Stonehouse Drilling and Construction, LLC. For Test Hole Drilling (A)

Recommendation:

Approve the accompanying agreement with Stonehouse Drilling and Construction, LLC. for the amount of \$221,900.00 and establish a change order contingency fund for the amount of \$22,190.00 (10%). Authorize total expenditure of not-to-exceed \$244,090.00. Authorize the General Manager to execute the agreement and issue a Notice to proceed.

**MANAGEMENT SERVICES REPORTS (I):**

None.

**CONSULTANTS' AND LEGAL COUNSEL'S REPORTS (I):**

None.

**DIRECTOR'S AND REPRESENTATIVE'S REPORTS (I):**

- D-1. Regional Water Authority (Sheehan/Straus).
- D-2. Sacramento Groundwater Authority (Sheehan).
- D-3. San Juan Water District (All).
- D-4. Association of California Water Agencies (Wheaton).
- D-5. ACWA Joint Powers Insurance Authority (Wheaton/Moore).
- D-6. City of Citrus Heights (Pieri).
- D-7. Chamber of Commerce Update (Park-Kim).
- D-8. RWA Legislative and Regulatory Affairs Update (Park-Kim).
- D-9. Customer Advisory Committee (Riehle/Park-Kim).
- D-10. Other Reports.

**CLOSED SESSION:**

None.

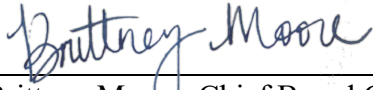
**FUTURE CHWD BOARD OF DIRECTORS MEETING DATES:**

September 21, 2022	6:30 PM	Regular Meeting
October 19, 2022	6:30 PM	Regular Meeting
November 16, 2022	6:30 PM	Regular Meeting
December 21, 2022	6:30 PM	Regular Meeting

**ADJOURNMENT:**

**CERTIFICATION:**

I do hereby declare and certify that this agenda for this Regular Meeting of the Board of Directors of the Citrus Heights Water District was posted in a location accessible to the public at the District Administrative Office Building, 6230 Sylvan Road, Citrus Heights, CA 95610 at least 72 hours prior to the regular meeting in accordance with Government Code Section 54954.2.



\_\_\_\_\_  
Brittney Moore, Chief Board Clerk

Dated: August 11, 2022



CITRUS HEIGHTS WATER DISTRICT  
BOARD OF DIRECTORS SPECIAL MEETING MINUTES  
June 15, 2022

The Special Meeting of the Board of Directors was called to order at 6:02 p.m. by President Sheehan and roll was called. Present were:

Caryl F. Sheehan, President  
Raymond A. Riehle, Vice President  
David C. Wheaton, Director

Staff:

Bryan Abaya, Principal Information Technology Analyst  
Brian Hensley, Water Resources Supervisor  
Brittney Moore, Administrative Services Manager/ Chief Board Clerk  
Joshua Nelson, Assistant General Counsel  
Rebecca Scott, Director of Operations  
Hilary Straus, General Manager

**PUBLIC COMMENT:**

None.

President Sheehan adjourned the meeting to closed session at 6:02 p.m.

**CLOSED SESSION:**

- CL-1. CONFERENCE WITH REAL PROPERTY NEGOTIATORS
- a. Pursuant to Section 54956.8:  
Property: Parcel Number 243-0276-002-0000  
Agency Negotiators: Brian Hensley, Rebecca Scott, Josh Nelson, Melissa Pieri, Hilary Straus, Susan Talwar, Steve Anderson, Brittney Moore, Lea Park-Kim  
Negotiating Parties: City of Citrus Heights  
Under Negotiation: Price and Terms of Payment
  - b. Pursuant to Section 54956.8:  
Property: Parcel Number 243-0276-003-0000  
Agency Negotiators: Brian Hensley, Rebecca Scott, Josh Nelson, Melissa Pieri, Hilary Straus, Susan Talwar, Steve Anderson, Brittney Moore, Lea Park-Kim  
Negotiating Parties: City of Citrus Heights  
Under Negotiation: Price and Terms of Payment

- c. Pursuant to Section 54956.8:  
Property: Parcel Number 243-0276-004-0000  
Agency Negotiators: Brian Hensley, Rebecca Scott, Josh Nelson, Melissa Pieri, Hilary Straus, Susan Talwar, Steve Anderson, Brittney Moore, Lea Park-Kim  
Negotiating Parties: City of Citrus Heights  
Under Negotiation: Price and Terms of Payment
  
- d. Pursuant to Section 54956.8:  
Property: Parcel Number 243-0275-013-0000  
Agency Negotiators: Brian Hensley, Rebecca Scott, Josh Nelson, Melissa Pieri, Hilary Straus, Susan Talwar, Steve Anderson, Brittney Moore, Lea Park-Kim  
Negotiating Parties: City of Citrus Heights  
Under Negotiation: Price and Terms of Payment

There was no reportable action.

President Sheehan adjourned the meeting back to the open session at 6:21 p.m.

**ADJOURNMENT:**

There being no other business to come before the Board, the meeting was adjourned at 6:21 p.m.

**APPROVED:**

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BRITTNEY C. MOORE  
Chief Board Clerk  
Citrus Heights Water District

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CARYL F. SHEEHAN, President  
Board of Directors  
Citrus Heights Water District

CITRUS HEIGHTS WATER DISTRICT  
BOARD OF DIRECTORS REGULAR MEETING MINUTES  
June 15, 2022

The Regular Meeting of the Board of Directors was called to order at 6:31 p.m. by President Sheehan and role was called. Present were:

Caryl F. Sheehan, President  
Raymond A. Riehle, Vice President  
David C. Wheaton, Director

Staff:

Bryan Abaya, Principal Information Technology Analyst  
Steve Anderson, General Counsel  
Brian Hensley, Water Resources Supervisor  
Brittney Moore, Senior Management Analyst/ Deputy Board Clerk  
Lea Park-Kim, Communications & Public Engagement Manager  
Rebecca Scott, Director of Operations  
Hilary Straus, General Manager

Glenn Lazof, Regional Government Services

**PLEDGE OF ALLEGIANCE:**

President Sheehan led the Pledge of Allegiance.

**PUBLIC COMMENT:**

Nick Shebert, Carson Landscape Industries

**CONSENT CALENDAR:**

Vice President Riehle requested CC-20 be pulled from Consent Calendar.  
Director Wheaton requested CC-18 be pulled from the Consent Calendar.  
President Sheehan pulled items CC-18, CC-19, and CC-20 from the Consent Calendar  
After discussion, President Sheehan added CC-18 and CC-19 back to the Consent Calendar

President Sheehan asked for consideration and/or approval of the Consent Calendar as amended.

CC-1a. Minutes of the Special Meeting – May 18, 2022 (A)  
CC-1b. Minutes of the Regular Meeting – May 18, 2022 (A)  
CC-1c. Minutes of the Special Meeting – May 25, 2022 (A)

Recommendation:

Approve the minutes of the May 18, 2022 Special and Regular Meetings  
and minutes of the May 25, 2022 Special Meeting.

CC-2. Revenue Analysis Report for May 2022 (I)

- CC-3. Assessor/Collector's Roll Adjustment for May 2022 (I)
- CC-4. Treasurer's Report for May 2022 (I)
- CC-5. Treasurer's Report of Fund Balances for May 2022 (I)
- CC-6. Operating Budget Analysis for May 2022 (I)
- CC-7. Capital Projects Summary for May 2022 (I)
- CC-8. Warrants for May 2022 (I)
- CC-9. Purchase Card Distributions for May 2022
- (I) CC-10. Employee Recognitions (I)
- CC-11. Long-Range Agenda (I)
- CC-12. Engineering Department Report
- (I) CC-13. Operations Department Report
- (I) CC-14. 2022 Water Supply (I)
- CC-15. Water Supply Reliability (I)
- CC-16. Water Efficiency and Safety Program Update (I)
- CC-17. Discussion and Possible Action to Extend Resolution 07-2021 Authorizing Remote Public Meetings (A)

Recommendation:

Extend Resolution 07-2021 to permit future hybrid remote public meetings by the Board of Directors.

- CC-18. Discussion and Possible Action to Adopt Resolution 08-2022 Approving and Confirming the Report of Delinquent Utilities Charges and Requesting Sacramento County to Collect Such Charges on the Tax Roll and Resolution 09- 2022 Approving and Confirming the Report of Delinquent Utilities Charges and Requesting Placer County to Collect Such Charges on the Tax Roll (A)

Recommendation:

Adopt Resolutions 08-2022 (Sacramento County) and 09-2022 (Placer County) approving and confirming the Report of Delinquent Utilities Charges and requesting the respective county to place such charges on the respective tax roll.

- CC-19. Review and Consideration to Adopt Resolution 06-2022 Approving the Submittal of an Application for a Grant from the U.S. Department of the Interior, Bureau of Reclamation for the Development of a Well (A)

Recommendation:

Adopt Resolution No. 06-2022 approving the submittal of an application for a grant from the U.S. Department of the Interior, Bureau of Reclamation for the development of a water well.

- CC-21. Ella Way Well Drilling, Development, and Testing Project (A)

Recommendation:

Accept the bid of Zim Industries, Inc. in the Base amount of \$868,406 and establish a change order contingency fund in the amount of \$130,261 (15%). Authorize the General Manager to execute the contract.

**ACTION:**

Director Wheaton moved and Vice President Riehle seconded a motion to approve the consent calendar.

The motion carried 3-0 with all Directors voting yes.

Item CC-20, Resolution 10-2022 Commending Susan K. Talwar for Service to the Citrus Heights Water District was removed from the Consent Calendar and considered under a separate motion.

**ACTION:**

Vice President Riehle moved and Director Wheaton seconded a motion to Adopt Resolution No. 10- 2022 Thanking Susan K. Talwar for her service to the District.

The motion carried 3-0 with all Directors voting yes.

**PRESENTATIONS:**

None.

**PUBLIC HEARINGS:**

None.

**STUDY SESSION:**

None.

**BUSINESS:**

- B-1. Adoption of Resolution 07-2022 Adopting Stage 2 of the District's Water Conservation Program (A)

**ACTION:**

President Sheehan moved and Director Wheaton seconded a motion to Adopt Resolution No. 07-2022 Adopting Stage 2 of the Water Conservation Program. The motion was then withdrawn by President Sheehan and Director Wheaton, and the recommendation language was revised to include "as required by the State".

President Sheehan moved, and Director Wheaton seconded a motion to Adopt Resolution 07-2022 Adopting Stage 2 of the Water Conservation Program, as required by the State. The Board directed staff to emphasize public outreach on their continued voluntary efficient use of water.

The motion carried 3-0 with all Directors voting yes.

- B-2. Discussion and Possible Action to Approve an Agreement with San Juan Water District for Groundwater Substitution Transfer (A)

**ACTION:**

Vice President Riehle moved and Director Wheaton seconded a motion to approve the agreement with San Juan Water District for a Groundwater Substitution Transfer in 2022. The General Manager was authorized to execute the agreement with SJWD as well as implement any minor or non-substantive changes agreed to by the General Manager and General Counsel.

The motion carried 3-0 with all Directors voting yes.

**MANAGEMENT SERVICES REPORTS (I):**

None

**CONSULTANTS' AND LEGAL COUNSEL'S REPORTS (I):**

None.

**DIRECTOR'S AND REPRESENTATIVE'S REPORTS (I):**

- D-1. Regional Water Authority (Sheehan/Straus).
- D-2. Sacramento Groundwater Authority (Sheehan).
- D-3. San Juan Water District (All).
- D-4. Association of California Water Agencies (Wheaton).
- D-5. ACWA Joint Powers Insurance Authority (Wheaton/Moore).
- D-6. City of Citrus Heights (Pieri).
- D-7. Chamber of Commerce Update (Park-Kim/Talwar).
- D-8. RWA Legislative and Regulatory Affairs Update (Talwar/Park-Kim).
- D-9. Customer Advisory Committee (Riehle/Park-Kim).
- D-10. Other Reports.

**CLOSED SESSION:**

None.

**ADJOURNMENT:**

There being no other business to come before the Board, the meeting was adjourned at 8:10 p.m.

APPROVED:

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BRITTNEY C. MOORE  
Chief Board Clerk  
Citrus Heights Water District

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CARYL F. SHEEHAN, President  
Board of Directors  
Citrus Heights Water District

CITRUS HEIGHTS WATER DISTRICT  
BOARD OF DIRECTORS SPECIAL MEETING MINUTES  
June 28, 2022

The Special Meeting of the Board of Directors was called to order at 6:01 p.m. by President Sheehan and roll was called. Present were:

Caryl F. Sheehan, President  
Raymond A. Riehle, Vice President

Absent  
David C. Wheaton, Director

Staff:

Brian Hensley, Water Resources Supervisor  
Brittney Moore, Senior Management Analyst/ Deputy Board Clerk  
Joshua Nelson, Assistant General Counsel  
Rebecca Scott, Director of Operations  
Hilary Straus, General Manager

**PLEDGE OF ALLEGIANCE:**

President Sheehan led the Pledge of Allegiance.

**PUBLIC COMMENT:**

None.

President Sheehan adjourned the meeting to closed session at 6:02 p.m.

**CLOSED SESSION:**

CL-1. CONFERENCE WITH REAL PROPERTY NEGOTIATORS

- a. Pursuant to Section 54956.8:  
Property: Parcel Number 243-0276-002-0000  
Agency Negotiators: Brian Hensley, Rebecca Scott, Josh Nelson, Melissa Pieri, Hilary Straus, Steve Anderson, Brittney Moore, Lea Park-Kim  
Negotiating Parties: City of Citrus Heights  
Under Negotiation: Price and Terms of Payment
- b. Pursuant to Section 54956.8:  
Property: Parcel Number 243-0276-003-0000  
Agency Negotiators: Brian Hensley, Rebecca Scott, Josh Nelson, Melissa Pieri, Hilary Straus, Steve Anderson, Brittney Moore, Lea Park-Kim  
Negotiating Parties: City of Citrus Heights  
Under Negotiation: Price and Terms of Payment

- c. Pursuant to Section 54956.8:  
Property: Parcel Number 243-0276-004-0000  
Agency Negotiators: Brian Hensley, Rebecca Scott, Josh Nelson, Melissa Pieri, Hilary Straus, Steve Anderson, Brittney Moore, Lea Park-Kim  
Negotiating Parties: City of Citrus Heights  
Under Negotiation: Price and Terms of Payment

There was no reportable action.

CL-2. CONFERENCE WITH REAL PROPERTY NEGOTIATORS

- a. Pursuant to Section 54956.8:  
Property Parcel Number 243-0192-012-0000  
Agency Negotiators: Brian Hensley, Rebecca Scott, Josh Nelson, Melissa Pieri, Hilary Straus, Steve Anderson, Brittney Moore, Lea Park-Kim  
Negotiating Parties: Sunrise Mall Realty Group LLC, Sunrise CH LLC, Sunrise Nassim LLC  
Under Negotiation: Price and Terms of Payment
- b. Pursuant to Section 54956.8:  
Property: Parcel Number 243-0192-013-0000  
Agency Negotiators: Brian Hensley, Rebecca Scott, Josh Nelson, Melissa Pieri, Hilary Straus, Steve Anderson, Brittney Moore, Lea Park-Kim  
Negotiating Parties: Seritage SRC Finance LLC  
Under Negotiation: Price and Terms of Payment

There was no reportable action.

President Sheehan adjourned the meeting back to the open session at 6:27 p.m.

**BUSINESS:**

- B-1 Discussion and Possible Action to Approve Purchase and Sale Agreement with the City of Citrus Heights in a form as approved by the General Counsel (A)

**ACTION:**

Vice President Riehle moved and President Sheehan seconded a motion to approve the Purchase and Sale Agreement with the City of Citrus Heights in a form as approved by the General Counsel

The motion carried 2-0 with all Directors voting yes.

**ADJOURNMENT:**

There being no other business to come before the Board, the meeting was adjourned at 6:28 p.m.



APPROVED:

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BRITTNEY C. MOORE  
Chief Board Clerk  
Citrus Heights Water District

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CARYL F. SHEEHAN, President  
Board of Directors  
Citrus Heights Water District

CITRUS HEIGHTS WATER DISTRICT  
BOARD OF DIRECTORS SPECIAL MEETING MINUTES  
August 8, 2022

The Special Meeting of the Board of Directors was called to order at 6:00 p.m. by President Sheehan and roll was called. Present were:

Caryl F. Sheehan, President  
Raymond A. Riehle, Vice President  
David C. Wheaton, Director

Staff:

Brittney Moore, Administrative Services Manager/ Chief Board Clerk  
Alberto Preciado, Accounting Manager  
Hilary Straus, General Manager

Shellie Anderson, Bryce Consulting

**PLEDGE OF ALLEGIANCE:**

President Sheehan led the Pledge of Allegiance.

**PUBLIC COMMENT:**

None.

**STUDY SESSION:**

S-1. Review of 2022 Compensation Study (I/D)

**ADJOURNMENT:**

There being no other business to come before the Board, the meeting was adjourned at 6:30 p.m.

APPROVED:

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BRITTNEY C. MOORE  
Chief Board Clerk  
Citrus Heights Water District

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CARYL F. SHEEHAN, President  
Board of Directors  
Citrus Heights Water District

June 2022

## REVENUE ANALYSIS

Outstanding Receivables

Aged Trial Balance					
Total	Current	31-90	91-150	>150	Unapplied Current
1,446,255	1,342,500	92,044	44,833	81,184	114,306

General Ledger Balance	Total
Outstanding A/R	1,522,939.37
Outstanding Liens	-
Outstanding Grants	946
A/R Other	(25,348)
Less Unapplied Payments	(114,930)
Total	\$ 1,383,607

**CITRUS HEIGHTS WATER DISTRICT  
ASSESSOR/COLLECTOR'S ROLL ADJUSTMENTS FOR  
June 30, 2022**

CC-03

Reason For Cancellation	Charge Type	Amount
Bank Error	NSF Charge	33.00
		<u>\$ 33.00</u>

## TREASURER'S REPORT TO THE BOARD OF DIRECTORS

June 2022

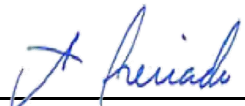
<b>Bank of the West</b>				
<b>Beginning Balance</b>				\$7,279,205
<b>RECEIPTS:</b>		1,693,976		
<b>DISBURSEMENTS:</b>				
Checks Issued / ACH Payments	1,123,782			
Payroll	579,722			
Returned Checks	2,231			
		1,705,736	(11,760)	
<b>Bank of the West</b>				
<b>Balance per Bank 06/30/2022</b>				7,267,446
Outstanding Checks			(166,816)	
Deposit in Transit			124,739	
<b>Balance Per Books 06/30/2022</b>				\$7,225,368


<b>RECONCILEMENT:</b>				
Bank of the West				\$7,225,368
Local Agency Investment Fund				14,542,375
Money Mkt Activity Account				544,426
<b>TOTAL BALANCE</b>				<u><u>\$22,312,169</u></u>

<b>CASH &amp; INVESTMENT SUMMARY:</b>				
Bank of the West (General Account)				7,225,368
Local Agency Investment Fund				14,542,375
Money Mkt Activity Account				544,426
<b>Total</b>				<u><u>\$22,312,169</u></u>

INSTITUTION	MATURITY DATE	INT RATE	DEPOSIT AMOUNT	DATE OF LAST TRANSACTION
Local Agency Investment Fund	Daily	0.32%	11,450.75	4/15/2022

I certify that this report accurately reflects all pooled investments and is in compliance with applicable State of California Government Codes and is in conformity with Investment of District Funds Policy 6300. As Treasurer of the Citrus Heights Water District, I hereby certify that sufficient investment liquidity and anticipated revenue are available to meet the next six months' estimated expenditures.

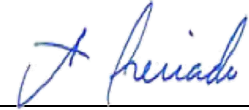
  
**ALBERTO PRECIADO**  
 Deputy Treasurer

  
**HILARY M. STRAUS**  
 Secretary

Signed: 8/11/2022

**TREASURER'S REPORT OF FUND BALANCES**  
**June 30, 2022**

Fund Name	Beginning Balance 01/01/2022	Year to Date Transfers In / Collections	Year to Date Transfers Out	Current Month Transfers In / Collections	Current Month Transfers Out	Ending Balance 06/30/2022	2022 Target Balance per Policy
<b>Operating Fund</b>	\$ 6,844,823	\$ 6,848,290	\$ (6,168,392)	\$ 1,709,695	\$ (1,721,455)	\$ 7,512,961	\$ 2,334,017
<b>Operating Reserve</b>	\$ 3,592,065	\$ -	\$ -	\$ -	\$ -	\$ 3,592,065	N/A
<b>Rate Stabilization Fund</b>	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ 1,000,000	\$ 1,000,000
<b>Capital Improvement Reserve</b>	\$ 2,796,860	\$ -	\$ -	\$ -	\$ -	\$ 2,796,860	\$ 2,681,248
<b>Restricted for Debt Service</b>	\$ 536,963	\$ -	\$ -	\$ -	\$ -	\$ 536,963	N/A
<b>Water Supply Reserve</b>	\$ 2,623,173	\$ -	\$ -	\$ -	\$ -	\$ 2,623,173	N/A
<b>Water Efficiency Reserve</b>	\$ 200,000	\$ -	\$ -	\$ -	\$ -	\$ 200,000	\$ 200,000
<b>Water Meter Replacement Reserve</b>	\$ 1,725,000	\$ -	\$ -	\$ -	\$ -	\$ 1,725,000	N/A
<b>Fleet Equipment Reserve</b>	\$ 334,253	\$ -	\$ -	\$ -	\$ -	\$ 334,253	\$ 318,559
<b>Employment-Related Benefits Reserve</b>	\$ 986,962	\$ -	\$ -	\$ -	\$ -	\$ 986,962	\$ 986,962
	<u><u>\$ 20,640,099</u></u>	<u><u>6,848,290</u></u>	<u><u>\$ (6,168,392)</u></u>	<u><u>\$ 1,709,695</u></u>	<u><u>\$ (1,721,455)</u></u>	<u><u>\$ 21,308,237</u></u>	<u><u>\$ 7,520,786</u></u>

  
 ALBERTO PRECIADO, Deputy Treasurer

**TREASURER'S REPORT OF FUND BALANCES**  
**June 30, 2022**

**Fund Transfers Summary:**

The Operating Fund Transferred:	\$ 1,709,695	from funds collected in June 2022 per Treasurer's Report
	<u>\$ (1,721,455)</u>	disbursements made in June 2022 per Treasurer's Report
	\$ (11,760)	

Citrus Heights Water District  
Budget Performance Report  
As of 6/30/2022

CC-06

	June Actual	Year-to-Date Actual	Year-to-Date Budget	YTD Variance Amount	Percent	Annual Budget
Revenues						
Metered Service Charges	\$1,222,610.73	\$5,902,655.74	\$5,537,296.50	\$365,359.24	6.60%	\$11,074,591.00
Metered Water Deliveries	664,569.66	2,109,164.80	2,037,191.00	71,973.80	3.53%	5,799,716.00
Water Main Replacement Revenue	145,370.26	539,637.55	687,049.50	(\$147,411.95)	-21.46%	1,374,099.00
Non-Metered Service Charges		8,850.94	58,335.00	(49,484.06)	-84.83%	140,000.00
Penalties	488.24	2,006.24	52,688.00	(50,681.76)	-96.19%	150,000.00
Interest	2,375.69	31,690.05	22,998.00	8,692.05	37.79%	45,991.00
Backflow Fees	8,623.26	35,244.71	58,002.00	(22,757.29)	-39.24%	116,000.00
Water Service Install & S&R	1,848.58	74,515.95	286,950.00	(212,434.05)	-74.03%	573,900.00
Grant Funds	525.00	133,336.55		133,336.55	0.00%	
Miscellaneous *	3,411.71	22,649.14	73,500.00	(50,850.86)	-69.18%	147,000.00
Cost Reimbursements		71,925.73		71,925.73	0.00%	
Income - Wheeling Water			1,350.00	(1,350.00)	-100.00%	2,700.00
Income - Connection Fees		42,224.48		42,224.48	0.00%	
Total Revenue	2,049,823.13	8,973,901.88	8,815,360.00	158,541.88	1.80%	19,423,997.00
*includes Assessments, New Account, Back Charges & other Miscellaneous Revenue Sources						
Operating Expenses						
Cost of Water						
Purchased Water		1,157,348.14	1,567,876.98	(410,528.84)	-26.18%	3,135,753.96
Ground Water	51,784.33	399,411.42	596,519.28	(197,107.86)	-33.04%	1,193,038.56
	51,784.33	1,556,759.56	2,164,396.26	(607,636.70)	-28.07%	4,328,792.52
Labor & Benefits						
Labor Regular	274,888.62	1,673,724.37	1,867,712.34	(193,987.97)	-10.39%	3,735,424.68
Labor Non-Regular						
Labor Taxes	21,327.89	130,892.80	142,209.00	(11,316.20)	-7.96%	284,418.00
Labor Workers Comp		18,840.80	50,050.02	(31,209.22)	-62.36%	100,100.04
Labor External	900.00	20,062.15	54,540.06	(34,477.91)	-63.22%	109,080.12
Benefits Med/Den/Vis	35,603.64	292,232.22	257,200.86	35,031.36	13.62%	514,401.72
Benefits LTD/Life/EAP	3,737.23	36,230.92	73,371.24	(37,140.32)	-50.62%	146,742.48
Benefits CalPers	37,158.55	140,856.44	173,690.58	(32,834.14)	-18.90%	347,381.16
Benefits Other	16,332.05	66,031.40	68,828.34	(2,796.94)	-4.06%	137,656.68
Benefit Retiree Expenses	4,239.66	25,437.96	29,558.04	(4,120.08)	-13.94%	59,116.08
Benefit Unemployment			4,616.28	(4,616.28)	-100.00%	9,232.56
Benefit GASB 68		210,532.00	224,587.26	(14,055.26)	-6.26%	449,174.52
Capitalized Labor & Benefit Contra	(39,925.89)	(304,841.07)	(249,999.96)	(54,841.11)	21.94%	(499,999.92)
	354,261.75	2,309,999.99	2,696,364.06	(386,364.07)	-14.33%	5,392,728.12
General & Administrative						
Fees & Charges	11,529.53	63,902.78	120,692.46	(56,789.68)	-47.05%	241,384.92
Regulatory Compliance/Permits		37,679.08	65,745.00	(28,065.92)	-42.69%	131,490.00
District Events & Recognition	2,074.67	15,177.89	30,274.98	(15,097.09)	-49.87%	60,549.96
Maintenance/Licensing	2,551.30	126,544.63	85,363.50	41,181.13	48.24%	170,727.00



Citrus Heights Water District  
Budget Performance Report  
As of 6/30/2022

CC-06

	June Actual	Year-to-Date Actual	Year-to-Date Budget	YTD Variance Amount	YTD Variance Percent	Annual Budget
Equipment Maintenance	6,536.94	35,922.76	63,799.98	(27,877.22)	-43.69%	127,599.96
Professional Development	5,539.62	44,221.82	84,914.52	(40,692.70)	-47.92%	169,829.04
Department Admin		153.97	9,850.08	(9,696.11)	-98.44%	19,700.16
Dues & Subscriptions	4,177.40	127,268.50	96,834.06	30,434.44	31.43%	193,668.12
Fuel & Oil	9,940.60	41,994.18	33,120.00	8,874.18	26.79%	66,240.00
General Supplies	6,420.71	34,409.61	50,300.04	(15,890.43)	-31.59%	100,600.08
Insurance - Auto/Prop/Liab		67,491.60	56,100.00	11,391.60	20.31%	112,200.00
Leasing/Equipment Rental	1,381.84	12,024.60	17,450.04	(5,425.44)	-31.09%	34,900.08
Other Agency Cost Reimbursement		651.86		651.86	0.00%	
Parts & Materials	60,632.17	232,451.29	27,499.98	204,951.31	745.28%	54,999.96
Postage/Shipping/Freight	7,159.69	38,038.69	69,250.02	(31,211.33)	-45.07%	138,500.04
Rebates & Incentives	715.00	20,193.06	18,499.98	1,693.08	9.15%	36,999.96
Telecom/Network	8,538.40	21,910.90	25,890.00	(3,979.10)	-15.37%	51,780.00
Tools & Equipment	784.90	26,434.37	40,100.04	(13,665.67)	-34.08%	80,200.08
Utilities	2,736.76	17,337.20		17,337.20	0.00%	
Write-Off Bad Debt Exp		65.64	2,500.02	(2,434.38)	-97.37%	5,000.04
Capitalized G&A Contra	(32,703.82)	(144,299.75)		(144,299.75)	0.00%	
Capitalized Equipment Contra	(45,268.50)	(255,820.29)		(255,820.29)	0.00%	
	52,747.21	563,754.39	898,184.70	(334,430.31)	-37.23%	1,796,369.40
Professional & Contract Services						
Support Services	117,231.23	473,787.59	744,764.94	(270,977.35)	-36.38%	1,489,529.88
Legal Services	39,914.38	143,236.32	142,500.00	736.32	0.52%	285,000.00
Printing Services	1597.68	9,209.49	24,500.04	(15,290.55)	-62.41%	49,000.08
	158,743.29	626,233.40	911,764.98	(285,531.58)	-31.32%	1,823,529.96
Reserves & Debt Services						
Interest Expense		6,194.79	34,877.11	(28,682.32)	-82.24%	69,754.21
Net Increase(Decrease) in Value of Investments		(37,190.54)		(37,190.54)	0.00%	
		(30,995.75)	34,877.11	(65,872.86)	-188.87%	69,754.21
Total Operating Expenses	617,536.58	5,025,751.59	6,705,587.11	(1,679,835.52)	-25.05%	13,411,174.21
Net Income / (Expense)	1,432,286.55	3,948,150.29	2,109,772.89	1,838,377.40	87.14%	6,012,822.79

Citrus Heights Water District  
Capital Projects Summary  
Fiscal Period End as of 06/2022

CC-7

Project Number	Project Name	BUDGET		AMOUNTS PAID			Remaining Budget
		Project Forecast Budget	Expenditures to 12/2021	Month to Date	Year to Date	Project to Date	
C16-134	Auburn Blvd-Rusch Park Placer	\$167,000	\$3,906	\$0	\$2,620	\$6,526	\$162,942
C19-108	6230 Sylvan East Wall	\$245,000	\$16,748	\$0	\$0	\$16,748	\$237,347
C20-108	Corp Yard PreArchitecture Stdy	\$100,000	\$1,676	\$0	\$0	\$1,676	\$98,324
C20-109	Corp Yard Plans Specs Estimate	\$400,000	\$0	\$0	\$0	\$0	\$400,000
<b>Construction in Progress</b>		<b>\$912,000</b>	<b>\$22,330</b>	<b>\$0</b>	<b>\$2,620</b>	<b>\$24,950</b>	<b>\$898,614</b>
C22-010	Water Main Replacements	\$50,000	\$0	\$4,680	\$4,680	\$4,680	\$45,320
C22-011	Water Valve Replacements	\$75,000	\$0	\$28,829	\$56,623	\$56,623	\$18,377
C22-012	Water Service Connections	\$825,000	\$0	\$112,395	\$576,803	\$576,803	\$248,197
C22-013	Water Meter Replacements	\$100,000	\$0	\$442	\$15,805	\$15,805	\$84,195
C22-014	Fire Hydrants	\$125,000	\$0	\$27,286	\$71,589	\$71,589	(\$71,589)
<b>Annual Infrastructure</b>		<b>\$1,175,000</b>	<b>\$0</b>	<b>\$173,631</b>	<b>\$725,500</b>	<b>\$725,500</b>	<b>\$324,500</b>
C15-104B	Document Management System	\$244,639	\$95,361	\$0	\$0	\$95,361	\$239,278
C22-003	Fleet/Field Operations Equip	\$260,000	\$0	\$0	\$89,957	\$89,957	\$170,043
C22-004	Technology Hardware/Software	\$56,650	\$0	\$0	\$0	\$0	\$56,650
<b>Fleet and Equipment</b>		<b>\$561,289</b>	<b>\$95,361</b>	<b>\$0</b>	<b>\$89,957</b>	<b>\$185,318</b>	<b>\$465,971</b>
C15-109	Blossom Hill Way 6" & 10" Inte	\$27,777	\$0	\$0	\$0	\$0	\$27,777
C15-110	Crestmont Ave 6" Intertie	\$24,979	\$91	\$0	\$0	\$91	\$24,888
C20-105	Walnut Drive	\$105,247	\$15,283	\$0	\$0	\$15,283	\$101,515
C20-106	Wisconsin Drive	\$301,990	\$42,391	\$71	\$71	\$42,463	\$259,527
C21-101	Antelope & Rusch Park	\$187,741	\$123,724	\$5,885	\$21,194	\$144,918	\$42,823
C21-102	Old Auburn Road	\$91,459	\$1,003	\$0	\$1,026	\$2,029	\$90,433
C21-103	Pratt Ave	\$39,043	\$46,820	\$58,373	\$386,399	\$433,220	(\$347,356)
C21-104	Mesa Verde HS	\$118,779	\$49,767	\$148,869	\$357,160	\$406,927	(\$238,381)
C21-105	Madison Ave & Dewey Dr	\$28,138	\$3,147	\$0	\$3,966	\$7,113	\$24,172
C22-101	Carriage Drive	\$427,104	\$0	\$32	\$118,105	\$118,105	\$308,999
<b>Water Mains</b>		<b>\$1,352,257</b>	<b>\$282,227</b>	<b>\$213,230</b>	<b>\$887,921</b>	<b>\$1,170,148</b>	<b>\$294,397</b>

Citrus Heights Water District  
Capital Projects Summary  
Fiscal Period End as of 06/2022

CC-7

Project Number	Project Name	BUDGET		AMOUNTS PAID			Remaining Budget
		Project Forecast Budget	Expenditures to 12/2021	Month to Date	Year to Date	Project to Date	
C21-040	Other City Partnerships	\$112,551	\$0	\$0	\$0	\$0	\$112,551
C21-040A	Greenback Ln Complete Strts	\$0	\$30	\$214	\$16,703	\$16,733	(\$16,703)
C21-040B	Elec. Greenway Bike Trail	\$0	\$1,647	\$53	\$150	\$1,797	(\$150)
C21-040C	MSR2S Phase4	\$0	\$11,007	\$0	\$357	\$11,364	(\$357)
C21-040E	Bonita Storm Drain	\$0	\$29,254	\$0	\$958	\$30,212	(\$958)
C21-041	Other Misc Infrastructure	\$112,551	\$0	\$0	\$0	\$0	\$112,551
C21-041A	Valve Box Raising	\$0	\$32,407	\$0	\$8,000	\$40,407	(\$8,000)
C21-041B	Greenback Acquisition	\$0	\$2,159	\$3,816	\$297,377	\$299,536	(\$297,377)
C22-005	Facilities Improvements	\$100,000	\$0	\$7,791	\$9,763	\$9,763	\$90,237
C22-040	Other City Partnerships	\$100,000	\$0	\$0	\$0	\$0	\$100,000
C22-040D	SACOG 22 AC Overlay P1	\$0	\$0	\$13	\$174	\$174	(\$174)
C22-041	Other Misc Infrastructure	\$100,000	\$0	\$0	\$0	\$0	\$100,000
C22-102	Well Site Acquisition	\$0	\$0	\$0	\$0	\$0	\$0
<b>Miscellaneous Projects</b>		<b>\$525,102</b>	<b>\$76,504</b>	<b>\$11,887</b>	<b>\$333,483</b>	<b>\$409,987</b>	<b>\$191,619</b>
C17-104	Groundwater Well Property Acq	\$640,000	\$370,943	\$0	\$0	\$370,943	\$264,090
C17-104A	Well #7 Patton	\$250,000	\$181,377	\$191	\$67,726	\$249,103	\$897
C17-104B	Well #8 Highland	\$0	\$251,862	\$0	\$0	\$251,862	(\$251,862)
C20-107	Well Design & Construction	\$1,105,500	\$0	\$16,172	\$48,972	\$48,972	\$1,056,528
C22-020	Groundwater Well Improvements	\$150,000	\$0	\$0	\$0	\$0	\$150,000
<b>Wells</b>		<b>\$2,145,500</b>	<b>\$804,182</b>	<b>\$16,363</b>	<b>\$116,698</b>	<b>\$920,880</b>	<b>\$1,219,653</b>
<b>Grand Totals:</b>		<b>\$6,671,148</b>	<b>\$1,280,604</b>	<b>\$415,112</b>	<b>\$2,156,179</b>	<b>\$3,436,783</b>	<b>\$3,394,754</b>

## JUNE 2022 WARRANTS

<u>CHECK</u>	<u>PAYEE</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
73672	Billy L/Kathleen A Cook Trust	Customer Refund	\$113.94
73673	Justin D/Laurie C Ward	Customer Refund	\$15.52
73674	Darryl J/Deborah D Kregger	Customer Refund	\$207.39
73675	James R Silva	Customer Refund	\$37.22
73676	Carvella M Bovee Family Trust	Customer Refund	\$60.31
73677	David L/Judith H Herrmann Family Trust	Customer Refund	\$55.61
73678	Andrew T Bullock	Customer Refund	\$34.23
73679	Ian Maxfield	Customer Refund	\$258.73
73680	Jeffrey S Ordonez	Customer Refund	\$23.63
73681	Valerie Raggio	Customer Refund	\$134.36
73682	Kathleen J Lopez	Customer Refund	\$169.41
73683	Samantha J Golden	Customer Refund	\$12.42
73684	Laura A Landry	Customer Refund	\$35.61
73685	Sawyer R Larkin	Customer Refund	\$123.51
73686	Linda/Toni M Baston	Customer Refund	\$26.86
73687	Simon G Cheon	Customer Refund	\$8.28
73688	ZILLOW HOMES PROPERTY TRUST	Customer Refund	\$28.89
73689	Abaya Bryan	Professional Development	\$25.00
73690	ACWA/JPIA	Workers Comp Insurance	\$90.44
73691	ASSOCIATED SOUND	Contract Services-Other	\$1,725.56
73692	BEST BEST & KRIEGER	Legal & Audit	\$18,070.00
73693	CALIFORNIA LANDSCAPE ASSOCIATES INC	Janitorial	\$743.00
73694	The Capitol Morning Report	Dues & Subscriptions	\$635.00
73695	Connor Kelly	Contract Services-Conservation	\$50.00
73696	CROMER, INC	Repair-Equipment/Hardware	\$1,064.45
73697	CYBEX	Equipment Rental-Office	\$188.60
73698	ICONIX WATERWORKS	Material	\$1,822.15
73699	J4 SYSTEMS	Contract Services-Other	\$1,618.17
73700	LOWE'S	Supplies-Field	\$328.67
73701	LUHDORFF & SCALMANINI	Contract Services-Wells	\$3,126.25
73702	PACE SUPPLY CORP	Material	\$3,727.87
73703	REGIONAL GOVERNMENT SERVICES	Contract Services-Other	\$3,529.14
73704	ROTARY CLUB OF CITRUS HEIGHTS	Professional Development	\$1,200.00
73705	LES SCHWAB TIRES	Repair-Trucks	\$431.33
73706	SMUD	Utilities	\$5,000.00
73707	SONITROL	Equipment Rental-Office	\$204.08
73708	SUPERIOR EQUIPMENT REPAIR	Repair-Trucks	\$1,217.92
73709	VERIZON WIRELESS	Telephone-Wireless	\$1,375.71
73751	Donald Brown	Customer Refund	\$860.56
73752	Cecil A/Tina M Jackson	Customer Refund	\$8.13
73753	Phyllis Irene Hartin	Customer Refund	\$141.03
73754	West 2006 Trust	Customer Refund	\$40.89
73755	AnnMerida/Richard Mujagic	Customer Refund	\$150.65

## JUNE 2022 WARRANTS

<u>CHECK</u>	<u>PAYEE</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
73756	Alicia M Seeholtz	Customer Refund	\$72.46
73757	Romanian Christian Fellowship	Customer Refund	\$135.76
73758	Erica Cantal	Customer Refund	\$249.70
73759	ZILLOW HOMES PROPERTY TRUST	Customer Refund	\$48.96
73760	Kerri A/Nicole K Ramser	Customer Refund	\$23.56
73761	AFLAC	Employee Paid Insurance	\$176.93
73762	AIA SERVICES, LLC/NDS	Tools/Equipment	\$5,166.05
73763	ALEXANDER'S CONTRACT SERVICES	Contract Services-Meter Reading	\$4,441.64
73764	ANSWERNET	Telephone-Answering Service	\$347.35
73765	BART/RIEBES AUTO PARTS	Repair-Trucks	\$4.62
73766	BEST BEST & KRIEGER	Legal & Audit	\$13,948.81
73767	Harry G/Mary E Brice	Toilet Rebate Program	\$75.00
73768	BSK ASSOCIATES	Contract Services-Wells	\$5,130.50
73769	CONSOLIDATED	Telephone-Local/Long Distance	\$5,162.57
73770	ROBIN COPE	Retiree Insurance	\$365.96
73771	R&B COMPANY	Material	\$4,777.11
73772	TAMAR DAWSON	Professional Development	\$360.00
73773	PAUL DIETRICH	Professional Development	\$360.00
73774	FERGUSON ENTERPRISES INC #1423	Material	\$20,903.50
73775	HUNT & SONS INC	Gas & Oil	\$1,813.21
73776	ICONIX WATERWORKS	Material	\$538.75
73777	INDEPENDENT BUSINESS FORMS INC	Printing	\$619.19
73778	INTEGRITY ADMINISTRATORS INC	Health Insurance	\$260.80
73779	J COMM INC	Contract Services-Other	\$4,250.00
73780	J4 SYSTEMS	Contract Services-Other	\$1,246.83
73781	LSL CPAS	Contract Services-Legal/Audit	\$13,400.00
73782	JOAN M MAYO	Toilet Rebate Program	\$75.00
73783	David C McVey	Toilet Rebate Program	\$75.00
73784	MESSENGER PUBLISHING GROUP	Publication Notices	\$225.00
73785	MMANC	Dues & Subscriptions	\$375.00
73786	NOWSPEED INC.	Contract Services-Other	\$250.00
73787	JACE A NUNES	Professional Development	\$1,950.00
73788	PACE SUPPLY CORP	Material	\$9,877.41
73789	PRECISION ACTUARIAL INC	Contract Services-Financial	\$270.00
73790	PRIME AUTO REPAIR	Repair-Trucks	\$65.28
73791	QUICK QUACK CAR WASH	Maintenance Agreement-Equipment	\$298.30
73792	RDO EQUIPMENT	Repair-Trucks	\$1,142.71
73793	REPUBLIC SERVICES #922	Utilities	\$261.89
73794	REGIONAL WATER AUTHORITY	Dues & Subscriptions	\$6,250.00
73795	LES SCHWAB TIRES	Repair-Trucks	\$685.78
73796	SMUD	Utilities	\$14,684.41
73797	SUPERIOR EQUIPMENT REPAIR	Repair-Trucks	\$1,607.23
73798	T-Mobile	Telephone-Wireless	\$1,383.36

## JUNE 2022 WARRANTS

<u>CHECK</u>	<u>PAYEE</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
73799	TEE JANITORIAL & MAINTENANCE	Janitorial	\$2,989.00
73800	TIAA COMMERCIAL FINANCE INC	Equipment Rental-Office	\$522.59
73801	ULINE	Supplies-Field	\$106.59
73802	UNI WASTE LLC	Contract Services-Other	\$1,023.00
73803	WEST YOST ASSOCIATES	Contract Services-Engineering	\$2,133.75
73804	WEX BANK	Gas & Oil	\$4,636.83
73805	WOLF CONSULTING	Contract Services-Other	\$1,125.00
73806	MOONLIGHT BPO LLC	Contract Services-Bill Print/Mailing	\$5,845.99
73807	Void	Void	\$0.00
73808	CALIFORNIA LANDSCAPE ASSOCIATES INC	Janitorial	\$285.00
73809	CORELOGIC INFORMATION SOLUTIONS INC	Dues & Subscriptions	\$218.55
73810	INTEGRITY ADMINISTRATORS INC	Health Insurance	\$5,000.00
73811	SIMON AND COMPANY INC	Contract Services-Other	\$4,000.00
73812	Patelco Credit Union	Customer Refund	\$119.77
73813	Lynn Griffin	Customer Refund	\$122.06
73814	Judith M Greenan	Customer Refund	\$133.86
73815	Bonnie D Gentry	Customer Refund	\$225.17
73816	Robert W/Julie E Bline	Customer Refund	\$171.52
73817	Holbrook-Castaneda Rev Trust	Customer Refund	\$31.36
73818	Inglett Family Rev Trust	Customer Refund	\$18.60
73819	Mark A Langeland	Customer Refund	\$9.89
73820	Bobbette V Bolan	Customer Refund	\$35.64
73821	Dragan/Katarina Mirkovic	Customer Refund	\$134.45
73822	Thomas/Jan Rodine	Customer Refund	\$140.92
73823	Raymond/James H Haselhuhn	Customer Refund	\$140.01
73824	Matthew A Solario	Customer Refund	\$127.99
73825	Kniesel Enterprise LLC	Customer Refund	\$67.26
73826	Paulo A Ibanez	Customer Refund	\$13.66
73827	Kiss Family Trust	Customer Refund	\$115.73
73828	Linda C Giguere	Customer Refund	\$40.66
73829	Thomas E Weideman	Customer Refund	\$168.44
73830	Elisia/Douglas McClure	Customer Refund	\$189.23
73831	Elaine/Jeanette Savage Helphingstine	Customer Refund	\$14.61
73832	Morteza Negahi	Customer Refund	\$110.24
73833	Thomas W/Sara J Lezon	Customer Refund	\$115.03
73834	Alex/Shelby Fischer	Customer Refund	\$30.07
73835	Daniel Elliot	Customer Refund	\$166.77
73836	Michael G/Caroline F Scott	Customer Refund	\$148.77
73837	Tara Abrahams	Customer Refund	\$17.19
73838	AKS Equities Inc	Customer Refund	\$46.02
73839	Jill Brooks	Customer Refund	\$55.78
73840	Raul Lopez	Customer Refund	\$29.84
73841	ZILLOW HOMES PROPERTY TRUST	Customer Refund	\$130.98

## JUNE 2022 WARRANTS

<u>CHECK</u>	<u>PAYEE</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
73842	A&A STEPPING STONE MANUFACTURING	Supplies-Field	\$28.12
73843	B&M BUILDERS	Contract Services-Engineering	\$63,657.00
73844	BART/RIEBES AUTO PARTS	Repair-Trucks	\$336.88
73845	BEST BEST & KRIEGER	Legal & Audit	\$15,719.19
73846	James Bechtold	Toilet Rebate Program	\$150.00
73847	BENDER ROSENTHAL INCORPORATED	Contract Services-Other	\$99,558.75
73848	CALIFORNIA WATER EFFICIENCY PARTNERSHIP	Dues & Subscriptions	\$3,882.25
73849	CALTRONICS BUSINESS SYSTEM	Small Office Equipment	\$254.32
73850	CAPIO	Professional Development	\$25.00
73851	COMCAST	Equipment Rental-Office	\$93.45
73852	Charlotte Corothers	Toilet Rebate Program	\$75.00
73853	CSDA	Dues & Subscriptions	\$550.00
73854	Russell Beldi	Customer Refund	\$444.70
73855	SACRAMENTO COUNTY UTILITIES	Utilities	\$190.10
73856	PAUL DIETRICH	Professional Development	\$60.00
73857	FAST ACTION PEST CONTROL	Contract Services-Miscellaneous	\$168.00
73858	FERGUSON ENTERPRISES INC #1423	Material	\$17,877.62
73859	HUNT & SONS INC	Gas & Oil	\$1,876.01
73860	Loving Life Landscapes	Contract Services-Conservation	\$1,250.00
73861	GERALD G NAYLOR	Toilet Rebate Program	\$75.00
73862	PACE SUPPLY CORP	Material	\$808.43
73863	PETTY CASH	Petty Cash	\$292.03
73864	PRIME AUTO REPAIR	Repair-Trucks	\$395.46
73865	RDO EQUIPMENT	Repair-Trucks	\$68.84
73866	RED WING SHOE STORE	Small Tools	\$275.00
73867	SAGENT	Contract Services-Other	\$8,323.72

## JUNE 2022 WARRANTS

<u>CHECK</u>	<u>PAYEE</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
73868	SAN JUAN WATER DISTRICT	Purchased Water	\$623,434.97
73869	SHRED CITY	Contract Services-Other	\$63.72
73870	SONSRAY MACHINERY, LLC	Fixed Assets	\$156.57
73871	SUPERIOR EQUIPMENT REPAIR	Repair-Trucks	\$287.54
73872	Tracy Theiss	Toilet Rebate Program	\$115.00
73873	WATER SYSTEMS CONSULTING, INC	Contract Services-Other	\$15,243.11
73874	WATERWISE CONSULTING, INC	Contract Services-Conservation	\$2,400.00
73875	WARREN CONSULTING ENGINEERS INC	Contract Services-Engineering	\$2,160.00
73876	Victoria P Knebel	Customer Refund	\$81.25
73877	Rebecca A Miller	Customer Refund	\$68.52
73878	Connie Chambas	Customer Refund	\$18.51
73879	Deborah A Vanwaesberghe	Customer Refund	\$87.65
73880	Mark D/Pamela S Thibodeau	Customer Refund	\$8.05
73881	Nancy Fresquez Trust	Customer Refund	\$16.94
73882	Alpine Holdings Inc	Customer Refund	\$34.63
73883	Jennifer/Darren Gress	Customer Refund	\$8.52
73884	Lynda Weaks	Customer Refund	\$27.97
73885	Joseph M/Melissa R Solorio	Customer Refund	\$24.60
73886	Viktoriya/Vladimir Kislyanka	Customer Refund	\$29.56
73887	Ruvim Oleynic	Customer Refund	\$40.07
73888	Kenneth C O'Brien	Customer Refund	\$17.80
73889	Mahaney Family Trust	Customer Refund	\$65.35
73890	Don Ellwanger Management	Customer Refund	\$651.82
73891	Anneli L Kousa Estate	Customer Refund	\$41.16
73892	Jeffrey E/Kelly M Souza	Customer Refund	\$12.28
73893	OPENDOOR PROPERTY TRUST I	Customer Refund	\$25.77
73894	Kristina Schuetze	Customer Refund	\$71.13
73895	ABA DABA RENTALS & SALES	Supplies-Field	\$394.03
73896	Abaya Bryan	Professional Development	\$250.00
73897	AFMAN SUPPLY	Small Tools	\$1,361.57
73898	ALEXANDER'S CONTRACT SERVICES	Contract Services-Meter Reads	\$6,192.57
73899	AREA RESTROOM SOLUTIONS	Equipment Rental-Field	\$159.76
73900	BEST BEST & KRIEGER	Legal & Audit	\$15,178.51
73901	BSK ASSOCIATES	Contract Services-Wells	\$2,380.00
73902	CALTRONICS BUSINESS SYSTEM	Small Office Equipment	\$254.32
73903	CYBEX	Equipment Rental-Office	\$188.60
73904	TAMAR DAWSON	Professional Development	\$127.45
73905	Scott Dmytrow	Contract Services-Miscellaneous	\$4,608.00
73906	GOVERNMENT FINANCE OFFICERS ASSOCIATION	Dues & Subscriptions	\$460.00
73907	HUNT & SONS INC	Gas & Oil	\$571.00



## JUNE 2022 WARRANTS

<u>CHECK</u>	<u>PAYEE</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
73908	INTEGRITY ADMINISTRATORS INC	Health Insurance	\$260.80
73909	LOWE'S	Supplies-Field	\$1,542.85
73910	LUND CONSTRUCTION	Contract Services-Engineering	\$55,331.42
73911	MOONLIGHT BPO LLC	Contract Services-Bill Print/Mail	\$4,709.88
73912	BRITTNEY MOORE	Professional Development	\$340.00
73913	OCCU-MED	Office Miscellaneous	\$311.00
73914	ONE PRINT SOURCE & GRAPHICS	Printing	\$277.69
73915	LEA PARK-KIM	Professional Development	\$340.00
73916	REGIONAL GOVERNMENT SERVICES	Contract Services-Other	\$4,161.50
73917	RAY RIEHLE	Professional Development	\$250.00
73918	CARYL SHEEHAN	Professional Development	\$340.00
73919	SIMON AND COMPANY INC	Contract Services-Other	\$1,000.00
73920	SONITROL	Equipment Rental-Office	\$204.08
73921	HILARY STRAUS	Professional Development	\$340.00
73922	VERIZON WIRELESS	Telephone-Wireless	\$551.75
73923	WATERWISE CONSULTING, INC	Contract Services-Conservation	\$5,430.00
73924	WEST YOST ASSOCIATES	Contract Services-Engineering	\$3,309.50
73925	ZANE DEZIGN	Tools/Equipment	\$205.92
Total			<u>\$1,175,493.53</u>
ACH	ADP 606953440	Contract Services-Financial	\$340.40
ACH	ADP 607955172	Contract Services-Financial	\$405.15
ACH	BOW MAY 2022	Bank Fee	\$1,029.79
ACH	CA CHOICE JULY2022	Health Insurance	\$46,943.78
ACH	FP POSTAGE RELOAD	Postage	\$1,000.00
ACH	ICMA 6/23/22 PAYDAY	Deferred Compensation	\$9,650.93
ACH	ICMA 6/9/22 PAYDAY	Deferred Compensation	\$9,397.10
ACH	JP MORGAN MAY 2022	See May Agenda Item CC-9	\$5,670.68
ACH	MID AMERICA 6/7-6/13/2	Employee Paid Insurance	\$40.00
ACH	MID AMERICA 5/31-6/6/22	Employee Paid Insurance	\$35.00
ACH	PERS 5/12/22 PAYDAY	PERS	\$23,938.22
ACH	PRINCIPAL JULY 2022	Health Insurance	\$7,669.74
ACH	VALIC 6/9/2022 PAYDAY	Deferred Compensation	\$5,084.21
ACH	MID AMERICA 6/14-6/20/2022	Employee Paid Insurance	\$412.31
ACH	PERS 5/26/22 PAYDAY	PERS	\$23,938.84
ACH	PERS 6/9/22 PAYDAY	PERS	\$23,633.48
ACH	PERS CERBT CONT	PERS	\$135,300.00
ACH	VALIC 6/23/22 PAYDAY	Deferred Compensation	\$2,007.61
Total			<u>\$296,497.24</u>
Grand Total			<u><u>\$1,471,990.77</u></u>

**JP Morgan Purchase Card Distributions**  
**Jun-22**

Name	Fees & Charges	Support Services	Maintenance/ Licensing	General Supplies	District Events & Recognition	Professional Development	Dues & Subscription	Equipment Maintenance	Tools & Equipment	Postage/ Shipping/ Freight	Total Bill
Straus	\$ 75.70										\$ 75.70
Park-Kim	\$ 265.90	\$ 156.50				\$ 19.39					\$ 441.79
Abaya			\$ 313.17	\$ 357.80		\$ 239.27	\$ 196.73		\$ 2,003.59		\$ 3,110.56
Shockley				\$ 2,809.36	\$ 2,626.67	\$ 12,046.23	\$ 10.00		\$ 754.35		\$ 18,246.61
Moore		\$ 923.00			\$ 183.97	\$ 187.94				\$ 36.60	\$ 1,331.51
Spiers								\$ 633.60			\$ 633.60
Talwar							\$ 275.00				\$ 275.00
Pieri					\$ 42.56						\$ 42.56
Scott					\$ 20.16	\$ 199.99					\$ 220.15
Nunes				\$ 49.56							\$ 49.56
Cutler				\$ 167.03							\$ 167.03
<b>Total Bill</b>	<b>\$ 341.60</b>	<b>\$ 1,079.50</b>	<b>\$ 313.17</b>	<b>\$ 3,383.75</b>	<b>\$ 2,873.36</b>	<b>\$ 12,692.82</b>	<b>\$ 481.73</b>	<b>\$ 633.60</b>	<b>\$ 2,757.94</b>	<b>\$ 36.60</b>	<b>\$ 24,594.07</b>

July 2022

## REVENUE ANALYSIS

Outstanding Receivables

Aged Trial Balance					
Total	Current	31-90	91-150	>150	Unapplied Current
980,402	916,358	88,448	39,320	68,529	132,252

General Ledger Balance	Total
Outstanding A/R	1,087,731.98
Outstanding Liens	-
Outstanding Grants	946
A/R Other	(25,348)
Less Unapplied Payments	(132,819)
Total	\$ 930,511

**CITRUS HEIGHTS WATER DISTRICT  
ASSESSOR/COLLECTOR'S ROLL ADJUSTMENTS FOR  
July 31, 2022**

CC-03

*There were no adjustments made for July 2022.*

Reason For Cancellation	Charge Type	Amount
		<u>\$ -</u>

**TREASURER'S REPORT TO THE BOARD OF DIRECTORS**  
**July 2022**


<b>Bank of the West</b>		
<b>Beginning Balance</b>		\$7,267,446
<b>RECEIPTS:</b>	1,704,550	
<b>DISBURSEMENTS:</b>		
Checks Issued / ACH Payments	549,366	
Payroll	831,684	
Returned Checks	3,393	
	<u>1,384,444</u>	<u>320,106</u>
<b>Bank of the West</b>		
<b>Balance per Bank 07/31/2022</b>		7,587,552
Outstanding Checks		(61,576)
Deposit in Transit		<u>94</u>
<b>Balance Per Books 07/31/2022</b>		\$7,526,070


<b>RECONCILEMENT:</b>	
Bank of the West	\$7,526,070
Local Agency Investment Fund	14,569,602
Money Mkt Activity Account	<u>544,935</u>
<b>TOTAL BALANCE</b>	<u><u>\$22,640,607</u></u>

<b>CASH &amp; INVESTMENT SUMMARY:</b>	
Bank of the West (General Account)	7,526,070
Local Agency Investment Fund	14,569,602
Money Mkt Activity Account	<u>544,935</u>
<b>Total</b>	<u><u>\$22,640,607</u></u>

INSTITUTION	MATURITY DATE	INT RATE	DEPOSIT AMOUNT	DATE OF LAST TRANSACTION
Local Agency Investment Fund	Daily	0.75%	27,226.37	7/15/2022

I certify that this report accurately reflects all pooled investments and is in compliance with applicable State of California Government Codes and is in conformity with Investment of District Funds Policy 6300. As Treasurer of the Citrus Heights Water District, I hereby certify that sufficient investment liquidity and anticipated revenue are available to meet the next six months' estimated expenditures.

  
**ALBERTO PRECIADO**  
 Deputy Treasurer

  
**HILARY M. STRAUS**  
 Secretary

Signed: 8/11/2022

**TREASURER'S REPORT OF FUND BALANCES**  
**July 31, 2022**

Fund Name	Beginning Balance 01/01/2022	Year to Date Transfers In / Collections	Year to Date Transfers Out	Current Month Transfers In / Collections	Current Month Transfers Out	Ending Balance 07/31/2022	2022 Target Balance per Policy
Operating Fund	\$ 6,844,823	\$ 8,557,985	\$ (7,889,847)	\$ 1,731,777	\$ (1,384,444)	\$ 7,860,293	\$ 2,334,017
Operating Reserve	\$ 3,592,065	\$ -	\$ -	\$ -	\$ -	\$ 3,592,065	N/A
Rate Stabilization Fund	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ 1,000,000	\$ 1,000,000
Capital Improvement Reserve	\$ 2,796,860	\$ -	\$ -	\$ -	\$ -	\$ 2,796,860	\$ 2,681,248
Restricted for Debt Service	\$ 536,963	\$ -	\$ -	\$ -	\$ -	\$ 536,963	N/A
Water Supply Reserve	\$ 2,623,173	\$ -	\$ -	\$ -	\$ -	\$ 2,623,173	N/A
Water Efficiency Reserve	\$ 200,000	\$ -	\$ -	\$ -	\$ -	\$ 200,000	\$ 200,000
Water Meter Replacement Reserve	\$ 1,725,000	\$ -	\$ -	\$ -	\$ -	\$ 1,725,000	N/A
Fleet Equipment Reserve	\$ 334,253	\$ -	\$ -	\$ -	\$ -	\$ 334,253	\$ 318,559
Employment-Related Benefits Reserve	\$ 986,962	\$ -	\$ -	\$ -	\$ -	\$ 986,962	\$ 986,962
	<u>\$ 20,640,099</u>	<u>8,557,985</u>	<u>\$ (7,889,847)</u>	<u>\$ 1,731,777</u>	<u>\$ (1,384,444)</u>	<u>\$ 21,655,569</u>	<u>\$ 7,520,786</u>

  
 ALBERTO PRECIADO, Deputy Treasurer

**TREASURER'S REPORT OF FUND BALANCES**  
**July 31, 2022**

**Fund Transfers Summary:**

The Operating Fund Transferred:	\$ 1,731,777	from funds collected in July 2022 per Treasurer's Report
	<u>\$ (1,384,444)</u>	disbursements made in July 2022 per Treasurer's Report
	\$ 347,333	

Citrus Heights Water District  
Budget Performance Report  
As of 7/31/2022

CC-06

	July Actual	Year-to-Date Actual	Year-to-Date Budget	YTD Variance		Annual Budget
				Amount	Percent	
Revenues						
Metered Service Charges	\$678,647.89	\$6,581,303.63	\$6,460,179.25	\$121,124.38	1.87%	\$11,074,591.00
Metered Water Deliveries	379,745.50	2,488,910.30	2,601,840.00	(112,929.70)	-4.34%	5,799,716.00
Water Main Replacement Revenue	78,524.33	618,161.88	801,557.75	(\$183,395.87)	-22.88%	1,374,099.00
Non-Metered Service Charges		8,850.94	81,669.00	(72,818.06)	-89.16%	140,000.00
Penalties	627.00	2,633.24	67,292.00	(64,658.76)	-96.09%	150,000.00
Interest	29,771.65	61,461.70	26,831.00	34,630.70	129.07%	45,991.00
Backflow Fees	2,882.32	38,127.03	67,669.00	(29,541.97)	-43.66%	116,000.00
Water Service Install & S&R		74,515.95	334,775.00	(260,259.05)	-77.74%	573,900.00
Grant Funds		133,336.55		133,336.55	0.00%	
Miscellaneous *	297.12	22,946.26	85,750.00	(62,803.74)	-73.24%	147,000.00
Cost Reimbursements	2,827.33	74,753.06		74,753.06	0.00%	
Income - Wheeling Water	64,559.09	64,559.09	1,575.00	62,984.09	3998.99%	2,700.00
Income - Connection Fees		42,224.48		42,224.48	0.00%	
Total Revenue	1,237,882.23	10,211,784.11	10,529,138.00	(317,353.89)	-3.01%	19,423,997.00
*includes Assessments, New Account, Back Charges & other Miscellaneous Revenue Sources						
Operating Expenses						
Cost of Water						
Purchased Water	769,156.73	1,926,504.87	1,829,189.81	97,315.06	5.32%	3,135,753.96
Ground Water	96,867.51	496,278.93	695,939.16	(199,660.23)	-28.69%	1,193,038.56
	866,024.24	2,422,783.80	2,525,128.97	(102,345.17)	-4.05%	4,328,792.52
Labor & Benefits						
Labor Regular	253,407.24	1,927,131.61	2,178,997.73	(251,866.12)	-11.56%	3,735,424.68
Labor Non-Regular						
Labor Taxes	19,566.35	150,459.15	165,910.50	(15,451.35)	-9.31%	284,418.00
Labor Workers Comp	15529.21	34,370.01	58,391.69	(24,021.68)	-41.14%	100,100.04
Labor External	2,400.00	22,462.15	63,630.07	(41,167.92)	-64.70%	109,080.12
Benefits Med/Den/Vis	39,207.43	331,439.65	300,067.67	31,371.98	10.45%	514,401.72
Benefits LTD/Life/EAP	3,991.75	40,222.67	85,599.78	(45,377.11)	-53.01%	146,742.48
Benefits CalPers	12,145.04	153,001.48	202,639.01	(49,637.53)	-24.50%	347,381.16
Benefits Other	8,200.01	74,971.87	80,299.73	(5,327.86)	-6.63%	137,656.68
Benefit Retiree Expenses	4,239.66	29,677.62	34,484.38	(4,806.76)	-13.94%	59,116.08
Benefit Unemployment			5,385.66	(5,385.66)	-100.00%	9,232.56
Benefit GASB 68	232,239.00	442,771.00	262,018.47	180,752.53	68.98%	449,174.52
Capitalized Labor & Benefit Contra	(61,450.69)	(366,291.76)	(291,666.62)	(74,625.14)	25.59%	(499,999.92)
	529,475.00	2,840,215.45	3,145,758.07	(305,542.62)	-9.71%	5,392,728.12
General & Administrative						
Fees & Charges	27,366.08	91,268.86	140,807.87	(49,539.01)	-35.18%	241,384.92
Regulatory Compliance/Permits	15,112.45	52,791.53	76,702.50	(23,910.97)	-31.17%	131,490.00
District Events & Recognition	2,940.84	18,118.73	35,320.81	(17,202.08)	-48.70%	60,549.96
Maintenance/Licensing	2,674.17	129,218.80	99,590.75	29,628.05	29.75%	170,727.00



Citrus Heights Water District  
Budget Performance Report  
As of 7/31/2022

CC-06

	July Actual	Year-to-Date Actual	Year-to-Date Budget	YTD Variance		Annual Budget
				Amount	Percent	
Equipment Maintenance	3,581.99	39,504.75	74,433.31	(34,928.56)	-46.93%	127,599.96
Professional Development	14,542.82	58,764.64	99,066.94	(40,302.30)	-40.68%	169,829.04
Department Admin		153.97	11,491.76	(11,337.79)	-98.66%	19,700.16
Dues & Subscriptions	60,172.02	187,440.52	112,973.07	74,467.45	65.92%	193,668.12
Fuel & Oil	8,305.31	50,299.49	38,640.00	11,659.49	30.17%	66,240.00
General Supplies	5,724.32	40,133.93	58,683.38	(18,549.45)	-31.61%	100,600.08
Insurance - Auto/Prop/Liab		67,491.60	65,450.00	2,041.60	3.12%	112,200.00
Leasing/Equipment Rental	1,060.77	13,085.37	20,358.38	(7,273.01)	-35.72%	34,900.08
Other Agency Cost Reimbursement		651.86		651.86	0.00%	
Parts & Materials	15,163.91	247,615.20	32,083.31	215,531.89	671.79%	54,999.96
Postage/Shipping/Freight	9,616.33	47,655.02	80,791.69	(33,136.67)	-41.01%	138,500.04
Rebates & Incentives	75.00	20,268.06	21,583.31	(1,315.25)	-6.09%	36,999.96
Telecom/Network	4,131.43	26,042.33	30,205.00	(4,162.67)	-13.78%	51,780.00
Tools & Equipment	3,036.13	29,470.50	46,783.38	(17,312.88)	-37.01%	80,200.08
Utilities	3,816.66	21,153.86		21,153.86	0.00%	
Write-Off Bad Debt Exp		65.64	2,916.69	(2,851.05)	-97.75%	5,000.04
Capitalized G&A Contra	(110,702.92)	(255,002.67)		(255,002.67)	0.00%	
Capitalized Equipment Contra	(47,728.83)	(303,549.12)		(303,549.12)	0.00%	
	18,888.48	582,642.87	1,047,882.15	(465,239.28)	-44.40%	1,796,369.40
Professional & Contract Services						
Support Services	56,228.47	530,016.06	868,892.43	(338,876.37)	-39.00%	1,489,529.88
Legal Services	12,192.14	155,428.46	166,250.00	(10,821.54)	-6.51%	285,000.00
Printing Services	6852.1	16,061.59	28,583.38	(12,521.79)	-43.81%	49,000.08
	75,272.71	701,506.11	1,063,725.81	(362,219.70)	-34.05%	1,823,529.96
Reserves & Debt Services						
Interest Expense	34,668.75	40,863.54	40,689.96	173.58	0.43%	69,754.21
Net Increase(Decrease) in Value of Investments		(37,190.54)		(37,190.54)	0.00%	
	34,668.75	3,673.00	40,689.96	(37,016.96)	-90.97%	69,754.21
Total Operating Expenses	1,524,329.18	6,550,821.23	7,823,184.96	(1,272,363.73)	-16.26%	13,411,174.21
Net Income / (Expense)	(286,446.95)	3,660,962.88	2,705,953.04	955,009.84	35.29%	6,012,822.79

Project Number	Project Name	BUDGET				COMMITMENTS	AMOUNTS PAID			Remaining Budget
		Project Forecast Budget	Expenditures to 12/2021	Remaining Budget	2021 Forecast Budget	Open Commitments	Month to Date	Year to Date	Project to Date	
C16-134	Auburn Blvd-Rusch Park Placer	\$167,000	\$3,906	\$165,562		\$0	\$1,103	\$3,723	\$7,630	\$161,839
C19-108	6230 Sylvan East Wall	\$7,653	\$16,748	\$0	\$0	\$0	\$0	\$0	\$16,748	\$0
C20-108	Corp Yard PreArchitecture Stdy	\$100,000	\$1,676	\$98,324		\$0	\$0	\$0	\$1,676	\$98,324
C20-109	Corp Yard Plans Specs Estimate	\$400,000	\$0	\$400,000		\$0	\$0	\$0	\$0	\$400,000
<b>Construction in Progress</b>		<b>\$674,653</b>	<b>\$22,330</b>	<b>\$663,887</b>	<b>\$0</b>	<b>\$0</b>	<b>\$1,103</b>	<b>\$3,723</b>	<b>\$26,054</b>	<b>\$660,163</b>
C22-010	Water Main Replacements	\$50,000	\$0	\$50,000	\$50,000	\$0	\$13,354	\$18,034	\$18,034	\$31,966
C22-011	Water Valve Replacements	\$75,000	\$0	\$75,000	\$75,000	\$0	\$9,806	\$66,429	\$66,429	\$8,571
C22-012	Water Service Connections	\$825,000	\$0	\$825,000	\$825,000	\$0	\$63,945	\$640,748	\$640,748	\$184,252
C22-013	Water Meter Replacements	\$100,000	\$0	\$100,000	\$100,000	\$0	\$2,788	\$18,593	\$18,593	\$81,407
C22-014	Fire Hydrants	\$125,000	\$0	\$0	\$0	\$0	\$29,063	\$100,652	\$100,652	(\$100,652)
<b>Annual Infrastructure</b>		<b>\$1,175,000</b>	<b>\$0</b>	<b>\$1,050,000</b>	<b>\$1,050,000</b>	<b>\$0</b>	<b>\$118,956</b>	<b>\$844,456</b>	<b>\$844,456</b>	<b>\$205,544</b>
C15-104B	Document Management System	\$244,639	\$95,361	\$239,278		\$0	\$200	\$200	\$95,561	\$239,078
C22-003	Fleet/Field Operations Equip	\$260,000	\$0	\$260,000	\$260,000	\$0	\$0	\$89,957	\$89,957	\$170,043
C22-004	Technology Hardware/Software	\$56,650	\$0	\$56,650	\$56,650	\$0	\$0	\$0	\$0	\$56,650
<b>Fleet and Equipment</b>		<b>\$561,289</b>	<b>\$95,361</b>	<b>\$555,928</b>	<b>\$316,650</b>	<b>\$0</b>	<b>\$200</b>	<b>\$90,157</b>	<b>\$185,518</b>	<b>\$465,771</b>
C15-109	Blossom Hill Way 6" & 10" Inte	\$27,777	\$0	\$27,777	0	\$0	\$0	\$0	\$0	\$27,777
C15-110	Crestmont Ave 6" Intertie	\$24,979	\$91	\$24,888	0	\$0	\$0	\$0	\$91	\$24,888
C20-105	Walnut Drive	\$105,247	\$15,283	\$101,515	\$0	\$0	\$0	\$0	\$15,283	\$101,515
C20-106	Wisconsin Drive	\$301,990	\$42,391	\$259,599	\$0	\$0	\$0	\$71	\$42,463	\$259,527
C21-101	Antelope & Rusch Park	\$187,741	\$123,724	\$64,017	\$0	\$0	\$0	\$21,194	\$144,918	\$42,823
C21-102	Old Auburn Road	\$91,459	\$1,003	\$91,459	\$91,459	\$0	\$0	\$1,026	\$2,029	\$90,433
C21-103	Pratt Ave	\$39,043	\$46,820	\$39,043	\$39,043	\$0	\$376	\$386,775	\$433,596	(\$347,732)
C21-104	Mesa Verde HS	\$118,779	\$49,767	\$118,779	\$118,779	\$0	\$15,758	\$372,918	\$422,685	(\$254,139)
C21-105	Madison Ave & Dewey Dr	\$28,138	\$3,147	\$28,138	\$28,138	\$0	\$389	\$4,355	\$7,502	\$23,783
C22-101	Carriage Drive	\$427,104	\$0	\$427,104	\$427,104	\$0	\$106,897	\$225,002	\$225,002	\$202,102
<b>Water Mains</b>		<b>\$1,352,257</b>	<b>\$282,227</b>	<b>\$1,182,319</b>	<b>\$704,523</b>	<b>\$0</b>	<b>\$123,420</b>	<b>\$1,011,341</b>	<b>\$1,293,568</b>	<b>\$170,977</b>

Project Number	Project Name	BUDGET				COMMITMENTS	AMOUNTS PAID			Remaining Budget
		Project Forecast Budget	Expenditures to 12/2021	Remaining Budget	2021 Forecast Budget	Open Commitments	Month to Date	Year to Date	Project to Date	
C21-040	Other City Partnerships	\$52,551	\$0	\$52,551	\$112,551	\$0	\$0	\$0	\$0	\$52,551
C21-040A	Greenback Ln Complete Strts	\$0	\$30	\$0		\$0	\$71	\$16,775	\$16,805	(\$16,775)
C21-040B	Elec. Greenway Bike Trail	\$0	\$1,647	\$0		\$0	\$0	\$150	\$1,797	(\$150)
C21-040C	MSR2S Phase4	\$0	\$11,007	\$0		\$0	\$0	\$357	\$11,364	(\$357)
C21-040E	Bonita Storm Drain	\$0	\$29,254	\$0		\$0	\$0	\$958	\$30,212	(\$958)
C21-041	Other Misc Infrastructure	\$12,551	\$0	\$12,551	\$112,551	\$0	\$0	\$0	\$0	\$12,551
C21-041A	Valve Box Raising	\$0	\$32,407	\$0	\$0	\$0	\$0	\$8,000	\$40,407	(\$8,000)
C21-041B	Greenback Acquisition	\$415,000	\$2,159	\$412,841	\$0	\$0	\$0	\$297,377	\$299,536	\$115,464
C22-005	Facilities Improvements	\$100,000	\$0	\$100,000	\$100,000	\$0	\$0	\$9,763	\$9,763	\$90,237
C22-040	Other City Partnerships	\$100,000	\$0	\$100,000	\$100,000	\$0	\$0	\$0	\$0	\$100,000
C22-040D	SACOG 22 AC Overlay P1	\$0	\$0	\$0	\$0	\$0	\$0	\$174	\$174	(\$174)
C22-041	Other Misc Infrastructure	\$82,347	\$0	\$82,347	\$100,000	\$0	\$0	\$0	\$0	\$82,347
C22-102	Well Site Acquisition	\$0	\$0				\$11,283	\$11,283	\$11,283	(\$11,283)
<b>Miscellaneous Projects</b>		<b>\$762,449</b>	<b>\$76,504</b>	<b>\$760,290</b>	<b>\$525,102</b>	<b>\$0</b>	<b>\$11,354</b>	<b>\$344,837</b>	<b>\$421,341</b>	<b>\$415,453</b>
C17-104	Groundwater Well Property Acq	\$640,000	\$370,943	\$264,090	\$0	\$0	\$0	\$0	\$370,943	\$264,090
C17-104A	Well #7 Patton	\$250,000	\$181,377	\$68,623	\$0	\$0	\$0	\$67,726	\$249,103	\$897
C17-104B	Well #8 Highland	\$0	\$251,862	(\$251,862)	\$0	\$0	\$0	\$0	\$251,862	(\$251,862)
C20-107	Well Design & Construction	\$1,105,500	\$0	\$1,105,500		\$0	\$209,273	\$258,245	\$258,245	\$847,255
C22-020	Groundwater Well Improvements	\$150,000	\$0	\$150,000	\$150,000	\$0	\$0	\$0	\$0	\$150,000
<b>Wells</b>		<b>\$2,145,500</b>	<b>\$804,182</b>	<b>\$1,336,351</b>	<b>\$150,000</b>	<b>\$0</b>	<b>\$209,273</b>	<b>\$325,971</b>	<b>\$1,130,153</b>	<b>\$1,010,380</b>
<b>Grand Totals:</b>		<b>\$6,671,148</b>	<b>\$1,280,604</b>	<b>\$5,548,774</b>	<b>\$2,746,275</b>	<b>\$0</b>	<b>\$464,307</b>	<b>\$2,620,486</b>	<b>\$3,901,090</b>	<b>\$2,928,289</b>

## JULY 2022 WARRANTS

<u>CHECK</u>	<u>PAYEE</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
73926	Steven C/Sandy R Frank	Customer Refund	\$71.25
73927	Jerry/Cheryl Basinger	Customer Refund	\$11.23
73928	Pierson Revocable Trust	Customer Refund	\$45.77
73929	Melannie A Mathies	Customer Refund	\$31.58
73930	LESLIE D/NANCY A SMITH	Customer Refund	\$171.18
73931	Donald Talkington	Customer Refund	\$48.10
73932	L & D Bortoletto Trust	Customer Refund	\$84.77
73933	Benjamin P Casten	Customer Refund	\$16.15
73934	Delondi N Kintaudi	Customer Refund	\$91.00
73935	Joei Heart	Customer Refund	\$26.10
73936	Lonnie/Jill McGee	Customer Refund	\$20.68
73937	David Lincoln	Customer Refund	\$120.57
73938	Jean M Drane	Customer Refund	\$220.67
73939	Brian Kozuwa	Customer Refund	\$424.83
73940	Gregory M/Shayleen N Willbee	Customer Refund	\$298.14
73941	Russell R/Pamela S Enyart	Customer Refund	\$19.65
73942	George V/Marianne M Williams	Customer Refund	\$244.55
73943	ABA DABA RENTALS & SALES	Supplies-Field	\$336.28
73944	ACWA/JPIA	Workers Comp Ins	\$88.06
73945	AFLAC	Employee Paid Ins	\$176.93
73946	ALEXANDER'S CONTRACT SERVICES	Contract Services-Meter Read	\$2,598.94
73947	All Phase Construction, Inc	Contract Services-Engineering	\$145,520.43
73948	ANSWERNET	Telephone-Answering Service	\$367.35
73949	AXIOM TECHNOLOGIES LLC	Contract Services-Other	\$584.50
73950	BACKFLOW TECHNOLOGIES	Material	\$416.65
73951	BART/RIEBES AUTO PARTS	Repair-Trucks	\$4.84
73952	BLUE JAY TRUCKING INC	Contract Services-Other	\$1,760.00
73953	BSK ASSOCIATES	Water Analysis	\$357.00
73954	CALIFORNIA LANDSCAPE ASSOCIATES INC	Janitorial	\$985.00
73955	CALIFORNIA OFFICE FURNITURE	Material	\$7,791.45
73956	CALIFORNIA SURVEYING & DRAFTING SUPPLY	Small Tools	\$35.00
73957	CITRUS HEIGHTS WATER DISTRICT	Legal & Audit	\$37,411.97
73958	COLANTUONO, HIGHSMITH & WHATLEY, PC	Legal & Audit	\$15,544.50
73959	ROBIN COPE	Health Insurance	\$365.96
73960	TAMAR DAWSON	Professional Development	\$380.00
73961	FP MAILING SOLUTIONS	Equipment Rental-Office	\$164.86
73962	FUTURE FORD	Repair-Trucks	\$1,421.65
73963	FERGUSON ENTERPRISES INC #1423	Material	\$24,453.62
73964	HARRIS & ASSOCIATES	Contract Services-Engineering	\$5,029.00
73965	HARRIS INDUSTRIAL GASES	Supplies-Field	\$19.40
73966	HUNT & SONS INC	Gas & Oil	\$2,856.76
73967	ICONIX WATERWORKS	Material	\$805.97

## JULY 2022 WARRANTS

<u>CHECK</u>	<u>PAYEE</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
73968	Institute for Local Government	Professional Development	\$625.00
73969	J4 SYSTEMS	Contract Services-Other	\$2,276.30
73970	KEI WINDOW CLEANING #12	Janitorial	\$120.00
73971	MASON SMITH SUCCESS STRATEGIES	Contract Services-Financial	\$10,750.00
73972	MESSENGER PUBLISHING GROUP	Publication Notices	\$225.00
73973	MOONLIGHT BPO LLC	Contract Services-Bill Print/Mail	\$1,839.45
73974	NAVIANT	Maintenance Agreement-Software	\$200.00
73975	NOR CAL PERLITE INC	Supplies-Field	\$2,364.80
73976	NOWSPEED INC.	Contract Services-Other	\$250.00
73977	ONE PRINT SOURCE & GRAPHICS	Printing	\$340.80
73978	PACE SUPPLY CORP	Material	\$13,273.40
73979	MISSY PIERI	Professional Development	\$67.48
73980	Pryor Learning Solutions Inc	Professional Development	\$69.00
73981	QUICK QUACK CAR WASH	Maintenance Agreement-Equipment	\$298.30
73982	RDO EQUIPMENT	Repair-Trucks	\$492.29
73983	RENTAL GUYS	Equipment Rental-Field	\$158.36
73984	REGIONAL WATER AUTHORITY	Dues & Subscriptions	\$25,614.00
73985	LES SCHWAB TIRES	Repair-Trucks	\$1,321.37
73986	SMUD	Utilities	\$10,819.50
73987	T-Mobile	Telephone-Wireless	\$1,440.72
73988	TEE JANITORIAL & MAINTENANCE	Contract Services-Other	\$2,989.00
73989	A. TEICHERT & SON, INC.	Road Base	\$2,530.39
73990	TIAA COMMERCIAL FINANCE INC	Equipment Rental-Office	\$571.09
73991	WALKER'S OFFICE SUPPLIES	Office Expense	\$69.05
73992	WALLACE KUHL & ASSOCIATES INC	Contract Services-Miscellaneous	\$2,646.25
73993	WATERWISE CONSULTING, INC	Contract Services-Conservation	\$1,900.00
73994	WOLF CONSULTING	Contract Services-Other	\$1,625.00
73995	BEST BEST & KRIEGER	Legal & Audit	\$13,436.24
73996	BRYCE CONSULTING, INC	Contract Services-Other	\$8,820.00
73997	WARREN CONSULTING ENGINEERS INC	Contract Services-Engineering	\$2,500.00
73998	REPUBLIC SERVICES #922	Utilities	\$802.72
73999	JP MORGAN CHASE BANK NA	See July Agenda Item CC-9	\$24,594.07
74000	WEX BANK	Gas & Oil	\$5,827.63
<b>Total</b>			<b>\$392,279.55</b>

ACH	1168-2022-6 IC	Bank Fee	\$6,278.50
ACH	ADP 609061740	Contract Services-Financial	\$318.80
ACH	ADP 609956358	Contract Services-Financial	\$407.25
ACH	CAL CHOICE-AUGUST 2022	Health Insurance	\$44,831.42
ACH	CHASE JUNE 2022	Bank Fee	\$4,402.74
ACH	MID AMERICA 7/12-7/18/2022	Employee Paid Insurance	\$2,553.00

## JULY 2022 WARRANTS

<u>CHECK</u>	<u>PAYEE</u>	<u>DESCRIPTION</u>	<u>AMOUNT</u>
ACH	MID AMERICA 7/14/2022	Employee Paid Insurance	\$384.00
ACH	PERS 6/23/22 PAYDAY	PERS	\$23,389.19
ACH	PERS UAL 2022/23	PERS	\$464,478.00
ACH	PRINCIPAL AUGUST 2022	Health Insurance	\$8,512.55
ACH	SAYONARA DR	Well Site Aquisition	\$10,000.00
ACH	ICMA 7/20/2022 PAYDAY	Deferred Compensation	\$9,676.19
ACH	ICMA 7/7/2022 PAYDAY	Deferred Compensation	\$9,676.19
ACH	MID AMERICA 6/21-6/27/2022	Employee Paid Insurance	\$738.60
ACH	ADP 611082895	Contract Services-Financial	\$285.15
ACH	US Bank	COP-Debt	\$34,668.75
ACH	Bank of the West	Bank Fee	\$950.73
<b>Total</b>			<hr/> \$621,551.06 <hr/>
<b>Grand Total</b>			<hr/> \$1,013,830.61 <hr/>

**JP Morgan Purchase Card Distributions**  
**Jul-22**

Name	District Events & Recognition	Dues & Subscription	Tools & Equipment	CIP	Fees & Charges	General Supplies	Professional Development	Equipment Maintenance	Prepaid	Maintenance/Licensing	Total Bill
Park-Kim	\$ 29.90	\$ 168.00			\$ 371.24		\$ 22.00				\$ 591.14
Shockley	\$ 676.44	\$ 231.94	\$ 2,578.92	\$ 680.97	\$ 257.38	\$ 855.96	\$ 7,538.02		\$ 221.94	\$ 238.90	\$ 13,280.47
Moore	\$ 146.68						\$ 85.44				\$ 232.12
Abaya		\$ 2,585.37	\$ 398.60			\$ 237.23	\$ 105.68				\$ 3,326.88
Spiers	\$ 25.86							\$ 3,822.23			\$ 3,848.09
Cutler						\$ 178.76					\$ 178.76
Straus							\$ 50.00				\$ 50.00
Scott	\$ 516.28										\$ 516.28
Nunes						\$ 12.39					\$ 12.39
<b>Total Bill</b>	<b>\$ 1,395.16</b>	<b>\$ 2,985.31</b>	<b>\$ 2,977.52</b>	<b>\$ 680.97</b>	<b>\$ 628.62</b>	<b>\$ 1,284.34</b>	<b>\$ 7,801.14</b>	<b>\$ 3,822.23</b>	<b>\$ 221.94</b>	<b>\$ 238.90</b>	<b>\$ 22,036.13</b>

# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

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SUBJECT : EMPLOYEE RECOGNITION  
 STATUS : Information Item  
 REPORT DATE : August 1, 2022  
 PREPARED BY : Brittney Moore, Administrative Services Manager

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The following District employees were recognized for perfect attendance during May and/or June 2022, and outstanding customer service and quality of work during the month of June and/or July 2022.

### Administrative Services

<u>Name</u>	<u>Attendance</u>	<u>Customer Service</u>	<u>Work Quality</u>
Bryan Abaya	Yes	Assisted staff with telework setup for an unexpected outage.	Assisted with updating the District's sam.gov registration
Dana Mellado	Yes	<p>Assisted with capturing team photo for recruitment brochure.</p> <p>Assisted customer on Arcade Lake who was having trouble due to passing of a family member. Dana and Kayleigh helped the customer sort out the billing and payments, and the customer complimented them on their empathy and patience.</p> <p>Assisted customer whose payment was missing. Dana answered questions regarding the customer's account and scheduled a follow-up call to update the customer on the status of the payment. The customer was grateful to Dana for her help.</p>	<p>Assisted with compiling data for State Water Resources Control Board reporting.</p> <p>Assisted with final analysis of customer accounts for potential inclusion on county property tax rolls.</p>
Brittney Moore	Yes		Assisted with updating the District's sam.gov registration



<u>Name</u>	<u>Attendance</u>	<u>Customer Service</u>	<u>Work Quality</u>
Lea Park-Kim	Yes	Assisted HR in posting recruitment materials to LinkedIn and District Website.  Assisted external agency partner with compiling a list of public relations organizations to use for a communications recruitment.	
Alberto Preciado	Yes	Assisted HR in posting recruitment materials to GFOA and CSMFO Website.	Assisted with updating the District's sam.gov registration
Kayleigh Shepard	Yes	Assisted customer on Arcade Lake who was having trouble due to passing of a family member. Kayleigh and Dana helped the customer sort out the billing and payments, and the customer complimented them on their empathy and patience.	Assisted with reviewing account data for delinquent accounts, and with proofing the letter that is being mailed to customers.  Began training for temporary Customer Service employee.
Beth Shockley		Coordinated travel and lodging for staff traveling to DC for conference/ legislature meetings.  Assisted GM with credit card reconciliation.  Cut an emergency check to ensure District staff could continue to use fuel cards without interruption.	Organized June employee recognition treats.  Planned farewell event for Susan.  Assisted with final analysis of customer accounts for potential inclusion on county property tax rolls.
Desiree Smith	Yes	Assisted with obtaining legal descriptions and APN's for Sayonara property.	Assisted with reviewing account data for delinquent accounts, and with proofing the letter that is being mailed to customers.  Assisted with final analysis of customer accounts for potential inclusion on county property tax rolls.  Began training for temporary Customer Service employee.

### Engineering Department

<u>Name</u>	<u>Attendance</u>	<u>Customer Service</u>	<u>Work Quality</u>
Tamar Dawson	Yes	Provided field inspection support during staff outage 7/5/22-7/8/22.	Updated District Project Cost Estimate to account for recent bids.
Paul Dietrich		Provided field inspection support during staff outage 7/5/22-7/8/22 and 7/19/22.	
Timothy Katkanov	Yes	6/9/22- Performed a site visit for condition assessment of the District's transmission main.  On 7/5/22 and 7/12/22 oversaw the condition assessment field work of the District's transmission main.	
Neil Tamagni		Worked on Friday 6/24/22 on the District's Mesa Verde High School Water Main Project. Worked on Friday 7/1/22, 7/15/22, 7/22/22 and 7/29/22 on the District's Mesa Verde High School and Carriage Water Main Project	

### Operations Department

<u>Name</u>	<u>Attendance</u>	<u>Customer Service</u>	<u>Work Quality</u>
Christopher Bell		Customer on Niessen Way called to express gratitude to the crew during a water shut off on 6/30 for bringing out water for the resident, which "really helped the day."	7/5 – Worked overtime to complete repair of 6" water main at 6316 Mariposa Ave.  7/26 – Customer on Northeast Circle called and was extremely complimentary of the quality of work the crew did when replacing the water services and fire hydrant in front of his house. "All of those guys are KEEPERS!"  7/28 – Customer on Beech Ave. stated that the crew involved with lowering the water main in his front yard were all absolutely amazing.

<u>Name</u>	<u>Attendance</u>	<u>Customer Service</u>	<u>Work Quality</u>
James Buford		Customer on Niessen Way called to express gratitude to the crew during a water shut off on 6/30 for bringing out water for the resident, which “really helped the day.”	7/5 – Worked overtime to complete repair of 6” water main at 6316 Mariposa Ave.  7/25 – Customer on Long Acres Ct. called to express his gratitude for the completed water service replacement on his property. “My landscape looked better after they left than before they arrived!”
Andrew Callister		Customer on Niessen Way called to express gratitude to the crew during a water shut off on 6/30 for bringing out water for the resident, which “really helped the day.”	7/25 – Customer on Long Acres Ct. called to express his gratitude for the completed water service replacement on his property. “My landscape looked better after they left than before they arrived!!”  7/26 – Customer on Northeast Circle called and was extremely complimentary of the quality of work the crew did when replacing the water services and fire hydrant in front of his house. “All of those guys are KEEPERS!”  7/28 – Customer on Beech Ave. stated that the crew involved with lowering the water main in his front yard were all absolutely amazing
Aaron Cater		Customer on Niessen Way called to express gratitude to the crew during a water shut off on 6/30 for bringing out water for the resident, which “really helped the day.”	7/26 – Customer on Northeast Circle called and was extremely complimentary of the quality of work the crew did when replacing the water services and fire hydrant in front of his house. “All of those guys are KEEPERS!”  7/28 – Customer on Beech Ave. stated that the crew involved with lowering the water main in his front yard were all absolutely amazing.

<u>Name</u>	<u>Attendance</u>	<u>Customer Service</u>	<u>Work Quality</u>
Tim Cutler	Yes	Customer on Niessen Way called to express gratitude to Tim, who was “very, very sweet” in advance of and during a water shut off and brought out water for the resident, which “really helped the day.”	
Kelly Drake	Yes		Coordinated and helped teach Temporary Traffic Control and Flagger Safety Training for Operations staff.  Scheduled and coordinated the Defensive Driving Training for all staff.
James Ferro	Yes	Property owner on Garryanna Drive, called and expressed his appreciation for the professional and friendly demeanor the CHWD crew exhibited while repairing his water line.	7/26 – Customer on Northeast Circle called and was extremely complimentary of the quality of work the crew did when replacing the water services and fire hydrant in front of his house. “All of those guys are KEEPERS!”  Assisted with USA markings during an unexpected staff outage.
Jarrett Flink		Customer on Niessen Way called to express gratitude to the crew during a water shut off on 6/30 for bringing out water for the resident, which “really helped the day.”	7/26 – Customer on Northeast Circle called and was extremely complimentary of the quality of work the crew did when replacing the water services and fire hydrant in front of his house. “All of those guys are KEEPERS!”  7/28 – Customer on Beech Ave. stated that the crew involved with lowering the water main in his front yard were all absolutely amazing.
Brandon Goad	Yes	Customer on Niessen Way called to express gratitude to the crew during a water shut off on 6/30 for bringing out water for the resident, which “really helped the day.”	7/5 – Worked overtime to complete repair of 6” water main at 6316 Mariposa Ave.

<u><b>Name</b></u>	<u><b>Attendance</b></u>	<u><b>Customer Service</b></u>	<u><b>Work Quality</b></u>
Brian Hensley	Yes		Assisted in the development of the WaterSMART grant.  Expediently developed and coordinated the bid process for the Sayonara test hole drilling project.
Ricky Kelley	Yes	Property owner on Garryanna Drive, called and expressed his appreciation for the professional and friendly demeanor the CHWD crew exhibited while repairing his water line.	7/9 - Assisted Stand-by with an emergency water main repair at 7216 Beech Ave.
Mike Mariedth	Yes	Property owner on Garryanna Drive, called and expressed his appreciation for the professional and friendly demeanor the CHWD crew exhibited while repairing his water line.	Assisted with USA markings during an unexpected staff outage.
Jace Nunes			6/9/22- Performed a site visit for condition assessment of the District's transmission main.
Ryon Ridner		Customer on Niessen Way called to express gratitude to the crew during a water shut off on 6/30 for bringing out water for the resident, which "really helped the day."	7/25 – Customer on Long Acres Ct. called to express his gratitude for the completed water service replacement on his property. "My landscape looked better after they left than before they arrived!!"
Nick Spiers	Yes		
John Spinella			7/5/22, performed a site visit on short notice and located the District's water facilities for the District's transmission main condition assessment program.
Jason Tupper	Yes		

# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS

### AUGUST 17, 2022 MEETING

SUBJECT : LONG RANGE AGENDA  
 STATUS : Consent/Information Item  
 REPORT DATE: August 11, 2022  
 PREPARED BY : Brittney Moore, Administrative Services Manager

**OBJECTIVE:**  
 Listed below is the current Long Range Agenda.

## Legend

S	Study Session
CC	Consent Calendar
P	Presentation
B	Business
PH	Public Hearing
CL	Closed Session

## CITRUS HEIGHTS WATER DISTRICT LONG RANGE AGENDA

MEETING DATE	MEETING TYPE	ITEM DESCRIPTION	ASSIGNED	AGENDA TYPE	AGENDA ITEM
September 21, 2022					
September 21, 2022		Agreement with Response Structural Engineers	Pieri	CC	A
September 21, 2022		Investment Services	Preciado	B	A
September 21, 2022		Water Meter Replacement Study	Scott	B	A
September 21, 2022	Annual	Refined 2023 Budget Options/Prop 218 Direction	Straus/Preciado	B	I/D
October 19, 2022					
October 19, 2022		ACWA Election -Fall Conference	Moore	CC	A
October 19, 2022		Update to Urban Water Mgt. Plan (UWMP)	Scott	CC	A
October 19, 2022		Electronic Document Records Management System (EDRMS) Project Update	Abaya	P	I/D
October 19, 2022		District-wide Easement Project	Pieri/Dawson	P	I/D
October 19, 2022	Annual	Misc. Charges and Fees - Proposed	Preciado	P	A
November 16, 2022					
November 16, 2022		Boring and Potholing Agreement	Pieri	CC	A
November 16, 2022		Operations Policies Updates (5,000 Series)	Scott	CC	A
December 21, 2022					
December 21, 2022	Annual	Operating and Capital Budgets	Straus/Preciado	B	P/A
December 21, 2022		Election Declaration	Moore	PH	A
December 21, 2022		Oath of Office	Moore	B	A
December 21, 2022	Annual	Selection of President and Vice President	Straus	B	A
December 21, 2022	Annual	District Officers	Moore	B	A
December 21, 2022	Annual	Committee Assignments	Moore	B	A
December 21, 2022	Annual	Financing Corp Officer Selection	Moore	B	A
January 18, 2023					
January 18, 2023		Strategic Plan Update/ 2023 Strategic Plan Preview	Moore	SS	I/D

# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

SUBJECT : ENGINEERING DEPARTMENT REPORT  
 STATUS : Information Item  
 REPORT DATE : August 02, 2022  
 PREPARED BY : Missy Pieri, Director of Engineering/District Engineer

Significant assignments and activities for the Engineering Department are summarized below. I will be available at the meeting to answer questions and/or provide additional details.

Items of Interest	Department	Project Team	To Board? If so, Date	Strategic Planning Item	Item Description	Update from Last Report/ Current Status
<b>PROJECT 2030 Water Main Replacement Project - Pipeline Condition Assessment</b>	Engineering	Director of Engineering and Project Manager	8/17/2022 as part of the CIP Work Program Update to the Board	Yes	Pipeline Condition Assessment	Performing condition assessment on Segment 1 Transmission Main. Preparing condition assessment work program for 2023.
<b>CAPITAL IMPROVEMENT PROJECT Corporation Yard / Facilities Master Plan Buildout</b>	Engineering	Director of Engineering and Project Manager	Yes, 07/17/19 (Award of Contract)	Yes	Masterplan for office space requirements through 2045.	Staffing Report approved by Board on 06/16/21.  Pre-Architectural Study kick-off meeting on 06/28/22.

Items of Interest	Department	Project Team	To Board? If so, Date	Strategic Planning Item	Item Description	Update from Last Report/ Current Status
<b>CAPITAL IMPROVEMENT PROJECT - Walnut Drive Water Service Project</b>	Engineering	Project Manager and Assistant Engineer	No	Yes	2021 design; 2022 construction.	4 of 5 easements acquired.  Plans are 100% complete.  Anticipate construction to be completed by Operations in Summer 2022.
<b>CAPITAL IMPROVEMENT PROJECT - Mesa Verde High School Water Main Project</b>	Engineering	Project Manager and Assistant Engineer	Yes, 04/20/22 (Award of Contract)	Yes	2021 design; 2022 construction.	District received easement from SJUSD. CHWD to record once construction is complete.  Award of Contract at the 04/20/22 Board meeting.  Project started. 80% complete.
<b>CAPITAL IMPROVEMENT PROJECT - Carriage Dr, Mesa Verde High School to Pratt</b>	Engineering	Project Manager and Assistant Engineer	Yes, 04/20/22 (Award of Contract)	Yes	2021 design; 2022 construction.	Award of Contract at the 04/20/22 Board meeting.  Project started. 80% complete.



Items of Interest	Department	Project Team	To Board? If so, Date	Strategic Planning Item	Item Description	Update from Last Report/ Current Status
<b>CAPITAL IMPROVEMENT PROJECT - Old Auburn Road Water Main</b>	Engineering	Project Manager and Assistant Engineer	Yes	Yes	2022 design; 2023 construction.	District to begin design.
<b>CAPITAL IMPROVEMENT PROJECT - Pratt Avenue Water Main</b>	Engineering	Project Manager and Assistant Engineer	Yes, 12/15/21 (Award of Contract)	Yes	2021 design; 2022 construction.	Award of contract occurred at the 12/15/21 Board Meeting.  Construction started on 04/05/22.  100% Complete. Punchlist being completed.
<b>CAPITAL IMPROVEMENT PROJECT - Madison Ave &amp; Dewey Dr Water Main</b>	Engineering	Project Manager and Assistant Engineer	Yes	Yes	2022 design; 2022 construction.	Easement received. District to record once project is constructed.  Plans 100% complete.
<b>CAPITAL IMPROVEMENT PROJECT - 7515 Greenback Lane Building Demolition</b>	Engineering	Project Manager and Assistant Engineer	Yes	Yes	2022 design; 2022 construction.	Preparing demolition plans.

Items of Interest	Department	Project Team	To Board? If so, Date	Strategic Planning Item	Item Description	Update from Last Report/ Current Status
<b>PRIVATE DEVELOPMENT Mitchell Village - 7925 Arcadia Dr</b>	Engineering	Director of Engineering and Senior Construction Inspector	Yes, 03/30/20, 04/15/20 (Deferment of Fees)	No	200-300 unit development by Watt Communities.	Project re-started on 07/14/20. Water portion 99% Complete.  CHWD sent conditional project acceptance on 01/12/22.
<b>PRIVATE DEVELOPMENT Lawrence Ave Wyatt Ranch</b>	Engineering	Senior Construction Inspector, Director of Engineering and Assistant Engineer	Yes, 01/20/21 (Deferment of Fees)	No	23 lot subdivision.	District signed plans on 12/04/19.  Deferment Agreement signed on 02/11/21.  All fees paid.  Construction 75% Complete. Construction restarted 08/09/21.
<b>PRIVATE DEVELOPMENT 12057 Fair Oaks Blvd Fair Oaks Senior Apartments</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	Seniors apartment complex with 42 one bedroom and 68 two bedroom units.	All fees paid on 10/18/21.  District signed plans on 10/19/21.  Pre-construction meeting occurred on 01/19/22. Awaiting construction.

Items of Interest	Department	Project Team	To Board? If so, Date	Strategic Planning Item	Item Description	Update from Last Report/ Current Status
<b>PRIVATE DEVELOPMENT</b> <b>8043 Holly Dr</b> <b>Parcel Split 1 - 3</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	Parcel being split into 3 for 3 home subdivision.	District received third submittal on 03/10/21 and provided comments on 03/29/21.  Awaiting final plans for signature. Plan check fees paid 04/13/21.
<b>PRIVATE DEVELOPMENT</b> <b>208 Langley Ave</b> <b>Parcel Split 1 - 2</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	Parcel being split into 2 lots. New single family home construction on one lot.	District sent correspondence to property owner on 04/20/20.
<b>PRIVATE DEVELOPMENT</b> <b>5425 Sunrise Blvd</b> <b>Sunrise Village Phase 2</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	Partial redevelopment of Sunrise Village.	Plans signed on 07/21/22.  Preconstruction meeting occurred on 07/28/22.  Awaiting construction.
<b>PRIVATE DEVELOPMENT</b> <b>7969 Madison Ave</b> <b>Orchard Apts</b> <b>Storage Units</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	Demolition of tennis courts to make storage unit with sprinkler system.	Payment received for Fees on 04/01/20.  District signed plans on 11/23/20.  Construction 95% complete.

Items of Interest	Department	Project Team	To Board? If so, Date	Strategic Planning Item	Item Description	Update from Last Report/ Current Status
<b>PRIVATE DEVELOPMENT</b> <b>7424 Sunrise Blvd</b> <b>Sunrise Pointe</b>	Engineering	Senior Construction Inspector and Assistant Engineer	No	No	Proposed multi-unit housing complex for low-income and homeless.	All fees paid.  Punchlist provided to contractor.  Construction 99% complete.
<b>PRIVATE DEVELOPMENT</b> <b>8220 Sunrise Blvd</b> <b>Carefield Citrus Heights</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	Proposed memory care facility.	Received schematic plans on 05/08/19.  Will-Serve letter sent on 05/20/19.
<b>PRIVATE DEVELOPMENT</b> <b>Livoti Development</b>	Engineering	Senior Construction Inspector and Assistant Engineer	No	No	Six Parcel Subdivision.	All fees paid.  Plans signed on 11/09/21.  District approved submittals.  Awaiting construction.
<b>PRIVATE DEVELOPMENT</b> <b>7951 Antelope Rd</b> <b>American River Collegiate Academy</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	Commercial Development.	Awaiting for payment of fees.  Received fourth submittal on 05/02/22. District provided comments on 05/05/22.

Items of Interest	Department	Project Team	To Board? If so, Date	Strategic Planning Item	Item Description	Update from Last Report/ Current Status
<b>PRIVATE DEVELOPMENT</b> <b>8556 Pheasant Ridge Ln</b> <b>Fire Improvements</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	Extension of water main, addition of fire hydrant, and fire sprinklers.	All fees paid on 03/11/21.  District approved plans on 01/24/22.  Awaiting construction.
<b>PRIVATE DEVELOPMENT</b> <b>6031 Sunrise Vista Dr</b> <b>Apartments &amp; Annexation</b>	Engineering	Director of Engineering and Assistant Engineer	Yes (Resolution adopted for Annexation - 12/16/20)	No	Annexation and proposed apartments.	Annexation fees paid.  Adoption of Resolution approving annexation occurred at the 12/16/20 Board Meeting.  Received planning level documents on 04/06/21 and District provided comments on 04/13/21.
<b>PRIVATE DEVELOPMENT</b> <b>7078 Auburn Blvd</b> <b>Auburn Heights Townhomes</b>	Engineering	Senior Construction Engineer and Assistant Engineer	No	No	8 Townhomes on undeveloped property.	All fees paid as of 11/22/21.  Water construction 95% complete.
<b>PRIVATE DEVELOPMENT</b> <b>8136 Auburn Blvd</b> <b>Self Service Coin Laundry</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	Redevelopment of existing building to a self-service coin laundry.	Plan check fees paid.  Plans signed on 07/19/21.  Awaiting construction.

Items of Interest	Department	Project Team	To Board? If so, Date	Strategic Planning Item	Item Description	Update from Last Report/ Current Status
<b>PRIVATE DEVELOPMENT</b> Talbot Way Citrus Place Subdivision	Engineering	Director of Engineering and Assistant Engineer	No	No	8 lot subdivision	Plan check fees paid 6/2022.  Plans signed on 6/21/22.  Awaiting other fees and construction.
<b>PRIVATE DEVELOPMENT</b> 7311 Hickory Ave Single Family Home	Engineering	Director of Engineering and Assistant Engineer	No	No	Customer requesting water service for a recently split lot.	Verify lot is split prior to initiating new water service.
<b>PRIVATE DEVELOPMENT</b> 7830 Macy Plaza Dr CSL Plasma	Engineering	Director of Engineering and Assistant Engineer	No	No	Tenant Improvements for a medical office.	Plan check fees paid.  Plans signed on 04/13/22.  Awaiting construction.
<b>PRIVATE DEVELOPMENT</b> 7527 Linden Ave Multi-duplex	Engineering	Senior Construction Inspector and Assistant Engineer	No	No	3 duplex complex.	Plans approved on 10/21/21.  All fees paid on 10/27/21.  Pre-construction meeting occurred on 02/15/22.

Items of Interest	Department	Project Team	To Board? If so, Date	Strategic Planning Item	Item Description	Update from Last Report/ Current Status
<b>PRIVATE DEVELOPMENT</b> <b>8207 Oak Ave</b> <b>Parcel Split, Annexation &amp; Single Family Home</b>	Engineering	Director of Engineering and Assistant Engineer	Yes, Inclusion approved by Board on 05/18/22.	No	Parcel Split, Annexation & 2 single family homes.	Awaiting payment of plan check fees.  Annexation/Inclusion fees paid and approved by Board on 05/18/22.  Resubmittal received on 04/28/22. District provided comments on 05/09/22.
<b>CITY OF CITRUS HEIGHTS PROJECT</b> <b>Auburn Blvd - Complete Streets Phase 2</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	City of Citrus Heights Frontage Improvements and Utility relocation on Auburn Blvd from Rusch Park to north.	District provided Cost Liability letter on 03/25/21 and the City approved on 01/27/22.  District provided utility conflict review comments on 8/3/22.
<b>CITY OF CITRUS HEIGHTS PROJECT</b> <b>Arcade-Cripple Creek Trail Project</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	City of Citrus Heights Bike Trail.	District received Cost Liability letter from the City on 10/09/20.  Plans completed. Awaiting construction.  Pre-bid meeting occurred on 05/19/22.

Items of Interest	Department	Project Team	To Board? If so, Date	Strategic Planning Item	Item Description	Update from Last Report/ Current Status
<b>CITY OF CITRUS HEIGHTS PROJECT Greenback Lane Complete Streets</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	City of Citrus Heights Road Improvements along Greenback Lane from Sunrise Blvd to Fair Oaks Blvd. Valve Box Adjustments.	City awarded project in early 2022.  Construction in progress. Water valve box adjustment complete.  Project Close-out in progress.
<b>COUNTY OF SACRAMENTO AC Overlay Project SACOG 2022 Phase 1 to 3</b>	Engineering	Director of Engineering and Assistant Engineer	No	No	County of Sacramento Road Improvements along Greenback Lane from Fair Oaks Blvd. to Hazel Ave.	Received first submittal on 04/20/22.  District provided comments on 05/24/22.
<b>District-wide Easement Project</b>	Engineering	Director of Engineering, Project Manager and Assistant Engineer	(06/16/21) Award of Contract	Yes	Research and review District facility locations and easements for potential additions/revisions.	Phase 1 - 99% complete. Phase 2 - 50% complete. Phase 3 - 50% complete.  Project completion expected 08/21/22.



# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

SUBJECT : OPERATIONS DEPARTMENT REPORT  
 STATUS : Information Item  
 REPORT DATE : July 6, 2022  
 PREPARED BY : Tim Cutler, Water Distribution Supervisor  
 Rebecca Scott, Director of Operations

Facilities Maintenance			CIP Projects		
	Completed WO's			Completed WO's	
	June	2022 YTD		June	2022 YTD
Backflow Maintenance	0	0	C22-010 Water Mainline	0	0
Blow Off Maintenance	0	3	C22-011 Water Valves	6	12
Hydrant Maintenance	78	297	C22-012 Water Services	25	196
Leak Investigation	0	0	C22-013 Water Meters	11	83
Mainline Repair/Maintenance	0	1	C22-014 Fire Hydrants	3	7
Meter Box Maintenance	1	19	C22-103 Pot Hole Main	0	0
Meter Register Replacement	20	156	<b>TOTAL</b>	<b>45</b>	<b>298</b>
Meter Repair/Test/Maintenance	1	120	<b>Water Quality</b>  <i>Water Analysis Report: Bacteriological testing has met all California Department of Public Health requirements. 72 samples were collected with no positive results.</i>		
Pot Hole Work	0	2			
Water Service Repair/Locate	2	5			
Valve, Mainline Maintenance	133	520			
Valve Box Maintenance	4	5			
<b>TOTAL</b>	<b>239</b>	<b>1,128</b>			

# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

SUBJECT : OPERATIONS DEPARTMENT REPORT  
 STATUS : Information Item  
 REPORT DATE : August 2, 2022  
 PREPARED BY : Tim Cutler, Water Distribution Supervisor  
 Rebecca Scott, Director of Operations

Facilities Maintenance			CIP Projects		
	Completed WO's			Completed WO's	
	July	2022 YTD		July	2022 YTD
Backflow Maintenance	0	0	C22-010 Water Mainline	2	2
Blow Off Maintenance	0	3	C22-011 Water Valves	2	14
Hydrant Maintenance	64	361	C22-012 Water Services	26	222
Leak Investigation	0	0	C22-013 Water Meters	3	86
Mainline Repair/Maintenance	0	1	C22-014 Fire Hydrants	2	9
Meter Box Maintenance	3	22	C22-103 Pot Hole Main	1	1
Meter Register Replacement	23	179	<b>TOTAL</b>	<b>36</b>	<b>334</b>
Meter Repair/Test/Maintenance	2	122	<b>Water Quality</b>		
Pot Hole Work	0	2	<i>Water Analysis Report: Bacteriological testing has met all California Department of Public Health requirements. 72 samples were collected with no positive results.</i>		
Water Service Repair/Locate	0	5			
Valve, Mainline Maintenance	61	581			
Valve Box Maintenance	0	5			
<b>TOTAL</b>	<b>153</b>	<b>1,281</b>			

**CITRUS HEIGHTS WATER DISTRICT**  
**DISTRICT STAFF REPORT TO BOARD OF DIRECTORS**  
**AUGUST 17, 2022 REGULAR MEETING**

SUBJECT : 2022 WATER SUPPLY - PURCHASED & PRODUCED  
 STATUS : Information Item  
 REPORT DATE : August 2, 2022  
 PREPARED BY : Brian M. Hensley, Water Resources Supervisor  
 : Rebecca Scott, Director of Operations

**OBJECTIVE:**

Monthly water supply report, including a comparison to the corresponding month in the prior 5 years. The 2013 data is included for reference as it is the baseline consumption year for water conservation mandates.

Month	2013    2017    2018    2019    2020    2021						2022				Year-to-Date Comparison to 2013			
	Total Water Monthly acre feet						Surface Water Purchased	Ground Water Produced	Total Water Monthly	Total Water Annual				
							acre feet						acre feet	
	Jan	602.52	506.81	531.38	520.86	519.03	575.54	332.65	196.08	528.73	528.73	-73.79	-12.2%	
Feb	606.36	443.99	525.73	447.48	589.8	485.17	323.56	281.61	605.17	1,133.90	-74.98	-6.2%		
Mar	819.55	546.60	540.78	516.87	654.31	601.02	479.25	295.49	774.74	1,908.64	-119.79	-5.9%		
Apr	1,029.73	575.52	646.09	682.90	767.24	1,001.96	610.48	153.35	763.83	2,672.47	-385.69	-12.6%		
May	1,603.43	1,138.72	1,072.27	977.41	1,168.99	1,277.33	1,032.29	100.77	1,133.06	3,805.53	-856.06	-18.4%		
Jun	1,816.73	1,412.94	1,387.03	1,328.07	1,475.82	1,541.32	1,288.62	0.00	1,288.62	5,094.15	-1,384.17	-21.4%		
Jul	2,059.21	1,650.76	1,737.13	1,582.40	1,682.83	1,643.73	823.41	713.28	1,536.69	6,630.84	-1,906.69	-22.3%		
Aug	1,924.28	1,570.80	1,583.78	1,603.36	1,660.59	1,538.76								
Sep	1,509.82	1,441.76	1,330.19	1,297.12	1,381.14	1,333.29								
Oct	1,297.42	1,128.97	1,061.88	1,083.17	1,185.00	972.09								
Nov	911.55	631.55	807.7	839.06	779.34	576.37								
Dec	700.94	574.43	558.97	548.17	620.34	536.97								
Total	14,881.54	11,622.85	11,782.93	11,426.87	12,484.43	12,083.55	4,890.26	1,740.58	6,630.84	6,630.84				
% of Total							73.75%	26.25%						

# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

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SUBJECT	: WATER SUPPLY RELIABILITY
STATUS	: Information Item
REPORT DATE	: July 5, 2022
PREPARED BY	: Brian Hensley, Water Resources Supervisor Rebecca Scott, Director of Operations

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### **OBJECTIVE:**

Receive status report on surface water supplies available to the Citrus Heights Water District (District).

### **BACKGROUND AND ANALYSIS:**

As of July 1, 2022, storage in Folsom Lake (Lake) was at 802,269 acre-feet, 82 percent of the total capacity of 977,000 acre-feet. This represents a decrease in storage of 61,887 acre-feet in the past month.

The District's total water use during June 2022 (1,288.62 acre-feet) was 29 percent below that of June 2013 (1,816.73 acre-feet).

The District continues to assist with preserving surface water supplies in the Lake by operating its groundwater wells. The District's groundwater production wells: Bonita, Skycrest, Mitchell Farms, and Sylvan are operational and used on a rotational or as-needed basis. Other District groundwater production wells, Palm and Sunrise, are available for emergency use.

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# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

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SUBJECT	: WATER SUPPLY RELIABILITY
STATUS	: Information Item
REPORT DATE	: August 2, 2022
PREPARED BY	: Brian Hensley, Water Resources Supervisor Rebecca Scott, Director of Operations

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### **OBJECTIVE:**

Receive status report on surface water supplies available to the Citrus Heights Water District (District).

### **BACKGROUND AND ANALYSIS:**

As of August 1, 2022, storage in Folsom Lake (Lake) was at 585,877 acre-feet, 60 percent of the total capacity of 977,000 acre-feet. This represents a decrease in storage of 216,392 acre-feet in the past month.

The District's total water use during July 2022 (1,536.64 acre-feet) was 25 percent below that of July 2013 (2,059.21 acre-feet).

The District continues to assist with preserving surface water supplies in the Lake by operating its groundwater wells. The District's groundwater production wells: Bonita, Skycrest, Mitchell Farms, and Sylvan are operational and used on a rotational or as-needed basis. Other District groundwater production wells, Palm and Sunrise, are available for emergency use.

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# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS August 17, 2022 REGULAR MEETING

SUBJECT : WATER EFFICIENCY & SAFETY PROGRAM UPDATE  
 STATUS : Information Item  
 REPORT DATE : August 3, 2022  
 PREPARED BY : Jace Nunes, Management Analyst  
 Rebecca Scott, Director of Operations

Water Efficiency, Safety and Meter Program updates are summarized below.

### **ACTIVITIES AND PROGRESS REPORT**

- Water Efficiency activities during the month of July 2022 included:
  - Thirty-four reports of water waste were received in July. Staff continues reaching out to customers concerning water waste violations and leak notifications.
- The District holds bi-monthly safety meetings. The July safety meetings covered Fatal Four Accidents (Construction) and Underground Utility Strikes. In addition, all staff attended a Defensive Driver training course.
- The 2022 lineup of remaining WaterSmart classes is below:

Date	Title
Sat., Sept. 10 10-11 a.m.	So You Planted a Garden, Now What? (In-Person at the Sylvan Ranch Community Garden) By Jessy Parker
Sat., Sept. 17 10-11 a.m.	Fall for Native Plants: Incorporating the Region's Flora into Your Garden (In-Person at the Sylvan Ranch Community Garden) By Chris Lewis

WaterSmart classes from 2021 to present are archived on CHWD's website and on YouTube, where they can be viewed any time.

- CHWD has three garden plots at the Sylvan Ranch Community Garden featuring water efficient landscaping. CHWD is working with a customer-based volunteer "Garden Corps," who maintains the plots by removing weeds and checking the irrigation system and controller timers.

- The following table summarizes the Residential Gallons Per Capita Per Day (R-GPCD) values for CHWD for 2022:

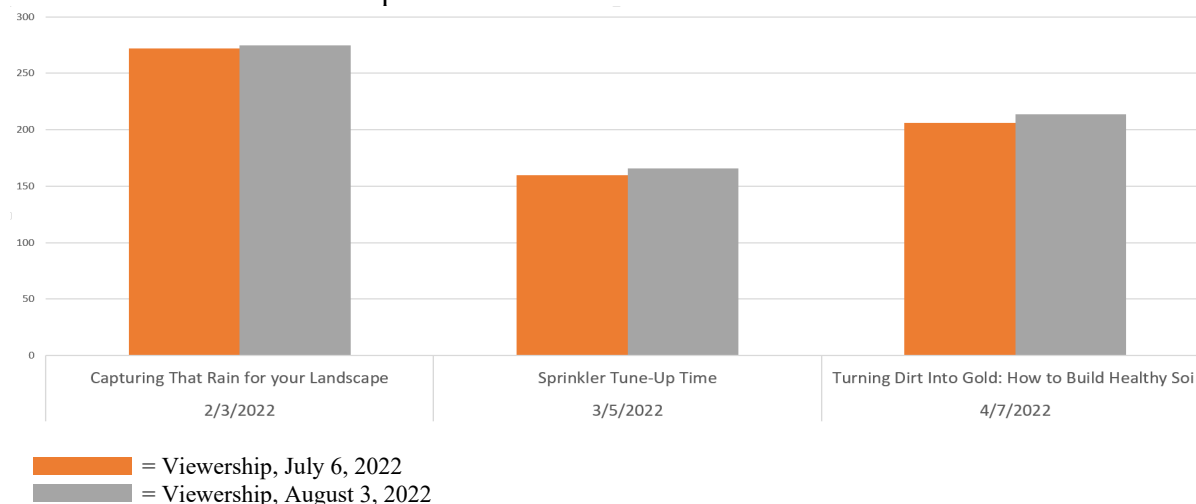
Month	R-GPCD 2021	R-GPCD 2022	% CHANGE
January	84	75	-10%
February	78	85	+8%
March	88	111	+26%
April	135	113	-17%
May	169	162	- 4.2%
June	172	190	+10%
July	230	219	-4.5%

The following table summarizes the service requests and work orders of Water Efficiency staff for July 2022:

Work Orders	July 2022	July 2021
CHANGE TOUCH-READ TO RADIO READ	2	1
CONVERT TO RADIO-READ METER	1	6
METER BOX MAINTENANCE	4	3
METER REPAIR	1	0
METER REPLACEMENT	1	2
METER TESTING	0	0
REGISTER REPLACEMENT	15	9
RADIO-READ REGISTER REPLACEMENT	7	7
INSTALL METER	0	15
<b>TOTAL</b>	<b>31</b>	<b>43</b>

Service Requests	July 2022	July 2021
CONSERVATION REQUEST	34	51
CHECK FOR LEAK	2	0
UNABLE TO OBTAIN METER READ	45	42
TRIM SHRUBS	22	9
METER BURIED	22	43
METER MAINT.	38	23
LOCKED GATE	1	5
RE-READ METER	7	30
READ METER	0	0
METER BOX MAINT.	1	1
MOVE-IN/MOVE-OUT	10	21
CAR OVER METER	16	19
<b>TOTAL</b>	<b>198</b>	<b>244</b>

### WaterSmart Class Viewership



# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

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SUBJECT : DISCUSSION AND POSSIBLE ACTION TO EXTEND RESOLUTION 07-2021  
AUTHORIZING REMOTE PUBLIC MEETINGS

STATUS : Action Item

REPORT DATE : August 8, 2022

PREPARED BY : Brittney Moore, Administrative Services Manager  
Joshua Nelson, Assistant General Counsel

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### **OBJECTIVE:**

Consider extending Resolution 07-2021 to permit future hybrid remote public meetings by the Board of Directors.

### **BACKGROUND AND ANALYSIS:**

On September 16, 2021, the Governor signed AB 361, which allows legislative bodies to meet virtually provided there is a state of emergency, and either (1) state or local officials have imposed or recommended measures to promote social distancing; or (2) the legislative body determines by majority vote that meeting in person would present imminent risks to the health and safety of attendees.

On October 20, 2021 CHWD Board of Directors adopted Resolution 07-2021 to permit future hybrid remote public meetings by the Board of Directors consistent with the requirements of AB 361. CHWD Board of Directors voted 3-0 to extend Resolution 07-2021 at its November 17, 2021, December 15, 2021, January 19, 2022, and March 16, 2022 Regular Meetings, and at the February 22, 2022 Special Meeting. The Board approved additional extensions of Resolution 07-2021 at its April 20, 2022, May 18, 2022, and June 15, 2022 Regular Meetings.

In order to continue to qualify for AB 361's waiver of in-person meeting requirements, the Board must, within thirty (30) days of its first meeting under AB 361, and every thirty (30) days thereafter, make findings that (a) state or local officials continue to recommend measures to promote social distancing, or that (b) an in-person meeting would constitute an imminent risk to the safety of attendees. The findings need not be in the form of a resolution, but a resolution is helpful in formalizing these findings.

Because the Board meets regularly on the third Wednesday of each month, it is possible that more than thirty days may elapse between consecutive meetings. AB 361 is silent as to whether special meetings are required on a more frequent basis to keep up with the thirty-day renewal of findings requirement, although scheduling such meetings would ensure strict compliance. Alternatively, if the Board does not meet within thirty days after its prior meeting, the Board should make its renewed findings at the beginning of its next meeting prior to any other action or discussion. If the Board wishes to continue meetings remotely, staff recommends the Board extend Resolution 07-2021 by motion, and continuously consider this Resolution as a monthly consent calendar item while there is a declared state of emergency, or until state and local orders aimed at containing the COVID-19 virus are rescinded.

### **RECOMMENDATION:**

Extend Resolution 07-2021 to permit future hybrid remote public meetings by the Board of Directors.



**ATTACHMENT:**

Resolution No. 07-2021 Resolution of the Board of Directors of the Citrus Heights Water District  
Authorizing Remote Public Meetings

**ACTION:**

Moved by Director \_\_\_\_\_, Seconded by Director \_\_\_\_\_, Carried \_\_\_\_\_

CITRUS HEIGHTS WATER DISTRICT  
RESOLUTION NO. 07-2021

RESOLUTION OF THE BOARD OF DIRECTORS  
OF CITRUS HEIGHTS WATER DISTRICT  
AUTHORIZING REMOTE PUBLIC MEETINGS

WHEREAS, CITRUS HEIGHTS WATER DISTRICT (“CHWD”) is committed to preserving and nurturing public access and participation in meetings of the Board of Directors; and

WHEREAS, all meetings of CHWD’s legislative bodies are open and public, as required by the Ralph M. Brown Act (Cal. Gov. Code 54950 – 54963), so that any member of the public may attend and participate in CHWD’s meetings; and

WHEREAS, starting in March 2020, in response to the spread of COVID-19 in the State of California, the Governor issued a number of executive orders aimed at containing the COVID-19 virus; and

WHEREAS, among other things, these orders waived certain requirements of the Brown Act to allow legislative bodies to meet virtually; and

WHEREAS, pursuant to the Governor’s executive orders, CHWD has been permitting virtual participation in meetings during the pandemic in the interest of protecting the health and safety of the public, staff, and Directors; and

WHEREAS, the Governor’s executive order related to the suspension of certain provisions of the Brown Act expired on September 30, 2021; and

WHEREAS, on September 16, 2021 the Governor signed AB 361 (in effect as of October 1, 2021 – Government Code Section 54953(e)), which allows legislative bodies to meet virtually provided there is a state of emergency, and either (1) state or local officials have imposed or recommended measures to promote social distancing; or (2) the legislative body determines by majority vote that meeting in person would present imminent risks to the health and safety of attendees; and

WHEREAS, such conditions now exist in CHWD, specifically, a state of emergency has been proclaimed related to COVID-19, State and Sacramento County officials are recommending measures to promote social distancing, and because of the ongoing threat of COVID-19, meeting in person would present imminent risks to the health and safety of attendees;

NOW, THEREFORE, THE BOARD OF DIRECTORS OF THE CITRUS HEIGHTS WATER DISTRICT DOES HEREBY RESOLVE AS FOLLOWS:

Section 1.     Recitals. The Recitals set forth above are true and correct and are incorporated into this Resolution by this reference.

Section 2. Remote Teleconference Meetings: Consistent with the provisions of Government Code Section 54953(e), the Board of Directors finds and determines that (1) a state of emergency related to COVID-19 is currently in effect; (2) state and local officials in Sacramento County have recommended measures to promote social distancing in connection with COVID-19, including indoor mask recommendations and minimum recommend distance between attendees; and (3) due to the COVID-19 emergency, the transfer of novel coronavirus from person-to-person, and the associated risk of serious illness or death from COVID-19, meeting in person would present imminent risks to the health and safety of attendees. Based on such facts, findings and determinations, the Board authorizes staff to conduct remote teleconference meetings of the Board of Directors and other CHWD legislatives bodies under the provisions of Government Code Section 54953(e).

Section 3. Effective Date of Resolution. This Resolution shall take effect October 20, 2021, and shall be effective for 30 days or until this Resolution is extended by a majority vote of the Board of Directors in accordance with Section 4 of this Resolution.

Section 4. Extension by Motion. The Board of Directors may extend the application of this Resolution by motion and majority vote by up to thirty days at a time, provided that it makes all necessary findings consistent with and pursuant to the requirements of Section 54953(e)(3).

PASSED, APPROVED, AND ADOPTED this 20th day of October, 2021.

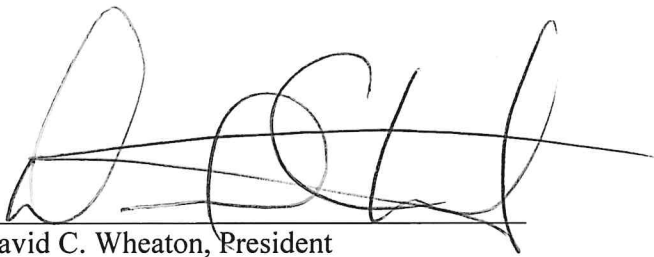
AYES:

NOES:

ABSENT:

ABSTAINED:



  
David C. Wheaton, President

ATTEST:

  
Brittney Moore, Deputy Board Clerk

# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

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SUBJECT : DISCUSSION AND POSSIBLE ACTION TO APPROVE AMENDMENTS TO  
THE CITRUS HEIGHTS WATER DISTRICT CONFLICT OF INTEREST CODE  
PURSUANT TO THE POLITICAL REFORM ACT OF 1974

STATUS : Action Item

REPORT DATE : August 9, 2022

PREPARED BY : Brittney Moore, Administrative Services Manager

---

**OBJECTIVE:**

Consider approving amendments to the Citrus Heights Water District Conflict of Interest Code

**BACKGROUND AND ANALYSIS:**

The Political Reform Act of 1974, Government Code section 81000 et seq. (the “Act”), requires all public agencies to adopt and maintain a conflict of interest code establishing the rules for disclosure of personal assets and the disqualification from making or participating in the making of any decisions that may affect any personal assets designating positions and establishing disclosure categories.

Pursuant to Section 87306 of the Act, the District must amend its Code when necessitated by changed circumstances including the creation of new positions which must be designated.

Attached is a redlined version of the proposed amended Code showing that the revisions are based on the establishment and recognition of new positions that must be designated, along with Board approved title changes for existing positions.

**RECOMMENDATIONS:**

1. Adopt Resolution 11-2022 and Updated Policy 1035 Appendix A and Appendix B to amend the Conflict of Interest Code pursuant to the Political Reform Act of 1974
2. Authorize the General Manager to Execute the CEO Declaration

**ATTACHMENTS:**

1. Explanation of Amendments
2. Resolution 11-2022 to Amend the Conflict of Interest Code Pursuant to the Political Reform Act of 1974
3. Redlined version of Policy 1035A: Conflict of Interest Code- Appendix A Designated Officials and Employees
4. Redlined version of Policy 1035B: Conflict of Interest Code - Appendix B Disclosure Categories
5. CEO Declaration

**ACTION:**

Moved by Director \_\_\_\_\_, Seconded by Director \_\_\_\_\_, Carried \_\_\_\_\_

---

# **ATTACHMENT 1**

## **Explanation of Amendments**

# CITRUS HEIGHTS WATER DISTRICT

## EXPLANATION OF CHANGES TO LIST OF DESIGNATED POSITIONS AND THE ASSIGNMENT OF DISCLOSURE REQUIREMENTS

Review of the Conflict of Interest Code of the Citrus Heights Water District (the “District”) indicates that it is necessary to update and amend the District’s Code to reflect changed circumstances within the District affecting the list of Designated Positions.

The Designated Positions have been amended as follows:

<b><u>TITLE</u></b>	<b><u>ACTION</u></b>
Accounting Manager/Assessor/Collector	Title revised
Administrative Services Manager/Chief Board Clerk	Title revised
Assistant Water Distribution Supervisor	Added with disclosure interests affected by decisions at District level – position makes and participates in decisions on District policies; budget development; equipment, materials, and supplies; approves expenditures; evaluates proposals and negotiates contracts
Communications and Public Engagement Manager	Added with disclosure interests affected by decisions at District wide level – position makes and participates in decisions on District policies; budget development; equipment, materials, and supplies; approves expenditures
Director of Finance and Administrative Services	Added with disclosure narrowed to real property and interests affected by decisions at department level – position makes and participates in decisions on construction and materials; recommends revisions to plans and specs, and compliance; attends and participates in project planning and construction meetings; assists with construction bids; and confirms and processes contractor requests for payment. Also takes role of the General Manager in his absence.
Director of Engineering /District Engineer	Title revised
Director of Operations	Title revised

Management Analyst (ALL)

Title revised

## **ATTACHMENT 2**

Resolution 11-2022

To Amend the Conflict of Interest Code  
Pursuant to the Political Reform Act of 1974



CITRUS HEIGHTS WATER DISTRICT  
RESOLUTION NO. 11-2022

RESOLUTION TO AMEND THE CONFLICT OF INTEREST CODE  
PURSUANT TO THE POLITICAL REFORM ACT OF 1974

**WHEREAS**, the State of California enacted the Political Reform Act of 1974, Government Code section 81000 et seq. (the “Act”), which contains provisions relating to conflicts of interest which potentially affect all officers, employees and consultants of the Citrus Heights Water District (the “District”) and requires all public agencies to adopt and promulgate a conflict of interest code; and

**WHEREAS**, the Board of Directors adopted a Conflict of Interest Code (the “Code”) which was amended and approved by the Fair Political Reform Act on April 12, 2017; and

**WHEREAS**, subsequent changed circumstances within the District have made it advisable and necessary pursuant to Sections 87306 and 87307 of the Act to amend and update the District’s Code; and

**WHEREAS**, the potential penalties for violation of the provisions of the Act are substantial and may include criminal and civil liability, as well as equitable relief which could result in the District being restrained or prevented from acting in cases where the provisions of the Act may have been violated; and

**WHEREAS**, notice of the time and place of a public meeting on, and of consideration by the Board of Directors of, the proposed amended Code was provided each affected designated employee and publicly posted for review and establishing a 45-day comment period in compliance with Title 2 California Code of Regulations Section 18750(a)(3); and

**WHEREAS**, a public meeting was held upon the proposed amended Code at a regular meeting of the Board of Directors on August 17, 2022, at which all present were given an opportunity to be heard on the proposed amended Code.

**NOW, THEREFORE, BE IT RESOLVED BY THE BOARD OF DIRECTORS OF THE CITRUS HEIGHTS WATER DISTRICT AS FOLLOWS:**

1. The Board of Directors does hereby adopt the proposed amended Conflict of Interest Code, a copy of which is attached hereto and shall be on file with the Chief Board Clerk and available to the public for inspection and copying during regular business hours;

2. The said amended Code shall be submitted to the Fair Political Practices Commission for approval and said Code shall become effective 30 days after the date of approval of the proposed amended Code.

3. All previously adopted conflict of interest codes and amendments are rescinded upon the effective date of approval by the Fair Political Practices Commission of the amended and updated Conflict of Interest Code, attached.

**PASSED AND ADOPTED** by the Board of Directors of the CITRUS HEIGHTS WATER DISTRICT, this 17th day of August, 2022, by the following vote, to-wit:

AYES:	Directors:
NOES:	Directors:
ABSTAIN:	Directors:
ABSENT:	Directors:

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Caryl Sheehan, President  
CITRUS HEIGHTS WATER DISTRICT

ATTEST:

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Brittney Moore, Chief Board Clerk  
CITRUS HEIGHTS WATER DISTRICT

## **CONFLICT OF INTEREST CODE FOR THE CITRUS HEIGHTS WATER DISTRICT**

The Political Reform Act (Government Code Section 81000, et seq.) requires state and local government agencies to adopt and promulgate conflict of interest codes. The Fair Political Practices Commission has adopted a regulation (2 Cal. Code of Regs. § 18730) that contains the terms of a standard conflict of interest code which can be incorporated by reference in an agency's code. After public notice and hearing, Section 18730 may be amended by the Fair Political Practices Commission to conform to amendments in the Political Reform Act. Therefore, the terms of 2 California Code of Regulations section 18730 and any amendments to it duly adopted by the Fair Political Practices Commission are hereby incorporated by reference. This incorporation page, Regulation 18730 and the attached Appendix designating positions and establishing disclosure categories, shall constitute the conflict of interest code of the **Citrus Heights Water District** (the **District**).

All officials and designated positions required to submit a statement of economic interests shall file their statements with the **District**, which will make the statements available for public inspection and reproduction during regular business hours. (Gov. Code Sec. 81008.) All statements will be retained by the **District**.

**APPENDIX**  
**CONFLICT OF INTEREST CODE**  
  
**OF THE**  
  
**CITRUS HEIGHTS WATER DISTRICT**  
  
**PART “A”**

**OFFICIALS WHO MANAGE PUBLIC INVESTMENTS**

District officials who manage public investments, as defined by 2 Cal. Code of Regs. § 18700.3, are NOT covered by the conflict of interest code because they must file statements of economic interests pursuant to Government Code Section 87200 and, therefore, are listed here for informational purposes only:

- Directors
- Treasurer
- Deputy Treasurer
- Consultants who manage public investments

An individual holding one of the above listed positions may contact the Fair Political Practices Commission for assistance or written advice regarding their filing obligations if they believe that their position has been categorized incorrectly. The Fair Political Practices Commission makes the final determination whether a position is covered by Government Code Section 87200.

**CONFLICT OF INTEREST CODE OF THE**  
**CITRUS HEIGHTS WATER DISTRICT**  
**DESIGNATED POSITIONS\***

<b><u>DESIGNATED POSITIONS'</u></b> <b><u>TITLE OR FUNCTION</u></b>	<b><u>DISCLOSURE CATEGORIES</u></b> <b><u>ASSIGNED</u></b>
Accounting Manager/Assessor/Collector	1
Administrative Services Manager/Chief Board Clerk	4
Assistant Engineer	2, 4
Assistant General Manager	1, 2, 3
Assistant Water Distribution Supervisor	4
Director of Finance and Administrative Services	1, 2, 3
General Counsel	1, 2, 3
Communications and Public Engagement Manager	4
Construction Inspection Supervisor	2, 4
Construction Inspector (ALL)	2, 4
General Manager, Secretary	1, 2, 3
Information Technology Manager	4
Management Analyst (ALL)	1
Director of Operations	1, 2
Director of Engineering/District Engineer	1, 2
Information Technology Analyst (ALL)	4
Project Manager	2, 4
Senior Accountant, Assessor/Collector	1
Civil Engineer (ALL)	2, 4
Water Distribution Supervisor	4
Water Efficiency Supervisor	4
Water Resources Supervisor/Chief Operator	4

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\* Consultant/New Position\*

Note: General Counsel is filled by an outside consultant, but acts in a staff capacity.

\*Individuals providing services as a Consultant defined in Regulation 18700.3 or in a new position created since this Code was last approved that makes or participates in making decisions shall disclose pursuant to the broadest disclosure category in the code subject to the following limitation:

The General Manager may determine that, due to the range of duties or contractual obligations, it is more appropriate to assign a limited disclosure requirement. A clear explanation of the duties and a statement of the extent of the disclosure requirements must be in a written document. (Gov. Code Sec. 82019; FPPC Regulations 18219 and 18734.). The General Manager's determination is a public record and shall be retained for public inspection in the same manner and location as this conflict of interest code. (Gov. Code Section 81008.)

**CONFLICT OF INTEREST CODE OF THE  
CITRUS HEIGHTS WATER DISTRICT  
PART B-DISCLOSURE CATEGORIES**

The disclosure categories listed below identify the types of economic interests that the designated position must disclose for each disclosure category to which the designated position is assigned. "Investment" means financial interest in any business entity (including a consulting business or other independent contracting business) and are reportable if they are either located in, doing business in, planning to do business in, or have done business during the previous two years in the jurisdiction of the District.

CATEGORY 1 - All investments and business positions in business entities, and sources of income, including gifts, loans, and travel payments, that are located in or doing business in the jurisdiction of the District and that provide services, products, materials, machinery, or equipment of the type utilized by the District. Sources may include, but are not limited to engineering and environmental consulting firms, water and soil testing companies, products and service contractors, mechanical vendors, farmers, and their agents.

CATEGORY 2 - Interests in real property, located in whole or in part within the boundaries of the District or within two miles of the District, including any leasehold, beneficial or ownership interest or option to acquire such interest in real property.

CATEGORY 3 - All investments and business positions in business entities, and sources of income, including gifts, loans, and travel payments, from entities that have filed a claim, or have a claim pending against the District.

CATEGORY 4 - All investments and business positions in business entities, and sources of income, including gifts, loans and travel payments, that provide services, products, materials, machinery, vehicles or equipment of a type purchased or leased by the Designated Position's department, unit or division.

## **ATTACHMENT 3**

### **Redlined Policy 1035A Conflict of Interest Code – Appendix A: Designated Officials and Employees**

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CITRUS HEIGHTS WATER DISTRICT  
POLICIES AND PROCEDURES MANUAL

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POLICY TYPE : GENERAL  
POLICY TITLE : CONFLICT OF INTEREST CODE-APPENDIX A  
DESIGNATED OFFICIALS AND EMPLOYEES  
POLICY NUMBER : 1035.A  
DATE ADOPTED : DECEMBER 8, 1992  
DATE AMENDED : AUGUST 17, 2022~~JUNE 19, 2019~~  
AMENDMENTS : (1) NOVEMBER 1, 1994; (2) MARCH 18, 1997; (3) DECEMBER 13, 2002;  
(4) JUNE 12, 2007; (5) AUGUST 14, 2012; (6) OCTOBER 9, 2012; (7) JANUARY 8, 2013;  
(8) NOVEMBER 19, 2014; (9) APRIL 14, 2015; (10) APRIL 12, 2017; (11) JUNE 19, 2019

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APPENDIX  
CONFLICT OF INTEREST CODE  
OF THE  
CITRUS HEIGHTS WATER DISTRICT  
PART A

OFFICIALS WHO MANAGE PUBLIC INVESTMENTS

District officials who manage public investments, as defined by 2 Cal. Code of Regs. § 18700.3, are NOT covered by the conflict of interest code because they must file statements of economic interests pursuant to Government Code Section 87200 and, therefore, are listed here for informational purposes only:

- Directors
- Treasurer
- Deputy Treasurer
- Consultants who manage public investments

An individual holding one of the above listed positions may contact the Fair Political Practices Commission for assistance or written advice regarding their filing obligations if they believe that their position has been categorized incorrectly. The Fair Political Practices Commission makes the final determination whether a position is covered by Government Code Section 87200.



CONFLICT OF INTEREST CODE OF THE  
CITRUS HEIGHTS WATER DISTRICT

DESIGNATED POSITIONS

DESIGNATED POSITIONS' TITLE OR FUNCTION	DISCLOSURE CATEGORIES ASSIGNED
Accounting <del>Manager</del> <u>Supervisor</u> /Assessor/Collector	1
Administrative Services Manager/ <u>Chief Board Clerk</u>	1
Assistant/ <del>Associate</del> Engineer	2, 4
Assistant General Manager	1, 2, 3
<u>Assistant Water Distribution Supervisor</u>	4
<u>Director of Finance and Administrative Services</u>	1, 2, 3
General Counsel	1, 2, 3
<u>Communications and Public Engagement Manager</u>	4
Construction Inspection Supervisor	2, 4
Construction Inspector (ALL)	2, 4
General Manager/Secretary	1, 2, 3
Information Technology Manager	4
Management <del>Analyst</del> <u>Services Specialist</u> (ALL)	1
<del>Management Services Supervisor</del>	1
<u>Director of Operations</u> <del>Manager</del>	1, 2
<u>Director of Engineering</u> <del>Manager</del> /District Engineer	1, 2
Information Technology Analyst (ALL)	4
Project Manager	2, 4
Senior Accountant	1
<del>Senior</del> Civil Engineer <u>(ALL)</u>	2, 4
Water Distribution Supervisor	4
Water Efficiency Supervisor	4
Water Resources Supervisor/Chief Operator	4
Consultant/New Position	*

Note: General Counsel is filled by an outside consultant, but acts in a staff capacity.

\*Individuals providing services as a Consultant defined in Regulation 18700.3 or in a new position created since this Code was last approved that makes or participates in making decisions shall disclose pursuant to the broadest disclosure category in the code subject to the following limitation:

The General Manager may determine that due to the range of duties or contractual obligations, it is more appropriate to assign a limited disclosure requirement. A clear explanation of the duties and a statement of the extent of the disclosure requirements must be in a written document. (Gov. Code Sec. 82019; ~~FPP~~PPC Regulations of 18219 and 18734). The General Manager's determination is a public record and shall be retained for public inspection in the same manner and location as this conflict of interest code. (Gov. Code Section 81008.)

# **ATTACHMENT 4**

Redlined Policy 1035B

Conflict of Interest

Appendix B: Disclosure Categories

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CITRUS HEIGHTS WATER DISTRICT  
POLICIES AND PROCEDURES MANUAL

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POLICY TYPE : GENERAL  
POLICY TITLE : CONFLICT OF INTEREST CODE-APPENDIX B  
DISCLOSURE CATEGORIES  
POLICY NUMBER : 1035.B  
DATE ADOPTED : DECEMBER 8, 1992  
DATE AMENDED : AUGUST 17, 2022 ~~JUNE 19, 2019~~  
AMENDMENTS : (1) NOVEMBER 1, 1994; (2) MARCH 18, 1997; (3) DECEMBER 13, 2002;  
(4) JUNE 12, 2007; (5) OCTOBER 9, 2012; (6) JANUARY 8, 2013 (7) FEBRUARY  
12, 2013; (8) APRIL 12, 2017; (9) JUNE 19, 2019

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CONFLICT OF INTEREST CODE OF THE  
CITRUS HEIGHTS WATER DISTRICT  
PART B-DISCLOSURE CATEGORIES

The disclosure categories listed below identify the types of economic interests that the designated position must disclose for each disclosure category to which ~~he or she~~ the designated position is assigned. “Investment” means financial interest in any business entity (including a consulting business or other independent contracting business) and are reportable if they are either located in, doing business in, planning to do business in, or have done business during the previous two years in the jurisdiction of the District.

CATEGORY 1

All investments and business positions in business entities and sources of income, including gifts, loans, and travel payments, that are located in or doing business in the jurisdiction of the District and that has provided services, products, materials, machinery, or equipment of the type utilized by the District. Sources may include, but are not limited to engineering and environmental consulting firms, water and soil testing companies, products and service contractors, mechanical vendors, farmers, and their agents.

CATEGORY 2

Interests in real property, located in whole or in part within the boundaries of the District or within two miles of the District, including any leasehold, beneficial or ownership interest or option to acquire such interest in real property.

CATEGORY 3

All investments and business positions in business entities, and sources of income, including gifts, loans, and travel payments, from entities that have filed a claim, or have a claim pending against the District.

#### CATEGORY 4

All investments and business positions in business entities, and sources of income, including gifts, loans and travel payments, that provide services, products, materials, machinery, vehicles or equipment of a type purchased or leased by the Designated Position's department, unit or division.

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# **ATTACHMENT 5**

## **CEO Declaration**

## DECLARATION OF HILARY STRAUS

I, HILARY STRAUS, declare as follows:

1. I am the General Manager of the Citrus Heights Water District (the "District").

2. The District's Conflict of Interest Code specifically enumerates each of the positions within the District which involve the making or participation in the making of decisions which may foreseeably have a material effect on financial interests.

I declare under penalty of perjury that the foregoing is true and correct and that this declaration was executed on \_\_\_\_\_, 2022, at Citrus Heights, California.

---

HILARY M. STRAUS

# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

SUBJECT : 2022 COMPENSATION STUDY  
 REPORT DATE : August 9, 2022  
 PREPARED BY : Brittney Moore, Administrative Services Manager

### **OBJECTIVE:**

Receive and file the 2022 Total Compensation Study conducted by Bryce Consulting, Inc

### **BACKGROUND AND ANALYSIS:**

This item is a follow up to the August 8, 2022 Study Session with the Board of Directors concerning the District's 2022 Total Compensation Study conducted by Bryce Consulting, Inc.

Per Policy 4101, up to every three years, the District surveys a labor market of agencies, including local water utilities, cities, and Sacramento County. These agencies are surveyed as they are similar in nature and scope, and/or these agencies are a direct employment competitor.

The District's last compensation study was finalized in August 2019, and resulted in adjusting the salary range of two positions and implementing six title changes.

For 2022, the 17 surveyed agencies are: Carmichael Water District, City of Citrus Heights, City of Davis, City of Folsom, City of Lincoln, City of Roseville, City of Sacramento, City of Woodland, El Dorado Irrigation District, Elk Grove Water District, Fair Oaks Water District, Rancho Murieta Community Services District, Regional Water Authority, Rio Linda Elverta Community Water District, Sacramento County, Sacramento Suburban Water District, and San Juan Water District.

The methodology of the District's compensation study was to collect data from the local market of agencies to ensure benefits and salaries are consistent and competitive. Job descriptions and budget documents were collected to confirm comparability. Other data elements that were analyzed during the study include: entry and top step monthly salaries, employer contributions to deferred compensation and insurance programs, certification pay, longevity pay, employee and employer portions for PERS, social security, cost of living increases, leave benefits, cash out policies, and retirement practices.

The 2022 survey results show that the proactive changes implemented in 2019 have helped the District stay consistent with the marketplace, and staff is not recommending any additional changes at this time.

### **RECOMMENDATION:**

Receive and file the 2022 Total Compensation Study

### **ATTACHMENT:**

2022 Compensation Study

### **ACTION:**

Moved by Director \_\_\_\_\_, Seconded by Director \_\_\_\_\_, Carried \_\_\_\_\_

BRYCE  
CONSULTING

## CITRUS HEIGHTS WATER DISTRICT 2022 COMPENSATION STUDY REPORT

Prepared By  
Bryce Consulting, Inc.  
1024 Iron Point Road, Suite 100  
Folsom, CA 95630  
916-974-0199



August 2022



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### Appendices

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## **SECTION I - PROJECT OVERVIEW**

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Bryce Consulting was retained by the Citrus Heights Water District to conduct a comprehensive compensation study of District classifications. This report presents the compensation study and includes:

- Section I      Project Overview
- Section II     Compensation Survey Parameters
- Section III    Compensation Survey Results

### **STUDY OBJECTIVES**

The study consisted of the following objectives:

- Review and confirm the survey parameters including survey agencies, survey classifications, and data elements.
- Collect and analyze base salary and benefit data for the survey classifications.
- Prepare and present a comprehensive report outlining the methodology and results.

## SECTION II – COMPENSATION SURVEY PARAMETERS

---

This section of the report presents the compensation survey parameters and includes:

- Selection of labor market employers and survey classes
- Survey scope
- Survey methodology

### SURVEY EMPLOYERS

The overall objective in selecting survey employers is to define as accurately as possible the District's "Labor Market." A labor market consists of those employers with whom the District might compete with for employees. The criteria typically utilized in identifying those employers include the following:

- **EMPLOYER SIZE** - As a general rule, the more similar employers are in size and complexity, the greater the likelihood that comparable positions exist within both organizations. Specifically, agencies of similar size to the District are likely to have departmental structures and organization of positions more similar to the District than organizations that are significantly larger or smaller in size.
- **NATURE OF SERVICES PROVIDED** - As a general rule, similar organizations are selected as survey employers, because they provide similar services. This is important for the following reasons:
  - Employers who provide similar services are most likely to compete with one another for employees.
  - These employers are most likely to have comparable jobs.
  - These employers are most likely to have similar organizational characteristics.
- **GEOGRAPHIC PROXIMITY** - Geographic proximity is another factor utilized in identifying an appropriate labor market. This factor is particularly important because it identifies those employers that the District must directly compete with to recruit and retain quality staff.

**LABOR MARKET**

**Table 1** displays the 17 survey agencies. All of the agencies surveyed participated in the study.

<b>TABLE 1 SURVEY AGENCIES</b>
Carmichael Water District
City of Citrus Heights
City of Davis
City of Folsom
City of Lincoln
City of Roseville
City of Sacramento
City of Woodland
El Dorado Irrigation District
Elk Grove Water Service
Fair Oaks Water District
Rancho Murieta Community Services District
Regional Water Authority
Rio Linda Elverta Community Water District
Sacramento County
Sacramento Suburban Water District
San Juan Water District

**SURVEY CLASSES**

Survey classes, as displayed in **Table 2**, are generally selected utilizing the following criteria:

- The survey classifications should have a significant relationship to other classes in their occupational group. This ensures that they will make good reference points in relating and establishing salaries for other classes within their occupational group.
- They should be reasonably well known and able to be clearly and concisely described. This enables the employer to more easily communicate with survey employers in establishing accurate comparabilities for the survey classes.
- They should be classes for which counterparts can readily be found in other agencies so that sufficient compensation data can be gathered.

<b>TABLE 2 SURVEY CLASSIFICATIONS</b>
Accountant
Associate Civil Engineer
Communications and Public Engagement Analyst
Customer Services Technician
Director of Engineering-District Engineer
Director of Finance and Administrative Services
Director of Operations
Engineering/GIS Specialist
General Manager
Information Technology Analyst
Information Technology Technician
Management Analyst
Senior Construction Inspector
Water Distribution Operator II
Water Distribution Supervisor
Water Efficiency Specialist
Water Resources Specialist

## **SURVEY SCOPE**

The scope of the survey included the labor market agencies previously presented. The data collected for each survey class included:

- Title of each comparable class
- Minimum and maximum monthly salary
- Cash add-ons to base salary including:
  - ◆ Employer pick-up of the employee contribution for retirement for new “classic” employees
  - ◆ Deferred compensation contribution made by the employer
  - ◆ Longevity pay at year 10
  - ◆ Education/Certification incentive pay
- Employer contributions for insurances (cafeteria, health, dental, vision, life, and long-term disability)
- Social Security
- Employer contribution to Retiree Health Savings Plan
- Amount the employee pays towards the employer’s portion of retirement
- Date and amount of last and next cost of living/salary range increase
- Retirement information (plan, benefit, formula, employer contribution, UAL)

- Leave benefits (vacation, sick, holiday, administrative/management leave)
- Retiree health benefits
- Leave cash out policy during active employment
- Cash in lieu of medical
- Cell phone stipend
- Permanent telework policy
- Standby pay

## **SURVEY METHODOLOGY**

The survey methodology utilized by Bryce Consulting included:

- The agencies' websites were utilized to collect salary and benefit data and to compare job descriptions, where available.
- The consultant followed up the survey agencies to collect additional information and seek clarification.

In addition to the collection of base salary and benefit information, careful efforts were made to analyze the full range of duties and requirements of the job classes determined to be comparable to the District's classes. This included the collection of:

- Reporting relationships
- Functional areas of responsibility
- The class's relationship to other classes in the series

For each classification using maximum base salary, total cash, and total compensation as the basis of comparison, the District's position was compared to the labor market to determine the percentage the District is above or below the labor market. The data is effective July 2022.

## SECTION III – COMPENSATION SURVEY RESULTS

---

This section of the report presents the compensation survey findings including base salary, total cash, and total compensation. In addition, miscellaneous benefit data is presented including cost of living information, retirement practices, retiree health benefits, and leave benefits.

As indicated in the previous section, the survey involved the collection of compensation information for each of the survey classes from the labor market employers identified. **Table 3** displays the comparability for each survey classification.

TABLE 3 COMPARABILITY	
Survey Classification	Number of Comparable Classes
Accountant	12
Associate Civil Engineer	12
Communications and Public Engagement Analyst	6
Customer Services Technician	16
Director of Engineering-District Engineer	8
Director of Finance and Administrative Services	12
Director of Operations	6
Engineering/GIS Specialist	10
General Manager	9
Information Technology Analyst	10
Information Technology Technician	10
Management Analyst	10
Senior Construction Inspector	12
Water Distribution Operator II	15
Water Distribution Supervisor	12
Water Efficiency Specialist	8
Water Resources Specialist	5

### BASE SALARY SURVEY RESULTS

The data has been organized into a series of tables that summarize the District's relationship to the labor market for each class. The detailed market compensation survey datasheets are presented in **Appendix A** of this report. **Table 4** summarizes for each classification how the District's base salaries compare to the labor market. The following data is presented:

- Title of the District's classification
- The District's current maximum monthly base salary for each classification
- The labor market for maximum monthly base salary
- Percentage the District's maximum base salary is above or below the labor market

**TABLE 4**  
**SUMMARY OF BASE SALARY**

<b>Survey Classification</b>	<b>CHWD Maximum Base Salary</b>	<b>Labor Market</b>	<b>% CHWD IS Above or Below Labor Market</b>
Accountant	\$8,749	\$8,464	3.26%
Associate Civil Engineer	\$12,692	\$11,638	8.31%
Communications and Public Engagement Analyst	\$8,999	\$8,763	2.62%
Customer Services Technician	\$6,252	\$6,240	0.19%
Director of Engineering-District Engineer	\$16,892	\$16,633	1.53%
Director of Finance and Administrative Services	\$15,357	\$16,633	-8.31%
Director of Operations	\$15,357	\$13,230	13.85%
Engineering/GIS Specialist	\$8,817	\$7,663	13.09%
General Manager	\$20,171	\$22,869	-13.37%
Information Technology Analyst	\$9,069	\$9,205	-1.50%
Information Technology Technician	\$7,540	\$8,599	-14.05%
Management Analyst	\$8,999	\$9,107	-1.20%
Senior Construction Inspector	\$8,574	\$8,053	6.08%
Water Distribution Operator II	\$7,871	\$7,147	9.20%
Water Distribution Supervisor	\$11,647	\$10,024	13.94%
Water Efficiency Specialist	\$7,212	\$6,942	3.74%
Water Resources Specialist	\$8,279	\$8,968	-8.33%

### **TOTAL CASH SURVEY RESULTS**

Total cash represents the maximum base salary plus the agencies' contribution towards the employees' share of retirement, the agencies' contribution towards deferred compensation, longevity pay, up to and including year 10, and education/certification incentive pay. **Table 5** displays how the District compares to the labor market with respect to total cash for each classification. The following data is presented:

- Title of the District's classification
- The District's current total cash for each classification
- The labor market for total cash
- Percentage the District's total cash is above or below the labor market



**TABLE 5  
SUMMARY OF TOTAL CASH**

<b>Survey Classification</b>	<b>CHWD Total Cash</b>	<b>Labor Market</b>	<b>% CHWD is Above or Below Labor Market</b>
Accountant	\$9,011	\$8,964	0.53%
Associate Civil Engineer	\$13,073	\$11,638	10.98%
Communications and Public Engagement Analyst	\$9,269	\$9,788	-5.60%
Customer Services Technician	\$6,440	\$6,458	-0.29%
Director of Engineering-District Engineer	\$17,399	\$16,800	3.44%
Director of Finance and Administrative Services	\$15,818	\$16,862	-6.60%
Director of Operations	\$15,818	\$13,230	16.36%
Engineering/GIS Specialist	\$9,222	\$7,663	16.90%
General Manager	\$20,619	\$22,869	-10.91%
Information Technology Analyst	\$9,341	\$9,925	-6.26%
Information Technology Technician	\$7,766	\$8,672	-11.66%
Management Analyst	\$9,269	\$9,945	-7.29%
Senior Construction Inspector	\$8,971	\$8,294	7.55%
Water Distribution Operator II	\$8,247	\$7,533	8.66%
Water Distribution Supervisor	\$12,136	\$10,078	16.96%
Water Efficiency Specialist	\$7,568	\$7,022	7.22%
Water Resources Specialist	\$8,667	\$8,968	-3.47%

### **TOTAL COMPENSATION SURVEY RESULTS**

Total compensation represents the elements included in total cash plus the agencies' contribution towards cafeteria plan, health, dental, vision, life insurance, long-term disability, retiree health savings plan, and Social Security/Medicare, minus the employers' share of retirement paid by the employee. **Table 6** displays how the District compares to the labor market with respect to total compensation. The following data is presented:

- Title of the District's classification
- The District's current total compensation for each classification
- The labor market for total compensation
- Percentage the District's total compensation is above or below the labor market

**TABLE 6  
SUMMARY OF TOTAL COMPENSATION**

<b>Survey Classification</b>	<b>CHWD Total Compensation</b>	<b>Labor Market</b>	<b>% CHWD is Above or Below Labor Market</b>
Accountant	\$12,782	\$12,269	4.01%
Associate Civil Engineer	\$17,131	\$15,719	8.24%
Communications and Public Engagement Analyst	\$13,059	\$11,467	12.19%
Customer Services Technician	\$10,010	\$9,564	4.46%
Director of Engineering-District Engineer	\$21,525	\$20,027	6.96%
Director of Finance and Administrative Services	\$19,922	\$20,027	-0.53%
Director of Operations	\$19,922	\$17,004	14.65%
Engineering/GIS Specialist	\$12,997	\$11,399	12.30%
General Manager	\$24,793	\$26,219	-5.75%
Information Technology Analyst	\$13,137	\$13,025	0.85%
Information Technology Technician	\$11,440	\$11,565	-1.09%
Management Analyst	\$13,059	\$12,211	6.49%
Senior Construction Inspector	\$12,727	\$11,823	7.11%
Water Distribution Operator II	\$11,947	\$10,837	9.29%
Water Distribution Supervisor	\$16,138	\$13,965	13.47%
Water Efficiency Specialist	\$11,216	\$10,609	5.41%
Water Resources Specialist	\$12,400	\$12,865	-3.75%

#### **RELATIONSHIP TO THE MARKET**

On average, for all of the classifications surveyed, the District is 1.71% above market for base salary, 2.15% above of the market for total cash, and 5.55% above the market for total compensation.

#### **MISCELLANEOUS BENEFIT DATA**

The tables provided in **Appendix B** present the miscellaneous benefit data that was collected including cost of living information, retirement practices, leave benefits and retiree health benefits.

#### **COST OF LIVING INCREASE – APPENDIX B - TABLE 1**

With respect to cost of living, the District's last increase was in January of 2022 in the amount of 3.2%. Currently, there is not a future cost of living increase scheduled.

With respect to the responding agencies, 13 of the agencies received an increase in 2022 as well, depending on bargaining unit, ranging from 2% to 8.35%. Two agencies are scheduled for a cost of living increases later in 2022 with one scheduled to receive an increase of 2% and one still to be determined. It should be noted that the several of the agencies are in negotiations and could receive increases

retroactively.

#### **RETIREMENT PRACTICES – APPENDIX B - TABLE 2**

The District has a CalPERS retirement plan with a benefit of 2% @ 55 and a formula of Highest Three Year Average for the latest Classic tier.

Of the responding agencies, 16 have a CalPERS retirement plan and one is a 1937 Act Agency. 11 agencies have a benefit of 2% @ 55; two have a benefit of 2% @ 60; one has a benefit of 2.7% @ 55; one has a benefit of 2.5% @ 55; one has a benefit of 3% @ 60; and one has a benefit of 1.92% @ 60. 11 have a formula of Highest 3 Year Average and six have a formula of Single Highest Year.

#### **EDUCATION/CERTIFICATION INCENTIVE PAY – APPENDIX B TABLE 3**

The District provides certification pay for possession of Water Distribution Operator and Water Treatment Operator certifications. Nine of the survey agencies provide certification and/or education incentive pay with the amount varying by classification. The details are provided in Table 3 of Appendix B.

#### **LEAVE BENEFITS – APPENDIX B – TABLES 4 - 5**

The District offers 96 hours of vacation leave at year 1; 120 hours at year 4; 144 hours at year 8; 168 hours at year 12; 192 hours at year 16; and 216 hours at year 20. The District provides 12 days of sick leave with an unlimited accrual, recognizes 11 holidays based on a 10-hour day, and provides 80 hours of administrative leave for management classifications.

Three of the survey agencies have annual leave whereby vacation and sick leave are combined. Of those with separate leave banks, the labor market average is 84 - 85 hours at year 1, depending on bargaining unit; 102 – 106 hours at year 4; 134 - 136 hours at year 8; 153 - 156 hours at year 12; 179 - 182 hours at year 16; 191 hours at year 20. The majority of the survey agencies provide 12 days of sick leave with 10 providing an unlimited accrual. The labor market average for holidays is 13 days with 15 of the agencies having an 8-hour day. 15 agencies provide administrative/management leave with the amounts varying by agency and classification.

#### **RETIREE HEALTH BENEFITS – APPENDIX B – TABLE 6**

With respect to a Retiree Health Savings Account, if the employee selects a plan that does not exceed Kaiser Platinum premiums, excess funds will be contributed by the District to a Health Savings Plan. In addition, the District contributes to post-employment retiree health benefits based on years of service with a maximum of \$472 at 30 years if hired prior to January 20, 2019.

Three of the agencies contribute to a retiree health savings account ranging from a flat dollar amount of \$25 per pay period to \$100 per month with one agency providing 1.5% of salary. 13 agencies contribute to

post employment retiree health benefits ranging from the PEMCHA minimum to 100%, depending on years of service.

#### **CASH OUT DURING ACTIVE EMPLOYMENT – APPENDIX B – TABLE 7**

The District allows vacation hours over 200 to be cashed out and up to 80 hours of administrative/management leave to be cashed out during active employment.

14 of the survey agencies allow for vacation to be cashed out during active employment, five agencies allow sick leave to be cashed out; and five agencies allow administrative/management leave to be cashed out with the details provided in Table 7 of Appendix B.

#### **MISCELLANEOUS BENEFIT INFORMATION – APPENDIX B – TABLE 8**

##### ***Cash In Lieu of Medical***

The District provides \$400 per month in lieu of medical insurance. The District does not tie the amount to COLA.

12 agencies also allow cash in lieu of medical insurance ranging from \$150 - \$600 per month. None of the agencies tie the amount to COLA.

##### ***Cell Phone Stipend***

The District provides a \$49 per month cell phone stipend for managers and supervisor.

10 of the agencies provide a cell phone stipend; however, in many instances, the amount varies by classification and/or situation with the details provided in Table 8 of Appendix B.

#### **PERMANENT TELEWORK – APPENDIX B – TABLE 9**

The District does not have a formal permanent telework policy.

Eight of the agencies have a long-term telework policy or practice with the details provided in Table 9 of Appendix B.

#### **STANDBY – APPENDIX B – TABLE 10**

The District provides \$30 to \$75 per day for standby duty depending on the day of the week.

15 of the agencies have a standby/call-back pay policy with the details varying by agency and bargaining group with the details provided in table 10 of Appendix B.

## **APPENDIX A**

### **DETAILED MARKET DATASHEETS**

	Base Salary			Total Cash			Total Compensation			Total Compensation (w/ PERS Cost)			
Survey Classification	CHWD Maximum Base Salary	Labor Market	% CHWD IS Above or Below Labor Market	CHWD Total Cash	Labor Market	% CHWD is Above or Below Labor Market	CHWD Total Compensation (w/o PERS Cost)	Labor Market	% CHWD is Above or Below Labor Market	CHWD Total Compensation (w/ PERS Cost)	Labor Market	% CHWD is Above or Below Labor Market	Comparability
Accountant	\$8,749	\$8,464	3.26%	\$9,011	\$8,964	0.53%	\$12,782	\$12,269	4.01%	\$13,685	\$13,499	1.36%	12
Associate Civil Engineer	\$12,692	\$11,638	8.31%	\$13,073	\$11,638	10.98%	\$17,131	\$15,719	8.24%	\$18,440	\$17,410	5.59%	12
Communications and Public Engagement Analyst	\$8,999	\$8,763	2.62%	\$9,269	\$9,788	-5.60%	\$13,059	\$11,467	12.19%	\$13,988	\$12,010	14.14%	6
Customer Services Technician	\$6,252	\$6,240	0.19%	\$6,440	\$6,458	-0.29%	\$10,010	\$9,564	4.46%	\$10,655	\$10,432	2.10%	16
Director of Engineering- District Engineer	\$16,892	\$16,633	1.53%	\$17,399	\$16,800	3.44%	\$21,525	\$20,027	6.96%	\$23,269	\$22,184	4.66%	8
Director of Finance and Administrative Services	\$15,357	\$16,633	-8.31%	\$15,818	\$16,862	-6.60%	\$19,922	\$20,027	-0.53%	\$21,507	\$22,184	-3.15%	12
Director of Operations	\$15,357	\$13,230	13.85%	\$15,818	\$13,230	16.36%	\$19,922	\$17,004	14.65%	\$21,507	\$18,871	12.25%	6
Engineering/GIS Specialist	\$8,817	\$7,663	13.09%	\$9,222	\$7,663	16.90%	\$12,997	\$11,399	12.30%	\$13,907	\$12,512	10.03%	10
General Manager	\$20,171	\$22,869	-13.37%	\$20,619	\$22,869	-10.91%	\$24,793	\$26,219	-5.75%	\$26,875	\$28,581	-6.35%	9
Information Technology Analyst	\$9,069	\$9,205	-1.50%	\$9,341	\$9,925	-6.26%	\$13,137	\$13,025	0.85%	\$14,073	\$14,097	-0.18%	10
Information Technology Technician	\$7,540	\$8,599	-14.05%	\$7,766	\$8,672	-11.66%	\$11,440	\$11,565	-1.09%	\$12,218	\$12,700	-3.95%	10
Management Analyst	\$8,999	\$9,107	-1.20%	\$9,269	\$9,945	-7.29%	\$13,059	\$12,211	6.49%	\$13,988	\$13,174	5.82%	10
Senior Construction Inspector	\$8,574	\$8,053	6.08%	\$8,971	\$8,294	7.55%	\$12,727	\$11,823	7.11%	\$13,612	\$12,993	4.55%	12
Water Distribution Operator II	\$7,871	\$7,147	9.20%	\$8,247	\$7,533	8.66%	\$11,947	\$10,837	9.29%	\$12,759	\$11,876	6.93%	15
Water Distribution Supervisor	\$11,647	\$10,024	13.94%	\$12,136	\$10,078	16.96%	\$16,138	\$13,965	13.47%	\$17,340	\$15,421	11.07%	12
Water Efficiency Specialist	\$7,212	\$6,942	3.74%	\$7,568	\$7,022	7.22%	\$11,216	\$10,609	5.41%	\$11,960	\$11,617	2.86%	8
Water Resources Specialist	\$8,279	\$8,968	-8.33%	\$8,667	\$8,968	-3.47%	\$12,400	\$12,865	-3.75%	\$13,254	\$13,790	-4.04%	5
Average			1.71%				2.15%				5.55%		

Data effective as of 7/15/2022																													
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments		
Citrus Heights Water District	Accountant	1/22 3%	None Scheduled	\$6,483	\$8,749	0%	\$0	\$262	\$0	\$0		\$9,011	\$0	\$2,898	\$136	\$25	\$13	\$30	\$0	\$669	\$12,782	0%	\$0	\$12,782	\$903	\$13,685			
Carmichael Water District	Senior Accountant	7/22 varied by class; based on study	7/23 1% - 5%	\$6,625	\$8,053	0%	\$0	\$0	\$0	\$0		\$8,053	\$0	\$2,902	\$115	\$29	\$50	\$18	\$0	\$616	\$11,783	0%	\$0	\$11,783	\$938	\$12,721			
City of Citrus Heights	Accountant	10/21 2.5%	9/22 2%	\$6,002	\$7,496	0%	\$0	\$0	\$0	\$0		\$7,496	\$0	\$1,600	\$161	\$15	\$4	\$21	\$0	\$109	\$9,405	0%	\$0	\$9,405	\$774	\$10,179			
City of Davis	Accountant II	7/22 2%	None Scheduled	\$6,677	\$8,116	0%	\$0	\$0	\$203	\$0		\$8,319	\$0	\$1,972	\$210	\$0	\$25	\$40	\$0	\$118	\$10,684	1.7%	\$138	\$10,546	\$671	\$11,217			
City of Folsom	No Comparable Class	7/21 2.25%	None Scheduled																										
City of Lincoln	Accountant II	varied by class	None Scheduled	\$5,364	\$7,188	0%	\$0	\$0	\$0	\$0		\$7,188	\$0	\$1,783	\$124	\$9	\$7	\$0	\$0	\$550	\$9,660	3%	\$216	\$9,444	\$403	\$9,847			
City of Roseville	Accountant II	1/22 3%	1/23 TBD	\$5,703	\$8,025	6.197%	\$497	\$241	\$201	\$0		\$8,964	\$1,945	inc	inc	inc	\$24	\$22	\$100	\$116	\$11,171	6.197%	\$497	\$10,673	\$370	\$11,044			
City of Sacramento	Accountant-Auditor	6/21 3.5%	None scheduled	\$6,157	\$8,077	0%	\$0	\$323	\$0	\$0		\$8,400	\$0	\$1,777	\$0	\$0	\$5	\$10	\$0	\$618	\$10,809	1%	\$81	\$10,729	\$632	\$11,360			
City of Woodland	Accountant II	7/22 4%	None Scheduled	\$5,716	\$7,296	0%	\$0	\$146	\$50	\$0		\$7,492	\$0	\$2,196	\$164	\$19	\$8	\$16	\$50	\$106	\$10,050	9%	\$657	\$9,393	\$118	\$9,511			
El Dorado Irrigation District	Accountant	1/22 6%	1/23 3% - 5%	\$6,613	\$8,038	0%	\$0	\$0	\$0	\$0		\$8,038	\$0	\$2,023	\$136	\$18	\$12	\$0	\$0	\$615	\$10,842	0%	\$0	\$10,842	\$830	\$11,672			
Elk Grove Water Service	No Comparable Class																												
Fair Oaks Water District	No Comparable Class																												
Rancho Murieta Community Services District	Accountant	1/22 3.5%	1/23 3.5%	\$5,165	\$6,592	0%	\$0	\$0	\$0	\$0		\$6,592	\$0	\$1,783	\$224	\$12	inc	DNA	\$0	\$96	\$8,706	0%	\$0	\$8,706	\$717	\$9,423			
Regional Water Authority	No Comparable Class																												
Rio Linda Elverta Community Water District	No Comparable Class																												
Sacramento County	Accountant	6/22 4%	None Scheduled	\$5,830	\$7,089	0%	\$0	\$0	\$0	\$177	2.5% MA	\$7,266	\$0	\$1,619	\$119	inc	\$1	\$0	\$54	\$542	\$9,601	1.82%	\$129	\$9,472	\$782	\$10,254			
Sacramento Suburban Water District	Accountant II	1/22 5.6%	None Scheduled	\$5,479	\$7,827	0%	\$0	\$0	\$0	\$0		\$7,827	\$0	\$1,927	\$189	\$20	\$28	\$20	\$0	\$599	\$10,610	0%	\$0	\$10,610	\$866	\$11,475			
San Juan Water District	Accountant	7/22 varied by class; based on study	7/22 (retro-not yet approved by Board)	\$7,053	\$8,464	0%	\$0	\$0	\$0	\$0		\$8,464	\$0	\$2,902	\$150	\$19	\$28	\$59	\$0	\$647	\$12,269	0%	\$0	\$12,269	\$1,230	\$13,499			
Labor Market					\$8,464						\$8,964						\$12,269						\$12,269						\$13,499
% CHWD is above or below Labor Market					3.26%						0.53%						4.01%						4.01%						1.36%
Comparability					12																								

**NOTES:**  
 Rancho Murieta CSD- dental, vision and life insurance rates are from 2021; unable to obtain 2022  
 Sacramento County-in negotiations and could receive equity increase  
 San Juan Water District- COLA for July 2022 not approved yet

Data effective as of 7/15/2022																															
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments				
Citrus Heights Water District	Associate Civil Engineer	1/22 3%	None Scheduled	\$9,402	\$12,692	0%	\$0	\$381	\$0	\$0		\$13,073	\$0	\$2,898	\$136	\$25	\$13	\$43	\$0	\$944	\$17,131	0%	\$0	\$17,131	\$1,310	\$18,440					
Carmichael Water District	No Comparable Class																										PE not required				
City of Citrus Heights	Associate Civil Engineer	10/21 2.5%	9/22 2%	\$7,173	\$8,958	0%	\$0	\$269	\$0	\$0		\$9,226	\$0	\$1,600	\$161	\$15	\$8	\$25	\$0	\$130	\$11,165	0%	\$0	\$11,165	\$924	\$12,089	PE				
City of Davis	Associate Civil Engineer	7/22 2%	None Scheduled	\$7,312	\$8,889	0%	\$0	\$0	\$222	\$0		\$9,112	\$0	\$1,972	\$210	\$0	\$8	\$40	\$0	\$129	\$11,470	1.7%	\$151	\$11,319	\$735	\$12,054	PE				
City of Folsom	Associate Civil Engineer	1/22 2.25%	None Scheduled	\$7,609	\$9,741	0%	\$0	\$275	\$0	\$300	\$300 MA	\$10,316	\$0	\$1,674	\$113	\$20	\$9	\$34	\$50	\$745	\$12,962	0%	\$0	\$12,962	\$1,036	\$13,999					
City of Lincoln	Associate Engineer	varied by class	None Scheduled	\$7,398	\$9,914	0%	\$0	\$0	\$0	\$0		\$9,914	\$0	\$1,783	\$124	\$9	\$7	\$0	\$0	\$758	\$12,594	3%	\$297	\$12,297	\$555	\$12,852	PE				
City of Roseville	Associate Engineer (PE)	1/22 3%	1/23 TBD	\$7,049	\$9,919	6.197%	\$615	\$298	\$248	\$0		\$11,079	\$1,945	inc	inc	inc	\$30	\$27	\$100	\$144	\$13,324	6.197%	\$615	\$12,710	\$458	\$13,167	PE				
City of Sacramento	Associate Civil Engineer	6/21 3.5%	None scheduled	\$7,297	\$10,310	0%	\$0	\$206	\$0	\$258	2.5% for 2 PEs	\$10,774	\$0	\$1,777	\$0	\$0	\$5	\$0	\$0	\$789	\$13,344	1%	\$103	\$13,241	\$806	\$14,047	PE				
City of Woodland	Associate Civil Engineer	7/22 4%	None Scheduled	\$7,499	\$9,572	0%	\$0	\$191	\$50	\$0		\$9,814	\$0	\$2,196	\$164	\$19	\$8	\$16	\$50	\$139	\$12,405	9%	\$861	\$11,544	\$155	\$11,699	PE				
El Dorado Irrigation District	Associate Civil Engineer	1/22 6%	1/23 3% - 5%	\$8,917	\$10,839	0%	\$0	\$0	\$0	\$0		\$10,839	\$0	\$2,023	\$136	\$18	\$16	\$0	\$0	\$829	\$13,861	0%	\$0	\$13,861	\$1,120	\$14,981	PE				
Elk Grove Water Service	Associate Civil Engineer	7/22 7.2%	None Scheduled	\$8,996	\$10,934	1%	\$109	\$0	\$273	\$0		\$11,317	\$0	\$2,403	\$128	\$23	\$50	\$0	\$0	\$159	\$14,079	0%	\$0	\$14,079	\$1,128	\$15,208	PE				
Fair Oaks Water District	No Comparable Class																										No PE required				
Rancho Murieta Community Services District	No Comparable Class																														
Regional Water Authority	No Comparable Class																														
Rio Linda Elverta Community Water District	No Comparable Class																														
Sacramento County	Associate Civil Engineer	6/22 4%	None Scheduled	\$9,060	\$11,014	0%	\$0	\$0	\$0	\$0		\$11,014	\$0	\$1,619	\$119	inc	\$1	\$0	\$0	\$843	\$13,595	1.82%	\$200	\$13,394	\$1,215	\$14,609	PE				
Sacramento Suburban Water District	Associate Engineer	1/22 5.6%	None Scheduled	\$7,229	\$10,327	0%	\$0	\$0	\$0	\$0		\$10,327	\$0	\$1,927	\$189	\$20	\$37	\$26	\$0	\$790	\$13,316	0%	\$0	\$13,316	\$1,142	\$14,459	PE				
San Juan Water District	Associate Engineer	7/22 varied by class; based on study	7/22 (retro-not yet approved by Board)	\$9,698	\$11,638	0%	\$0	\$0	\$0	\$0		\$11,638	\$0	\$2,902	\$150	\$19	\$39	\$81	\$0	\$890	\$15,719	0%	\$0	\$15,719	\$1,691	\$17,410	PE				
Labor Market				\$11,638								\$11,638										\$15,719				\$15,719				\$17,410	
% CHWD is above or below Labor Market				8.31%								10.98%										8.24%				8.24%				5.59%	
Comparability				12																											

NOTES:  
 Sacramento County-in negotiations and could receive equity increase





Data effective as of 7/15/2022																												
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments	
Citrus Heights Water District	Customer Services Technician	1/22 3%	None Scheduled	\$4,631	\$6,252	0%	\$0	\$188	\$0	\$0		\$6,440	\$0	\$2,898	\$136	\$25	\$13	\$21	\$0	\$478	\$10,010	0%	\$0	\$10,010	\$645	\$10,655		
Carmichael Water District	Billing Specialist II	7/22 varied by class; based on study	7/23 1% - 5%	\$4,716	\$5,732	0%	\$0	\$0	\$0	\$0		\$5,732	\$0	\$2,902	\$115	\$29	\$36	\$13	\$0	\$438	\$9,264	0%	\$0	\$9,264	\$668	\$9,932		
City of Citrus Heights	Financial Assistant II	10/21 2.5%	9/22 2%	\$3,462	\$4,324	0%	\$0	\$0	\$0	\$0		\$4,324	\$0	\$1,600	\$161	\$15	\$4	\$12	\$0	\$63	\$6,178	0%	\$0	\$6,178	\$446	\$6,624		
City of Davis	Accounting Assistant	7/22 2%	None Scheduled	\$3,599	\$4,375	0%	\$0	\$0	\$109	\$0		\$4,484	\$0	\$1,972	\$210	\$0	\$8	\$40	\$0	\$63	\$6,777	1.7%	\$74	\$6,703	\$362	\$7,065		
City of Folsom	Revenue Technician II	7/21 2.25%	None Scheduled	\$3,997	\$5,531	0%	\$0	\$0	\$0	\$250	\$250 MA	\$5,781	\$0	\$1,674	\$113	\$20	\$6	\$20	\$50	\$423	\$8,087	0%	\$0	\$8,087	\$588	\$8,675		
City of Lincoln	Account Clerk II	varied by class	None Scheduled	\$3,584	\$4,802	0%	\$0	\$0	\$0	\$0		\$4,802	\$0	\$1,783	\$124	\$9	\$7	\$0	\$0	\$367	\$7,091	3%	\$144	\$6,947	\$269	\$7,216		
City of Roseville	Utility Customer Service Specialist II	1/22 3%	1/23 TBD	\$4,046	\$5,693	6.197%	\$353	\$171	\$142	\$0		\$6,359	\$1,945	inc	inc	inc	\$17	\$15	\$100	\$83	\$8,519	6.197%	\$353	\$8,166	\$263	\$8,429		
City of Sacramento	Customer Service Representative	6/21 3.5%	None scheduled	\$3,489	\$4,931	0%	\$0	\$0	\$0	\$0		\$4,931	\$0	\$1,777	\$0	\$0	\$2	\$0	\$0	\$377	\$7,087	1%	\$49	\$7,038	\$386	\$7,424		
City of Woodland	Finance Clerk II	7/22 3%	None Scheduled	\$3,699	\$4,720	0%	\$0	\$94	\$50	\$0		\$4,865	\$0	\$2,347	\$164	\$19	\$8	\$10	\$50	\$68	\$7,531	1%	\$47	\$7,484	\$454	\$7,938		
El Dorado Irrigation District	Finance Assistant II	1/22 6%	None Scheduled	\$4,314	\$5,243	0%	\$0	\$0	\$0	\$0		\$5,243	\$0	\$2,023	\$136	\$18	\$8	\$0	\$0	\$401	\$7,829	0%	\$0	\$7,829	\$542	\$8,371		
Elk Grove Water Service	Utility Billing Specialist III	7/22 7.2%	None Scheduled	\$5,136	\$6,240	1%	\$62	\$0	\$156	\$0		\$6,458	\$0	\$2,403	\$128	\$23	\$37	\$0	\$0	\$90	\$9,141	0%	\$0	\$9,141	\$644	\$9,785	III is journey level	
Fair Oaks Water District	Customer Service Representative II	7/22 8.35%	None Scheduled	\$4,335	\$5,852	0%	\$0	\$0	\$0	\$0		\$5,852	\$0	\$3,015	\$128	\$24	\$6	\$22	\$0	\$448	\$9,495	0%	\$0	\$9,495	\$604	\$10,099		
Rancho Murieta Community Services District	Accounting Technician	1/22 3.5%	1/23 3.5%	\$4,403	\$5,620	0%	\$0	\$0	\$0	\$0		\$5,620	\$0	\$1,783	\$224	\$12	inc	DNA	\$0	\$81	\$7,720	0%	\$0	\$7,720	\$611	\$8,331		
Regional Water Authority	No Comparable Class																											
Rio Linda Elverta Community Water District	Customer Service Technician II	11/21 3.5%	11/22 TBD	\$4,557	\$5,543	3.5%	\$194	\$0	\$0	\$0		\$5,737	\$1,770	inc	inc	inc	\$11	\$0	\$0	\$424	\$7,942	0%	\$0	\$7,942	\$572	\$8,514		
Sacramento County	Utility Billing Services Representative II	6/22 4%	6/23 4%	\$3,887	\$4,724	0%	\$0	\$0	\$0	\$236	5% max	\$4,960	\$0	\$1,619	\$119	inc	\$1	\$0	\$54	\$361	\$7,114	1.82%	\$86	\$7,028	\$521	\$7,549		
Sacramento Suburban Water District	Customer Service Representative II	1/22 5.6%	None Scheduled	\$4,382	\$5,478	0%	\$0	\$0	\$0	\$43	\$0.25/hour for one cert	\$5,521	\$0	\$1,927	\$189	\$20	\$20	\$14	\$0	\$419	\$8,110	0%	\$0	\$8,110	\$606	\$8,715		
San Juan Water District	Customer Services Technician II	7/22 varied by class; based on study	7/22 (retro-not yet approved by Board)	\$4,978	\$5,975	0%	\$0	\$0	\$0	\$0		\$5,975	\$0	\$2,902	\$150	\$19	\$20	\$42	\$0	\$457	\$9,564	0%	\$0	\$9,564	\$868	\$10,432		
				Labor Market								\$6,458									\$9,564				\$9,564		\$10,432	
				% CHWD is above or below Labor Market								-0.29%									4.46%				4.46%		2.10%	
				Comparability								16																

**NOTES:**  
 Folsom- Local 39 still in negotiations; MOU expired 6/2022  
 Rancho Murieta CSD- dental, vision and life insurance rates are from 2021; unable to obtain 2022  
 San Juan Water District- COLA for July 2022 not approved yet

Data effective as of 7/15/2022																																
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments					
Citrus Heights Water District	Director of Engineering-District Engineer	1/22 3%	None Scheduled	\$12,511	\$16,892	0%	\$0	\$507	\$0	\$0		\$17,399	\$0	\$2,898	\$136	\$25	\$13	\$51	\$0	\$1,004	\$21,525	0%	\$0	\$21,525	\$1,743	\$23,269	PE; D2 and T1 may be required					
Carmichael Water District	Engineering Manager	7/22 varied by class; based on study	7/23 1% - 5%	\$12,822	\$15,585	0%	\$0	\$0	\$0	\$0		\$15,585	\$0	\$2,902	\$115	\$29	\$52	\$19	\$0	\$985	\$19,686	0%	\$0	\$19,686	\$1,816	\$21,502	PE					
City of Citrus Heights	No Comparable Class																															
City of Davis	City Engineer	7/22 2%	None Scheduled	\$11,201	\$13,615	0%	\$0	\$0	\$340	\$0		\$13,955	\$0	\$1,972	\$210	\$0	\$25	\$40	\$0	\$197	\$16,400	1.7%	\$231	\$16,169	\$1,126	\$17,295	PE					
City of Folsom	No Comparable Class																															
City of Lincoln	No Comparable Class																										Lincoln has been removed as a comparable class as they list the same broad range for managers, department directors and the City Manager. Given that we cannot determine where each class would be paid within the range, it is not an accurate reflection of the salary for the classification					
City of Roseville	Engineering Manager	1/22 3%	1/23 TBD	\$10,773	\$14,437	6.197%	\$895	\$433	\$0	\$0		\$15,765	\$1,945	inc	inc	inc	\$43	\$27	\$100	\$209	\$18,089	6.197%	\$895	\$17,195	\$666	\$17,861	PE					
City of Sacramento	Engineering Manager	6/21 3.5%	None scheduled	\$11,650	\$15,286	0%	\$0	\$611	\$0	\$0		\$15,898	\$0	\$1,777	\$0	\$0	\$5	\$18	\$0	\$981	\$18,679	1%	\$153	\$18,526	\$1,195	\$19,721						
City of Woodland	City Engineer	7/22 4%	None Scheduled	\$10,598	\$13,525	0%	\$0	\$271	\$50	\$0		\$13,846	\$0	\$2,196	\$164	\$19	\$8	\$16	\$50	\$196	\$16,494	9%	\$1,217	\$15,277	\$219	\$15,496	PE					
El Dorado Irrigation District	Director of Engineering	1/22 6%	1/23 3% - 5%	\$13,684	\$16,633	0%	\$0	\$167	\$0	\$0		\$16,800	\$0	\$2,023	\$136	\$18	\$49	\$0	\$0	\$1,001	\$20,027	0%	\$0	\$20,027	\$1,718	\$21,745	PE					
Elk Grove Water Service	No Comparable Class																															
Fair Oaks Water District	No Comparable Class																										PE not required					
Rancho Murieta Community Services District	No Comparable Class																															
Regional Water Authority	No Comparable Class																															
Rio Linda Elverta Community Water District	No Comparable Class																															
Sacramento County	No Comparable Class																															
Sacramento Suburban Water District	Engineering Manager	1/22 5.6%	None Scheduled	\$9,422	\$13,461	0%	\$0	\$0	\$0	\$0		\$13,461	\$0	\$1,927	\$189	\$20	\$48	\$34	\$0	\$955	\$16,634	0%	\$0	\$16,634	\$1,489	\$18,123	PE; D2; T1					
San Juan Water District	Director of Engineering	7/22 varied by class; based on study	7/22 (retro-not yet approved by Board)	\$13,071	\$15,685	0%	\$0	\$0	\$0	\$0		\$15,685	\$0	\$2,902	\$150	\$19	\$53	\$110	\$0	\$987	\$19,905	0%	\$0	\$19,905	\$2,279	\$22,184	PE (New title)					
Labor Market				\$16,633								\$16,800									\$20,027				\$20,027				\$22,184			
% CHWD is above or below Labor Market				1.53%								3.44%									6.96%				6.96%				4.66%			
Comparability				8																												

NOTES:  
San Juan Water District- COLA for July 2022 not approved yet





Data effective as of 7/15/2022																												
Agency	Classification	Barg Unit	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments
Citrus Heights Water District	Engineering/GIS Specialist	all-	1/22 3%	None Scheduled	\$6,531	\$8,817	0%	\$0	\$265	\$0	\$140	\$40 T2; \$100 D5	\$9,222	\$0	\$2,898	\$136	\$25	\$13	\$30	\$0	\$675	\$12,997	0%	\$0	\$12,997	\$910	\$13,907	
Carmichael Water District	GIS Specialist	ne	7/22 varied by class; based on study	7/23 1% - 5%	\$5,752	\$6,992	0%	\$0	\$0	\$0	\$0		\$6,992	\$0	\$2,902	\$115	\$29	\$44	\$16	\$0	\$535	\$10,631	0%	\$0	\$10,631	\$815	\$11,446	
City of Citrus Heights	Engineering Technician II		10/21 2.5%	9/22 2%	\$4,789	\$5,980	0%	\$0	\$0	\$0	\$0		\$5,980	\$0	\$1,600	\$161	\$15	\$4	\$17	\$0	\$87	\$7,863	0%	\$0	\$7,863	\$617	\$8,481	
City of Davis	No Comparable Class		7/22 2%	None Scheduled																								
City of Folsom	Engineering Technician II	39	7/21 2.25%	None Scheduled	\$5,102	\$7,058	0%	\$0	\$0	\$0	\$300	\$300 max	\$7,358	\$0	\$1,674	\$113	\$20	\$6	\$25	\$50	\$540	\$9,786	0%	\$0	\$9,786	\$751	\$10,537	
City of Lincoln	No Comparable Class		7/22 4%	7/23 4%																								
City of Roseville	Engineering Technician II	39	1/22 3%	1/23 TBD	\$4,558	\$6,413	6.197%	\$397	\$192	\$160	\$0		\$7,163	\$1,945	inc	inc	inc	\$19	\$17	\$100	\$93	\$9,338	6.197%	\$397	\$8,940	\$296	\$9,236	
City of Sacramento	Engineering Technician II	omoltp6	6/21 3.5%	None scheduled	\$4,417	\$6,242	0%	\$0	\$0	\$0	\$0		\$6,242	\$0	\$1,777	\$0	\$0	\$2	\$0	\$0	\$477	\$8,498	1%	\$62	\$8,436	\$488	\$8,924	
City of Woodland	Engineering Technician II	gs	7/22 3%	None Scheduled	\$4,853	\$6,194	0%	\$0	\$124	\$50	\$0		\$6,368	\$0	\$2,347	\$164	\$19	\$8	\$13	\$50	\$90	\$9,059	1%	\$62	\$8,997	\$596	\$9,593	
El Dorado Irrigation District	Engineering Technician II	eidea	1/22 6%	1/23 3% - 5%	\$5,697	\$6,925	0%	\$0	\$0	\$0	\$0		\$6,925	\$0	\$2,023	\$136	\$18	\$10	\$0	\$0	\$530	\$9,642	0%	\$0	\$9,642	\$715	\$10,358	
Elk Grove Water Service	Engineering Technician II	all same	7/22 7.2%	None Scheduled	\$6,088	\$7,401	1%	\$74	\$0	\$185	\$0		\$7,660	\$0	\$2,403	\$128	\$23	\$44	\$0	\$0	\$107	\$10,366	0%	\$0	\$10,366	\$764	\$11,130	
Fair Oaks Water District	No Comparable Class		7/22 8.35%	None Scheduled																								
Rancho Murieta Community Services District	No Comparable Class																											
Regional Water Authority	No Comparable Class																											
Rio Linda Elverta Community Water District	No Comparable Class																											
Sacramento County	Engineering Technician II	26	6/22 4%	None Scheduled	\$4,776	\$5,807	0%	\$0	\$0	\$0	\$290	5% EIT	\$6,098	\$0	\$1,619	\$119	inc	\$1	\$0	\$54	\$444	\$8,335	1.82%	\$106	\$8,229	\$641	\$8,870	
Sacramento Suburban Water District	No Comparable Class																											
San Juan Water District	Engineering Technician II	all	7/22 varied by class; based on study	7/22 (retro-not yet approved by Board)	\$6,386	\$7,663	0%	\$0	\$0	\$0	\$0		\$7,663	\$0	\$2,902	\$150	\$19	\$26	\$54	\$0	\$586	\$11,399	0%	\$0	\$11,399	\$1,113	\$12,512	
Labor Market					\$7,663							\$7,663							\$11,399				\$11,399				\$12,512	
% CHWD is above or below Labor Market					13.09%							16.90%							12.30%				12.30%				10.03%	
Comparability					10																							

NOTES:  
Folsom- Local 39 still in negotiations; MOU expired 6/2022  
Sacramento County-in negotiations and could receive equity increase  
San Juan Water District- COLA for July 2022 not approved yet



Data effective as of 7/15/2022																													
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments		
Citrus Heights Water District	Information Technology Analyst	1/22 3%	None Scheduled	\$6,701	\$9,069	0%	\$0	\$272	\$0	\$0		\$9,341	\$0	\$2,898	\$136	\$25	\$13	\$31	\$0	\$694	\$13,137	0%	\$0	\$13,137	\$936	\$14,073			
Carmichael Water District	Information Technology Coordinator	7/22 varied by class; based on study	7/23 1% - 5%	\$7,573	\$9,205	0%	\$0	\$0	\$0	\$0		\$9,205	\$0	\$2,902	\$115	\$29	\$52	\$19	\$0	\$704	\$13,025	0%	\$0	\$13,025	\$1,072	\$14,097			
City of Citrus Heights	Information Technology Analyst II	10/21 2.5%	9/22 2%	\$6,403	\$7,997	0%	\$0	\$0	\$0	\$0		\$7,997	\$0	\$1,600	\$161	\$15	\$4	\$23	\$0	\$116	\$9,915	0%	\$0	\$9,915	\$825	\$10,740			
City of Davis	MIS Systems Analyst	7/22 2%	None Scheduled	\$6,108	\$7,425	0%	\$0	\$0	\$186	\$0		\$7,610	\$0	\$1,972	\$210	\$0	\$8	\$40	\$0	\$108	\$9,948	1.7%	\$126	\$9,821	\$614	\$10,435			
City of Folsom	No Comparable Class																												
City of Lincoln	Information Technology Technician II	varied by class	None Scheduled	\$4,856	\$6,508	0%	\$0	\$0	\$0	\$0		\$6,508	\$0	\$1,783	\$124	\$9	\$7	\$0	\$0	\$498	\$8,928	3%	\$195	\$8,733	\$364	\$9,097			
City of Roseville	Information Technology Analyst II	1/22 3%	1/23 TBD	\$6,315	\$8,886	6.197%	\$551	\$267	\$222	\$0		\$9,925	\$1,945	inc	inc	inc	\$27	\$24	\$100	\$129	\$12,150	6.197%	\$551	\$11,599	\$410	\$12,009			
City of Sacramento	Systems Engineer	6/21 3.5%	None scheduled	\$6,692	\$8,781	0%	\$0	\$176	\$0	\$0		\$8,957	\$0	\$1,777	\$0	\$0	\$5	\$0	\$0	\$672	\$11,410	1%	\$88	\$11,322	\$687	\$12,009			
City of Woodland	Information Technology Analyst	7/22 3%	None Scheduled	\$6,527	\$8,331	0%	\$0	\$167	\$50	\$0		\$8,547	\$0	\$2,347	\$164	\$19	\$8	\$16	\$50	\$121	\$11,272	1%	\$83	\$11,188	\$801	\$11,990			
El Dorado Irrigation District	Information Technology Analyst II	1/22 6%	1/23 3% - 5%	\$7,530	\$9,153	0%	\$0	\$0	\$0	\$0		\$9,153	\$0	\$2,023	\$136	\$18	\$14	\$0	\$0	\$700	\$12,044	0%	\$0	\$12,044	\$946	\$12,989			
Elk Grove Water Service	No Comparable Class																												
Fair Oaks Water District	No Comparable Class																												
Rancho Murieta Community Services District	No Comparable Class																												
Regional Water Authority	No Comparable Class																												
Rio Linda Elverta Community Water District	No Comparable Class																												
Sacramento County	Information Applications Analyst II	6/22 4%	6/23 4%	\$7,176	\$9,159	0%	\$0	\$0	\$0	\$229	2.5% MA	\$9,388	\$0	\$1,619	\$119	inc	\$1	\$0	\$54	\$701	\$11,881	1.82%	\$167	\$11,715	\$1,010	\$12,725			
Sacramento Suburban Water District	Information Technology Analyst	1/22 5.6%	None Scheduled	\$5,985	\$8,551	0%	\$0	\$0	\$0	\$0		\$8,551	\$0	\$1,927	\$189	\$20	\$31	\$22	\$0	\$654	\$11,393	0%	\$0	\$11,393	\$946	\$12,339			
San Juan Water District	No Comparable Class																												
Labor Market				\$9,205								\$9,925									\$13,025			\$13,025			\$14,097		
% CHWD is above or below Labor Market				-1.50%								-6.26%									0.85%			0.85%			-0.18%		
Comparability				10																									

NOTES:



Data effective as of 7/15/2022																													
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments		
Citrus Heights Water District	Information Technology Technician	1/22 3%	None Scheduled	\$5,585	\$7,540	0%	\$0	\$226	\$0	\$0		\$7,766	\$0	\$2,898	\$136	\$25	\$13	\$26	\$0	\$577	\$11,440	0%	\$0	\$11,440	\$778	\$12,218			
Carmichael Water District	No Comparable Class																												
City of Citrus Heights	No Comparable Class																												
City of Davis	Computer Support Technician II	7/22 2%	None Scheduled	\$4,363	\$5,303	0%	\$0	\$0	\$133	\$0		\$5,436	\$0	\$1,972	\$210	\$0	\$8	\$40	\$0	\$77	\$7,742	1.7%	\$90	\$7,652	\$439	\$8,091			
City of Folsom	Information Systems Analyst	7/21 2.25%	None Scheduled	\$6,051	\$8,372	0%	\$0	\$0	\$0	\$300	\$300 max	\$8,672	\$0	\$1,674	\$113	\$20	\$6	\$30	\$50	\$640	\$11,205	0%	\$0	\$11,205	\$891	\$12,096			
City of Lincoln	No Comparable Class																												
City of Roseville	Information Technology Technician II	1/22 3%	1/23 TBD	\$4,788	\$6,737	6.197%	\$417	\$202	\$168	\$0		\$7,525	\$1,945	inc	inc	inc	\$20	\$18	\$100	\$98	\$9,706	6.197%	\$417	\$9,289	\$311	\$9,599			
City of Sacramento	Support Technician Specialist II	6/21 3.5%	None scheduled	\$6,084	\$8,599	0%	\$0	\$0	\$0	\$0		\$8,599	\$0	\$1,777	\$0	\$0	\$2	\$0	\$0	\$658	\$11,036	1%	\$86	\$10,950	\$672	\$11,622			
City of Woodland	Information Technology Technician II	7/22 3%	None Scheduled	\$5,357	\$6,837	0%	\$0	\$137	\$50	\$0		\$7,024	\$0	\$2,347	\$164	\$19	\$8	\$15	\$50	\$99	\$9,725	1%	\$68	\$9,657	\$658	\$10,315			
El Dorado Irrigation District	Information Technology Technician II	1/22 6%	1/23 3% - 5%	\$5,873	\$7,138	0%	\$0	\$0	\$0	\$0		\$7,138	\$0	\$2,023	\$136	\$18	\$11	\$0	\$0	\$546	\$9,872	0%	\$0	\$9,872	\$737	\$10,609			
Elk Grove Water Service	No Comparable Class																												
Fair Oaks Water District	Information Technology Technician	7/22 8.35%	None Scheduled	\$5,599	\$7,559	0%	\$0	\$0	\$0	\$0		\$7,559	\$0	\$3,015	\$128	\$24	\$8	\$28	\$0	\$578	\$11,341	0%	\$0	\$11,341	\$780	\$12,121			
Rancho Murieta Community Services District	No Comparable Class																												
Regional Water Authority	No Comparable Class																												
Rio Linda Elverta Community Water District	No Comparable Class																												
Sacramento County	Information Technology Technician II	6/22 4%	6/23 4%	\$4,314	\$5,505	0%	\$0	\$0	\$0	\$138	2.5% MA	\$5,643	\$0	\$1,619	\$119	inc	\$1	\$0	\$54	\$421	\$7,856	1.82%	\$100	\$7,756	\$607	\$8,363			
Sacramento Suburban Water District	Information Technology Technician II	1/22 5.6%	None Scheduled	\$5,889	\$7,361	0%	\$0	\$0	\$0	\$43	\$0.25/hour for one cert	\$7,404	\$0	\$1,927	\$189	\$20	\$26	\$19	\$0	\$563	\$10,148	0%	\$0	\$10,148	\$814	\$10,962			
San Juan Water District	Information Technology Technician II	7/22 varied by class; based on study	7/22 (retro-not yet approved by Board)	\$6,514	\$7,816	0%	\$0	\$0	\$0	\$0		\$7,816	\$0	\$2,902	\$150	\$19	\$26	\$55	\$0	\$598	\$11,565	0%	\$0	\$11,565	\$1,136	\$12,700			
Labor Market				\$8,599								\$8,672								\$11,565				\$11,565				\$12,700	
% CHWD is above or below Labor Market				-14.05%								-11.66%								-1.09%				-1.09%		-3.95%			
Comparability				10																									

NOTES:  
Folsom- Local 39 still in negotiations; MOU expired 6/2022  
San Juan Water District- COLA for July 2022 not approved yet

Data effective as of 7/15/2022																														
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments			
Citrus Heights Water District	Management Analyst	1/22 3%	None Scheduled	\$6,663	\$8,999	0%	\$0	\$270	\$0	\$0		\$9,269	\$0	\$2,898	\$136	\$25	\$13	\$31	\$0	\$688	\$13,059	0%	\$0	\$13,059	\$929	\$13,988				
Carmichael Water District	Administrative Specialist II	7/22 varied by class; based on study	7/23 1% - 5%	\$6,908	\$8,397	0%	\$0	\$0	\$0	\$0		\$8,397	\$0	\$2,902	\$115	\$29	\$52	\$19	\$0	\$642	\$12,155	0%	\$0	\$12,155	\$978	\$13,133				
City of Citrus Heights	Management Analyst II	10/21 2.5%	9/22 2%	\$6,602	\$8,245	0%	\$0	\$247	\$0	\$0		\$8,493	\$0	\$1,600	\$161	\$15	\$8	\$23	\$0	\$120	\$10,419	0%	\$0	\$10,419	\$851	\$11,270				
City of Davis	Management Analyst II	7/22 2%	None Scheduled	\$6,677	\$8,116	0%	\$0	\$0	\$203	\$0		\$8,319	\$0	\$1,972	\$210	\$0	\$25	\$40	\$0	\$118	\$10,684	1.7%	\$138	\$10,546	\$671	\$11,217				
City of Folsom	Management Analyst	1/22 2.25%	None Scheduled	\$6,726	\$9,046	0%	\$0	\$275	\$0	\$300	\$300 MA	\$9,621	\$0	\$1,674	\$113	\$20	\$9	\$32	\$50	\$692	\$12,211	0%	\$0	\$12,211	\$963	\$13,174				
City of Lincoln	Administrative Analyst II	varied by class	None Scheduled	\$5,618	\$7,529	0%	\$0	\$0	\$0	\$0		\$7,529	\$0	\$1,783	\$124	\$9	\$7	\$0	\$0	\$576	\$10,027	3%	\$226	\$9,801	\$422	\$10,223				
City of Roseville	Management Analyst II	1/22 3%	1/23 TBD	\$6,796	\$9,107	6.197%	\$564	\$273	\$0	\$0		\$9,945	\$1,945	inc	inc	inc	\$27	\$24	\$100	\$132	\$12,173	6.197%	\$564	\$11,609	\$420	\$12,029				
City of Sacramento	Administrative Analyst	6/21 3.5%	None scheduled	\$6,261	\$8,214	0%	\$0	\$329	\$0	\$0		\$8,543	\$0	\$1,777	\$0	\$0	\$5	\$10	\$0	\$628	\$10,962	1%	\$82	\$10,880	\$642	\$11,523				
City of Woodland	Management Analyst II	7/22 4%	None Scheduled	\$6,467	\$8,253	0%	\$0	\$330	\$50	\$0		\$8,634	\$0	\$2,347	\$164	\$19	\$8	\$16	\$100	\$120	\$11,407	0%	\$0	\$11,407	\$877	\$12,283				
El Dorado Irrigation District	Administrative Analyst II	1/22 6%	1/23 3% - 5%	\$7,164	\$8,708	0%	\$0	\$0	\$0	\$0		\$8,708	\$0	\$2,023	\$136	\$18	\$13	\$0	\$0	\$666	\$11,564	0%	\$0	\$11,564	\$900	\$12,464				
Elk Grove Water Service	No Comparable Class																													
Fair Oaks Water District	No Comparable Class																													
Rancho Murieta Community Services District	No Comparable Class																													
Regional Water Authority	No Comparable Class																													
Rio Linda Elverta Community Water District	No Comparable Class																													
Sacramento County	Associate Administrative Analyst II	6/22 4%	None Scheduled	\$6,992	\$8,499	0%	\$0	\$0	\$0	\$212	2.5% MA	\$8,711	\$0	\$1,619	\$119	inc	\$1	\$0	\$54	\$650	\$11,154	1.82%	\$155	\$11,000	\$937	\$11,937				
Sacramento Suburban Water District	No Comparable Class																													
San Juan Water District	No Comparable Class																													
Labor Market												\$9,945												\$12,211				\$13,174		
% CHWD is above or below Labor Market												-1.20%												6.49%				5.82%		
Comparability												10																		

NOTES:  
Sacramento County-in negotiations and could receive equity increase

Data effective as of 7/15/2022																																																	
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments																						
Citrus Heights Water District	Senior Construction Inspector	1/22 3%	None Scheduled	\$6,350	\$8,574	0%	\$0	\$257	\$0	\$140	\$40 T2; \$100 D5	\$8,971	\$0	\$2,898	\$136	\$25	\$13	\$29	\$0	\$656	\$12,727	0%	\$0	\$12,727	\$885	\$13,612	D2; T2																						
Carmichael Water District	No Comparable Class																																																
City of Citrus Heights	Construction/Maintenance Inspector II	10/21 2.5%	9/22 2%	\$5,172	\$6,459	0%	\$0	\$0	\$0	\$0		\$6,459	\$0	\$1,600	\$161	\$15	\$4	\$18	\$0	\$94	\$8,350	0%	\$0	\$8,350	\$667	\$9,017																							
City of Davis	Public Works Inspector II	7/22 2%	None Scheduled	\$5,807	\$7,058	0%	\$0	\$0	\$176	\$0		\$7,235	\$0	\$1,972	\$210	\$0	\$8	\$40	\$0	\$102	\$9,567	1.7%	\$120	\$9,447	\$584	\$10,031	D2																						
City of Folsom	Construction Inspector II	7/21 2.25%	None Scheduled	\$5,102	\$7,058	0%	\$0	\$0	\$0	\$300	\$300 max	\$7,358	\$0	\$1,674	\$113	\$20	\$6	\$25	\$50	\$540	\$9,786	0%	\$0	\$9,786	\$751	\$10,537																							
City of Lincoln	Construction Inspector II	varied by class	None Scheduled	\$5,155	\$6,909	0%	\$0	\$0	\$0	\$0		\$6,909	\$0	\$1,783	\$124	\$9	\$7	\$0	\$0	\$529	\$9,359	3%	\$207	\$9,152	\$387	\$9,539																							
City of Roseville	Construction Inspector II	1/22 3%	1/23 TBD	\$5,277	\$7,425	6.197%	\$460	\$223	\$186	\$0		\$8,294	\$1,945	inc	inc	inc	\$22	\$20	\$100	\$108	\$10,488	6.197%	\$460	\$10,028	\$343	\$10,371																							
City of Sacramento	Construction Inspector II	6/21 3.5%	None scheduled	\$5,259	\$7,431	0%	\$0	\$0	\$0	\$0		\$7,431	\$0	\$1,777	\$0	\$0	\$2	\$0	\$0	\$568	\$9,778	1%	\$74	\$9,704	\$581	\$10,285																							
City of Woodland	Engineering Technician II	7/22 3%	None Scheduled	\$4,853	\$6,194	0%	\$0	\$124	\$50	\$0		\$6,368	\$0	\$2,347	\$164	\$19	\$8	\$13	\$50	\$90	\$9,059	1%	\$62	\$8,997	\$596	\$9,593																							
El Dorado Irrigation District	Construction Inspector II	1/22 6%	1/23 3% - 5%	\$5,990	\$7,282	0%	\$0	\$0	\$0	\$0		\$7,282	\$0	\$2,023	\$136	\$18	\$11	\$0	\$0	\$557	\$10,027	0%	\$0	\$10,027	\$752	\$10,779																							
Elk Grove Water Service	No Comparable Class																																																
Fair Oaks Water District	Construction Inspector	7/22 8.35%	None Scheduled	\$5,599	\$7,559	0%	\$0	\$0	\$0	\$0		\$7,559	\$0	\$3,015	\$128	\$24	\$8	\$28	\$0	\$578	\$11,341	0%	\$0	\$11,341	\$780	\$12,121	D2; T2; Class B; Certified Cross Connection Control Specialist, California Certified Backflow Prevention Assembly Tester																						
Rancho Murieta Community Services District	No Comparable Class																																																
Regional Water Authority	No Comparable Class																																																
Rio Linda Elverta Community Water District	No Comparable Class																																																
Sacramento County	Construction Inspector	6/22 4%	None Scheduled	\$6,798	\$7,495	0%	\$0	\$0	\$0	\$375	5% max	\$7,870	\$0	\$1,619	\$119	inc	\$1	\$0	\$54	\$573	\$10,236	1.82%	\$136	\$10,100	\$827	\$10,926																							
Sacramento Suburban Water District	Senior Inspector	1/22 5.6%	None Scheduled	\$6,109	\$7,636	0%	\$0	\$0	\$0	\$87	\$0.50 per hour for one grade level above	\$7,723	\$0	\$1,927	\$189	\$20	\$27	\$19	\$0	\$584	\$10,490	0%	\$0	\$10,490	\$845	\$11,334	D2; T1																						
San Juan Water District	Construction Inspector II	7/22 varied by class; based on study	7/22 (retro-not yet approved by Board)	\$6,711	\$8,053	0%	\$0	\$0	\$0	\$0		\$8,053	\$0	\$2,902	\$150	\$19	\$27	\$56	\$0	\$616	\$11,823	0%	\$0	\$11,823	\$1,170	\$12,993	D3																						
Labor Market												\$8,053														\$8,294														\$11,823				\$11,823				\$12,993	
% CHWD is above or below Labor Market												6.08%														7.55%														7.11%				7.11%				4.55%	
Comparability												12																																					

**NOTES:**  
 Folsom- Local 39 still in negotiations; MOU expired 6/2022  
 Sacramento County-in negotiations and could receive equity increase  
 San Juan Water District- COLA for July 2022 not approved yet

Data effective as of 7/15/2022																																	
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments						
Citrus Heights Water District	Water Distribution Operator II	1/22 3%	None Scheduled	\$5,830	\$7,871	0%	\$0	\$236	\$0	\$140	\$40 T2; \$100 D5	\$8,247	\$0	\$2,898	\$136	\$25	\$13	\$27	\$0	\$602	\$11,947	0%	\$0	\$11,947	\$812	\$12,759	D2						
Carmichael Water District	Distribution Operator 2	7/22 4%	7/23 1% - 5%	\$5,860	\$6,623	0%	\$0	\$0	\$0	\$173	\$1/hour for D4	\$6,796	\$0	\$2,902	\$115	\$29	\$62	\$15	\$0	\$507	\$10,425	0%	\$0	\$10,425	\$772	\$11,197	Class B; D2						
City of Citrus Heights	No Comparable Class																																
City of Davis	Water Distribution Operator II	7/22 2%	None Scheduled	\$4,691	\$5,702	0%	\$0	\$0	\$143	\$0		\$5,844	\$0	\$1,972	\$210	\$0	\$8	\$40	\$0	\$83	\$8,157	1.7%	\$97	\$8,060	\$472	\$8,531	D2, Class A						
City of Folsom	Water Distribution Operator II	7/21 2.25%	None Scheduled	\$4,860	\$6,722	0%	\$0	\$0	\$0	\$300	\$300 max	\$7,022	\$0	\$1,674	\$113	\$20	\$6	\$24	\$50	\$514	\$9,423	0%	\$0	\$9,423	\$715	\$10,138							
City of Lincoln	Maintenance Worker II	7/22 4%	7/23 4%	\$3,834	\$5,139	0%	\$0	\$0	\$0	\$300	\$300 max	\$5,439	\$0	\$1,783	\$124	\$9	\$3	\$0	\$0	\$393	\$7,750	3%	\$154	\$7,596	\$288	\$7,884	Class B; D2						
City of Roseville	Water Distribution Worker II	varied by class	5/23 TBD	\$4,707	\$6,625	6.197%	\$411	\$299	\$0	\$199	3% max	\$7,533	\$1,945	inc	inc	inc	\$20	\$16	\$100	\$96	\$9,710	6.197%	\$411	\$9,299	\$306	\$9,605	Class B; D2						
City of Sacramento	Utilities Operations and Maintenance Serviceworker	6/21 3.5%	None scheduled	\$4,914	\$6,942	0%	\$0	\$0	\$0	\$0		\$6,942	\$0	\$1,777	\$0	\$0	\$1	\$0	\$0	\$531	\$9,251	1%	\$69	\$9,182	\$543	\$9,724	Class A by assignment; D1 or higher						
City of Woodland	Utilities Maintenance Worker II	7/22 3%	None Scheduled	\$4,185	\$5,341	0%	\$0	\$107	\$50	\$0		\$5,497	\$0	\$2,347	\$164	\$19	\$8	\$11	\$50	\$77	\$8,174	1%	\$53	\$8,120	\$514	\$8,634	D2; Collections I; Class B						
El Dorado Irrigation District	Distribution Operator II	1/22 6%	1/23 3% - 5%	\$5,210	\$6,334	0%	\$0	\$0	\$0	\$0		\$6,334	\$0	\$2,023	\$136	\$18	\$9	\$0	\$0	\$485	\$9,005	0%	\$0	\$9,005	\$654	\$9,659	D2						
Elk Grove Water Service	Water Distribution Operator II	7/22 7.2%	None Scheduled	\$5,800	\$7,048	1%	\$70	\$0	\$176	\$0		\$7,294	\$0	\$2,403	\$128	\$23	\$42	\$0	\$0	\$102	\$9,993	0%	\$0	\$9,993	\$727	\$10,721	D2; T1; Class A						
Fair Oaks Water District	Distribution System Operator II	7/22 8.35%	None Scheduled	\$4,335	\$5,852	0%	\$0	\$0	\$0	\$0		\$5,852	\$0	\$3,015	\$128	\$24	\$6	\$22	\$0	\$448	\$9,495	0%	\$0	\$9,495	\$604	\$10,099	D2; T1; Class A						
Rancho Murieta Community Services District	Utility Worker II	1/22 3.5%	1/23 3.5%	\$4,324	\$5,405	0%	\$0	\$0	\$0	\$270	5% max	\$5,675	\$0	\$1,783	\$224	\$12	inc	DNA	\$0	\$78	\$7,772	0%	\$0	\$7,772	\$588	\$8,360	D1; D2 desired						
Regional Water Authority	No Comparable Class																																
Rio Linda Elverta Community Water District	Distribution System Operator II	11/21 3.5%	11/22 TBD	\$4,157	\$5,058	3.5%	\$177	\$0	\$0	\$152	3% max	\$5,387	\$1,770	inc	inc	inc	\$11	\$0	\$0	\$387	\$7,555	0%	\$0	\$7,555	\$522	\$8,077	D2						
Sacramento County	Water System Operator	6/22 4%	None Scheduled	\$5,624	\$6,835	0%	\$0	\$0	\$0	\$137	2% T2; 2% for D2 added to base pay	\$6,971	\$0	\$1,619	\$119	inc	\$1	\$0	\$54	\$523	\$9,287	1.82%	\$124	\$9,163	\$754	\$9,916	D1; added 2% to base pay for D2						
Sacramento Suburban Water District	Distribution Operator II	1/22 5.6%	None Scheduled	\$5,345	\$6,681	0%	\$0	\$0	\$0	\$87	\$0.50 per hour for one grade level above	\$6,767	\$0	\$1,927	\$189	\$20	\$24	\$17	\$0	\$511	\$9,456	0%	\$0	\$9,456	\$739	\$10,195	D2; T2						
San Juan Water District	Distribution Operator II	7/22 varied by class; based on study	7/22 (retro-not yet approved by Board)	\$5,956	\$7,147	0%	\$0	\$0	\$0	\$0		\$7,147	\$0	\$2,902	\$150	\$19	\$24	\$50	\$0	\$547	\$10,837	0%	\$0	\$10,837	\$1,038	\$11,876	D3						
Labor Market				\$7,147										\$7,533								\$10,837				\$10,837				\$11,876			
% CHWD is above or below Labor Market				9.20%										8.66%										9.29%				6.93%					
Comparability				15																													

NOTES:  
Folsom- Local 39 still in negotiations; MOU expired 6/2022  
Rancho Murieta CSD- dental, vision and life insurance rates are from 2021; unable to obtain 2022  
Sacramento County-in negotiations and could receive equity increase  
San Juan Water District- COLA for July 2022 not approved yet

Data effective as of 7/15/2022																																							
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments												
Citrus Heights Water District	Water Distribution Supervisor	1/22 3%	None Scheduled	\$8,627	\$11,647	0%	\$0	\$349	\$0	\$140	\$40 T2; \$100 D5	\$12,136	\$0	\$2,898	\$136	\$25	\$13	\$40	\$0	\$891	\$16,138	0%	\$0	\$16,138	\$1,202	\$17,340	D3; T1												
Carmichael Water District	No Comparable Class																																						
City of Citrus Heights	No Comparable Class																																						
City of Davis	Water Distribution Crew Supervisor	7/22 2%	None Scheduled	\$5,395	\$6,557	0%	\$0	\$0	\$164	\$0		\$6,720	\$0	\$1,972	\$210	\$0	\$8	\$40	\$0	\$95	\$9,045	1.7%	\$111	\$8,934	\$542	\$9,476	Class A; D3												
City of Folsom	Water Distribution Supervisor	1/22 2.25%	None Scheduled	\$7,066	\$9,503	0%	\$0	\$275	\$0	\$300	\$300 MA	\$10,078	\$0	\$1,674	\$113	\$20	\$9	\$34	\$50	\$727	\$12,705	0%	\$0	\$12,705	\$1,011	\$13,716													
City of Lincoln	Public Services Supervisor	varied by class	None Scheduled	\$6,794	\$9,104	0%	\$0	\$0	\$0	\$0		\$9,104	\$0	\$1,783	\$124	\$9	\$7	\$0	\$0	\$696	\$11,722	3%	\$273	\$11,449	\$510	\$11,959	D2												
City of Roseville	Water Distribution Supervisor	1/22 3%	1/23 TBD	\$6,472	\$8,673	6.197%	\$537	\$260	\$0	\$0		\$9,471	\$1,945	inc	inc	inc	\$26	\$23	\$100	\$126	\$11,691	6.197%	\$537	\$11,153	\$400	\$11,553	D4												
City of Sacramento	Utilities Operations and Maintenance Supervisor	6/21 3.5%	None scheduled	\$5,873	\$8,786	0%	\$0	\$176	\$0	\$439	5% for BA and 5 years	\$9,401	\$0	\$1,777	\$0	\$0	\$3	\$0	\$0	\$672	\$11,854	1%	\$88	\$11,766	\$687	\$12,453	Class B; D3												
City of Woodland	No Comparable Class																																						
El Dorado Irrigation District	Water Construction Supervisor	1/22 6%	1/23 3% - 5%	\$7,835	\$9,523	0%	\$0	\$0	\$0	\$0		\$9,523	\$0	\$2,023	\$136	\$18	\$14	\$0	\$0	\$729	\$12,443	0%	\$0	\$12,443	\$984	\$13,427	D3												
Elk Grove Water Service	Water Distribution Supervisor	7/22 7.2%	None Scheduled	\$7,223	\$8,779	1%	\$88	\$0	\$219	\$0		\$9,087	\$0	\$2,403	\$128	\$23	\$50	\$0	\$0	\$127	\$11,818	0%	\$0	\$11,818	\$906	\$12,724	D3; T2												
Fair Oaks Water District	Operations Supervisor	7/22 8.35%	None Scheduled	\$6,644	\$8,968	0%	\$0	\$0	\$0	\$0		\$8,968	\$0	\$3,015	\$128	\$24	\$10	\$33	\$0	\$686	\$12,865	0%	\$0	\$12,865	\$926	\$13,790	D3; T2; Class A												
Rancho Murieta Community Services District	Utility Supervisor	11/21 varied by class	None Scheduled	\$5,833	\$7,291	0%	\$0	\$0	\$0	\$0		\$7,291	\$0	\$2,228	\$280	\$15	inc	DNA	\$0	\$106	\$9,920	0%	\$0	\$9,920	\$793	\$10,713	CP Listed; Max is \$8101; D2; Backflow												
Regional Water Authority	No Comparable Class																																						
Rio Linda Elverta Community Water District	No Comparable Class																																						
Sacramento County	Water Distribution Supervisor	6/22 4%	None Scheduled	\$6,859	\$8,337	0%	\$0	\$0	\$0	\$417	1% Class A; 4% D5	\$8,753	\$0	\$1,619	\$119	inc	\$1	\$0	\$54	\$638	\$11,184	1.82%	\$152	\$11,032	\$920	\$11,952	D3; Class A												
Sacramento Suburban Water District	Foreman (Distribution)	1/22 5.6%	None Scheduled	\$6,871	\$8,588	0%	\$0	\$0	\$0	\$87	\$0.50 per hour for one grade level above	\$8,675	\$0	\$1,927	\$189	\$20	\$31	\$22	\$0	\$657	\$11,521	0%	\$0	\$11,521	\$950	\$12,470	D3, T2												
San Juan Water District	Distribution Leadworker	7/22 varied by class; based on study	7/22 (retro-not yet approved by Board)	\$8,353	\$10,024	0%	\$0	\$0	\$0	\$0		\$10,024	\$0	\$2,902	\$150	\$19	\$34	\$70	\$0	\$767	\$13,965	0%	\$0	\$13,965	\$1,456	\$15,421	Supervisor, Class A; D4, Backflow, Cross Connection												
Labor Market					\$10,024											\$10,078											\$13,965						\$13,965						\$15,421
% CHWD is above or below Labor Market					13.94%											16.96%											13.47%						13.47%						11.07%
Comparability					12																																		

NOTES:  
Rancho Murieta CSD- dental, vision and life insurance rates are from 2021; unable to obtain 2022  
Sacramento County-in negotiations and could receive equity increase

Data effective as of 7/15/2022																															
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments				
Citrus Heights Water District	Water Efficiency Specialist	1/22 3%	None Scheduled	\$5,340	\$7,212	0%	\$0	\$216	\$0	\$140	\$40 T2; \$100 D5	\$7,568	\$0	\$2,898	\$136	\$25	\$13	\$25	\$0	\$552	\$11,216	0%	\$0	\$11,216	\$744	\$11,960	D1; Possession of, or ability to obtain, a Level 1 or 2 Conservation Practitioner certificate from the American Water Works Association is preferred				
Carmichael Water District	Water Efficiency Specialist II	7/22 varied by class; based on study	7/23 1% - 5%	\$5,410	\$6,576	0%	\$0	\$0	\$0	\$0		\$6,576	\$0	\$2,902	\$115	\$29	\$41	\$15	\$0	\$503	\$10,180	0%	\$0	\$10,180	\$766	\$10,946	Water Use Efficiency Grade 1 within one (1) year of hire; Irrigation Association Water Auditor Certification within two (2) years of employment; D1;In order to advance to step 5 within this classification an employee must complete the requirements to possess and maintain a valid AWWA Water Use Efficiency Grade 2 License.				
City of Citrus Heights	No Comparable Class																														
City of Davis	Water System Maintenance Worker	7/22 2%	None Scheduled	\$4,926	\$5,986	0%	\$0	\$0	\$150	\$0		\$6,136	\$0	\$1,972	\$210	\$0	\$8	\$40	\$0	\$87	\$8,453	1.7%	\$102	\$8,351	\$495	\$8,846	Class A; Backflow; D2				
City of Folsom	Water Utility Worker II	7/21 2.25%	None Scheduled	\$4,860	\$6,722	0%	\$0	\$0	\$0	\$300	\$300 max	\$7,022	\$0	\$1,674	\$113	\$20	\$6	\$24	\$50	\$514	\$9,423	0%	\$0	\$9,423	\$715	\$10,138					
City of Lincoln	No Comparable Class																														
City of Roseville	Meter Service Worker	1/22 3%	1/23 TBD	\$3,697	\$5,203	6.197%	\$322	\$156	\$130	\$0		\$5,812	\$1,945	inc	inc	inc	\$16	\$14	\$100	\$75	\$7,962	6.197%	\$322	\$7,639	\$240	\$7,879					
City of Sacramento	Utilities Operations and Maintenance Serviceworker	6/21 3.5%	None scheduled	\$4,914	\$6,942	0%	\$0	\$0	\$0	\$0		\$6,942	\$0	\$1,777	\$0	\$0	\$1	\$0	\$0	\$531	\$9,251	1%	\$69	\$9,182	\$543	\$9,724	Class A by assignment; D1 or higher				
City of Woodland	Meter Services Technician	7/22 3%	None Scheduled	\$4,620	\$5,896	0%	\$0	\$118	\$50	\$0		\$6,064	\$0	\$2,347	\$164	\$19	\$8	\$13	\$50	\$85	\$8,749	1%	\$59	\$8,690	\$567	\$9,257	D2; Collections Grade 1; Class B				
El Dorado Irrigation District	No Comparable Class																										Water Use Efficiency Technician does not do any meter work				
Elk Grove Water Service	No Comparable Class																														
Fair Oaks Water District	Field Customer Service Representative II	7/22 8.35%	None Scheduled	\$4,335	\$5,852	0%	\$0	\$0	\$0	\$0		\$5,852	\$0	\$3,015	\$128	\$24	\$6	\$22	\$0	\$448	\$9,495	0%	\$0	\$9,495	\$604	\$10,099	D2; Class B; Water Use Practitioner within 2 years				
Rancho Murieta Community Services District	No Comparable Class																														
Regional Water Authority	No Comparable Class																														
Rio Linda Elverta Community Water District	No Comparable Class																														
Sacramento County	No Comparable Class																														
Sacramento Suburban Water District	No Comparable Class																										No Meter Work				
San Juan Water District	Water Efficiency Technician II	7/22 varied by class; based on study	7/22 (retro-not yet approved by Board)	\$5,781	\$6,937	0%	\$0	\$0	\$0	\$0		\$6,937	\$0	\$2,902	\$150	\$19	\$23	\$49	\$0	\$531	\$10,609	0%	\$0	\$10,609	\$1,008	\$11,617	D1; QWEL certificate				
Labor Market				\$6,942																		\$10,609				\$10,609				\$11,617	
% CHWD is above or below Labor Market				3.74%																		5.41%				5.41%				2.86%	
Comparability				8																											

NOTES:  
Folsom- Local 39 still in negotiations; MOU expired 6/2022  
San Juan Water District- COLA for July 2022 not approved yet

Data effective as of 7/15/2022																																			
Agency	Classification	Date/Amount of Last Increase	Date/Amount of Next Increase	Minimum Base Salary	Maximum Base Salary	Employee's Portion of Retirement Paid by the Employer (%)	Employee's Portion of Retirement Paid by the Employer (\$)	Deferred Comp	Longevity Pay (Year 10)	Education / Certification Pay (\$)	Education / Certification Pay (notes)	Total Cash	Cafeteria Plan	Health (Most Expensive Plan)	Dental	Vision	Life Insurance	LTD Insurance	RHSA	Social Security - Medicare	Total Comp.	Employer's Portion of Retirement Paid by the Employee (%)	Employer's Portion of Retirement Paid by the Employee (\$)	Total Comp Less Employer Share of Retirement Paid by Employee (w/o PERS cost)	22/23 Employer's Normal Cost to Retirement (minus any cost sharing)	Total Comp Less Employer Share of Retirement Paid by Employee (w/ PERS cost)	Comments								
Citrus Heights Water District	Water Resources Specialist	1/22 3%	None Scheduled	\$6,130	\$8,279	0%	\$0	\$248	\$0	\$140	\$40 T2; \$100 D5	\$8,667	\$0	\$2,898	\$136	\$25	\$13	\$28	\$0	\$633	\$12,400	0%	\$0	\$12,400	\$854	\$13,254	D3; T2; Possession of an AWWA Backflow Prevention Assembly Tester certification; AWWA Cross Connection Specialist certification.								
Carmichael Water District	No Comparable Class																																		
City of Citrus Heights	No Comparable Class																																		
City of Davis	Water Production System Operator	7/22 2%	None Scheduled	\$5,171	\$6,286	0%	\$0	\$0	\$157	\$0		\$6,443	\$0	\$1,972	\$210	\$0	\$8	\$40	\$0	\$91	\$8,764	1.7%	\$107	\$8,658	\$520	\$9,177	Class B; T1; D3								
City of Folsom	No Comparable Class																																		
City of Lincoln	Water Technician II	7/22 4%	7/23 4%	\$4,650	\$6,231	0%	\$0	\$0	\$0	\$300	\$300 max	\$6,531	\$0	\$1,783	\$124	\$9	\$3	\$0	\$0	\$477	\$8,926	3%	\$187	\$8,739	\$349	\$9,088	D2								
City of Roseville	No Comparable Class																																		
City of Sacramento	No Comparable Class																																		
City of Woodland	Water System Operator II	7/22 3%	None Scheduled	\$4,506	\$5,752	0%	\$0	\$115	\$50	\$0		\$5,917	\$0	\$2,347	\$164	\$19	\$8	\$12	\$50	\$83	\$8,600	1%	\$58	\$8,542	\$553	\$9,096	T2								
El Dorado Irrigation District	No Comparable Class																																		
Elk Grove Water Service	No Comparable Class																																		
Fair Oaks Water District	Water Supply Operator	7/22 8.35%	None Scheduled	\$6,644	\$8,968	0%	\$0	\$0	\$0	\$0		\$8,968	\$0	\$3,015	\$128	\$24	\$10	\$33	\$0	\$686	\$12,865	0%	\$0	\$12,865	\$926	\$13,790	D2; T2; Cross Connection Specialist; Class A								
Rancho Murieta Community Services District	No Comparable Class																																		
Regional Water Authority	No Comparable Class																																		
Rio Linda Elverta Community Water District	No Comparable Class																																		
Sacramento County	No Comparable Class																																		
Sacramento Suburban Water District	Production Operator II	1/22 5.6%	None Scheduled	\$5,345	\$6,681	0%	\$0	\$0	\$0	\$87	\$0.50 per hour for one grade level above	\$6,767	\$0	\$1,927	\$189	\$20	\$24	\$17	\$0	\$511	\$9,456	0%	\$0	\$9,456	\$739	\$10,195	T2, D2								
San Juan Water District	No Comparable Class																																		
Labor Market												\$8,968									\$12,865				\$12,865		\$13,790								
% CHWD is above or below Labor Market												-8.33%									-3.47%									-3.75%		-3.75%		-4.04%	
Comparability					5																														

NOTES:

## **APPENDIX B**

### **MISCELLANEOUS BENEFITS**



APPENDIX B - TABLE 1 COLA/Salary Range Increase Information		
Survey Agency	Last COLA/Increase (Date) (Amount)	Next COLA/Increase (Date) (Amount)
<i>Citrus Heights Water District</i>	<i>1/2022- 3.2%</i>	<i>None Scheduled</i>
Carmichael Water District	Represented 7/2022-4%  Unrepresented 7/2022- amounts varied based on study	Represented 7/2023- 1% - 5% CPI based  Unrepresented 7/2023- 1% - 5% CPI based
City of Citrus Heights	10/2021-2.5%	9/2022-2% (No MOUs)
City of Davis	Unrepresented Management, PASEA, DCEA, General Management 7/2022-2%	Unrepresented Management, PASEA, DCEA, General Management None Scheduled  (PASEA/DCEA/General Management MOU expires 6/2023)
City of Folsom	Department Heads Varies by contract  FMMG 1/2022-2.25%  Local 39 7/2021-2.25%	Department Heads Varies by contract  FMMG None Scheduled (MOU expires 12/2022)  Local 39 TBD (MOU expired 6/2022)
City of Lincoln	Department Heads DNA  Local 39- Professional Admin 4/2022-varied by class  Mid Management/Confidential 4/2022-varied by class  Local 39- Classified 7/2022-3% COLA + 1% Market adjustment	Department Heads None Scheduled  Local 39- Professional Admin None Scheduled (MOU expires 3/2023)  Mid Management/Confidential None Scheduled (MOU expires 3/2023)  Local 39- Classified 7/2023-3% COLA + 1% Market adjustment

APPENDIX B - TABLE 1 COLA/Salary Range Increase Information		
Survey Agency	Last COLA/Increase (Date) (Amount)	Next COLA/Increase (Date) (Amount)
		(MOU expires 6/2024)
City of Roseville	Local 39 1/2022-3%  Management 1/2022-3%  IBEW 5/2022- varied by class (Going to Council 5/11/2022)	Local 39 1/2023-TBD by compensation study  Management 1/2023-TBD by compensation study  IBEW 5/2023- TBD by compensation study
City of Sacramento	Exec Mngt Varied by class  Engineer 6/2021-3.5%  Local 39-misc 6/2021-3.5%  SCXEA 6/2020-3.5%  Plumbers/Pipefitters 6/2021-3.5%  Local 39-Supervisory 6/2021-3.5%	Exec Mngt None Scheduled (resolution effective 3/2022)  Engineer None Scheduled (MOU expires 12/2023)  Local 39-misc None Scheduled (MOU expires 9/2023)  SCXEA None Scheduled (MOU expires 6/2023)  Plumbers/Pipefitters None Scheduled (MOU expires 6/2023)  Local 39-Supervisory None Scheduled (MOU expires 9/2023)
City of Woodland	Mid Management 7/2022-4% (per email)	Mid Management None Scheduled (Just finished negotiations- MOU not available yet)

APPENDIX B - TABLE 1 COLA/Salary Range Increase Information		
Survey Agency	Last COLA/Increase (Date) (Amount)	Next COLA/Increase (Date) (Amount)
	General 7/2022-3%  Confidential 7/2022-3%	General None Scheduled (MOU expires 6/2023)  Confidential None Scheduled (Resolution expires 6/2023)
El Dorado Irrigation District	1/22 - 6%	1/2023-3% - 5% CPI based (MOUs expire 12/2024)
Elk Grove Water District	7/2022 - 7.2%	None Scheduled (No MOUs)
Fair Oaks Water District	7/22 - 8.35%	Increases unknown at this time (No MOUs)
Rancho Murieta Community Services District	Represented 1/2022-3.5%  Unrepresented 11/2021- varied (based on comp study)	Represented 1/2023-3.5% (MOU expires 12/2023)  Unrepresented None Scheduled
Regional Water Authority	Data Not Available	TBD by Compensation Study (No MOUs)
Rio Linda Elverta Community Water District	11/2021-3.5%	11/2022-TBD (MOU expires 11/2024)
Sacramento County	Per contact (4% increase is universal) (Those in negotiations could have equity adjustments)  Unit 1 6/2022-4%  Unit 5 6/2022-4% (plus some got equity increases)  Unit 10 6/2022-4% per Tentative agreement	Unit 1 TBD- In negotiations (MOU expired 6/2022)  Unit 5 6/2023-4% (plus some get equity increases) (MOU expires 6/2025)  Unit 10 TBD- Tentative agreement

**APPENDIX B - TABLE 1**  
**COLA/Salary Range Increase Information**

Survey Agency	Last COLA/Increase (Date) (Amount)	Next COLA/Increase (Date) (Amount)
	Unit 23 6/2022-4%  Unit 26 6/2022-4%  Unit 32 6/2022-4%  Unit 34 6/2022-4%  Unit 17 6/2022-4%  Unit 28 6/2022-4%	Unit 23 TBD- in negotiations (MOU expired 6/2022)  Unit 26 TBD- in negotiations (MOU expired 6/2022)  Unit 32 TBD- in negotiations (MOU expired 6/2022)  Unit 34 TBD- in negotiations (MOU expired 6/2022)  Unit 17 TBD- in negotiations (MOU expired 6/2021)  Unit 28 6/2023-4% (MOU expires 6/2025)
Sacramento Suburban Water District	Staff 1/2022-5.6%  General Manager 1/2022-7.37%	All None Scheduled (No MOUs)
San Juan Water District	7/2022- amount varied by study	July 2022 COLA going to board end of July- not approved yet (No MOUs)

**APPENDIX B - TABLE 2**  
**Retirement Information**  
**New Hire-Classic Employee**

Survey Agency	Retirement Agency	Retirement Benefit	Retirement Formula	22/23 Employer Contribution (Normal Cost) (Does not include cost sharing)	UAL % of payroll 21/22 Most recent Non PEPR Tier
<b>Citrus Heights Water District</b>	<b>CalPERS</b>	<b>2% @ 55 - Tier 2</b> <b>2% @ 55 - Tier 1</b>	<b>H3Y</b> <b>SHY</b>	<b>10.32%</b>	<b>.34%</b>
Carmichael Water District	CalPERS	2% @ 55 (no other tiers)	SHY	11.65%	13.34%
City of Citrus Heights	CalPERS	2% @ 55 - Tier 2 2.7% @ 55 - Tier 1	H3Y SHY	10.32%	.85%
City of Davis	CalPERS	2.5% @ 55 (no other tiers)	SHY	9.97%	36.16%
City of Folsom	CalPERS	2% @ 55 -Tier 2 2.7% @ 55 - Tier 1	H3Y SHY	10.64%	33.10%
City of Lincoln	CalPERS	2% @ 60 - Tier 2 2.7% @ 55 - Tier 1	SHY SHY	8.63%	.87%
City of Roseville	CalPERS	2.7% @ 55 (no other tiers)	SHY	10.81%	23.32%
City of Sacramento	CalPERS	2% @ 55 (no other tiers)	SHY	8.82%	15.04%
City of Woodland	CalPERS	2% @ 60 -Tier 2 2.7% @ 55 - Tier 1	H3Y SHY	10.62%	28.82%
El Dorado Irrigation District	CalPERS	2% @ 55 -Tier 2 2.7% @ 55 - Tier 1	H3Y SHY	10.33%	31.33%
Elk Grove Water District	CalPERS	2% @ 55 (no other tiers)	H3Y	10.32%	6.48%
Fair Oaks Water District	CalPERS	2% @ 55 (no other tiers)	H3Y	10.32%	14.47%
Rancho Murieta Community Services District	CalPERS	2% @ 55 (no other tiers)	SHY	10.87%	24.93%
Regional Water Authority	CalPERS	2% @ 55 (no other tiers)	H3Y	7.76%	1.38%
Rio Linda Elverta Community Water District	CalPERS	2% @ 55 (no other tiers)	H3Y	10.32%	26.74%
Sacramento County	SCERS	1.92% @ 60 (or 2% @ 61 ¼) -Tier 4 2% @ 55 1/2- Tier 1, 2, 3	H3Y SHY	12.85%	DNA

**APPENDIX B - TABLE 2**  
**Retirement Information**  
**New Hire-Classic Employee**

Survey Agency	Retirement Agency	Retirement Benefit	Retirement Formula	22/23 Employer Contribution (Normal Cost) (Does not include cost sharing)	UAL % of payroll 21/22 Most recent Non PEPRA Tier
Sacramento Suburban Water District	CalPERS	2% @ 55 - Tier 2 3% @ 60 - Tier 1	H3Y SHY	11.06%	2.79%
San Juan Water District	CalPERS	3% @ 60 - Tier 2 3% @ 60 - Tier 1	H3Y SHY	14.53%	.98%

APPENDIX B - TABLE 3 Education/Certification Pay		
Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
Citrus Heights Water District	<p><i>In addition to salary compensation received, FLSA (Fair Labor Standards Act) exempt, who are not department heads (Senior Management), and non-exempt Regular Employees are authorized to receive the following compensation:</i></p> <p><i>Certified California State Water Distribution System Operators</i>  <i>Grade D1 \$ 20.00 / month</i>  <i>Grade D2 \$ 40.00 / month</i>  <i>Grade D3 \$ 60.00 / month</i>  <i>Grade D4 \$ 80.00 / month</i>  <i>Grade D5 \$100.00 / month</i></p> <p><i>Certified California State Water Treatment Operators</i>  <i>Grade T1 \$ 20.00 / month</i>  <i>Grade T2 \$ 40.00 / month</i>  <i>Grade T3 \$ 60.00 / month</i>  <i>Grade T4 \$ 80.00 / month</i>  <i>Grade T5 \$ 100.00 / month</i></p>	Not tied to COLA
Carmichael Water District	<p>Represented  Treatment Operator with T5 = \$1.00/hour  Distribution Operator with D4 = \$1.00/hour</p>	Not tied to COLA
City of Citrus Heights	None	Not applicable
City of Davis	None	Not applicable
City of Folsom	<p>FMMG  \$300-BA  \$300-MA  \$150-BA/MA unrelated field</p> <p>Local 39  \$300/month Max  \$150-AA  \$250-BA  \$250-MA</p>	Not tied to COLA

APPENDIX B - TABLE 3 Education/Certification Pay		
Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p>\$150-BA/MA (unrelated field)</p> <p>Building Inspector- \$50 each (Certified Combination Inspector, Certified Electrical Inspector, Certified Mechanical Inspector, Certified Plumbing Inspector, Uniform Fire Code Certificate, ADA Specialist Certificate</p> <p>Clerical- \$50 for Notary Public Commission</p> <p>Code Enforcement Technician- \$100 for Certified Code Enforcement Officer</p> <p>Construction Inspector- \$200- Registered Public Works Inspector</p> <p>Engineering Technician- \$200-Licensed Land Surveyor</p> <p>IS Technician/Analyst- \$75 Microsoft or CISCO</p> <p>Maintenance I/II/Lead- \$150- Class A</p> <p>Mechanic- \$50- ASE Certs</p> <p>Mechanic/Welder- \$200- ASE Master, \$50- for each- Automatic Transmission, Brakes, Electrical Systems, Engine Performance, Heating and Air, Manual Transmission, Refrigerant License, SMOG, Suspension and Steering</p> <p>Park Maintenance Worker I/II- \$100- Playground Safety and Pool Operator; \$50- Landscape Irrigation Auditor, Landscape Technician, Irrigation Contractor</p> <p>Park Planner/Associate Planner- \$50- Irrigation Designer</p> <p>Plan Checker- \$50 for each- Building Inspector, Electrical Inspector, Plumbing Inspector, Mechanical Inspector, Fire Code Certificate, ADA Specialist</p> <p>Traffic Control/Lighting Technician I/II- \$50- IMSA Level I/II/III, IMSA Roadway Lighting certificate; Fiber Optics Installation Certification</p> <p>Water Utility Worker I/II/III/Senior, WTPO I/II/III/Senior; Water Distribution Operator I/II/III/Chief; Wastewater Collection Technician I/II/III/Senior, Water Management Specialist, Water Quality Technician, Water Management Coordinator- \$300- advanced state certification for D5, T5, G4 only; \$200- advanced state certification for D4, T4, G3; \$150- Class A</p>	
City of Lincoln	<p>Dept. Heads None</p> <p>Local 39-Prof/Admin None</p> <p>Mid Management None</p> <p>Local 39-Classified \$75 per cert up to a max of 4 Street/Water Distribution</p>	Not tied to COLA



APPENDIX B - TABLE 3 Education/Certification Pay		
Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p>Maintenance Worker I/II/Senior-DO I, DO II, DO III, DO IV, CDL-A, CDL-B, CDL w/Tanker Endorsement, CDL w/Hazmat Endorsement, Distribution System Operator Cert, CA Qualified Applicator Cert Category C, International Municipal Signal Association Cert, Spray Certification, Arborist</p> <p>Water Quality</p> <p>Maintenance Worker I/II/Senior, Water Tech I, Water Tech II, Sr. Water Tech- CDL-A, CDL-B, DO I / Backflow, DO II / Backflow / Cross Connect, DO III / Backflow, CDPH Water Distribution Operator 1-5, AWWA Backflow Prevention Assembly General Tester, AWWA Cross Connection Specialist, AWWA Water Conservation Practitioner, Certified Irrigation Technician (CIT), Certified Landscape Irrigation Auditor (CLIA), Certified Landscape Water Manager (CLWM), Water Treatment Plant Operator 1-5, Wastewater Treatment Plant Operator 1-5</p> <p>Fleet</p> <p>Mechanic's Helper, Equip Mechanic I/II/Senior- CDL-B (not for Sr. Equip Mechanic), CDL-A, CDL-M1, CDL w/Tanker Endorsement, CDL w/ Hazmat Endorsement, ASE certs, Fire Apparatus, Welding</p> <p>Parks</p> <p>Maintenance Worker I/II/Senior- CDL-B, CDL-A, Spray Cert, CPO Certified Pool Operator, CPSI Certified Playground Safety Instructor, Certified Water Auditor, Building Trade / Electrical, Horticulture, Arborist</p> <p>Refuse</p> <p>Maintenance Worker I/II/Senior- DO I, DO II, DO III, DO IV, CDL-A, CDL-B, CDL w/Passenger Endorsement, CDL w/Tanker Endorsement, CDL w/Hazmat Endorsement, CDL w/Hazardous Waste</p> <p>Sewer Wastewater</p> <p>Maintenance Worker I/II/Senior, Wastewater Technician I/II/Senior- CDL-A, CDL-B, CDL w/Tanker Endorsement, CDL w/Hazmat Endorsement, CWEA Sewer Collection System Maintenance 1-4, Wastewater Treatment Plant Operator 1-5</p> <p>Transit</p> <p>Transit Operator, Sr. Transit Operator- CDL-A w/Passenger Endorsement, CDL-B w/Passenger Endorsement, Instruction Card</p> <p>Airport</p> <p>Airport Maintenance Worker I/II/Senior- CDL-A, CDL-B, CDL w/Tanker Endorsement, CDL w/Hazmat Endorsement</p>	
City of Roseville	<p>Management</p> <p>5% for PE if not required, except for Water Utility Manager</p>	Not tied to COLA

**APPENDIX B - TABLE 3  
Education/Certification Pay**

Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p align="center"><b>IBEW</b></p> <p>A five percent (5%) differential will be paid to employees in the classifications of Power Engineer I/II and Power Plant Engineer I/II who possess a California Professional Engineer Certificate (PE) license.</p> <p>Employees in the classifications of Electronic Technician I/II or Senior Electronic Technician may be compensated by a maximum of three percent (3%) for the following certifications as specified. Employees who obtain and maintain an International Municipal Signal Association (IMSA) Traffic Signal Level III certification will be compensated at a rate of one percent (1%) higher than their base hourly rate. Employees who obtain and maintain a Certified Fiber Optic Installer (4 day program) certificate will be compensated at a rate of two percent (2%) higher than their base hourly rate and employees who obtain and maintain a CompTIA Server+ certification will be compensated at a rate of two percent (2%) higher than their base hourly rate.</p> <p>Represented employees in the Environmental Utilities Department will have the ability to earn a maximum of three percent (3%) in certification pay</p> <p align="center">Water and Wastewater Classifications:</p> <p align="center">Senior Water Distribution Worker (Maximum 3%)</p> <p align="center">Cross Connection Control Specialist – 1%</p> <p align="center">Backflow Tester Certification – 1 %</p> <p align="center">Distribution Operator Grade 4 or Grade 5- 1%</p> <p align="center">Treatment Operator Grade 1, 2, 3, 4, or 5 – 1%</p> <p align="center">Water Sampler certification-1%</p> <p align="center">Water Distribution Worker I/II (Maximum 3%):</p> <p align="center">Cross Connection Control Specialist – 1%</p> <p align="center">Backflow Tester Certification – 1 %</p> <p align="center">Conservation Certification – 1%</p> <p align="center">Distribution Operator Grade 3, 4 or 5- 1%</p> <p align="center">Treatment Operator Grade 1, 2, 3, 4, or 5- 1%</p> <p align="center">Sr. Wastewater Utility Maintenance Worker (Maximum 3%):</p> <p align="center">CWEA Grade 3 or Grade 4 – 1%</p> <p align="center">Collection System Maintenance – 1%</p> <p align="center">Environmental Compliance Inspection – 1%</p>	

**APPENDIX B - TABLE 3**  
**Education/Certification Pay**

Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p align="center">Wastewater Utility Maintenance Worker I/II (Maximum 3%): CWEA Grade 2, Grade 3 or Grade 4- 1% Collection System Maintenance – 1% Environmental Compliance Inspection – 1%</p> <p align="center">Water Conservation Worker II Water Use Efficiency Practitioner Grade 1, 2, 3 (AWWA) – 1% Qualified Efficient Landscaper (QWEL)-1% Distribution Operator Grade 2 – 1% (New hires not eligible)</p> <p align="center">Water Conservation Worker I Water Use Efficiency Practitioner Grade 1, 2 (AWWA) – 1% Qualified Efficient Landscaper (QWEL)-1% Distribution Operator Grade 1,2 - 1% Certified Landscape Irrigation Auditor (CLIA) – 1%</p> <p align="center">Water Conservation Specialist- Water Use Efficiency Practitioner Grade 2, 3 (AWWA) – 1% Qualified Efficient Landscaper (QWEL)-1% Distribution Operator Grade 2 (DPH) – 1%</p> <p align="center">Local 39 Engineering Classifications: Professional Engineer Certificate - 5% 3% Max for below</p> <p align="center">Water Treatment Plant Operator 3- 1% for Grade 4 WTPO; 1% for Grade 5 WTPO; 1% for Distribution Operator Grade 2 or 3 Water Treatment Plant Operator 2 – 1% for each (Grade 3, 4, 5 WTPO); 1% for Distribution Operator Grade 2 or 3 Wastewater Treatment Plant Operator Grade 4- 1% for Grade 5 WWTPO Wastewater Treatment Plant Operator Grade 3- 1% for WWTPO Grade 4 and 1% for WWTPO Grade 5; 1% for CWEA Collections Grade 1; 1% for Lab Cert Grade 1 Wastewater Treatment Plant Operator Grade 2 - 1% for WWTPO Grade 3, 1% for WWTPO Grade 4; 1% for WWTPO Grade 5; 1% for CWEA Collections Grade1; 1% for Lab Cert Grade 1</p>	
City of Sacramento	<p align="center">Executive Management None Engineering 2.5% for 2 PES</p>	Not tied to COLA

APPENDIX B - TABLE 3 Education/Certification Pay		
Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p>OMOTP None (for matched classes)</p> <p>SCXEA None</p> <p>Water/Sewer None</p> <p>OMOTP-Supervisory 3%- AA and 7 years 5%- BA and 5 years</p>	
City of Woodland	None	Not applicable
El Dorado Irrigation District	None	Not applicable
Elk Grove Water District	None	Not applicable
Fair Oaks Water District	None	Not applicable
Rancho Murieta Community Services District	<p>Represented</p> <p>Certificate pay is capped at five percent (5%) for Represented Utility Worker and Plant Operator classifications. Additional Certificates. Effective January 1, 2015, additional certificates for Plant Operator classifications shall be limited to Treatment Plant Operator certificates and/or collection system certificates issued by the State of California or a District-approved educational institution. Plant Operators shall be paid an additional two and one-half percent (2.5%) above base pay per additional certificate above those required by their classification level, not to exceed five percent (5%) or two additional certificates, for each month so qualified during the term of this Agreement.</p> <p>Additional certificates for Utility Worker classifications shall be limited to distribution certificates and/or collection system certificates issued by the State of California or a District-approved educational institution. Utility Workers shall be paid an additional two and one-half percent (2.5%) above base pay per additional certificate above those required by their classification level, not to exceed five percent (5%) or two additional certificates, for each month so qualified during the term of this Agreement.</p> <p>The District shall pay \$500 (one time, lump sum) to any employee who is awarded an associate academic degree by an</p>	Not tied to COLA

APPENDIX B - TABLE 3 Education/Certification Pay		
Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p>accredited college or university and \$1,000 (one time, lump sum) to any employee who is awarded a bachelor academic degree by an accredited college or university; however, this incentive pay will be paid only for associate and bachelor degrees awarded after the employee has been employed by the District for at least six months. Education incentive pay shall not apply to any employee whose current District job description requires the degree being awarded.</p> <p>Unrepresented None</p>	
Regional Water Authority	None	Not Applicable
Rio Linda Elverta Community Water District	<p>A one percent (1%) increase shall be granted for each grade level above the grade level stipulated in the applicable position description for the following:</p> <p>State of California water treatment operator certification. State of California water distribution system operator certification. Dept. of Motor Vehicles Class B License (assumes the District acquires a vehicle requiring such license to operate). Water Use Efficiency Practitioner</p> <p>A three percent (3%) wage increase shall be granted for backflow prevention assembly tester license.</p>	Not tied to COLA
Sacramento County	<p>Unit 1</p> <p>2.5% -Thirty (30) to fifty-nine (59) undergraduate semester units above the minimum qualifications for the employee's job classification.</p> <p>2.5%- Sixty (60) or more undergraduate semester units above the minimum qualifications for the employee's job classification.</p> <p>Employees who are required to maintain a Class A License, Hazardous Material Endorsement (H or X) or Tanker Endorsement (N) as a condition of employment when the class specification does not make the same requirement for all of the positions in the classes of Mechanical Maintenance Supervisor, Wastewater Treatment Plant Operations Supervisor, Underground Construction and Maintenance Supervisor, Water Distribution Supervisor, Water Treatment Operations Supervisor, Senior Equipment Mechanic, Park Maintenance Supervisor, Waste Management Operations Supervisor, and Sanitation District Maintenance &amp; Operations Supervisor will receive an additional 1% of pay.</p> <p>2% incentive pay to an employee in the class of Wastewater Treatment Plant Operations Supervisor who obtains a Treatment Plant Operator Grade V Certificate.</p> <p>Plant Maintenance Grade III Certificate: 2% differential to an employee in the classes of Mechanical Maintenance Supervisor, Underground Construction and Maintenance Supervisor, or Wastewater Treatment Plant Operations Supervisor who obtains this certificate.</p> <p>Plant Maintenance Grade IV Certificate: 4% differential to an employee in the classes of Mechanical Maintenance Supervisor, Underground Construction and Maintenance Supervisor, or Wastewater Treatment Plant Operations</p>	Not tied to COLA

**APPENDIX B - TABLE 3**  
**Education/Certification Pay**

Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p align="center">Supervisor who obtains this certificate.</p> <p>Plant Maintenance Electrical/Instrumentation Grade III Certificate: 2% differential to an employee in the class of Water Quality Control Systems Supervisor who obtains this certificate.</p> <p>Plant Maintenance Grade IV Certificate: 4% differential to an employee in the class of Water Quality Control Systems Supervisor who obtains this certificate.</p> <p align="center">California Water Environment Association, Collection Series:</p> <p>Collection Systems Grade III Certificate: 2% differential to an employee in the Department of Water Quality in the classes of Mechanical Maintenance Supervisor or Underground Construction and Maintenance Supervisor who obtains this certificate.</p> <p>Collection Systems Grade IV Certificate: 4% differential to an employee in the Department of Water Quality in the classes of Mechanical Maintenance Supervisor or Underground Construction and Maintenance Supervisor who obtains this certificate.</p> <p>Laboratory Analyst III Certificate: 2% differential to an employee in the class of Water Quality Laboratory Supervisor.</p> <p>Laboratory Analyst IV Certificate: 4% differential to an employee in the class of Water Quality Laboratory Supervisor.</p> <p>Plant Maintenance Grade III Certificate: 2% differential to an employee in the class of Mechanical Maintenance Supervisor or Water Treatment Operations Supervisor who obtains this certificate.</p> <p>Plant Maintenance Grade IV Certificate: 4% differential to employees in the class of Mechanical Maintenance Supervisor or Water Treatment Operations Supervisor who obtains this certificate.</p> <p>Plant Maintenance Electrical/Instrumentation Grade III Certificate: 2% differential to an employee in the class of Water Quality Control Systems Supervisor who obtains this certificate.</p> <p>Plant Maintenance Grade IV Certificate: 4% differential to an employee in the class of Water Quality Control Systems Supervisor who obtains this certificate.</p> <p>Wildlife Society: 2% incentive pay to an employee in the class of Natural Resource Supervisor who obtain the Wildlife Biologist Certification.</p> <p>2% incentive pay to an employee in the class of Mechanical Maintenance Supervisor Underground Construction and Maintenance Supervisor or Water Treatment Operations Supervisor who obtains the T4 Certificate.</p> <p>5% incentive pay to employees in the classes of Mechanical Maintenance Supervisor Underground Construction and Maintenance Supervisor, or Water Treatment Operations Supervisor who obtains the Grade T5 Certificate</p> <p>1% incentive pay to an employee in the classes of Highway Maintenance Supervisor I or Highway Maintenance Supervisor II who obtains the Grade D3 Certificate.</p> <p>2% incentive pay to an employee in the classes of Mechanical Maintenance Supervisor, Underground Construction and Maintenance Supervisor, Water Distribution Supervisor, or Water Treatment Operations Supervisor who obtains the Grade D4 Certificate.</p>	

APPENDIX B - TABLE 3 Education/Certification Pay		
Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p>4% incentive pay to employees in the classes of Mechanical Maintenance Supervisor, Underground Construction and Maintenance Supervisor, Water Distribution Supervisor, or Water Treatment Operations Supervisor who obtains the Grade D5 Certificate.</p> <p>Senior Equipment Mechanic, Equipment Maintenance Supervisor, and Automotive Maintenance Supervisor will become eligible for incentive pay up to a maximum of 4% for the certifications (ASE and/or Welder Certification/Qualification Certificate)</p> <p>State of California Welder Certification/Qualification Certificate Incentive pay shall be paid at the rate of two percent 2%.</p> <p>Tree Supervisor who meet the requirements below, may receive up to three percent (3%) pay for either the Arborist Certification or Pesticide Spray Applicators Certification/License, but not both.</p> <p>Arborist Certification: Employees in the classifications of Tree Supervisor who possess an International Society of Arborists (ISA), Arborist Certificate may be assigned duties consistent with the use of such certification. In such case, the employee will receive a three percent (3%) differential. The assignment of duties consistent with the certification shall be made in writing.</p> <p>Pesticide Spray Applicators Certification/License: Employees in the classification of Tree Supervisor who possesses a State of California Qualified Applicators License or Qualified Applicators Certificate may be assigned duties consistent with the use of such certification or license. In such case, the employee will receive a two percent (2%) differential for the license or one and one-half percent (1.5%) for the certificate. The employee may not receive the differential for both the license and the certificate. In addition to the differential for the license or certificate, the employee may receive a one-half percent (.5%) differential for each additional State of California Qualified Applicators License/Certificate category used in conjunction with the employee's prescribed work assignments.</p> <p>Unit 5</p> <p>2.5% -Thirty (30) to fifty-nine (59) undergraduate semester units above the minimum qualifications for the employee's job classification.</p> <p>2.5%- Sixty (60) or more undergraduate semester units above the minimum qualifications for the employee's job classification.</p> <p>Certification Incentive Pay: Additional salary shall be paid to an employee for possession of certification(s). To qualify for additional salary, such certification(s) shall meet the following criteria:</p> <p>Certification is not required as part of the minimum qualifications specified in the employee's job classification.</p> <p>Recognized certificates include those offered at the following institutions: California State University system, University of California system, and the Community College system. UPE and the County shall meet to determine additional recognized certificates and the amount of assigned salary differentials. No employee who qualifies for both Certification and Education Incentive pay shall receive additional salary of more than 5%.</p>	

APPENDIX B - TABLE 3 Education/Certification Pay		
Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p>Unit 10 2.5%- MA, CPA, CIA or CISA</p> <p>Unit 17 1 % incentive pay to employees in the class of Wastewater Treatment Plant Operator Apprentice who obtain a Treatment Plant Operator Grade II Certificate. 1 % incentive pay to employees in the class of Wastewater Treatment Plant Operator who obtain a Treatment Plant Operator Grade III Certificate. 1 % incentive pay to employees in the class of Senior Wastewater Treatment Plant Operator who obtain a Treatment Plant Operator Grade IV Certificate. Plant Maintenance Grade I Certificate: 1 % differential to employees in the classes of Wastewater Treatment Plant Operator (Level 1 ), Assistant Mechanical Maintenance Technician, Assistant Underground Construction and Maintenance Specialist and Water Quality Control Systems Technician who obtain this certificate. Plant Maintenance Mechanical Technologist Grade II Certificate: 1 % differential to employees in the classes of Wastewater Treatment Plant Operator (Level 2), Senior Wastewater Treatment Plant Operator, Mechanical Maintenance Technician, Underground Construction and Maintenance Specialist who obtain this certificate. Plant Maintenance Electrical/Instrumentation Grade II Certificate: 1 % differential to employees in the class of Senior Water Quality Control Systems Technician who obtain this certificate. Plant Maintenance Electrical/Instrumentation Grade II Certificate: 3% differential to employees in the class of Water Quality Control Systems Technician who obtain this certificate. Plant Maintenance Mechanical Technologist Grade III Certificate: 3% differential to employees in the classes of Wastewater Treatment Plant Operator (Level 2), Senior Wastewater Treatment Plant Operator, Mechanical Maintenance Technician, Underground Construction and Maintenance Specialist who obtain this certificate. Plant Maintenance Mechanical Technologist Grade III Certificate: 4% differential to employees in the classes of Wastewater Treatment Plant Operator (Level 1), Assistant Mechanical Maintenance Technician, Assistant Underground Construction and Maintenance Specialist and Water Quality Control Systems Technician who obtain this certificate. Plant Maintenance Electrical/Instrumentation Grade III Certificate: 4% differential to employees in the class of Water Quality Control Systems Technician who obtain this certificate. Plant Maintenance Electrical/Instrumentation Grade III Certificate: 3% differential to employees in the class of Senior Water Quality Control Systems Technician who obtain this certificate. Plant Maintenance Electrical/Instrumentation Grade IV Certificate and Plant Maintenance Mechanical</p>	



**APPENDIX B - TABLE 3**  
**Education/Certification Pay**

Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p align="center">Technologist Grade IV Certificate:</p> <p>Those employees who were receiving the 4% differential as of May 5, 2009 for the Plant Maintenance Grade IV Certificate will continue to receive the differential as long as they maintain their certificate.</p> <p>Effective May 10, 2009, a 4% differential to employees in the class of Senior Water Quality Control Systems Technician and Water Quality Control Systems Technician who obtain a Plant Maintenance Electrical/Instrumentation Grade IV Certificate.</p> <p>Effective May 20, 2009, a 4% differential to employees in the classes of Wastewater Treatment Plant Operator (Level 2), Senior Wastewater Treatment Plant Operator, Mechanical Maintenance Technician, Underground Construction and Maintenance Specialist who obtain a Plant Maintenance Mechanical Technologist Grade IV Certificate.</p> <p>Collection Systems Grade I Certificate: 1 % differential to employees in the Department of Water Quality in the classes of Assistant Mechanical Maintenance Technician, Assistant Underground Construction and Maintenance Specialist who obtain this certificate.</p> <p>Collection Systems Grade II Certificate: 1 % differential to employees in the Sanitation Districts Agency in the classes of Mechanical Maintenance Technician, Underground Construction and Maintenance Specialist who obtain this certificate.</p> <p>Collection Systems Grade II Certificate: 2% differential to employees in the Sanitation Districts Agency in the class of Sanitation District Maintenance and Operations Assistant.</p> <p>Collection Systems Grade III Certificate: 3% differential to employees in the Department of Water Quality in the classes of Mechanical Maintenance Technician and Underground Construction and Maintenance Specialist who obtain this certificate.</p> <p>Collection Systems Grade III Certificate: 2% differential to employees in the Sanitation Districts Agency in the class of Sanitation District Maintenance and Operations Technician.</p> <p>Collection Systems Grade III Certificate: 3% differential to employees in the Sanitation Districts Agency in the classes of Mechanical Maintenance Technician, Underground Construction and Maintenance Specialist, and Sanitation District Maintenance and Operations Assistant who obtain this certificate.</p> <p>Collection Systems Grade IV Certificate: 4% differential to employees in the Department of Water Quality in the classes of Mechanical Maintenance Technician and Underground Construction and Maintenance Specialist who obtain this certificate.</p> <p>Collection Systems Grade IV Certificate: 2% differential to employees in the Sanitation Districts Agency in the class of Sanitation District Maintenance &amp; Operations Senior Technician.</p> <p>Collection Systems Grade IV Certificate: 3% differential to employees in the Sanitation Districts Agency in the class of Sanitation District Maintenance and Operations Technician.</p> <p>Collection Systems Grade IV Certificate: 4% differential to employees in the Sanitation Districts Agency in the classes of Mechanical Maintenance Technician and Underground Construction and Maintenance Specialist who obtain this certificate.</p>	

**APPENDIX B - TABLE 3**  
**Education/Certification Pay**

Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p>Laboratory Analyst I Certificate: 1 % differential to employees in the class of Environmental Laboratory Analyst.</p> <p>Laboratory Analyst II Certificate: 2% differential to employees in the class of Environmental Laboratory Analyst.</p> <p>Laboratory Analyst II Certificate: 1 % differential to employees in the class of Senior Environmental Laboratory Analyst, Biologist and Chemist.</p> <p>Laboratory Analyst III Certificate: 3% differential to employees in the class of Environmental Laboratory Analyst, Senior Environmental Laboratory Analyst, Biologist and Chemist.</p> <p>Laboratory Analyst IV Certificate: 4% differential to employees in the class of Senior Environmental Laboratory Analyst, Biologist and Chemist.</p> <p>California Water Environment Association (CWEA), Plant Maintenance Series:</p> <p>Plant Maintenance Grade I Certificate: 1 % differential to employees in the class of Water Quality Control Systems Technician who obtain this certificate.</p> <p>Plant Maintenance Electrical/Instrumentation Grade II Certificate:</p> <p>1 % differential to employees in the class of Senior Water Quality Control Systems Technician who obtain this certificate.</p> <p>Plant Maintenance Electrical/Instrumentation Grade II Certificate: 3% differential to employees in the class of Water Quality Control Systems Technician who obtain this certificate.</p> <p>Plant Maintenance Mechanical Technologist Grade III Certificate: 4% differential to employees in the class Water Quality Control Systems Technician who obtain this certificate.</p> <p>Plant Maintenance Electrical/Instrumentation Grade III Certificate: 4% differential to employees in the class of Water Quality Control Systems Technician who obtain this certificate.</p> <p>Plant Maintenance Electrical/Instrumentation Grade III Certificate: 3% differential to employees in the class of Senior Water Quality Control Systems Technician who obtain this certificate.</p> <p>Plant Maintenance Electrical/Instrumentation Grade IV Certificate:</p> <p>Those employees who were receiving the 4% differential as of May 5, 2009 for the Plant Maintenance Grade IV Certificate will continue to receive the differential as long as they maintain their certificate.</p> <p>Effective May 10, 2009, a 4% differential to employees in the class of Senior Water Quality Control Systems Technician who obtain a Plant Maintenance Electrical/Instrumentation Grade IV Certificate.</p> <p>2% incentive pay to employees in the classes of Natural Resources Specialist and Senior Natural Resources Specialist who obtain the Wildlife Biologist Certification.</p> <p>2% incentive pay to employees in the Department of Water Resources in the classes of Mechanical Maintenance Technician and Senior Water Treatment Operator who obtain the Grade T3 Certificate or higher.</p> <p>2% incentive pay to employees in the Department of Water Resources in the classes of Assistant Mechanical Maintenance Technician and Water System Operator who obtain the T2 Certificate or higher.</p> <p>2% incentive pay to employees in the classes of Mechanical Maintenance Technician, Underground</p>	

APPENDIX B - TABLE 3 Education/Certification Pay		
Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p>Construction and Maintenance Specialist, Senior Water Distribution Operator, and Senior Water Treatment Operator who obtain the Grade D3 Certificate or higher.</p> <p>2% incentive pay to employees in the classes of Assistant Mechanical Maintenance Technician, Assistant Underground Construction and Maintenance Specialist, and Water System Operator who obtain the Grade D2 Certificate or higher.</p> <p>An employee who is required to maintain a Commercial Class A License, Commercial Class B License with Hazardous Material Endorsement or Tanker Endorsement (N), or Commercial Class C License with Hazardous Material Endorsement (H or X) or Tanker Endorsement (N) as a condition of employment when the class specification does not make the same requirement for all of the positions within the class will receive an additional 1 % of pay.</p> <p>Unit 23 None</p> <p>Unit 26 5% differential for Engineering Technicians who possess an Engineer in Training certificate also applies to the advanced classes in the series, the Senior Engineering Technicians and Principal Engineering Technicians who possess such certification.</p> <p>Construction Inspector series: Employees will be paid at the rate of 1.5% for each below listed certification up to a maximum of 5% (4 certificates): American Welding Society Certified Welding Inspector, National Association of Corrosion Engineers (NACE) Coating Inspector, American Concrete Institute Concrete Construction Special Inspector, ICC Structural Masonry Special Inspector, ICC Pre-stressed Concrete Special Inspector, ICC Reinforced Concrete Special Inspector, Structural Welding Special Inspector, Structural Steel and Bolting Special Inspector</p> <p>Unit 28 2.5%-MA</p> <p>Unit 32 None</p> <p>Unit 34 2.5%-MA</p>	
Sacramento Suburban Water District	<p>Class 'A' Driver's License</p> <p>Employees in certain job classifications approved by the General Manager who obtain a Class A vehicle operator's license from the State of California and who are deemed qualified to operate equipment associated with this level of license by the Operations Manager will be compensated at \$1.00 per hour.</p>	Not tied to COLA

**APPENDIX B - TABLE 3**  
**Education/Certification Pay**

Survey Agency	Education/Certification Pay	Are certification/incentive pay increases related to Cost-of-Living?
	<p align="center">State Certification Required for Position</p> <p>Non-exempt employees who meet the minimum certification requirement(s) for positions requiring State of California State Water Resources Control Board, Division of Drinking Water, Distribution and/or Treatment Operator certifications will be compensated \$0.50 per hour for a maximum of one certification above the required level per employee.</p> <p align="center">State Certification Not Required for Position</p> <p>Non-exempt employees who obtain certification from the State of California State Water Resources Control Board, Division of Drinking Water, for either Water Distribution Operator or Treatment Operator and the certification is not required for their current position will be compensated \$0.25 per hour for a maximum of one certification per employee.</p> <p align="center">Other Certification Not Required for Position</p> <p>Non-exempt employees who obtain other certification not required for their current position may be compensated \$0.25 per hour for a maximum of one certificate per employee determined to be of value to the District subject to approval by the General Manager.</p>	
San Juan Water District	None	Not Applicable

APPENDIX B - TABLE 4 Vacation Leave							
Agency	Year 1 (hours per year)	Year 4 (hours per year)	Year 8 (hours per year)	Year 12 (hours per year)	Year 16 (hours per year)	Year 20 (hours per year)	Max Accrual
<b>Citrus Heights Water District</b>	<b>96</b>	<b>120</b>	<b>144</b>	<b>168</b>	<b>192</b>	<b>216</b>	<b>200</b>
Carmichael Water District	96	96	120	144	176	176	300
City of Citrus Heights <sup>1</sup>	136	136	160	184	200	240	2x
City of Davis	120	136	160	192	224	224	1x
City of Folsom <sup>2</sup>	192	192	224	256	288	288	320
City of Lincoln	88	112	136	144	160	208	240
City of Roseville	96	96	112	112	144	160	400
City of Sacramento <sup>3</sup>	80	80	120	120	160	160	480
City of Woodland	MM/Conf 84	MM/Conf 108	MM/Conf 136	MM/Conf 160	MM/Conf 184	MM/Conf 199	352
	General 80	General 104	General 136	General 160	General 184	General 200	
El Dorado Irrigation District <sup>4</sup>	176	216	216	256	296	296	280, but excess goes to Bank B
Elk Grove Water District	40	80	120	160	200	200	320
Fair Oaks Water District	80	120	160	160	160	160	320

<sup>1</sup> Citrus Heights- Have combined sick and vacation leave; but do offer Long Term Medical Leave (listed under sick leave)

<sup>2</sup> Folsom- Have combined sick and vacation leave

<sup>3</sup> Sacramento- At year 10, Employees receive 24 hours of longevity lave (not included)

<sup>4</sup> EID- Have combined sick and vacation leave

APPENDIX B - TABLE 4 Vacation Leave							
Agency	Year 1 (hours per year)	Year 4 (hours per year)	Year 8 (hours per year)	Year 12 (hours per year)	Year 16 (hours per year)	Year 20 (hours per year)	Max Accrual
Rancho Murieta Community Services District	Represented 80	Represented 80	Represented 120	Represented 136	Represented 168	Represented 200	Represented 160
	Unrepresented 96	Unrepresented 128	Unrepresented 152	Unrepresented 176	Unrepresented 200	Unrepresented 200	Represented 2x
Regional Water Authority	96	96	136	176	200	200	360
Rio Linda Elverta Community Water District	40	96	144	168	184	200	300
Sacramento County	81	120	143	177	200	200	400
Sacramento Suburban Water District	96	96	120	128	160	192	400 (up to age 55) Unlimited (over age 55)
San Juan Water District	96	120	144	168	192	192	240

APPENDIX B - TABLE 5 Sick Leave, Holidays, and Administrative Leave				
Agency	Sick Leave Annual Accrual (days/year)	Sick Leave Max Accrual	Fixed Holidays + Floating Holidays (number of holidays per year)  <i>Hours listed are based on normal work schedule. (Notes listed are for those on alternative work schedules if information available)</i>	Administrative, Management Leave, Personal Leave (number of hours per year)
<b>Citrus Heights Water District</b>	<b>12</b>	<b>Unlimited</b>	<b><math>9 + \frac{1}{2} + \frac{1}{2} + 1 = 11</math> (based on 10 hours/day) (110 hours/year)</b>	<b>Management- 80 Non-Management- 0</b>
Carmichael Water District	12	Unlimited	$11 + 1 = 12$ (based on 8 hours/day) (96 hours/year)	General Manager-80 hours Unrepresented-80 hours for some classes Represented-0
City of Citrus Heights	5 (Long Term Medical Leave)	Unlimited	$12 + 2 = 14$ (based on 8 hours/day) (112 hours/year)	Executive Management-120 hours Management- 80 Non-Management- 0
City of Davis	12	Unlimited	$12 + 2.5 = 14.5$ (based on 8 hours/day) (116 hours/year)  Employees who normally work an irregular work week (i.e., other than Monday through Friday) shall be entitled to the same amount of time off for holidays as those who work a regular work week. Any employee who works an irregular work week shall be credited with straight time off as in lieu of Holiday Time.	Management- 80 PASEA- 0 DCEA- 0
City of Folsom	Included in vacation	NA	$12 + 1 = 13$ (based on 8 hours/day) (104 hours/year)  If a holiday occurs on the employee's first normal day off, the employee shall take the preceding day as the holiday; however, if the holiday occurs on the employee's second consecutive normal day off, the employee shall take the following day as the holiday.	Local 39- 0 FMMG, Dept. Heads-80 if exempt

APPENDIX B - TABLE 5				
Sick Leave, Holidays, and Administrative Leave				
Agency	Sick Leave Annual Accrual (days/year)	Sick Leave Max Accrual	Fixed Holidays + Floating Holidays (number of holidays per year)  <i>Hours listed are based on normal work schedule. (Notes listed are for those on alternative work schedules if information available)</i>	Administrative, Management Leave, Personal Leave (number of hours per year)
City of Lincoln	12	Dept Heads 1,440 hours  Local 39-Prof/Admin 1440 hours  Mid Mngt 1000 hours  Local 39-Classified Unlimited	10 + 2 = 12 (based on 8 hours/day) (96 hours/year)  If a holiday falls on an employee's regular day off, he/she shall be entitled to equivalent time off at a later date.	Mid Management- 80 hours Dept. Heads- 80 – 104 hours Local 39-Prof/Admin- 64 hours Local 39-Classified- 0
City of Roseville	12	Unlimited	10 + 2 = 12 (based on 8 hours/day) (96 hours/year)  (110 hours/year for shift workers)  (Treatment Plant shift workers - 6 shifts (144 hours/year))  If a holiday occurs on the employee's first normal day off, the employee shall take the preceding day as the holiday; however, if the holiday occurs on the employee's second consecutive normal day off, the employee shall take the following day as the holiday. This policy shall be adhered to where practical and may be modified only by written consent to other conditions by the department head.	Local 39- 45 -Personal Leave Management- up to 100 hours IBEW- 45 -Personal Leave



APPENDIX B - TABLE 5 Sick Leave, Holidays, and Administrative Leave				
Agency	Sick Leave Annual Accrual (days/year)	Sick Leave Max Accrual	Fixed Holidays + Floating Holidays (number of holidays per year)  <i>Hours listed are based on normal work schedule. (Notes listed are for those on alternative work schedules if information available)</i>	Administrative, Management Leave, Personal Leave (number of hours per year)
City of Sacramento	12	Unlimited	$11 + \frac{1}{2} + \frac{1}{2} + 2 = 14$ (based on 8 hours/day) (112 hours/year)  For employees who work a Monday through Friday alternative work schedule, including but not limited to 9/80 or 4/10, if the recognized holiday falls on the employee's scheduled day off, the employee shall receive holiday credit for the hours of the holiday benefit, up to a maximum of eight (8) hours.	Executive Management- 80 Engineering- 0 OMOTP- 0 SCXEA- 24 - 80 Water/Sewer- 0 OMOTP-Supervisory- 24
City of Woodland	12	Unlimited	$10.5 + 2 = 12.5$ (based on 8 hours/day) (100 hours)	Mid Management- 96 Confidential- 96 General- 0
El Dorado Irrigation District	Included in vacation	NA	$12 + 1 = 13$ (based on 8 hours/day) (104 hours/year)  If a non-exempt employee works an alternative shift schedule and does not work on the holiday, the employee shall receive (8) hours of holiday pay at the employee's regular rate of pay and shall make up the remaining hours for that day from his or her PTO A leave bank.	EIDEA- 40 if exempt Dept Heads- 80 Manager/Supervisor-80
Elk Grove Water District	12 (Called PTO)	320 hours	$11 + 1 = 12$  (Per email, 12 holidays is approximately 105 hours, but it does vary depending on when the holiday falls, since they work 9 hour days most of the time.)	Exempt-80 Non-exempt-0

**APPENDIX B - TABLE 5**  
**Sick Leave, Holidays, and Administrative Leave**

Agency	Sick Leave Annual Accrual (days/year)	Sick Leave Max Accrual	Fixed Holidays + Floating Holidays (number of holidays per year)  <i>Hours listed are based on normal work schedule. (Notes listed are for those on alternative work schedules if information available)</i>	Administrative, Management Leave, Personal Leave (number of hours per year)
Fair Oaks Water District	10	Unlimited	10 + 1 (personal day) = 11  (based on 9 hours/day) (99 hours/year)	Management-64 (with 6 years) (40 with less than 5 years) General Manager- 104 hours Non-Management- 0
Rancho Murieta Community Services District	12	Unlimited	8 + 4 = 12 (based on 8 hours/day) (96 hours/year)	Unrepresented-80 hours-certain classes
Regional Water Authority	12	480 hours	11 + 2 = 13 (based on 8 hours/day) (104 hours/year)  When a regular day off of any regular employee whose work schedule is other than Monday through Friday falls on a holiday, then, at the Executive Director's discretion, the employee will be provided with (1) a day off with pay on the day preceding or succeeding the holiday, or (2) eight hours of compensatory time off	None
Rio Linda Elverta Community Water District	12	240 hours	11.5 + 2 = 13.5 (based on 8 hours/day) (108 hours/year)  If work alternative work schedule- Observed holiday- The number of paid hours associated with a paid day off for the observed holiday will be equal to the scheduled hours of work for that day. For example; if the employee is scheduled to work 9-hours on Wednesdays, and July 4th is Wednesday, the employee will be paid for 9-hours.	General Manager- 48 Operations Superintendent-32

APPENDIX B - TABLE 5 Sick Leave, Holidays, and Administrative Leave				
Agency	Sick Leave Annual Accrual (days/year)	Sick Leave Max Accrual	Fixed Holidays + Floating Holidays (number of holidays per year)  <i>Hours listed are based on normal work schedule. (Notes listed are for those on alternative work schedules if information available)</i>	Administrative, Management Leave, Personal Leave (number of hours per year)
Sacramento County	15	Unlimited	$13.5 + 0 = 13.5$ (based on 8 hours/day) (108 hours/year)  An employee shall be granted a holiday that falls on the employee's scheduled eight-hour work shift. If the holiday falls on the scheduled nine-hour work shift, the remaining hour must be taken off as leave first from accumulated compensating time off or holiday in lieu, and second from accumulated vacation time; and, if there are no leave balances, then leave without pay. If the holiday falls when the employee is scheduled to work the two (2) four-hour work shifts, then both four-hour work shifts shall be deemed the holiday. If a holiday falls on an employee's scheduled day off, the employee shall accrue eight (8) hours compensating time off.	Management gets Management Time Off but no set number of hours each year Non-Management- 0
Sacramento Suburban Water District	12	240 hours (under age 55)  Unlimited (over age 55)	$13 + 0 = 13$ (based on 8 hours/day) (104 hours/year)	Exempt-40 General Manager-80 Non-exempt- 0
San Juan Water District	12	Unlimited	$11 + 1 = 12$  (based on 8 hours/day) (96 hours/year)	40 hours (Exempt)

APPENDIX B - TABLE 6 Retiree Health - (New Hires)					
Agency	Agency Contribution to Retiree Health Savings	Agency Monthly Contribution for Retiree	Agency Monthly Contribution for Retiree + 1	Agency Monthly Contribution for Retiree + 2	Vesting
<b>Citrus Heights Water District</b>	<b><i>If the employee has selected a plan that does not exceed Kaiser Platinum premiums, excess funds will be contributed by the District to a Health Savings Plan administered by MidAmerica.</i></b>	<b><i>Based on years of service \$377 with 20 years \$422 with 25 years \$472 with 30 years (if hired prior to 1/30/19)</i></b>	<b><i>No additional contribution</i></b>	<b><i>No additional contribution</i></b>	<b><i>20 years</i></b>
Carmichael Water District	\$0	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years
City of Citrus Heights	\$0	PEMCHA Minimum	No additional contribution	No additional contribution	10 years with PERS; 5 years with agency
City of Davis	\$0	= to Supplement/Managed Medicare Monthly Rate (CalPERS)	= to Supplement/Managed Medicare Monthly Rate (CalPERS)	No additional contribution	5 years
City of Folsom	\$50	\$0	\$0	\$0	NA
City of Lincoln	\$0	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years
City of Roseville	\$100/month (with 5 years)	PEMCHA Minimum	No additional contribution	No additional contribution	10 years with PERS; 5 years with agency
City of Sacramento	\$0	\$0	\$0	\$0	NA
City of Woodland	MM and General \$50  Confidential \$100	PEMCHA Minimum	No additional contribution	No additional contribution	10 years with PERS; 5 years with agency
El Dorado Irrigation District	\$0	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years
Elk Grove Water District	\$0	100% of active rate with 15 years	100% of active rate with 15 years	No additional contribution	15 years

APPENDIX B - TABLE 6 Retiree Health - (New Hires)					
Agency	Agency Contribution to Retiree Health Savings	Agency Monthly Contribution for Retiree	Agency Monthly Contribution for Retiree + 1	Agency Monthly Contribution for Retiree + 2	Vesting
Fair Oaks Water District	\$0	\$0	\$0	\$0	NA
Rancho Murieta Community Services District	\$0	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years
Regional Water Authority	\$0	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years
Rio Linda Elverta Community Water District	\$0	\$300	No additional contribution	No additional contribution	20 years
Sacramento County	Units 1, 5, 10, 17, 26, 28, 32, 80 \$25/per pay period  Unit 23 \$0	\$0	\$0	\$0	NA
Sacramento Suburban Water District	\$0	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years
San Juan Water District	\$0	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years = 50%; + 5% for each additional year to max of 100% with 20 years	10 years

**APPENDIX B - TABLE 7**  
**Cash out of Leave During Active Employment**

Survey Agency	Vacation Leave Cash Out	Sick Leave Cash Out	Admin/Mngt. Leave Cash Out
Citrus Heights Water District	<p><i>Accumulations above 200 hours will be reduced to 200 hours based on the last payroll of October. Account balances in excess of 200 hours will be paid to the employee on a special payroll in November. Payment shall be made at the employee's current rate of pay and shall be paid according to the employee's instructions on the Earned Leave Payout form.</i></p> <p><i>Employee Request for Payment in Lieu of Annual Leave. An employee may request payment once per year in accordance with the procedure set forth in the Administrative Procedures.</i></p> <p><i>An employee may not request a payment in lieu of Annual hours that would reduce the employee's total leave balance (Annual + CTO + Sick) to be less than 160 hours at the time of payment. Any such request shall not be approved.</i></p> <p><i>An employee may request a payment in lieu of annual leave up to the equivalent number of time off hours they have submitted via vacation request.</i></p>	None	<p><i>An FLSA exempt employee may request Payment in Lieu of Management Leave once per calendar year, for up to eighty (80) hours, regardless of the employee's total leave balance.</i></p>
Carmichael Water District	None	None	None
City of Citrus Heights	<p>Annually, at a time determined by the City (or at the request of the employee and upon special approval by the City Manager), employees may, upon written request and written approval, receive compensation for up to forty (40) hours</p>	None	<p>Management Leave hours may be cashed-out in either December or June up to the maximum hours provided per fiscal year. The City Manager may approve cash-out requests at times other than December or June at the written request</p>

**APPENDIX B - TABLE 7**  
**Cash out of Leave During Active Employment**

<b>Survey Agency</b>	<b>Vacation Leave Cash Out</b>	<b>Sick Leave Cash Out</b>	<b>Admin/Mngt. Leave Cash Out</b>
	of unused Annual Leave based on their base salary. The ability to cash-out Annual Leave in return for compensation is based on the following criteria: The employee used at least 40 hours of Annual Leave during the previous year; and the employee will have a minimum balance of 80 Annual Leave hours after the cash out.		of an employee. A maximum of forty (40) hours of Management Leave may be carried over to the following fiscal year unless additional hours are approved by the City Manager. Carried-over hours may not be cashed out.
City of Davis	Management-Employees are able to cash-out up to forty (40) hours of vacation as long as: (1) the employee has at least ten (10) years of service with the City, and (2) the employee has a minimum of one (1) year of accrued vacation on the books.  PASEA/DCEA Can cash out 80 hours with 10 years of service an 1x accrual on the books	None	Management-Employees are able to cash out up to one-hundred (100) percent of the management leave accrued in one year.
City of Folsom	Can cash out up to 40 hours of PTO and Management Leave (if applicable) per year	NA (PTO)	Hours are included under vacation cash out.
City of Lincoln	Can cash out 40 hours with a minimum balance of 80 hours and have used one week	Prof/Admin Up to 50 hours of balance over 500 and 12 years of service  Mid Mngt/Dept Heads Can cash out up to 60 hours over 500 hours and 12 years of service  Local 39-classified None	None
City of Roseville	If the amount exceeds specified limits, the employee shall take the excess number of vacation hours up to a maximum of twenty (20) hours prior to the anniversary date or, if operational necessity will not	None	Local 39/IBEW- 100% can be cashed out  Management- Up to 50 hours can be cashed out

**APPENDIX B - TABLE 7**  
**Cash out of Leave During Active Employment**

Survey Agency	Vacation Leave Cash Out	Sick Leave Cash Out	Admin/Mngt. Leave Cash Out
	permit taking such time, the employee may be paid the straight time hourly equivalent.		
City of Sacramento	Upon completion of 15 years, can cash out 5 days	Employees who have at least four hundred and eighty (480) hours of sick leave on November 1 in any calendar year may make an irrevocable election to forego the accrual of not more than twenty- four (24) hours of sick leave during the following calendar year and receive instead a cash payment for the number of sick leave hours designated in the election.	Executive Management-Budgeted full-time career employees may cash out up to forty (40) hours of management leave time one-time per fiscal year.  SCXEA-Employees may cash out forty (40) hours of management leave time each fiscal year.  OMOTP-Supervisory-None
City of Woodland	Employees may cash out accrued vacation leave once they have three or more years of service. Each calendar year an employee may, at employee's request, cash out up to eighty (80) accrued hours of vacation based on the chart below. 3-5 years = 40 hours 5+ years = 80 hours	None	Mid Management-Can cash out 40 hours.  Confidential- Can cash out 40 hours.
El Dorado Irrigation District	ALL  Employees who have accrued one hundred and sixty (160) hours of PTO A may sell back hours beyond one hundred and forty (140) up to a maximum of ten (10) hours per calendar year.  Employees who have accrued two hundred (200) hours of PTO A may sell back hours beyond one hundred and sixty (160) up to a maximum of twenty (20) hours per calendar year.  Employees who have accrued two hundred and forty (240) hours of PTO A may sell back hours beyond two hundred (200) up to a maximum of thirty (30) hours per calendar year.  Employees who have accrued two	Not Applicable	None



**APPENDIX B - TABLE 7**  
**Cash out of Leave During Active Employment**

<b>Survey Agency</b>	<b>Vacation Leave Cash Out</b>	<b>Sick Leave Cash Out</b>	<b>Admin/Mngt. Leave Cash Out</b>
	<p>hundred and eighty (280) hours of PTO A may sell back hours beyond two hundred and forty (240) up to a maximum of forty (40) hours per calendar year.</p> <p>PTO Bank A Cash Out requests must be submitted on approved District forms and must be received by the Human Resources department commencing December 1st but no later than December 15th of each year. Eligible employees may elect to take the PTO A Cash Out in the form of cash, deferred compensation or a combination of the two.</p>		
Elk Grove Water District	Vacation can be cashed out when accruals are available and when approved by the GM.	Sick Leave (PTO) can be cashed out when accruals are available and when approved by the GM.	None
Fair Oaks Water District	None	None	None
Rancho Murieta Community Services District	<p>Upon approval of the General Manager an employee may receive pay for his/her earned vacation instead of taking time off, after the initial six (6) month probationary period, provided that the employee has taken at least five (5) consecutive days of vacation, administration leave and/or personal holiday time off during that year. In addition, the employee must have at least (forty) 40 hours of accrued vacation time remaining after the buy back. The vacation buy-back will be an annual event in early December coinciding with a regular pay cycle.</p>	None	None
Regional Water Authority	None	None	None
Rio Linda Elverta Community Water District	Can sell 40 hours if used 40 hours and have balance of 180 hours	None	None

**APPENDIX B - TABLE 7**  
**Cash out of Leave During Active Employment**

<b>Survey Agency</b>	<b>Vacation Leave Cash Out</b>	<b>Sick Leave Cash Out</b>	<b>Admin/Mngt. Leave Cash Out</b>
Sacramento County	Management- with 10 years can cash out 40 hours if have 240 hours remaining	None	None
Sacramento Suburban Water District	Yes, EEs have a max of 400 hours of vacation and are paid out once a year in December for the hours exceeding that amount – they can also elect to have that excess amount paid into a deferred comp plan provided through the District, subject to the IRS maximum contribution limit. Otherwise, EEs can cash out unused vacation at any time with GM approval as long as the EE has taken at least 40 hours of vacation or admin leave within the prior 12 months.	EEs under age 55 are automatically paid out once per year in December for all SL exceeding 240 hours at ½ their current rate of pay. They can also have this amount paid to a deferred comp account per IRS max limit. EEs over 55 can accumulate unlimited SL but have the option to cash out any SL over 240 hours at ½ their rate of pay in December, with the same ability to have it paid into a deferred comp account per IRS max limit.	None
San Juan Water District	Each July, employees receive pay for their earned vacation time for any hours in excess of 240 hours as of June 30th. Beyond that, once they have completed their new hire evaluation period their manager can approve them cashing out any amount of accrued vacation leave.	Anything over 480 hours is cashed out @ 50%	None

APPENDIX B - TABLE 8 Miscellaneous Benefit Information			
Survey Agency	Cash in lieu of Medical Insurance	Is Cash in lieu of medical insurance related to Cost of Living?	Cell Phone Stipend
<i>Citrus Heights Water District</i>	<i>\$400/month cash</i>	<i>Not tied to COLA</i>	<i>Exempt employees, including District Department Managers and Supervisors, will receive a monthly stipend in the amount of \$49 to use District sanctioned personal cellular telephones. This stipend will be paid through payroll quarterly. If an employee obtains or currently has a plan that exceeds the monthly stipend, Citrus Heights Water District will not be liable for the cost difference. The device remains the property of the employee, who is responsible for all repairs or replacement of the device.</i>
Carmichael Water District	None	Not applicable	None
City of Citrus Heights	\$600/month cash or deferred comp	Not tied to COLA	Policy is being reviewed. There are City paid phones issues to certain employees, mainly Directors, some managers, fieldworkers.
City of Davis	\$500/month cash	Not tied to COLA	Two levels (\$30 or \$65 per month) available for Management Employees  Management Employees – Use of Personal Cell Phone for City Business Management employees, based on positional requirements and Department Head approval, may be provided a technology stipend to be used toward the purchase and maintenance of a personal cell phone that can also be used for City Business. This option is only available to approved positions whose function requires regular communication via cell phones. The following levels have been established: \$30/month for low volume (based on positional requirements, not individual employees) \$65 month for high volume/PDA phones
City of Folsom	\$250/month cash	Not tied to COLA	Dept. Heads \$1200/year technology allowance  FMMG A department head, with City Manager approval, may approve the issuance of a city cell phone or may authorize the use of the employee's personal cell phone for work purposes. If an employee opts to use his/her personal phone for work purposes the City will provide employee with a maximum monthly cell phone stipend of \$50.00. The monthly stipend shall cover expenses, charges, maintenance and replacement of the employee's phone including damage, loss, theft or

APPENDIX B - TABLE 8 Miscellaneous Benefit Information			
Survey Agency	Cash in lieu of Medical Insurance	Is Cash in lieu of medical insurance related to Cost of Living?	Cell Phone Stipend
			<p>other operational issues affecting the phone during private use or during the course and scope of employment. The City shall have no further liability for these items beyond the stipend amount. If an employee opts to use his/her personal cell phone, employee will provide the cellular phone record of business calls during work hours upon request of the City.</p> <p>Local 39</p> <p>A Department head, with City Manager approval, may approve the issuance of a city cell phone or may authorize the use of the employee's personal cell phone for work purposes. If an employee opts to use his/her personal phone for work purposes the City will provide employee with a monthly cell phone stipend of \$50.00. The monthly stipend shall cover expenses, charges, maintenance and replacement of the employee's phone including damage, loss, theft or other operational issues affecting the phone during private use or during the course and scope of employment. If an employee opts to use his/her personal cell phone, employee will provide the cellular phone record of business calls during work hours upon request of the City.</p>
City of Lincoln	\$571/month	Not tied to COLA (tied to 66.67% of EE only rate)	Only department heads have the option to receive a monthly cell stipend or be issued a city phone. Any other employees with need of cell phone access are issued a city cell phone.
City of Roseville	\$150/month cash	Not tied to COLA	None
City of Sacramento	None	Not Applicable	<p>Executive Management</p> <p>If the City requires an employee in the Executive Management, Executive Management Support, or Mayor/Council Support unit to be generally accessible via technology device for the conduct of City-related business, the City shall provide a technology allowance in accordance with the provisions of this Section.</p> <p>Employees in the Executive Management, Executive Management Support, or Mayor/Council Support units may be authorized a monthly technology allowance of up to one hundred dollars (\$100).</p> <p>Engineers</p>

**APPENDIX B - TABLE 8**  
**Miscellaneous Benefit Information**

Survey Agency	Cash in lieu of Medical Insurance	Is Cash in lieu of medical insurance related to Cost of Living?	Cell Phone Stipend
			<p align="center">\$25/month</p> <p align="center">SCXEA</p> <p>If the City requires an Exempt Management or Exempt Management Support employee to be generally accessible via cellular telephone for the conduct of City-related business, the City shall either provide a technology allowance or a City-issued cellular phone in lieu of a technology allowance in accordance with the provisions of this Section.</p> <p>Exempt Management (Unit 01) and Exempt Management Support (Unit 14) employees may be authorized a monthly technology allowance of up to one-hundred dollars (\$100.00). At the discretion of the Appointing Authority, or as delegated by the City Manager to a department head, the City may provide a City-issued cellular phone in lieu of a technology allowance. Use of City-provided cellular telephones shall be discontinued upon receipt of the technology allowance by the employee.</p> <p align="center">Local 39- Supervisory</p> <p>Employees in the classifications of Supervising Dispatcher who, in their capacity as line supervisors, have Dispatcher IIIs reporting to them, and Survey Party Chief shall receive a monthly technology allowance of fifty dollars (\$50.00).</p> <p>Use of City-provided cellular telephones shall be discontinued upon receipt of the technology allowance by the employee.</p> <p>Upon approval of the monthly technology allowance the employee shall provide and maintain a personal cellular phone and service that is available to conduct City-related business. The employee shall provide the cellular telephone number to designated individuals and organizations with whom the employee normally conducts City-related business.</p>
City of Woodland	\$405/month cash	Not tied to COLA	There is a one-time \$100 equipment reimbursement and then a monthly \$60 or \$80 reimbursement based on tethering. (Smartphone reimbursements)

APPENDIX B - TABLE 8 Miscellaneous Benefit Information			
Survey Agency	Cash in lieu of Medical Insurance	Is Cash in lieu of medical insurance related to Cost of Living?	Cell Phone Stipend
El Dorado Irrigation District	\$275/month cash or to FSA	Not tied to COLA	Employees are eligible. Varies by class \$33-\$68/month Plus data - \$42/month
Elk Grove Water District	None	Not Applicable	<p>The leadership Team, which is management do receive stipends (see policy below)</p> <p>Using Personal Electronics for Business Purpose Employees in leadership roles and operations, depending on job function, are required to use mobile phones for business purposes and if so, will receive a monthly stipend to help cover their costs.</p> <p>In certain situations, some employees, may use personally owned devices to connect with District systems. The District reserves the right to refuse this access. Prior to use on the District network, all personal devices must be inspected by the Systems Administrator, who will verify that the device is appropriate and contains no harmful software or viruses. This inspection may be repeated whenever the Systems Administrator determines it is necessary.</p> <p>Use of a personal device for business purposes does not entitle the employee to the District's systems support. If the device requires repair or other maintenance, it is the sole responsibility of the employee.</p>
Fair Oaks Water District	None	Not Applicable	FOWD issues cell phones to employees to use for work purposes
Rancho Murieta Community Services District	\$350/month cash	Not tied to COLA	The District provides cell phones for the employees who are both unrepresented and represented (depending upon classification and roles/responsibilities. The District does provide a "technology stipend" of \$75 a month for staff who work from home. This stipend is only for Unrepresented staff who are not eligible for Overtime (exempt).
Regional Water Authority	\$511/month	Not tied to COLA	\$50/month if eligible
Rio Linda Elverta Community Water District	\$300/month cash	Not tied to COLA	District provides all cell phones to employees.

APPENDIX B - TABLE 8 Miscellaneous Benefit Information			
Survey Agency	Cash in lieu of Medical Insurance	Is Cash in lieu of medical insurance related to Cost of Living?	Cell Phone Stipend
Sacramento County	None	Not Applicable	The County does not provide a cell phone allowance. However, management employees receive a 3.35% management differential.
Sacramento Suburban Water District	Currently, and at the Board's discretion, EEs can receive ½ of the lowest-cost plan premium available through CalPERS based on the coverage level For 2022, the EE only cash benefit is \$351-EE only; \$701- EE + 1; \$912-family	Not tied to COLA. They are based on CalPERS rates	Cell phones are provided if requested and as needed for position.
San Juan Water District	\$400/month cash	Not tied to COLA	Employee's who are deemed to need a cell phone for District purposes, and are not provided with a District cell phone receive one of two stipends. \$55 monthly (no data), \$80 monthly (with data). Also, employees who have a designated role in our EOC are required to sign up for Wireless Priority Service and WPS activation. These employees receive a \$10 one -time enrollment fee reimbursement and a \$5 monthly stipend.

APPENDIX B - TABLE 9 Permanent Telework Policy	
Survey Agency	Permanent Telework Policies
Citrus Heights Water District	<i>CHWD does not have a formal telework policy.</i>
Carmichael Water District	None
City of Citrus Heights	<p>PURPOSE</p> <p>To establish the general rules and eligibility requirements for City of Citrus Heights (City) employees telework policy with an approved Telework Agreement. The City recognizes that telework is a viable work option when the nature of the work and employee are suited for such an arrangement. A formal Telework Policy and agreement provides the framework for assessing the appropriateness of the work arrangement, ensures transparency and preserves public trust. Police Department personnel are not eligible to participate in the Telework Policy due to the demands and nature of running a 24/7 operation.</p> <p>The goal of the City's Telework Policy is to support work-life balance, ensure efficient use of City resources, maintain responsive services to the community and allow employees and supervisors to mutually agree upon a varied distribution of individual employee's in-office work hours while still maintaining an exceptional level of service to both the public and all City staff.</p> <p>DEFINITIONS</p> <p>Alternate Worksite: A location where the employee works other than at a City facility, where an employee can perform official City work.</p> <p>Work Schedule: Planned/established hours of work while teleworking.</p> <p>Telework: The act of working at an alternate worksite (generally from home) while continuing to conduct City business and maintaining regular contact with colleagues and customers.</p> <p>POLICY AND GUIDELINES</p> <p>The City believes that staff benefit from regular workplace interaction with co-workers and the community we serve. Casual face-to-face interaction promotes information sharing, mentoring, and establishment of relationships with co-workers thereby promoting a cohesive team environment. In addition to the interpersonal benefits of the in-office collaboration, the City, above all, is a service organization for the benefit of the community which we serve. Therefore, participating employees are required to work a minimum of 60% or three (3) days per week from the City worksite, and are permitted to work a maximum of 40% or two (2) days per week from a designated alternate worksite. A request to telework for more than 40% or two (2) days may be considered under rare circumstances requiring the support of the department director and approval from the City Manager.</p> <p>The Telework Policy applies to all regular City employees with the exception of Police Department personnel who are exempt from participation in this program. The department directors may consider telework requests submitted by eligible employees in their department to the extent possible. Probationary employees may be allowed to participate with division manager support and department director approval. All requests for telework must be reviewed in coordination with Human Resources. No employee is permitted to participate in the telework program while participating in the City's alternative work schedule or other alternative schedule such as a 9/80, 4/10, 3/12, etc.</p> <p>Teleworking is a privilege, not an employee right. Not all classifications and positions are suitable for telework. Classifications or positions that require day-to-day access to City-owned premises or specialized equipment or on-site workflows, as well as those dependent on the frequency of in-person interaction with staff and/or the public are not conducive to telework arrangements. Employees within the same classification may not be eligible for telework based on the requirements of their specific duties or assignments, as well as the employee's individual capabilities and departmental needs.</p> <p>All City employees who telework must have an approved Telework Request Form and Agreement under this policy. A City division/department may have additional telework requirements, guidelines, or procedures, provided they are consistent with the intent of this program.</p>



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	<p>Teleworking does not change the duties, obligations, responsibilities, or terms and conditions of City employment. Employees who telework must comply with all City rules, policies, practices, and instructions.</p> <p>A teleworking employee must perform work during scheduled telework hours. Employees may not engage in activities while teleworking that would not be permitted at the regular worksite, such as outside employment or other means of earning income; providing childcare, eldercare, or other dependent care; using drugs or alcohol; running errands during working time, etc. Scheduled work hours from the employee's home shall be dedicated exclusively to City work. Teleworking employees may take care of personal business during scheduled breaks and unpaid lunch periods, as they would at the City worksite.</p> <p>Employees must read the Telework Policy, submit a Telework Request and Agreement form through the departmental approval process, and complete the Ergonomic Self-Assessment Checklist and Self-Certification before teleworking. Teleworking is not permitted until all required documents are submitted and their supervisor/manager, department director and Human Resources approves the agreement.</p> <p>With the support and coordination of Human Resources, a supervisor/manager or a department director may deny, end, or modify a telework agreement for any reason, at any time, with or without notice at the sole discretion of the City. Similarly, a teleworking employee may end or request to change a telework agreement at any time. Employees may also be removed from the telework program if they do not comply with the terms and conditions of the telework agreement. If, in the best interest of the City, the City Manager or his or her designee has the sole discretion to amend, suspend, end, or modify this policy. This decision is not subject to the grievance procedures or to any other review or appeal procedures.</p> <p>The City is not required to provide teleworking employees with materials or supplies needed to establish an alternate worksite other than a City issued computer, keyboard and computer mouse. Participating employees are responsible for providing their own desk, chair, cell phone, printer, scanner, copier, etc., and the City assumes no responsibility for set-up or operating costs at an alternate worksite (telephone or internet services, etc.).</p> <p>All City rules regarding the use of computers and the internet apply while an employee is teleworking, regardless of whether the employee is using City provided or personal equipment.</p> <p align="center"><b>PROCEDURES</b></p> <p align="center"><b>1. Eligibility Criteria</b></p> <p>Teleworking is not suitable for all employees and/or positions. Eligibility for telework is based on both the position and the employee. Not every job, or every employee, is well-suited for telework. The department directors in consultation with Human Resources have the discretion to determine the employees and positions who may telework, utilizing criteria that include, but are not limited to:</p> <ul style="list-style-type: none"> <li>A. The operational needs of the employee's department and the City;</li> <li>B. The potential for remote work to unduly disrupt or create problems for projects, staff, the community or other stakeholders;</li> <li>C. The ability of the employee to perform his or her specific job duties from a location separate from the City's worksite ("Alternate Worksite") without diminishing the quantity or quality of the work performed in a full workday;</li> <li>D. The degree of face-to-face interaction with other city employees, the public, and/or clients that the employee's position requires;</li> <li>E. The portability of the employee's work;</li> <li>F. The employee's ability to create a functional, reliable, efficient, safe, and secure alternate worksite absent of distractions;</li> <li>G. The employee's supervisory responsibilities;</li> <li>H. The employee's need for supervision; and,</li> <li>I. Other considerations deemed necessary and appropriate by the employee's immediate supervisor/manager, department director, and the City Manager.</li> </ul> <p align="center"><b>2. Position Eligibility:</b></p>

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	<p align="center">An employee's position may be suitable for teleworking when the job duties:</p> <ul style="list-style-type: none"> <li>A. Are independent in nature;</li> <li>B. Are primarily knowledge-based;</li> <li>C. Lend themselves to measurable deliverables;</li> </ul> <p>D. Do not require frequent interaction at the regular worksite or project construction worksites with supervisors, colleagues, subordinates, clients, or the public, in person or by phone;</p> <p>E. Do not require the employee's immediate presence at the regular worksite or project construction worksites to address unscheduled events, unless alternative arrangements for coverage are possible; and</p> <p>F. Are not essential to the management of on-site workflow and operations.</p> <p align="center">3. Employee Eligibility</p> <p>Employees may be suitable for telework when their personal disposition, as determined by the supervisor, include:</p> <ul style="list-style-type: none"> <li>A. Demonstrate dependability and responsibility;</li> <li>B. Effective and consistent communication with supervisors, coworkers, public, and clients;</li> <li>C. Demonstrated motivation;</li> <li>D. The ability to work independently;</li> <li>E. A consistently high rate of productivity;</li> <li>F. A high level of skill and knowledge of the job;</li> <li>G. The ability to prioritize work effectively; and</li> <li>H. Good organization and time management skills.</li> </ul> <p align="center">4. Telework Assignment</p> <p>A. All telework agreements will initially be on a 90-day trial basis, then reviewed every 12 months thereafter, unless terminated earlier in the sole discretion of the City. Agreements may be revisited if changes to operations or the convenience of the City necessitate it. The City has sole discretion to terminate or modify the agreement without notice.</p> <p>B. Employee acknowledges and agrees that teleworking is subject to the discretion of management. Telework will be approved on a case-by-case basis consistent with the eligibility criteria above and the City's decisions concerning teleworking shall not be subject to appeal or grievance.</p> <p>C. Non-exempt employees who receive overtime shall be assigned a work schedule in the telework agreement, including rest and meal breaks ("Work Schedule"). Any deviation from the Work Schedule must be approved in advance, in writing, by the supervisor/management. Non-exempt employees must take meal and rest breaks while teleworking, just as they would if they were reporting to work at their City worksite. Non-exempt employees may not telework outside their normal work hours without prior written authorization from their supervisor/manager. A non-exempt employee who fails to secure written authorization before teleworking outside his or her normal work hours may face discipline in accordance with the City's policy for working unauthorized overtime. Exempt employees may be provided with a schedule of core hours they are required to work and be available, in addition to any other hours they must work to complete their workload.</p> <p>D. Teleworking employees are required to be accessible in the same manner as if they are working at their City worksite during the established telework Work Schedule, regardless of the designated location for telework, or "Alternate Worksite." Employees must be accessible to their supervisor/manager and other City employees via telephone, email, and/or network access and video conferencing software such as Zoom while teleworking to the same extent as their City worksite. Employees shall check their City-related business phone messages and emails on a consistent basis as if working at their City worksite.</p> <p>E. Employees shall work on a full-time basis, according to the Work Schedule. Employees are required to maintain an accurate record of all hours</p>

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	<p>worked at the Alternate Worksite and make that record available to his or her supervisor upon request.</p> <p align="center">F. While teleworking, employees shall adhere to the following:</p> <ul style="list-style-type: none"> <li>i. Be available to the department via telephone, email and video conferencing software such as Zoom during all designated work hours while teleworking.</li> <li>ii. Employees will be visible on camera at all times when participating in video conference meetings.</li> <li>iii. Have the Alternate Worksite be quiet and free of distractions from all household members including pets, just as though the employee was working from the City worksite.</li> <li>iv. Must have reliable and secure internet and wireless access.</li> <li>v. All periods of employees' unavailability must be approved in advance by supervisor/manager in accordance with department policy and documented appropriately on the employee's time card.</li> <li>vi. Employees shall ensure dependent care will not interfere with work responsibilities.</li> <li>vii. Employees must notify their supervisor/manager promptly when unable to perform work assignments because of equipment failure or other unforeseen circumstances.</li> <li>viii. If the City has provided City-owned equipment, employees agree to follow the City's Policy for the use of such equipment. Employees will report to their supervisor/manager any loss, damage, or unauthorized access to City-owned equipment, immediately upon discovery of such loss, damage, or unauthorized access.</li> </ul> <p align="center">5. General Duties, Obligations and Responsibilities:</p> <p>Employees must adhere to the provisions set forth in this Policy and the terms of the Telework Agreement. Any deviation from the agreement requires prior written approval from the City.</p> <ul style="list-style-type: none"> <li>A. All existing duties, obligations, responsibilities, and conditions of employment remain unchanged. Teleworking employees are expected to abide by all City and departmental policies and procedures, rules and regulations, applicable Memoranda of Understanding, and all other official City documents and directives. Employees authorized to perform work at an Alternate Worksite must meet the same standards of performance and professionalism expected of City employees in terms of job responsibilities, work product, timeliness of assignments, and contact with other City employees, clients, and the public.</li> <li>C. Employee's teleworking must adhere to the same standards of grooming and professional attire when participating in virtual video meetings, and be free of distractions.</li> <li>D. Employees should be cognizant of images displayed on their desktop while sharing screens as to not display anything offensive, inappropriate, or confidential.</li> <li>E. Employees shall ensure that all official City documents are retained and maintained according to the normal operating procedures in the same manner as if working at a City worksite.</li> <li>F. The City shall not be responsible for costs associated with the use of computer and/or cell equipment, including energy, data or maintenance costs, internet costs, network costs, home maintenance, home workspace furniture, ergonomic equipment, liability for third party claims, or any other incidental costs (e.g., utilities associated with the employee's telecommuting), as the City makes these services available to employees working in the office and telecommuting is not a job requirement.</li> <li>G. Employees shall continue to abide by practices, policies, and procedures for requests of sick, vacation, and other leaves of absences. Requests to work overtime, declare vacation, or take other time off from work must be pre-approved in writing by each employee's supervisor. If an employee becomes ill while working under a telework agreement, he/she shall notify his/her supervisor immediately and record on his/her timesheet any hours not worked due to incapacitation. Similarly, any personal pursuits and errands must be handled during scheduled rest or meal periods</li> </ul>

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	<p>H. Employees must take reasonable precautions to ensure their devices (e.g., computers, laptops, tablets, smartphones, etc.) are secure before connecting remotely to the City's network and must close or secure all connections to City desktop or system resources (e.g., remote desktop, VPN connections, etc.) when not conducting work for the City. Employees must maintain adequate firewall and security protection on all such devices used to conduct City work from the Alternate Worksite.</p> <p>I. Employees shall exercise the same precautions to safeguard electronic and paper information, protect confidentiality, and adhere to the City's records retention policies, especially as it pertains to the Public Records Act. Employees must safeguard all sensitive and confidential information (both on paper and in electronic form) relating to City work they access from the Alternate Worksite or transport from their City worksite to the Alternate Worksite. Employees must also take reasonable precautions to prevent third parties from accessing or handling sensitive and confidential information they access from the Alternate Worksite or transport from their City worksite to the Alternate Worksite. Employees are not permitted to take permanent files to their approved Alternate Worksite and shall NOT leave their City work or laptop in a vehicle unless it is locked in a trunk. Employees must return all records, documents, and correspondence to the City at the termination of the telework agreement or upon request by their supervisor/manager, department director or Human Resources.</p> <p>J. Employees' salary and benefits remain unchanged. Workers' Compensation laws apply when performing work duties at their Alternate Worksite. Employees who suffer a work-related injury or illness while teleworking must notify their supervisor/manager and complete any required forms immediately. Workers' Compensation benefits will apply only to injuries arising out of and in the course of employment as defined by workers' compensation laws. The City shall not be responsible for injuries or property damage unrelated to such work activities, including injuries to third persons when said injuries occur at the Alternate Worksite.</p> <p>K. All of an employee's existing supervisory relationships, lines of authority, and supervisory practices remain in effect. Prior to the approval of the telework agreement, the supervisor and employee shall agree upon a reasonable set of goals and objectives to be accomplished. The supervisor shall use reasonable means to ensure that timelines are adhered to and that goals and objectives are achieved.</p> <p>L. Any breach of the telework agreement by the employee may result in termination of the agreement and/or disciplinary action, up to and including termination of employment.</p> <p align="center">6. Work Hours</p> <p align="center">All the rules applicable at the City worksite are applicable while teleworking. That is:</p> <p>A. All teleworking employees are required to establish and maintain core work hours, and be at their workstation during the established hours;</p> <p align="center">B. Teleworking employees must perform designated work during scheduled work hours;</p> <p align="center">C. Calendars should be up to date and shared with other co-workers as deemed appropriate by their supervisor/manager;</p> <p align="center">D. Employees may be called to report to the office on a regular telework day for a meeting or other in-office activity;</p> <p>E. Employees must account for and report time spent teleworking the same way they would at the regular worksite, or according to the terms of the telework agreement;</p> <p align="center">F. Non-exempt employees may work overtime only when directed to do so and approved in advance by the supervisor;</p> <p>G. Employees must obtain approval to use vacation, sick, or other leave in the same manner as departmental employees who do not telework; and</p> <p>H. Teleworking employees who become ill or are caring for dependent who is ill must report the hours actually worked, and use accrued leave per City policy for hours not worked.</p> <p align="center">7. Worksite</p> <p>A teleworking employee must designate an Alternate Worksite suitable for performing official business. The employee must perform work in the designated Alternate Worksite when teleworking. Requirements for the Alternate Worksite will vary depending on the nature of the work and the</p>

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	<p>equipment needed, and may be determined by the department. Teleworking employees must work in an environment that allows them to perform their duties safely and efficiently. Employee's telework environment must be free from hazards and meet ergonomic standards. Employees are responsible for ensuring their work areas comply with the health and safety requirements covered in the telework policy. The City and/or department may request photographs of the employee's Alternate Worksite to determine compliance with health and safety rules.</p> <p>The City is not liable for damages to an employee's personal or real property while the employee is working at an Alternate Worksite. Alternate Worksites must be specifically designated, and an employee approved for telework in one location is not necessarily approved for another location. For example, an employee approved for telework from their home may not decide unilaterally to change their worksite to another location (e.g. vacation home, relatives home, coffee shop, etc.), but may request such change, subject to the approval of the department director. Working out of state is prohibited. An employee found to be working out of state will be subject to discipline which could include termination. This provision does not apply to employees required to be out of state due to a family emergency or other short-term stay for a period of two work weeks or less. In such instances, employees must request and receive approval from their supervisor/manager to designate a temporary Alternative Worksite before working in an alternate location other than the approved Alternate Worksite.</p> <p align="center">8. Equipment and Supplies</p> <p align="center">A. City Equipment</p> <p align="center">Equipment, software, or supplies provided by the City are for City business only.</p> <p>A teleworking employee does not obtain any rights to City equipment, software, or supplies provided in connection with teleworking. The employee must immediately return all City equipment, software, and supplies at the conclusion of the teleworking arrangement or at the department's request. The supervisor/manager shall keep track of all these items.</p> <p>A teleworking employee must protect City equipment, software, and supplies from possible theft, loss, and damage. The teleworking employee may be liable for replacement or repair of the equipment, software, or supplies in compliance with applicable laws on negligence or intentional conduct in the event of theft, loss, or damage.</p> <p>Any equipment, software, files, and databases provided by the City shall remain the property of the City. A teleworking employee must adhere to all software copyright laws, and may not make unauthorized copies of any City-owned software. Employees may not add hardware or software to City equipment without prior written approval.</p> <p align="center">Employees have no expectation of privacy in City-provided equipment or applications.</p> <p align="center">9. Security of Confidential Information</p> <p>All files, records, papers, or other materials created while teleworking are City property. Teleworking employees and their supervisors shall identify any confidential, private, or personal information and records to be accessed and ensure appropriate safeguards are used to protect them. A department may require employees to work in private locations when handling confidential or sensitive material. Departments may prohibit employees from printing confidential information in teleworking locations to avoid breaches of confidentiality.</p> <p>Employees may not disclose confidential or private files, records, materials, or information, and may not allow access to City equipment, networks or databases to anyone who is not authorized to have access.</p> <p align="center">Employees are required to ONLY use City-issued email addresses to conduct City business.</p> <p align="center">10. Public Records Act Requests</p> <p>The California Public Records Act regarding public information and public records apply to telecommuting employees. Public records include any writing containing information relating to the conduct of the public's business prepared, owned, used, or retained by the City regardless of physical form or characteristic. Public information means the contents of a public record. Upon receipt of an appropriate request, and subject to authorized exemptions, a telecommuting employee must permit inspection and examination of any public record or public information in the employee's custody, or any</p>

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	portion of a public record, within required time limits. This requirement exists regardless of where the public record is located.
City of Davis	<p align="center">Still working under an “interim” telework policy.</p> <p align="center"><b>PURPOSE</b></p> <p>Teleworking (a.k.a. Telecommuting) is a limited duration arrangement that allows eligible City employees to work in a designated area outside City offices. Teleworking is a cooperative arrangement between employees, supervisors, and employing departments. The teleworking arrangement described in this framework applies City-wide. A City department may have additional teleworking requirements, guidelines, or procedures, provided they are consistent with the intent of this City-wide framework.</p> <p>Teleworking is a privilege, not a right. All City employees who desire to have teleworking arrangements described herein must have their specific agreement pre-approved in writing by their department head.</p> <p>City employees are to meet all the responsibilities, perform all the duties and comply with all the policies that apply to their position, regardless of their work location. Teleworking does not change employee responsibilities, duties, and the terms and conditions of employment.</p> <p>Clear descriptions of each employee classification's responsibilities and roles inform eligibility. Given the City is a public service organization that provides key services directly to the public, not all classifications are suitable for alternative workplace arrangement such as telework. Classifications that require day-to-day access to City-owned premises or specialized equipment or on-site workflows, as well as those dependent on the frequency of in-person interactions with the public and/or other staff, are not conducive to teleworking arrangements. Employees within the same classification may not be eligible for telework based on the requirements of their specific duties or assignment, as well as the employee's individual capabilities and departmental needs.</p> <p>The intent of this framework is not to establish full-time telework for each employee approved. The City believes in the benefits to in-person interactions and collaboration with fellow employees. This teleworking arrangement includes required attendance in-office and on other City-owned premises. The purpose of this policy is to provide guidance for:</p> <ol style="list-style-type: none"> <li>(1) eligibility for teleworking and terms of participation;</li> <li>(2) professional standards and evaluation;</li> <li>(3) use of and responsibility for City equipment and resources;</li> <li>(4) use of personal equipment;</li> <li>(5) establishing and maintaining a suitable workspace;</li> <li>(6) ensuring that all teleworking arrangements are in full compliance with applicable laws governing workplace safety, employee rights and responsibilities, and City of Davis policies.</li> </ol> <p>The City of Davis believes that staff benefit from regular workplace interaction with co-workers. Casual face-to-face interaction promotes informal sharing of information, mentoring, and establishment of relationships with co-workers thereby promoting a cohesive team environment. Besides the interpersonal benefits of in-office collaboration, the City, above all, is a service organization for the benefit of the community which we serve. The City Council supports the goals of sustainability through reduction in commute trips and other benefits of telecommuting, but equally supports the benefits of consistent and regular in-person workplace interactions. Therefore, the privilege of telecommuting is not expected to be granted for more than 50% of an employee's work schedule (by pay period). Requests to work a telework schedule of more than 50% of the employee's work schedule may be considered under exceptional circumstances requiring approval of both the Department Head and the City Manager.</p> <p align="center"><b>I. ELIGIBILITY</b></p> <p>Eligibility is based primarily on the employee classification's responsibilities and functions. Employees and classifications eligible for teleworking must</p>

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	<p>not require physical presence at a City of Davis office location to fulfill roles, perform job duties, complete tasks, or support a team or group when in-person interaction is necessary. In addition, the employee or classification must not require access to specialized City assets. Additional eligibility criteria shall be considered to grant approval of a request for teleworking. These additional criteria are based on the following, but are not limited to:</p> <p>Situational Eligibility: whether a teleworking arrangement serves the purpose of this policy and supports City-wide protective measures during the pandemic period.</p> <p>Classification Eligibility: whether the employee's absence from the primary onsite work location will disrupt the workflow of other employees and/or overall management of the City of Davis or any Department.</p> <p>Employee Eligibility: completion of required probation or trial periods (unless waived); not subject to any disciplinary actions or performance remediation programs; past work performance shows reliable and responsible performance of work duties over time; demonstrated understanding of work output and expectations of performance between employee and supervisor in addition to the requirements of this policy.</p> <p>Alternative Workspace Eligibility reliable and suitable alternative work space for performing professional work and official business (i.e. an environment where the employee can furnish a dedicated, ergonomically-appropriate workspace, with limited distractions, privacy, and ability to connect to the internet, etc.) The City will make efforts to provide reasonable accommodations to employees with a known disability, and will follow its obligations under the ADA and FEHA. However, the City cannot guarantee that it can provide the same reasonable accommodation in an alternative workspace as it could in a City office or on other City premises. Therefore, it is possible that the City will be able to accommodate an employee with a known disability in a City work location but not at an alternative workspace. Any employee who requires an accommodation should speak with Human Resources staff. Department Heads may use other reasonable criteria in addition to these examples, so long as such criteria is clearly defined and used equitably across the department. A request to telecommute may be initiated by either the employee or the employee's supervisor.</p> <p>Employee participation in telecommuting is determined at the discretion of the employee's Department Head. Since the teleworking arrangement is a privilege, the City of Davis has the right to refuse to make telecommuting available to any employee. The City of Davis has no obligation to approve an eligible employee to telecommute based on approval of another employee under the same classification.</p> <p>Management has the discretion to change or eliminate telecommuting arrangements to meet the City's operational needs, or at the employee's reasonable request.</p> <p align="center"><b>II. WORK SCHEDULE</b></p> <p>This policy does not grant full-time telework for each employee approved. This teleworking arrangement requires attendance in-office or on other City-owned premises determined prior to approval of employee participation. The City and Department Heads may require employees approved for teleworking to spend a minimum number of work days per week or per pay period at their primary onsite work location.</p> <p>All teleworking work schedules are at the Department Head's discretion. The work schedule shall be consistent with the operational needs of the employee's work group, department and overall management of the City of Davis. Absent agreement on telework schedule, the employee's primary worksite will remain on City premises. Approved employees may only break from their established telework schedule based on: Unforeseen emergency event or operational needs that may demand the presence of the employee, with or without advance notice. Management shall attempt to provide as much notice as possible to the employee in such an event. Delays in repair or replacement of an inoperable telework workspace set-up.</p> <p>Upon request or prior approval by the Department Head, to be granted at the Department Head's sole discretion.</p> <p>To ensure continuity of operational needs, an employee scheduled to work remotely may have their schedule revised to be onsite for purposes of coordinating coverage during the absence of other staff members. In such instances, the department head will provide as much prior notice as practical of the work location change and expected duration. Teleworking arrangements are separate from flexible work schedules such as a 9/80 work schedule. Eligibility and/or approval for telework does not limit employee from participating in a flexible work schedule, but also does not guarantee a flexible</p>



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	<p>schedule. Approved teleworking arrangements as described herein are designed for a consistent work schedule. This teleworking framework does not apply to ad hoc needs for temporary telework triggered by occasional work situations, emergencies of a personal or public nature, inclement weather, or business travel.</p> <p align="center"><b>III. RESPONSIVENESS</b></p> <p>Employees approved for telework shall maintain regular contact with supervisors and co-workers by phone and e-mail while they are teleworking. Unless granted express permission by the employee's department head or their designee, employees shall expect to adhere to a regular workday schedule as if they were present in the office, and shall be in communication by phone and e-mail during those hours.</p> <p>Supervisors and employees should also arrange when and how to contact each other on days and hours scheduled for teleworking. Employees must agree to respond to phone, voicemail and/or text messages within the time window agreed with their manager. Employees are expected to be available and responsive to customers' and co-workers' calls or emails during their regularly scheduled work hours. Supervisors may require additional contact to facilitate management of the remote working arrangement. Eligible employees approved for telework must arrange for child or dependent care as necessary for the work hours in which the employee works in their teleworking site. Teleworking does not allow for child or dependent care during work hours. Eligible employees approved for telework must not perform personal tasks or errands during the employee's scheduled work hours unless performed during scheduled breaks and lunches.</p> <p align="center"><b>IV. MEETINGS AT THE TELEWORK SITE</b></p> <p>Employees approved for telework are not permitted to conduct work-related meetings at their telework worksites. Meetings must be conducted either on City-owned sites or through tele/videoconferencing platforms. Absent express written authorization from the employee's supervisor, no other City of Davis employee is permitted to conduct City of Davis business at the remote worksite.</p> <p align="center"><b>V. BENEFITS AND COMPENSATION</b></p> <p>All benefits and compensation will be based on the employee's classification. No benefit and compensation distinctions are made between employees eligible or approved for teleworking and employees who are not. All applicable contracts, agreements and policies governing an employee's position shall continue to apply in the teleworking program. Employees who are subject to overtime shall continue to follow applicable contract provisions and City policy regarding overtime. No employee shall work more than their regularly scheduled work hours and/or incur overtime without prior authorization by the employee's supervisor. When completing timekeeping records, the employee is responsible for accurately recording time worked on the day in which the hours are worked and recording all actual time worked.</p> <p align="center"><b>VI. CITY OF DAVIS POLICIES</b></p> <p>Employees who telework are bound by all City of Davis policies as if they were working onsite and/or on City of Davis property. This includes policies governing appropriate conduct in the workplace and towards one's fellow employees, regardless of working location. Any employee who violates any of the City of Davis's policies while teleworking shall be subject to revocation of their teleworking arrangement, in addition to any disciplinary measures that would be taken if the employee was working onsite.</p> <p align="center"><b>VII. HEALTH AND SAFETY</b></p> <p>The City of Davis is committed to ensuring a safe worksite in compliance with the rules and guidelines set forth by the Division of Occupational Safety and Health (Cal/OSHA). Alternative work locations must be specifically designated, and an employee approved for telework in one location is not necessarily approved for another location. For example, an employee approved for telework from their home may not decide unilaterally to change their worksite to another location (e.g., a relative's home or coffee shop), but may request such change, subject to the approval of the department head. Generally, requests to work out of state will not be approved, however exceptions will be considered on an individual basis. An employee found to be working out of state without prior approval may be subject to discipline. This provision does not apply to employees required to be out of state (e.g., due to family emergency or other short-term stay) for a period of two work weeks or less. In such instance, employees must provide notice to their</p>



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	<p align="center">supervisor that their primary remote worksite will change to a different location for that given period.</p> <p align="center"><b>Workspace and Worksite Environment</b></p> <p>Employees who telework are responsible for designating a single workspace location as their teleworking worksite. The employee's direct supervisor or other designated manager shall review the applicable health and safety rules for workspace set up with the employee. The employee must complete a checklist and certify in writing that their teleworking workspace and worksite meets all of the requirements for a safe and healthy work environment. The employee must also certify in writing that, should any condition arise at the worksite so that the health and safety requirements are no longer met, or if any other hazardous condition occurs, the employee will notify their supervisor immediately and cease working at the teleworking worksite until the condition has been remediated. The employee shall not be permitted to resume teleworking from the worksite without the express authorization of their supervisor.</p> <p>Upon a minimum of 24-hours' notice, the City has the right to inspect the employee's designated worksite solely to determine if it meets the requirements of this policy. If the employee refuses such a request, they may not be allowed to continue telecommuting. Alternatively, inspection may also be conducted by way of video or other virtual means. The City and Department Heads reserve the right to refuse or rescind a teleworking agreement based on the employee's failure to adhere to the guidelines above, or if a supervisor or other manager makes the reasonable assessment that the employee's worksite poses a health or safety risk.</p> <p>If an employee incurs an injury or illness in the course or scope of employment while telecommuting, Workers' Compensation laws apply. Employees must immediately notify their supervisor and complete all necessary paperwork as required by the City of Davis.</p> <p>Injury or illness caused by actions not directly related to the approved telework worksite will not be covered under Workers' Compensation. These non-covered actions include, but are not limited to, all actions that the employee would not be able to perform in their City of Davis office, such as caring for children or dependents, domestic tasks, personal errands and interacting with non- City of Davis employees for non-business purposes.</p> <p>The City of Davis shall in no instance be liable for injuries to third persons, including members of the employee's family, who enter the employee's worksite or otherwise interact with the employee or use their home office equipment.</p> <p>Employees with disabilities and who are eligible for telework shall be entitled to the same rights they would be entitled to under all applicable state and federal laws and City of Davis policy. In some instances, compliance with the health and safety provisions of this policy and as required by law will not allow for the reasonable accommodations requested by employees with disabilities. In situations where the provision of a reasonable accommodation at the alternative worksite would compromise the employee's health and safety, such accommodation may be denied. In other situations, telework may be provided as a reasonable accommodation with medical certification of a disability or serious medical condition and following an interactive process discussion. The granting of a specific accommodation to one employee does not guarantee that the same accommodation can be provided to another employee.</p> <p align="center"><b>VIII. PERFORMANCE STANDARDS AND EVALUATION</b></p> <p>An employee participating in a teleworking arrangement is accountable under the same performance standards as City of Davis employees working on City-owned premises. As in City-owned office assignments, supervisors and employees should discuss and understand deadlines and rates of productivity, caliber of time management, and ability to prioritize during the scheduled teleworking hours. Employee performance must remain satisfactory or above to participate in the teleworking program, and is revocable at any time due to performance concerns. Some employees will perform at a higher level when they are at a City worksite, and therefore good performance onsite does not guarantee that an employee will be approved to work at an alternative location.</p> <p align="center"><b>IX. BUSINESS EXPENSES AND REIMBURSEMENT</b></p> <p>Employees will not be reimbursed for expenses unless they are normally reimbursable pursuant to City of Davis policies. Such non-reimbursable expenses include, but are not limited to, utility costs, personal computer repair or replacement, optional purchase of office equipment or furniture, and</p>

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	<p>travel to and from the City of Davis worksite if required to be onsite. Both the remote worksite and the City worksite will be considered the "primary worksite," and an employee who telecommutes will not be reimbursed for travel time when they are required to work on site at the City for a full day. For this reason, splitting one work day between a City worksite and remote worksite is prohibited unless by exception. Exceptions involving direct travel between worksites will result in travel time being compensable time. Exceptions by employee request for purposes of addressing personal appointments or other personal business as part of the time between working at different worksites does not result in compensable time. Employees who telework should not purchase home office equipment, and may use City of Davis office equipment and supplies at any time, according to need. An employee who teleworks is allowed to come to City of Davis's office to use printing and copying equipment, administrative assistance, or other office resources to which the employee would have access if they were working on City premises. With the advance approval of the employee's supervisor, employee who telework may be permitted to take City of Davis office supplies to their remote worksite to facilitate productivity. Such supplies may include printer paper, pens and pencils, or other miscellaneous office-related items. Employees should not remove any item from City of Davis property to use off site without the express permission of their supervisor.</p> <p><b>X. USE OF PERSONAL COMPUTERS, SMART PHONES AND OTHER TECHNOLOGY</b> Employees must adhere to City of Davis information security standards. Employees who use their personal computers or devices shall take reasonable measures to protect the confidentiality and security of city systems and documents and adhere to City of Davis information security standards. Any City equipment provided to an employee for telework purposes remains the property of the City, and must be returned to the City immediately upon request, and in all cases prior to the final day of employment. Employees agree to take all necessary precautions to protect City equipment loaned to them. The equipment shall not be used for personal purposes, or by any other person (e.g., family members, guests, other employees). In the event an employee is unable to protect the equipment from damage, or if damage - even if minor - occurs more than once, the City reserves the right to revoke the telecommuting privilege.</p> <p>Employees may access systems available on the internet from a personal computer or device (publicly available systems) but may not access the private city network from a personal computer or device. Personal email accounts should not be used for any City business or communications. USB "Thumb" drives or other external storage devices are not to be shared between City and non-City computers due to risk of passing a virus to the City system.</p> <p>Any and all policies governing employee usage of City of Davis computers, internet connections and mobile devices shall apply to employees who telework when they are using their personal equipment in the course and scope of employment, and when they are using City of Davis technology at any time.</p> <p>In the event of a public records request where City business has been conducted on a personal device, such personal device may be subject to inspection or duplication, in accordance with applicable law.</p> <p align="center"><b>XI. EQUAL OPPORTUNITY</b></p> <p>This policy does not alter the City of Davis's commitment to maintaining an equal opportunity, discrimination-free workplace. All City of Davis policies, as well as all state and federal laws, governing the City of Davis's anti-discrimination policy apply uniformly to employees who telework or work on City office premises.</p> <p align="center"><b>XII. HARASSMENT-FREE WORKPLACE</b></p> <p>This policy does not alter the City of Davis's commitment to maintaining a harassment-free workplace. All City of Davis policies, as well as all state and federal laws, governing the City of Davis's anti-harassment policy apply uniformly to telecommuting and onsite employees.</p> <p>Any employee who feels he or she has been subjected to harassment in the course of performing City of Davis business should report the incident in accordance with the City of Davis's anti-harassment policy. Investigations of alleged harassment shall be conducted in the same manner for teleworkers as for onsite employees, regardless of where the incident occurred.</p> <p align="center"><b>XIII. PROCEDURE</b></p> <p>Employees who wish to telework are encouraged to contact their immediate supervisor to discuss the feasibility of such an arrangement. Employees will complete the Teleworking Application, completing guidelines and eligibility checklists as well as indicating their proposed schedule. Same-day requests</p>

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	<p>or situational telework cannot be granted unless the employee has already certified to a safety-compliant worksite and discussed information security with his or her supervisor.</p> <p>All teleworking arrangements are subject to ongoing review and may be revoked at any time. Nothing in this policy shall grant employees who telework any rights they would not have if working on City premises, nor shall it limit their rights under all applicable City of Davis policies and state and federal laws. Telework arrangements are considered temporary. The telework agreement shall be renewed annually, or more frequently at the City's discretion. This policy is effective immediately upon release and will continue until such time as revoked by City Manager action.</p> <p align="center">XIV. DISASTER SERVICES WORKER</p> <p>All City employees are designated as disaster services worker and shall remain available to return to City premises worksite with 24 hours' notice or as required by their department head, unless otherwise on approved leave.</p>
City of Folsom	The City does not have a permanent telework policy.
City of Lincoln	There is no official telework policy at this time. Positions are at-work on a regular basis and any regular telework schedule requests are considered individually.
City of Roseville	<p>We have a Hybrid Remote Work Policy that tentatively became effective last May thinking staff were partially going to return in June, but then we continued operating under our Limited-duration Telework policy. I'm understanding the City will likely be lifting the Emergency Orders due to COVID-19 at the end of June, so the following will be implemented soon.</p> <p>SUBJECT: Hybrid Remote Work Policy</p> <p>PURPOSE</p> <p>One of the City Council's top priorities is Delivering Exceptional City Services. To deliver exceptional City of Roseville (City) services requires creating the conditions in which the staff who deliver these services can be successful while also benefiting the organization as a whole. In a pandemic that necessitated remote work where practicable, the remote-work arrangement proved effective. Beyond the pandemic, instead of returning to requiring all staff to work onsite every day, a hybrid option is being offered for eligible employees, which allows combining onsite work with remote work. Remote work is a voluntary arrangement that allows eligible City employees to request to work in a designated area outside the office. Where approved, remote work is a cooperative arrangement between employees, supervisors, and employing departments.</p> <p>Remote work benefits employees, departments, and the community. Benefits include:</p> <ul style="list-style-type: none"> <li>• Ability to function during an emergency when the regular worksite is inaccessible</li> <li>• Potential for increased productivity</li> <li>• Efficient use of City resources, including office space</li> <li>• Recruitment and retention of highly qualified employees</li> <li>• Greater flexibility for employees and departments</li> <li>• Improved employee morale and job satisfaction</li> <li>• Reduced employee commute time and costs</li> </ul> <p>Onsite work benefits employees, departments, and the community in ways that include:</p> <ul style="list-style-type: none"> <li>• Comprehensive communication unfettered by limitations of technology</li> <li>• Serendipitous, unscheduled collaboration</li> </ul>

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	<ul style="list-style-type: none"> <li>• Ongoing sharing of institutional knowledge and areas of expertise</li> <li>• Greater understanding of expectations, job requirements, and how to get things done in the organization and community</li> <li>• Recruitment and retention of highly qualified employees</li> <li>• Reinforcement of core values and sense of commitment to a common mission</li> <li>• Improved employee morale and job satisfaction</li> <li>• Interactions with a broader variety of staff and the community, which facilitate professional growth</li> </ul> <p>It is for these reasons that a hybrid option, combining both remote and onsite work is offered.</p> <p>The Hybrid Remote Work Policy applies citywide and is made available to all eligible employees in their respective departments upon Department Head approval, subject to City Manager/designee's authorization.</p> <p>POLICY-Remote work is neither an entitlement, nor a vested right. It is a tool to allow for flexibility in work options where the work is conducive to remote work. Options will vary among specific job classifications and department needs/requirements. Not all City employees perform work that will qualify for remote work. Remote work does not change the duties, obligations, responsibilities, or terms and conditions of City employment. Remote workers must comply with all City rules, policies, practices, applicable MOUs, approved work schedules, and instructions.</p> <p>All City employees who request to work remotely must have an approved Hybrid Remote Work Agreement under this Policy. A City department may have additional remote work requirements, guidelines, or procedures, provided they are consistent with the intent of this Policy. Employees must read the Hybrid Remote Work Policy and guidelines and submit a Hybrid Remote Work Application and Agreement and Hybrid Remote Work Safety Checklist and Self-Certification through the departmental approval process.</p> <p>The City Manager/designee or a Department Head may deny, end, or modify a Hybrid Remote Work Agreement at any time with written notice for any business reason that is not arbitrary or capricious. Similarly, a remote worker may end or request to change a Hybrid Remote Work Agreement at any time (for requests to modify the arrangement but continue remotely working, Department Head approval is required). Employees may be removed from the Hybrid Remote Work Program if they do not comply with the terms of their remote work agreements or, if in the sole discretion of their respective Department Head, the work being performed remotely is no longer appropriate to be performed remotely or for any other legitimate business, operational, or personnel-based reason.</p> <p>A remote worker must perform work during scheduled remote work hours. Employees may not engage in activities while working remotely that would not be permitted at the regular worksite, such as child, elder, or other dependent care. Remote workers may take care of personal business during standard break periods, as they would at the regular worksite.</p> <p>Following approval, remote workers are required to comply with the terms of their Hybrid Remote Work Program Agreement and must be accessible and readily available via telephone, video-conference and e-mail, just as they are when working at the main work site.</p> <p>It is the employee's responsibility to be aware of their work commitments and to make necessary arrangements to attend all meetings while working remotely. When appropriate, meetings can be attended via telephone, video-conference, or other electronic means. At the supervisor or manager's discretion, employees may be required to report to a central workplace as needed to attend work-related meetings or other events.</p> <p>The Hybrid Remote Work Policy is generally intended to be cost neutral and the City assumes no responsibility for the set up or operating costs of working remotely, as the employee has volunteered for the benefits of working remotely. The City shall generally not be responsible for personal costs that are associated with remote work, including but not limited to energy, data or maintenance costs, network costs, home maintenance, home</p>

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	<p>workspace furniture, ergonomic equipment, liability for third party claims, or any other incidental costs (e.g., utilities associated with the employee's remote work). Exceptions will be evaluated on a case-by-case basis as needed.</p> <p>Departments have the sole discretion to provide equipment, software, or supplies, or allow employees to use their personal equipment while working remotely. Departments providing equipment, software, or other supplies to remote workers must reasonably allocate those resources based on operational and workload needs and must notify and work with the Information Technology Department (IT) when allowing use of City resources outside of City property.</p> <p>All City rules regarding the use of computers and the internet apply while an employee is working remotely, regardless of whether the employee is using City-provided or personal equipment.</p> <p>There is no change to existing compensation or benefits due to remote working. Any tax implications due to remote work are the remote worker's responsibility.</p> <p>Any breach of this Policy or the associated agreement by the employee may result in termination of the arrangement and agreement and/or disciplinary action, up to and including termination of employment.</p> <p><b>ELIGIBILITY</b></p> <p>Eligibility for remote work is based on both the position and the employee. Not every position or every employee is well suited and/or eligible for remote work. The Department Head and City Manager/Designee has the absolute discretion to determine whether a position/employee is eligible to work remotely, utilizing criteria that includes, but is not limited to the following:</p> <p><b>A. Position Eligibility</b></p> <p>An employee's position may be suitable for remote work when the job duties:</p> <ul style="list-style-type: none"> <li>• Are independent in nature and remote work will not negatively impact the workload of others.</li> <li>• Are primarily knowledge-based.</li> <li>• Lend themselves to measurable deliverables.</li> <li>• Do not require frequent interaction at the regular worksite with supervisors, colleagues, clients, or the public, in person or by phone. (For example, classifications which are the first point of contact at a public counter, or which must supervise the work of others in person, may not be suitable for working remotely.)</li> <li>• Do not require the employee's immediate presence at the regular worksite to address unscheduled events, unless alternative arrangements for coverage are possible.</li> <li>• Are not essential to the management of on-site workflow.</li> </ul> <p><b>B. Employee Eligibility</b></p> <p>Employees may be suitable for remote work when they have demonstrated, as determined by the supervisor:</p> <ul style="list-style-type: none"> <li>• Dependability and responsibility</li> <li>• Effective communication with supervisors, coworkers, and customers</li> <li>• Demonstrated motivation</li> <li>• The ability to work independently</li> <li>• A consistently high rate of productivity</li> </ul>

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	<ul style="list-style-type: none"> <li>• A high level of skill and knowledge of the job</li> <li>• The ability to prioritize work effectively</li> <li>• Good organizational and time management skills</li> </ul> <p>Other considerations include, but are not limited to: the employee’s ability to create a functional, reliable, safe, and secure remote workplace; the risk factors associated with performing the employee’s job duties from a location separate from the regular worksite; the ability to measure the employee’s work performance from a location separate from the regular worksite; the employee’s supervisory responsibilities; the ability to maintain effective working relationships; other considerations deemed necessary and appropriate by the employee’s immediate supervisor, Department Head, and the City Manager/ Designee.</p> <p>Employees who are not upholding City obligations, such as meeting acceptable performance or conduct expectations and standards, as determined by the supervisor/manager, are not eligible to work remotely under this Policy. Employees must have been rated as at least “Meets Expectations” in all competencies on their most recent performance evaluation in order to qualify for remote work. If an employee is marked “Below Expectations” in any competency and is subsequently placed on a Performance Improvement Plan (PIP), remote work can be suspended until performance improves.</p> <p>Disciplinary action, including Memos of Counseling and higher levels of discipline and/or being placed on a PIP within the last 12 months may preclude an employee from being able to work remotely. Similarly, if an employee is working remotely and is the subject of disciplinary action, the Remote Work agreement will automatically end.</p> <p><b>AGREEMENT OPTIONS</b></p> <p>Hybrid Remote Work Agreements are voluntary and can be on a long-term or short-term basis, regular and recurring, an occasional basis, or any combination thereof.</p> <p>Regular and recurring means an employee works away from the regular worksite on a recurring schedule (i.e., specified day or days). This should generally not be more than three days per week, unless project specific or for other department driven needs.</p> <p>Employees who work remotely on a regular and recurring basis must be available to work at the regular worksite on remote workdays if needed. Employees must obtain prior authorization to change a regularly scheduled remote workday. Remote workers will not, under any circumstances, be paid for commute time.</p> <p>Occasional remote work means an employee works away from the office on an infrequent, one-time, or irregular basis. This option provides an ideal arrangement for employees who generally need to be in the office, but who sometimes have projects, assignments, or other circumstances that meet the eligibility criteria.</p> <p><b>WORK HOURS</b></p> <p>All the rules applicable at the regular worksite are applicable while working remotely. That includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Remote workers must perform designated work during scheduled work hours.</li> <li>• Employees must account for and report time spent working remotely the same way they would at the regular worksite, or according to the terms of the remote work agreement.</li> <li>• Employees may work overtime only when directed to do so and approved in advance by the supervisor.</li> <li>• Employees must obtain approval to use vacation, sick, or other leave in the same manner as departmental employees who do not work remotely.</li> <li>• Remote workers who become ill must advise their supervisor and report the hours actually worked, and use sick leave for hours not worked.</li> </ul>

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	<p><b>WORKSITE</b></p> <p>A remote worker must designate a work area suitable for performing official business. The employee must perform work in the designated area when working remotely.</p> <p>Remote workers must work in an environment free of distractions that allows them to focus and perform their duties safely and efficiently. Employees are responsible for ensuring their work areas are ergonomic and comply with the health and safety requirements covered in the Remote Work Policy/guidelines/etc. The City and/or department may request video tours of the employee's designated work area to determine compliance with health and safety rules. The remote worker must complete the associated Remote Work Safety Checklist and Self-Certification form to ensure compliance.</p> <p>Employees are covered by workers' compensation laws when performing work duties at their designated alternate location during regular work hours. Employees who suffer a work-related injury or illness while working remotely must notify their supervisor immediately.</p> <p>The City is not liable for injury to the remote worker that occurs outside of working hours or while not conducting City work. The City is not be liable for damage to an employee's personal or real property while the employee is working at an alternate worksite. The City is not liable for injury to the remote worker's family members, or others within or around the remote worker's home.</p> <p><b>EQUIPMENT AND SUPPLIES</b></p> <p>A remote worker must have a suitable desk/work area and chair to work ergonomically safe and without disruption. A remote worker must identify the equipment, software, supplies, and support required to successfully work at an alternate location, and must specify those items in the remote work application, and complete the agreement form. If the department does not provide the needed equipment, software, supplies, or support, and the employee does not have them, the employee will not be eligible to work remotely. The department will coordinate with the Chief Information Officer/Designee to review and approve equipment and software as it relates to network safety and security, as well as track and monitor City-owned equipment utilized by a remote worker.</p> <p>Remote workers must immediately contact their supervisors if equipment, connectivity, or other problems prevent them from working remotely.</p> <p><b>A. City Equipment</b></p> <p>Equipment, software, or supplies provided by the City are for City business only.</p> <p>A remote worker does not obtain any rights to City equipment, software, or supplies provided in connection with working remotely. The employee must immediately return all City equipment, software, and supplies at the conclusion of the remote work arrangement or at the department's request.</p> <p>A remote worker must protect City equipment, software, and supplies from possible theft, loss, and damage. The remote worker may be liable for replacement of supplies or repair of the equipment due to negligence or intentional conduct that results in theft, loss, or damage. Depending on the circumstances, a remote worker may be disciplined and/or may be allowed to voluntarily agree to pay for repair or replacement of supplies or equipment at the discretion of the City Manager. Any repairs or required maintenance on City-owned equipment will require the item be physically brought into the IT or the employee's primary workplace if the issue cannot be resolved remotely by IT staff.</p> <p>Any equipment, software, files, and databases provided by the City shall remain the property of the City. A remote worker must adhere to all software copyright laws, and may not make unauthorized copies of any City-owned software. Remote workers may not add hardware or software to City equipment without prior written approval.</p> <p><b>B. Personal Equipment</b></p>



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	<p>Employees who use their personal equipment for Remote Work are responsible for the installation, repair, and maintenance of the equipment and to ensure that the proper programs, protections and access are utilized to protect the City's IT network.</p> <p>In the event of a Public Records Act Request, the remote worker is required to provide to the City any responsive records stored on a personal computer, system, or device. For more information, reference the Public Records Act Compliance section of the Policy.</p> <p><b>SECURITY OF CONFIDENTIAL INFORMATION</b></p> <p>All files, records, papers, or other materials created while working remotely are City property. Remote workers and their supervisors shall identify any confidential, private, or personal information and records to be accessed and ensure appropriate safeguards are used to protect them. A department may require employees to work in private locations when handling confidential or sensitive material. Departments may prohibit employees from printing confidential information in remote work locations to avoid breaches of confidentiality.</p> <p>Remote workers are required to log off the City network when not in use and secure equipment when left unattended. Remote workers may not disclose confidential or private files, records, materials, or information, and may not allow access to City networks or databases to anyone who is not authorized to have access.</p> <p>Remote workers are not to store City documents or materials on their personal computer or device or use their personal e-mail accounts to transfer documents. All materials should be stored on an Office365 account or City network. Remote workers are required to follow all record retention/management and document disposal policies (in particular AR 1.08 and AR 1.10) for all associated documents and work products.</p> <p>In the event of an incidence of hacking or any compromise of City data and network systems, the remote worker must notify their supervisor and the IT department immediately.</p> <p><b>PUBLIC RECORDS ACT COMPLIANCE</b></p> <p>The California Public Records Act regarding public information and public records applies to Remote workers. (See Administrative Regulations, including, but not limited to A. R. 1.04 and 1.04.2.) Public records include any writing containing information relating to the conduct of the public's business prepared, owned, used, or retained by the City regardless of physical form or characteristic. Public information means the contents of a public record. Upon receipt of an appropriate request, and subject to authorized exemptions, a remote worker must permit inspection and examination of any public record or public information in the employee's custody, or any segregable portion of a public record, within required time limits. This requirement exists regardless of where the public record is located.</p> <p><b>PROCEDURES</b></p> <p>Employees must complete the following steps to request to work remotely before beginning to work remotely:</p> <ol style="list-style-type: none"> <li>1. Talk with their supervisor to determine eligibility</li> <li>2. Complete the following: <ol style="list-style-type: none"> <li>a) Read and agree to the Hybrid Remote Work Program Policy</li> <li>b) Read and agree to comply with the Hybrid Remote Work Technical Guidelines, all applicable MOUs, overtime policies, City policies/procedures and Administrative Regulations, specifically A.R. 1.04 - Computer &amp; Network Acceptable Use Policy, A. R. 1.04.2 - Email Use, Retention Policy and Remote Email Access, A. R. 1.08 Records Storage and Destruction Policy/Procedure, A. R. 1.10 Disposal of Paper Records Containing Confidential or Sensitive Information, and A. R. 6.13 - Cellular Phone and Smart Device Policy</li> </ol> </li> <li>3. Complete the Hybrid Remote Work Application and Agreement form and the Hybrid Remote Work Safety Checklist and Self-Certification form.</li> <li>4. Upload form in Oracle (Me/Personal Information/Document Records; +Add) with Document Type "Hybrid Work Agreement." The request will</li> </ol>



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	<p>be routed via workflow to the Supervisor, Department Head, IT and HR for approval.</p> <p>5. Once the approval process has been completed, the Supervisor and Employee will receive notification from Oracle of the approval.</p> <p>DENIAL OF APPLICATION-The City's Hybrid Remote Work Policy is not subject to the grievance procedures in any Memorandum of Understanding or Personnel Rules, or to any other review or appeal procedures. The decision of the Department Head and City Manager/designee to deny an application for remote work is final and also not subject to grievance or appeal.</p>
City of Sacramento	<p>TELECOMMUTING PROGRAM- The Telecommuting Program shall be governed by the policies and procedures described below.</p> <p align="center">1. General</p> <p>The program shall be effective May 1, 1995, and requires the agreement as set forth in the attachments. Telecommuting is voluntary and requires cooperation from the supervisor as well as commitment from the telecommuter.</p> <p align="center">2. Program Participation</p> <p>The following full-time represented employees are eligible to participate in the program:</p> <ul style="list-style-type: none"> <li>• Represented personnel covered by a labor agreement which permits telecommuting</li> <li>• Unrepresented Confidential/Administrative personnel</li> </ul> <p align="center">3. Working Hours</p> <p>The workday shall be at least eight hours with no more than four workdays per week telecommuting. The telecommuting and daily work hours schedule must be arranged between the employee and the supervisor. The means and frequency of communication with the office must be established.</p> <p align="center">4. Measurement of Work Activity</p> <p>The program shall be effective May 1, 1995, and requires the agreement as set forth in the attachments. Telecommuting is voluntary and requires cooperation from the supervisor as well as commitment from the telecommuter.</p> <p align="center">5. On-Site Visits to the Work Area</p> <p>The telecommuter shall set aside a designated work area in the home. A City representative may make on-site visits to the telecommuter's residence to determine that the worksite is acceptable, safe and free from hazards.</p> <p align="center">6. Equipment and Supplies</p> <p>Employees who telecommute must provide any required equipment, which may include a computer. The employee is responsible for repair and maintenance of the equipment. Office supplies shall be provided by the City.</p>

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	<p align="center"><b>7. Participation in Telecommuting Studies</b></p> <p align="center">Employees who telecommute will participate in all studies, inquiries, reports and analyses relating to telecommuting.</p> <p align="center"><b>8. Overall Obligation</b></p> <p align="center">Telecommuters are obligated to comply with all Department rules, policies, practices, and instructions. The violation of any of these may result in a removal from telecommuting and/or disciplinary action, up to and including termination of employment.</p> <p align="center"><b>9. Employee Benefits</b></p> <p align="center">There is no change to existing benefits due to telecommuting. Requests to use sick leave, vacation or other paid or unpaid leave must be approved by the telecommuter's supervisor in the same manner as if the person was in his/her office. Tax deductions and implications due to telecommuting are the employee's responsibility.</p> <p align="center"><b>10. Costs of Telecommuting</b></p> <p align="center">The supervisor shall authorize reimbursement for approved additional cost attributable to the City associated with telecommuting.</p> <p align="center"><b>11. Data Security</b></p> <p align="center">Appropriate arrangements must be made to ensure the safety and security of City data.</p> <p><b>TELECOMMUTING AGREEMENT-</b> In order for the telecommuting program to operate smoothly, it is important that telecommuters and supervisors have a clear understanding of their roles. This agreement is intended to set forth the understanding between the telecommuter and supervisor. By participating in the telecommuting program, the City and the employee understand and agree to the following conditions:</p> <p align="center"><b>A. General</b></p> <ol style="list-style-type: none"> <li><b>1.</b> At the discretion of the City, telecommuting is a voluntary work assignment which must have the mutual agreement of both the City and the employee. For a telecommuting assignment to be successful, it must continue to meet the needs of the City and the employee.</li> <li><b>2.</b> The duties, obligations, responsibilities, and conditions of a telecommuter's employment with the City shall remained unchanged.</li> <li><b>3.</b> The security and confidentiality of any City work brought to the telecommuting work site shall be maintained at all times by the employee.</li> <li><b>4.</b> The employee shall comply with all City and Department rules, policies, practices, and instructions. Violation of such may result in preclusion from telecommuting and/or disciplinary action, up to and including termination of employment.</li> <li><b>5.</b> The employee will report to work at the City worksite at least one day per week.</li> </ol>

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	<p align="center"><b>B. Termination</b></p> <ol style="list-style-type: none"> <li data-bbox="514 269 1986 431">1. The telecommuting assignment may be terminated by either the supervisor or the employee. Telecommuting is not an employee benefit, but is an alternative method of meeting the needs of the City. Since employees do not have a right to telecommute, the assignment can be terminated any time it is determined that the City's needs are not being met. Similarly, employees do not have an obligation to telecommute and may return to the conventional office arrangement if they wish to withdraw from the telecommuting program.</li> <li data-bbox="472 477 1986 574">2. A telecommuting arrangement may be terminated by the supervisor or by the employee upon submission of written notice to the other party. Upon receipt of the written notice, the telecommuting arrangement will be terminated on a date mutually acceptable to the City and the employee or thirty (30) calendar days from the date of written notice should there be no mutual agreement.</li> <li data-bbox="489 604 1986 669">3. This agreement shall continue for six (6) months from the date of implementation unless the assignment is terminated as provided in paragraph B2 of this agreement.</li> </ol> <p align="center"><b>C. Employee Coverage</b></p> <ol style="list-style-type: none"> <li data-bbox="724 773 1751 805">1. The employee shall remain covered by the provisions of the Civil Service Rules if applicable.</li> <li data-bbox="682 818 1793 850">2. Employee's salary, retirement, benefits and insurance coverage are unchanged by telecommuting.</li> <li data-bbox="478 863 1986 961">3. The employee is acting within the course and scope of employment only when engaged in job-related activities at the designated work space during the telecommuting days and hours. Workers' Compensation benefits shall only apply to injuries arising out of and in the course of employment.</li> <li data-bbox="541 980 1919 1013">4. The City shall not be liable for injuries on the employee's premises to third persons or members of the employee residence.</li> </ol> <p align="center"><b>D. Work Activity</b></p> <p data-bbox="520 1101 1986 1166">Each participant will agree with their supervisor on the objectives to be accomplished during the telecommuting period. Attachment "A" to this agreement shall include the method of measuring productivity.</p> <p align="center"><b>E. Time Accounting</b></p> <ol style="list-style-type: none"> <li data-bbox="472 1227 1986 1357">1. The employee's work hours and overtime compensation remain unchanged. Requests for overtime, sick leave, vacation, or other paid or unpaid leave must be approved by the employer's supervisor in the same manner as when working in the office. The amount of time the employee is expected to work will not change due to participating in this program. The employee and supervisor shall specifically agree to the telecommuting schedule as provided on Attachment "B" of this agreement.</li> <li data-bbox="514 1377 1944 1442">2. If the employee is sick during any hours scheduled for telecommuting, the employee shall immediately report the sickness to the supervisor and use sick leave to cover all hours not worked.</li> </ol>

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	<p align="center"><b>F. Work Site</b></p> <ol style="list-style-type: none"> <li>The employee shall designate a specific work space as the telecommuting site. The work space shall be maintained in a safe condition, free from hazards and other dangers to the employee and equipment. The employee's designated work space shall be identified in Attachment "A".</li> <li>The City retains the right to make on-site visits to the telecommuting site to ensure that safe work conditions exist and to maintain, repair, inspect or retrieve City-owned equipment, software, data, and/or supplies. When practicable, the employee will be given a 24-hour notice of an on-site visit by the City.</li> </ol> <p align="center"><b>G. City-owned Supplies</b></p> <p>Supplies required to complete assigned work at the telecommuting site shall be obtained during the employee's in-office visits. Out-of-pocket expenses for supplies will not be reimbursed unless advance approval is given by the employee's supervisor.</p> <p align="center"><b>H. Employee-owned Equipment/Supplies</b></p> <ol style="list-style-type: none"> <li>If the employee uses their own equipment, the employee shall be solely responsible for maintenance and repair of equipment even though it is being used for work-related purposes.</li> <li>If the employee is using their personal computer for City business, the employee shall install an anti-viral product to be provided by the City.</li> </ol> <p align="center"><b>I. Dependent Care</b></p> <p>Telecommuting is not a substitute for child or dependent care. Adequate child or dependent care arrangements shall be made to assure the employee's work time remains uninterrupted.</p> <p align="center"><b>J. Tax Implications</b></p> <p>All individual tax implications related to the telecommuting work space shall be the responsibility of the employee.</p> <p align="center"><b>K. Participant Feedback</b></p> <p>Employees who telecommute are required to participate in all studies, inquiries, reports, or analysis relating to the City's telecommuting program. While the employee's individual responses shall remain anonymous to the public, the data may be compiled and made available to the public without identification of the employee's responses.</p> <p>The above agreement has been fully reviewed and discussed. It is understood that this agreement must be in effect at all times for the telecommuting assignment to continue. Attachment "A" has been fully completed. This document shall be kept up-to-date at all times.</p>
City of Woodland	No telework policy in place as of 5/4/2022

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El Dorado Irrigation District	<p align="center"><b>Telecommuting</b></p> <p>Telecommuting is defined as working on a temporary, irregular basis at home or another remote location away from the primary workplace that is linked electronically (via computer, telephone, internet service provider, etc.) to District systems and information resources.</p> <p>Telecommuting may be approved for exempt employees based on business requirements. Telecommuting should be an infrequent event rather than a standard work schedule. Approval must be in advance of the telecommuting time period, and may only be approved by a Department Director or their designee. Any approved time periods must be designated on the weekly timecard using the telecommuting project number designated annually by accounting.</p>
Elk Grove Water District	No telework policy.
Fair Oaks Water District	No telework policy.
Rancho Murieta Community Services District	No telework policy at this time.
Regional Water Authority	No telework policy.
Rio Linda Elverta Community Water District	<p align="center"><b>Purpose</b></p> <p>The telework schedule allows the Rio Linda Elverta Community Water District (District) employees and supervisors to mutually agree upon a varied distribution of their normal work hours. It does not change the number of hours worked, but simply allows each individual the flexibility to rearrange their work schedule to better meet their personal needs while considering the needs of the District office.</p> <p align="center">The major benefits of a telework schedule are:</p> <ul style="list-style-type: none"> <li>• Improve program effectiveness and employee productivity and morale; <ul style="list-style-type: none"> <li>• Reduce absenteeism;</li> <li>• Promote employee health and wellness;</li> </ul> </li> <li>• Improve air quality and reduce traffic congestion;</li> <li>• Improve employee recruitment and retention;</li> <li>• Enhance the working life and opportunities of persons with disabilities;</li> <li>• Effectively continue business as a part of a disaster recovery or emergency plan.</li> </ul> <p align="center"><b>Policy</b></p> <p>The District encourages the use of teleworking and telecommuting where it's a viable option and clearly defines the benefits to the employee and management. Managers and employees must understand that adherence to the policy and procedures are an essential requirement of the telework program.</p> <p align="center"><b>Eligibility</b></p> <p>Employees in roles that are eligible for participation in the telework program are administrative positions where work is performed by telephone and/or computer and have attained permanent employment status. Employees serving in a training capacity or providing hands-on service will not normally be</p>

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	<p align="center">approved to participate in the telework program on a regular, ongoing basis.</p> <p align="center"><b>Responsibilities and Approvals</b></p> <p>Managers/supervisors are responsible to ensure that their Divisions and working units have coverage, including lunch period. Consideration should be given to the employees' workload and the type of work performed. These issues must be considered prior to approving any request for a telework schedule.</p> <p>Eligible employees who are interested in a telework schedule must submit a completed Telework Agreement (Exhibit 1) and Safety Checklist/Acknowledgement (Exhibit 2) to their supervisor.</p> <p>Prior to approving the Telework Agreement supervising managers must consider the impact the proposed work schedule will have on fellow employees, employee morale, as well as the functional needs of the District as a whole. Management is responsible to ensure necessary adjustments are implemented and that the telework policy is administered in a manner that will positively impact the District.</p> <p>All telework schedules will be conditionally approved for a trial period. The trial period should allow sufficient time to determine what impact the scheduling change may have on meeting workload commitments, assessing impact on attendance, as well as allowing the employee and their supervisor to determine whether the new work schedule will meet the needs of the individual and the District.</p> <p>Any adjustments to the employee's original request should be discussed with the employee to develop a work schedule that is agreeable to both the supervisor and the employee. Adjustments to the original agreement must be documented.</p> <p>Participation in the telework program is voluntary and subject to the prior written approval by the employee and the employee's immediate supervisor. Approval must be completed prior to the start of the employee's telework schedule by execution of a Telework Agreement. Once the approval has been given, the original copy of the Telework Agreement and subsequent adjustments must be kept by the employee's supervisor or manager with a copy placed in the employee's personnel file and a copy given to the employee.</p> <p align="center"><b>Telework Daily Documentation</b></p> <p>Employees working in the telework program must document their work start times and stop times using the Office 365 Forms (time tracking). Any change to the authorized method of documenting telework employee work start/stop times must be authorized by the General Manager. The consistent, accurate completion of the Office 365 Time Tracking Forms is the equivalent of a timecard, i.e. it is a legal document used for, among other things, documenting compliance with Fair Labor Standards Act. Employees who regularly fail to accurately complete and submit their daily Office 365 Time Tracking Form may have their teleworking assignment suspended or revoked.</p> <p>Mitigation measures to compensate for the absences of in-person communication and visual context is essential to a successful telework program. Teleworking employees are expected to communicate project status, unforeseen impediments, and similar information to their supervisor and, as appropriate, their co-workers. Emails, texts and phone calls are the preferred modes of communicating such information. Employees who insufficiently communicate project/assignment status on a regular basis may have their telework assignment suspended or revoked.</p> <ul style="list-style-type: none"> <li>• Due to potential outcomes and foreseeable consequences for California Public Records Act requests, it is imperative that telework employees prioritize use of the @RLECWD.Com email domain, i.e. do not use personal email accounts for conducting District business. Similarly, use a District-owned cell phone when texting.</li> </ul> <p align="center"><b>Core Time</b></p> <p>The period of time during which all employees are expected to report for work at the main office, i.e. dates/times excluded from telework The General Manager is responsible for establishing and , if needed, modifying core time. Managers/supervisors are responsible to ensure that staff is available to cover key unit functions during the normal work hours.</p>

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	<p align="center">Telework Schedule</p> <p align="center">Regular Work Week</p> <p align="center">Defined by the Districts Personnel Handbook and Memorandum of Understanding (MOU)</p> <p align="center">Telework</p> <p>An employee who does not come into the office to work every day but works from home or another established location for a pre-established number of days. Employee must be available and accessible by phone and email during their agreed upon scheduled core business hours as determined by their approved time base.</p> <p align="center">Regular Telework Schedule</p> <p>Regular telework means an established schedule of days per week or month. A regular telework schedule must be established prior to the start of the work arrangement and must be mutually agreed to by the employee and the supervisor. Any change in the agreed upon schedule must be approved by the supervisor, and when permanent, documented and appended to the Telework Agreement. Schedule changes are to be approved by the supervisor.</p> <p>An employee must forgo telework if needed in the office on a regularly scheduled telework day. The employee may be called in to the office when necessary to meet operational needs. The manager or supervisor should provide reasonable notice whenever possible. However, the employee may be required to report to the office without advance notice, as needed.</p> <p>While working away from the office, employees must be accessible for communication (e.g., telephone, e-mail, etc.). Specific requirements are subject to the needs of the District as determined by the General Manager.</p> <p>Full-time telework is permissible only when necessary and justified (e.g., to accommodate medical restrictions, disabilities, or mandated health orders) and depends on the needs of the job and demonstration of a clear benefit to program objectives and operations.</p> <p align="center">Casual Schedule</p> <p>Employees may be allowed to telework on a temporary basis as their duty assignment permits. If the request is of a medical nature, written documentation approving the telework arrangement must be provided by a doctor or other licensed practitioner. Circumstances which may be appropriate for "casual" telework include, but are not limited to:</p> <ul style="list-style-type: none"> <li>• Special project work which requires a period of uninterrupted time. <ul style="list-style-type: none"> <li>• During convalescence from injury or illness.</li> </ul> </li> <li>• While a family member is recovering and needs in-home assistance.</li> <li>• During the last few weeks of pregnancy, and/or following the birth of a child.</li> <li>• While all reasonable commute routes are blocked (i.e., major construction, storm, or disaster). <ul style="list-style-type: none"> <li>• Primary work site is inaccessible or uninhabitable.</li> </ul> </li> </ul> <p align="center">Expenses Incurred While Working a Telework Schedule</p> <p>Expenses incurred resulting from working a telework schedule will not be reimbursed by the District including, but not limited to, the following: usage fees for privately owned computers, utility costs associated with the use of telephone, computer or occupation of the home, or travel to the District office if required to come in on a telework day.</p> <p align="center">Termination of Telework Participation</p> <p>The Telework Agreement may be cancelled at any time by either the employee or the District by written notification or at the discretion of the</p>

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	<p>supervisor to include, but not limited to, the following: exceptional and verifiable needs of the District; change in the employee's work function, employee non-satisfactory performance, or abuse of the telework policy.</p> <p align="center">Procedures and Considerations</p> <p>Access to the computer network is essential for obtaining work-related information, processing work, and communicating. The effectiveness of performing work at a remote location, such as a home office, may be greatly diminished if an employee does not have access to the computer network. However, under specific situations of a temporary duration, such as providing reasonable accommodation for disabled employees, management may allow an employee to telework periodically when they do not have complete access to a computer or the computer system.</p> <p>Participation in the telework program should be based on the ability of the employee to perform tasks that can be completed from remote locations, such as a home office and the manager's assessment of the employee's ability to complete those tasks satisfactorily. Consideration, on a case-by-case basis, should be given to the following:</p> <p align="center">Job Knowledge</p> <p>Does the employee have the necessary knowledge to perform the required job tasks at home or does the employee need close supervision or input from others that is only available at the office?</p> <p align="center">Employee Characteristics</p> <p>Does the employee have a history of reliability and responsibility in reporting to work on time and completing work assignments? Is the employee motivated and self-directed? Does the employee demonstrate an ability to establish priorities and effectively manage their time?</p> <p align="center">Task Scheduling</p> <p>Does the individual already work alone handling information tasks such as thinking, planning, coordinating, writing, reading, analysis, teleconferencing, computer programming, word processing or data entry? Can tasks, which can be completed away from the office, be grouped, and scheduled for telework days? Can staff meetings and conferences be grouped and scheduled for non-telework days or accommodated through other means (e.g., teleconferencing)?</p> <p align="center">Public/Department Contacts</p> <p>What portion of the job is devoted to face-to-face contact with other agencies, the public or internal staff? Can this contact be structured to allow for communication via phone or computer, or grouped into non-telework days, or can alternatives be established to provide this contact on telework days?</p> <p align="center">Reference Materials</p> <p>What portion of the job requires the use of reference materials or resources located in the designated work site? Can these resources be easily taken home for a day or two without interfering with co-workers' job performance? Are these resources available through other means such as a computer accessible library service?</p> <p align="center">Use of Computers</p> <p>Will response time on computer equipment used at home be fast enough to allow for required productivity? If connection to a Local Area Network (LAN) at the workplace is required, are the necessary hardware components in place? Has the employee completed training for and demonstrated an adequate level of skill in use of the computer and software that will be used for teleworking?</p> <p align="center">Special Considerations</p> <p>Changes in work schedules or temporary telework assignments may be made at discretion to meet management needs or to accommodate an employee's request (e.g., convalescence, parental leave, etc.)</p>



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	<p align="center">Special Equipment</p> <p>What portion of the job relies upon access to photocopiers or other specialized equipment? Can access be managed to allow teleworkers needs to be met on non-telework days or can these needs be satisfied at a facility near the employee's telework office?</p> <p align="center">Information Security</p> <p>What portion of the job uses secured or otherwise confidential information and can the integrity of that information be secured in accordance with information security policies if it is taken or accessed from off-site?</p> <p align="center">Travel</p> <p>Does the job involve field work? Can trips begin or end at the employee's off-site office rather than at the main office?</p> <p align="center">Responsibilities</p> <p align="center">General Manager</p> <ul style="list-style-type: none"> <li>• Administer the telework program, including ensuring compliance with all applicable policies and procedures, identifying positions suitable for the telework option, and determining whether the District should provide equipment and software on a case-by-case basis. Software may in some instances be approved, when the General Manager approves the purchase of the necessary licenses.</li> <li>• Unless there are extreme mitigating circumstances, the District will not provide equipment and software when a similarly equipped workstation is maintained at the office for the employee seeking a telework option. Provision of equipment for a teleworker will normally be and exceptional situation in which the General Manager determines a clear benefit to the program and the employee has special needs.</li> <li>• Determine if proposals for their employees to telework are likely to contribute to the District's objectives, while maintaining or improving program objectives, efficiency, productivity, service, benefits, and safety conditions.</li> <li>• Ensure that employees who remain in the office are not burdened by being required to handle the teleworker's regular assignments (i.e., answering telephone calls, dispensing information, etc.).</li> <li>• Through the use of performance/task tracking tools, provide specific, measurable, and attainable performance expectations for the teleworker for assignments, corresponding deadlines, and the quality of the work expected. <ul style="list-style-type: none"> <li>• Provide for employee training in the use of equipment and software as required for the employee to function effectively and independently.</li> </ul> </li> <li>• Inform employees that failure to comply with the policy and procedures may cause for terminating participation in the program and/or possible adverse action. <ul style="list-style-type: none"> <li>• Maintain copies of signed Employee's Telework Agreement.</li> </ul> </li> </ul> <p align="center">Teleworkers</p> <ul style="list-style-type: none"> <li>• When telework is determined to be a viable work option, employees must work with their supervisor to develop and follow an acceptable Telework Agreement. <ul style="list-style-type: none"> <li>• Abide by the provisions set forth in this District Telework Program Policy and document.</li> </ul> </li> <li>• Adhere to all applicable laws, rules, regulations, policies, and procedures regarding information security as outlined below in "Information Security". <ul style="list-style-type: none"> <li>• Acquire the skills necessary to meet District requirements and operate independently from a telework-site.</li> <li>• Establish, operate, and maintain the home office, equipment, devices, and services associated with the telework arrangement.</li> </ul> </li> </ul>

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	<p align="center"><b>Telework Environment</b></p> <p align="center"><b>Equipment, Software, Services, Maintenance, Repair, and Replacement</b></p> <p>The District will not purchase computers, software, software licenses, Internet or phone services or office equipment such as printers, calculators, or furniture for in-home telework.</p> <p>In addition, the selection, installation, maintenance, repair or replacement of employee-owned equipment and software is the responsibility of the employee. Computer equipment should have a configuration that is compatible with the Districts Information Technology (IT) infrastructure. In the event of equipment malfunction, the teleworker must notify their supervisor immediately. If repairs will take some time, the teleworker may be asked to report to the District office until the equipment is usable.</p> <p align="center"><b>Work Environment Criteria</b></p> <p>The opportunity to participate in a home telework program is offered with the understanding that it is the responsibility of the employee to ensure that a proper work environment is maintained as follows:</p> <p>Designate an area that allows for working in an office setting. Ensure that the equipment necessary to perform the work is in the designated area.</p> <p>Make advance arrangements for dependent care to ensure a productive work environment. (Telework is not intended to be a substitute for day care or other personal obligations.);</p> <p>Keep personal disruptions such as non-business telephone calls and visitors to a minimum.</p> <p>Obtain pre-approval from the supervisor for use of vacation time or sick leave to attend to family or home matters during home office hours.</p> <p>Ensure that the home office is a safe place to work.</p> <p align="center"><b>Information Security</b></p> <p>Security of confidential information is of primary concern and importance to the District. Teleworkers, like all District employees, are expected to adhere to all applicable laws, rules, regulations, policies, and procedures regarding information security: The following are basic information security guidelines:</p> <p>Use District information assets only for authorized purposes and ensure that confidential information is not disclosed to any unauthorized person.</p> <p>Back up critical information on a regular basis to assure the information can be recovered if the primary source is damaged or destroyed.</p> <p>Use "logon" passwords on all systems containing confidential information and keep those passwords secure.</p> <p>Use the latest virus protection software on telework systems used to prepare information.</p> <p>Return material (paper documents, etc.) containing all confidential information to the District for proper handling or disposal, if necessary.</p> <p>Adhere to copyright law by not copying or sharing any District owned software utilized by teleworkers, and when no longer employed by the District, remove all such software from the home computer and return any software media to the District.</p> <p align="center"><b>Health and Safety</b></p> <p>If an employee incurs a work-related injury while teleworking, worker's compensation laws and rules apply just as they would if such an injury occurred at the main office. Employees must notify their supervisor immediately and complete all necessary documents regarding the injury.</p> <p align="center"><b>Setting Up a Home Office</b></p> <p>It is important for all employees to maintain a healthy, safe and ergonomically sound work environment while working in the office or at a remote location. The major difference between the employer's office and the home office is ownership and control over the workplace.</p> <p align="center"><b>Exhibit 1 (Telework Agreement)</b></p> <p align="center"><b>Telework Agreement</b></p> <p align="center">Name of Teleworker:</p>

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	<p align="center">Residence Address: Residence Phone: Mobile Phone (if applicable): Understanding</p> <p>The supervisor and the teleworker have read and understand the District Telework Policy and Procedures. All parties understand that the Telework agreement may be terminated by the supervisor or the teleworker as indicated in this policy and associated procedures. The supervisor and the teleworker have read, understand, completed, and signed the "Supervisor's Checklist," prior to participation in the telework program and further agree to the following:</p> <p align="center">Telework Schedule</p> <p>It is understood that telework days must be scheduled in advance and approved by the supervisor. At certain times, it may be necessary for the telework schedule to be revised to ensure critical deadlines are met or to attend meetings. Any change by the teleworker in the agreed upon schedule must be pre-approved, and when permanent, documented and appended to the Telework Agreement.</p> <p align="center">The following telework schedule is being established:</p> <p align="center">Date of first scheduled telework day: _____ Core Time (in-office) Work Days: _____ Teleworker will be available for communication on telework days during the hours of: ○ Begin Time: _____ to End Time: _____ with bona fide meal break at: _____</p> <p align="center">This arrangement must be reviewed and renewed at least annually to ensure the standards for participation are being followed.</p> <p align="center">Information Security</p> <p align="center">The teleworker will provide necessary security for both electronic and paper information.</p> <p align="center">Work Effectiveness and Safety</p> <p align="center">The teleworker agrees to:</p> <p align="center">Master computer hardware and software skills necessary to perform the assigned telework duties. Learn and apply ergonomic safety practices. Establish and maintain a safe home office environment. Ensure customer needs take precedence over the home office schedule. Proactively stay in touch with customers, coworkers and supervisor. Ensure the work takes precedence over family and home matters during home office hours. Make arrangements for dependent care, if applicable.</p>
Sacramento County	<p><b>1. Purpose</b> To provide requirements for establishing and monitoring telework arrangements so they are in compliance with Federal and State laws and County operational procedures. Teleworking will be considered on a case- by-case basis, at management's discretion, when it is cost effective and supportive of the County's business objectives.</p>

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	<p><b>2. Authority</b> Board of Supervisors Resolution dated 07/21/92</p> <p><b>3. Scope</b> Teleworking is a cooperative venture between the Department and teleworker based on the needs of the Department and the past and present performance of the teleworker. Teleworking is neither a right nor an entitlement, but a tool to allow flexibility in work options. Terms and conditions of employment with the County of Sacramento remain the same regardless of work site.</p> <p>Definitions</p> <p>Telework - an arrangement by which an employee (teleworker) works at home for a specified portion of the work week.</p> <p><b>4. Policy</b> Sacramento County encourages the use of Telework when it is a viable option and clearly provides benefits to the employee and management. If agreed and the employee meets the eligibility criteria, the employee and Department management shall enter into a formal Telework Agreement.</p> <p>A telework Agreement is a voluntary, joint decision between the Department and the teleworker and will be reviewed at least annually to ensure the terms of the Agreement are relevant and effective. The telework arrangement may be terminated by either party at any time, if it is determined that the needs are not being met.</p> <p>Standards of Application</p> <p>Eligibility Any regular County employee who meets all of the following requirements:</p> <ul style="list-style-type: none"> <li>• The work assignment allows them to be out of the office, their job is independent in nature, and doesn't require frequent face-to-face interaction.</li> <li>• Has Departmental approval to participate in the program as shown by having all signatures on Attachments A and B.</li> </ul> <p>Requests for a reasonable accommodation to telework due to a disability should be addressed through the Reasonable Accommodation Process.</p> <p>Work Hours The work schedule shall be pre-established between the teleworker and the supervisor. Requests for overtime, sick leave, vacation, and other leave</p>

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	<p>balances or to change their work schedule must be pre-approved by the teleworker's supervisor.</p> <p><b>Measurement of Work Activity</b> The expectations regarding work assignments, productivity level, and productivity measurements are to be pre-established and agreed upon between the supervisor and the teleworker. Considerations should include: quality of work, timely completion of projects, and maintenance of close communication.</p> <p><b>Telework Site</b> The teleworker shall designate a specific work space in their home (primary residence) as the teleworking site. The teleworker is solely responsible for ensuring that the work space is maintained in a safe condition, free from hazards and other dangers to the teleworker and equipment.</p> <p>The supervisor or County representative may make on-site visits to the teleworker's home at any time during the teleworker's regularly scheduled work hours.</p> <p><b>Reporting to Office</b> The frequency of reporting to the office will be specified in the telework agreement, and will be determined by the business needs of the Department. Additionally, a teleworker may be required to report to the office due to business necessity at any time during normal business hours; advanced notice shall be provided whenever possible.</p> <p><b>Equipment</b> In general, the County will not provide specific tools and equipment for the teleworker to perform their duties. The employee is responsible for providing all equipment which may include computer hardware/software, furniture, phone lines, email, voicemail, connectivity to host applications, and other applicable equipment as deemed necessary. Software provided by the teleworker must be compatible with the County's IT requirements.</p> <p>In some circumstances, an employee may have a County issued cell phone. The use of the cell phone in conjunction with telework should be discussed with the supervisor.</p> <p><b>Teleworking Costs</b> The teleworker is responsible for all utility and home maintenance costs incurred while working at home. The Department may reimburse the cost of job related telephone calls.</p> <p><b>Information Security</b> Teleworker's must adhere to the County's and Departmental Policies. Security measures must be taken by the teleworker to safeguard confidential</p>

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	<p>information and data. To ensure security of data, telework must be performed through the County's Virtual Personal Network (VPN) connection.</p> <p><b>Employee (Teleworker) Benefits and Tax Implications</b> There is no change to existing benefits due to teleworking. Tax deductions and implications due to teleworking are the teleworker's responsibility.</p> <p><b>Compliance</b> Teleworkers are obligated to comply with all County and Departmental rules, policies, practices, and instructions. A violation of any of these may result in removal from teleworking and/or disciplinary action up to and including termination of employment.</p> <p><b>Insurance</b> The teleworker is solely responsible for ensuring the safety of their work site. Since the County is legally obligated to provide its employees with a workplace that is free from hazards, the County may periodically inspect the teleworker's home work space. Teleworkers are protected by the County's workers' compensation insurance during the agreed upon work hours, and are required to immediately report any injuries that occur while working.</p> <p><b>Coverage Requirements</b>  The teleworker is required to provide proof of Homeowners/Renters Liability Insurance with a minimum of \$100,000 Combined Single Limit. The minimum amount of liability is subject to periodic review and adjustment by the County Risk &amp; Loss Control Division.</p> <p>Teleworkers are required to provide 30 days written notice to the County prior to cancellation or termination of this coverage for any reason. If the insurance is not in effect the teleworker's ability to continue teleworking will be terminated.</p> <p><b>Hold Harmless Agreement</b>  The teleworker hereby agrees to release and hold harmless the County of Sacramento, its Board of Supervisors, officers, directors, agents, and respective boards, from any and all claims, actions, causes of action, demands, rights, damages, costs, expenses, legal expenses, including subrogation, caused by or related to this teleworking agreement.</p> <p>Liability for injuries or property damage to third parties and/or members of the employee's family, on the employee's premises is the responsibility of the teleworker. Allowing work-related visitors at the remote work-site, other than the Supervisor/Manager, is prohibited.</p>

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	<p>Dependent Care Teleworking is not a substitute for child or dependent care. Adequate child or dependent care arrangements shall be made to assure the teleworker's work time remains uninterrupted.</p> <p><b>5. Review</b> To be reviewed every 5 years or as required by law.</p>
Sacramento Suburban Water District	<p>Remote/Alternate Work Program that© allows EEs the option of an alternate schedule of 7am – 3:30 pm (our usual business hours are 8-4:30 pm) or remote work one day a week at this time.</p> <p>The Alternate/Remote Work Program (Program) is a cooperative arrangement between the Sacramento Suburban Water District (District) and its employees to work either: a) at their normal worksite on an alternate work schedule; or b) away from the office on an occasional basis.</p> <p>The Program is intended to benefit both the District and employees in the following ways:</p> <ul style="list-style-type: none"> <li>• Enhance ability to function during an emergency when the regular worksite is inaccessible <ul style="list-style-type: none"> <li>• Potential for increased productivity</li> <li>• Efficient use of resources</li> </ul> </li> <li>• Enhanced recruitment and retention of employees <ul style="list-style-type: none"> <li>• Greater flexibility for workgroups</li> </ul> </li> <li>• Enhanced employee morale and job satisfaction</li> <li>• Reduced employee commute time and expense</li> </ul> <p>The Program applies District-wide and is made available to all eligible employees upon their Department Manager's approval.</p> <p align="center">Program General</p> <p>The Program consists of either: a) working at a normal worksite on an alternate work schedule; or b) away from the office on an occasional basis. Employees may choose just one option in the Program, depending on eligibility. Combining options a) and b) is not allowed as part of the Program. Participation in the Program is a privilege; it is neither an entitlement nor a vested right. It is a tool to allow for flexibility in work options where the work is conducive.</p> <p>The Program is voluntary under most circumstances, but may be imposed by the District to maintain operations under unusual conditions ( e.g., damage to a facility affecting usability of a normal work location).</p> <p align="center">Options will vary among specific job classifications and department needs/requirements.</p> <p align="center">Participation in the Program does not change the duties, obligations, responsibilities, or terms and conditions of employment.</p> <p align="center">All employees who request to work remotely must have an approved Program Agreement</p> <p align="center">(Agreement). Employees who request to work an alternative schedule must have the approval of their department manager; written approval is not necessary.</p> <p align="center">Eligibility</p>

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	<p>Eligibility for the Program is based on both the position and the employee. Not every position or every employee is well suited, and/or eligible for an alternate schedule or remote work. The General Manager or designee has the final discretion to determine whether a position/employee is eligible, utilizing criteria that include, but are not limited to, those listed below.</p> <p align="center"><b>Alternate Schedule</b></p> <p align="center">An employee may be eligible for the Program as follows:</p> <ul style="list-style-type: none"> <li>• The alternate schedule will not negatively impact functioning of the District or the workload of others</li> <li>• The alternate schedule will not impede the needs of the District or department as decided upon by the department manager</li> <li>• The hours for an alternate schedule are generally 7:00 a.m. to 3:30 p.m. and are subject to change at the discretion of management and to meet the needs of the District. Written approval is not necessary, but subject to change at the department manager's discretion.</li> </ul> <p align="center"><b>Remote Work</b></p> <p align="center">An employee may be eligible for the Program as follows:</p> <p>asks are independent in nature and remote work will not negatively impact functioning of the District or the workload of others</p> <ul style="list-style-type: none"> <li>• Tasks are primarily knowledge-based</li> <li>• Responsibilities lend themselves to measurable work products</li> <li>• Tasks do not require frequent interaction at the regular worksite with supervisors, colleagues, clients, or the public, in person or by phone (For example, classifications which are the sole point of contact, or which must supervise the work of others in person, may not always be suitable for working remotely)</li> <li>• Work does not require the employee's immediate presence at the regular worksite to address unscheduled events, unless alternative arrangements for coverage are practical.</li> </ul> <p>An employee may be eligible for this Program when they have consistently demonstrated, as determined by their department manager, all of these listed items:</p> <ul style="list-style-type: none"> <li>• Dependability and responsibility <ul style="list-style-type: none"> <li>• Effective communication with supervisors, coworkers, and customers</li> <li>• An established ethic of motivation and trustworthiness</li> </ul> </li> <li>• The ability to work independently, and at a consistently high rate of productivity</li> <li>• A high level of knowledge, skill, and ability to complete assigned duties <ul style="list-style-type: none"> <li>• The ability to prioritize work effectively</li> <li>• Effective organizational and time management skills.</li> </ul> </li> </ul> <p align="center"><b>Other Factors</b></p> <p align="center"><b>Performance Considerations</b></p> <p>Employees who are not upholding District obligations, such as meeting acceptable performance or conduct expectations and standards as determined by their department manager, are not eligible for the Program.</p> <p>Employees must have been rated as at least 3 in their Overall Performance Rating in their most recent performance evaluation in order to qualify for the Program. If an employee is placed on a performance improvement plan at any time while participating in the Program, such privileges will be suspended until performance improves.</p> <p align="center"><b>Disciplinary Considerations</b></p> <p>Disciplinary action or being placed on a performance improvement plan within the last 12 months will preclude an employee from participating in the</p>



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	<p align="center">Program.</p> <p align="center">Other Considerations</p> <p align="center">Other considerations include:</p> <ul style="list-style-type: none"> <li>• The employee's ability to create a functional, reliable, safe, and secure remote workplace <ul style="list-style-type: none"> <li>• The risk factors associated with performing duties remotely</li> </ul> </li> <li>• The ability to measure work performance and/or products while working remotely <ul style="list-style-type: none"> <li>• The employee's supervisory responsibilities</li> <li>• The ability to maintain effective working relationships</li> </ul> </li> <li>• Other considerations deemed necessary and appropriate by the employee's immediate supervisor/manager, department manager, and the General Manager or designee.</li> </ul> <p>Eligibility for the Program is not subject to any review or appeal procedure. The decision of the department manager to deny an application for the Program is final.</p> <p align="center">Agreement Options</p> <p align="center">Agreements are voluntary and can be on a regular and recurring and/or occasional basis as defined below.</p> <ul style="list-style-type: none"> <li>• Regular/recurring - means an employee works away from the regular worksite on a recurring schedule (i.e., specified day or days). This should generally not be more than one day per week, and will be determined based upon departmental needs by the department manager. Plans may be approved for project-specific or other work-driven needs</li> <li>• Occasional - means an employee works away from the office on an infrequent, one-time, or irregular basis. This option provides flexibility for employees who generally need to be in the office, but who sometimes have projects, assignments, or other circumstances that meet the eligibility criteria.</li> </ul> <p>Changes to schedules:</p> <ul style="list-style-type: none"> <li>• To meet the needs of the District, employees must be available to work at the regular worksite and/or regular work hours as and when required by the District with little to no notice</li> <li>• Employees must obtain prior authorization from the department manager to change a scheduled remote workday</li> <li>• Employees may choose (at their discretion) to work at their regular worksite on a scheduled remote work day without first contacting their department manager. However, there is no guarantee that a substitute remote work day will be provided.</li> </ul> <p>Work Hours</p> <p>Remote work is available during standard ("core") work hours which are from 8:00 a.m. to 4:30 p.m. All rules applicable at the regular worksite are applicable while working remotely. These include, but are not limited to:</p>

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Survey Agency	Permanent Telework Policies
	<ul style="list-style-type: none"> <li>• Work during scheduled work hours</li> <li>• Account for and report time the same way as at the regular worksite, or according to the terms of the Agreement</li> <li>• Work overtime only when approved in advance by the supervisor</li> <li>• Obtain approval to use vacation, sick, or other leave in the same manner as if not working remotely</li> <li>• Advise the supervisor when ill; report the hours actually worked, and use sick leave for the hours not worked, just as they would if they were at the regular worksite.</li> </ul> <p>Work Area</p> <p>Suitability</p> <p>A remote worker must designate a work area suitable for performing official business, and work must be performed there. The work area must be free of distractions and allow the employee to focus and perform their duties safely and efficiently.</p> <p>Safety</p> <p>District safety requirements for a remote workplace are the same as a regular District workplace under Cal/OSHA standards. Remote workers are responsible for ensuring their work areas are ergonomic and comply with the health and safety requirements covered in the Hybrid Remote Work Program.</p> <p>Verification</p> <p>The District will require video tours or photos of the designated work area to assess compliance with workplace safety requirements. The remote worker must complete the associated Remote Workplace Safety Checklist and Self-Certification form to assess compliance.</p> <p>Accident, Injury, and Property Damage</p> <p>Employees are covered by workers' compensation laws during authorized remote work. Employees who suffer a work-related injury or illness while working remotely must notify their supervisor immediately.</p> <p>The District is not liable for the following:</p> <ul style="list-style-type: none"> <li>• Injury to a remote worker that occurs outside of terms of the Agreement (e.g., non-conforming working hours, and/or while not conducting District work)</li> </ul>

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	<ul style="list-style-type: none"> <li>• Injury to the remote worker's family members or others within or around a remote work area</li> <li>• Damage to an employee's personal or real property while an employee is working remotely.</li> </ul> <p>Costs and Expenses</p> <p>The Program is intended to be cost-neutral to the District. Accordingly, the District assumes no responsibility for the set up or operating costs of working remotely, since the employee has volunteered for the benefits of working remotely. Remote workers will not, under any circumstances, be paid for commute expenses.</p> <p>The District shall generally not be responsible for personal costs that are associated with remote work, including but not limited to:</p> <ul style="list-style-type: none"> <li>• Utilities (e.g., lighting, heating, cooling, energy, etc.)</li> <li>• Data/network and its maintenance</li> <li>• Building maintenance</li> <li>• Furniture and ergonomic equipment</li> <li>• Liability for third party claims</li> <li>• Other incidental costs.</li> </ul> <p>Exceptions to these costs will be evaluated on a case-by-case basis with final approval made by the General Manager or designee.</p> <p>There is no change to existing compensation or benefits under the program. Any tax impacts due to remote work are solely the remote worker's responsibility.</p> <p>Equipment and Supplies</p> <p>A remote worker must have a suitable desk/work area and chair to work ergonomically safely and without disruption.</p> <p>A remote worker must coordinate with the Information Technology (IT) department to identify the equipment, software, supplies, and support required. This is discussed in the next section, "District Equipment."</p> <p>The remote worker and department will coordinate with IT to review and approve equipment and software as it relates to network safety and security, as well as track and monitor District-owned equipment and software utilized.</p> <p>Remote workers must immediately contact their supervisors if equipment, connectivity, or other problems prevent them from working remotely.</p> <p>District Equipment</p>

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	<p>Equipment, software, or supplies provided by the District are for District business only. A remote worker does not obtain any rights to District equipment, software, or supplies provided in connection with working remotely. The employee must immediately return all District equipment, software, and supplies at the conclusion of the remote work arrangement, separation of employment, or at the District's request.</p> <p>The District will not purchase additional computers, software, software license, internet or phone services or office equipment including printers, fax machines, calculators, or furniture for remote work, unless approved by the General Manager or designee.</p> <p>The District has the sole discretion to provide equipment, software, or supplies for employees working remotely. The IT department will reasonably allocate resources such as equipment, software, or other supplies to remote workers based on operational or workload needs.</p> <p>Employees may not use any personal equipment to work remotely. Departments must notify and receive approval from the IT Manager before allowing use of District resources for remote work.</p> <p>A remote worker must protect District equipment, software, and supplies from possible theft, loss, and damage. A remote worker should not allow anyone else to use their District equipment under any circumstances, and may be liable for replacement of supplies or repair of the equipment or other District property due to negligence or intentional conduct that results in theft, loss, or damage. Depending on the circumstances, a remote worker may be disciplined at the discretion of the General Manager or designee. Any repairs or required maintenance on District- owned equipment will require the item be physically brought to the IT department if the issue cannot be resolved remotely by IT staff.</p> <p>Any equipment, software, files, and databases provided by the District shall remain the property of the District. A remote worker must adhere to all software copyright laws, and may not make unauthorized copies of any District-owned software. Remote workers may not add/download hardware or software to District equipment without prior written approval.</p> <p>Security of Confidential Information</p> <p>All files, records, papers, or other materials created while working remotely are District property. Remote workers and their supervisors shall identify any confidential, private, or personal information and records to be accessed and ensure appropriate safeguards are used to protect them. A department may require employees to work in private locations when handling confidential or sensitive material. Printing confidential information while working remotely is prohibited.</p> <p>Remote workers are required to log off the District network when not in use and secure equipment when left unattended. Remote workers may not disclose confidential or private files, records, materials, or information, and may not allow access to District networks or databases to unauthorized persons.</p> <p>Remote workers are not to store District documents or materials on their personal computer or device or use their personal e-mail accounts to transfer documents. All materials should be stored in OnBase, the main District network, or as is otherwise appropriately safeguarded. Remote workers are required to follow all record retention/management and document disposal policies for all associated documents and work products.</p>

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	<p>In the event of an incident of hacking or any compromise of District data and network systems, the remote worker must immediately notify their supervisor and the IT department.</p> <p>Public Records Act Compliance</p> <p>The California Public Records Act regarding public information and public records applies to remote workers. Public records include any writing containing information relating to the conduct of the public's business that is prepared, owned, used, or retained by the District regardless of physical form or characteristic. Public information means the contents of a public record. Upon receipt of an appropriate request, and subject to authorized exemptions, a remote worker must permit inspection and examination of any public record or public information in the employee's custody, or any segregable portion of a public record, within required time limits.</p> <p>This requirement exists regardless of where the public record is located.</p> <p align="center">Procedure for Remote Work</p> <p>An approved Alternate/Remote Work Program Application and Agreement Form (Agreement) must be in place before participation in the Program can commence. Department Managers may have requirements, guidelines, or procedures in addition to the Agreement. Employees must complete the following steps to work remotely:</p> <ul style="list-style-type: none"> <li>• Talk with their department manager to determine eligibility</li> <li>• Complete the following: <ul style="list-style-type: none"> <li>a. Read and agree to all Program requirements</li> <li>b. Read and agree to comply with all District policies/procedures listed in the reference section of this Program</li> <li>c. Attachment A - Alternate/Remote Work Program Application and Agreement</li> <li>d. Attachment B - Alternate/Remote Workplace Safety Checklist and Self- Certification Form</li> </ul> </li> <li>• Receive approval of the Agreement from the IT Manager and Department Manager.</li> <li>• Return the following completed forms to Human Resources: Attachment A) Agreement; Attachment B) Alternate/Remote Workplace Safety Checklist and Self-Certification Form. Human Resources will distribute to the General Manager or designee for final approval.</li> </ul> <p>Remote Working Requirements</p> <ul style="list-style-type: none"> <li>• Remote workers must comply with all District policies, procedures, approved work schedules, and instructions</li> <li>• Remote workers are required to comply with the terms of their Remote Work Program Agreement and must be accessible and readily available via telephone, video-conference, and e-mail, just as they are when working at the regular worksite</li> </ul>

**APPENDIX B - TABLE 9**  
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Survey Agency	Permanent Telework Policies
	<ul style="list-style-type: none"> <li>• A remote worker must perform work during scheduled remote work hours. Employees may not engage in activities while working remotely that would not be permitted at the regular worksite, such as child, elder, or other dependent care</li> <li>• Remote workers may take care of personal business during standard break periods, as they would at the regular worksite</li> <li>• It is the employee's responsibility to be aware of their work commitments and to make necessary arrangements to attend in-person meetings as needed or directed by their department manager. Some meetings may be attended via telephone, video-conference, or other electronic means</li> <li>• At the department manager's discretion, employees may be required to report to a central workplace as deemed necessary.</li> </ul> <p>Termination and Modification of Agreement</p> <p>The District may deny, terminate, or modify an Agreement at any time and for any business reason and without notice.</p> <p>An employee may terminate a voluntary Agreement at any time. An employee may request to modify an Agreement at any time, but it will require their Department Manager's approval.</p> <p>Any breach of an Agreement by an employee may result in termination of participation in the Program, and may result in disciplinary action, up to and including termination of employment.</p> <p>Employees may be removed from the Program at any time if they do not comply with the terms of their Agreement or, if in the sole discretion of their Department Manager, their work is no longer appropriate to be performed remotely, or for any other legitimate business, operational, work task, or personnel-based reason.</p> <p>If an employee is not meeting expectations in any category of performance and is subsequently placed on a performance improvement plan, Program participation will be either terminated or suspended until performance improves, at the Department Manager's sole discretion.</p> <p>If an employee becomes the subject of any disciplinary action, participation in the Program will be terminated until the issue is resolved to the satisfaction of the General Manager or designee.</p>
San Juan Water District	No written policies exist, but District allows people work from home so long as they prove to be effective and efficient and are generally in the office more than at home.

**APPENDIX B - TABLE 10**  
**Standby Pay Policy**

Citrus Heights Water District	<p>Employees who are assigned to Standby Duty in a non-working status at their residence during off-duty hours shall be entitled to payment for Standby Duty in addition to their regular compensation and overtime pay as set forth in the “Other Compensation” schedule (see Policy 4101) per each Standby Duty assignment. Daily pay for Standby Duty, as set forth by the Board of Directors, may differentiate between regular work days, Friday, Saturday, Sunday and holidays.</p> <p>An employee who is assigned to Standby Duty during the time period from 7:00 AM to 5:30 PM on a District observed holiday (see Policy 4350) will be compensated for the day the holiday is observed by receiving District holiday Standby Duty pay (see Policy 4101) and will also receive ten (10) hours added to their Annual Leave accrual upon completion of their Standby Duty assignment.</p> <p><u>Standby Duty</u> (see Policy 4120)</p> <table><tr><td>Regular Work Days</td><td>\$ 30.00 / day</td></tr><tr><td>Friday</td><td>\$ 75.00 / day</td></tr><tr><td>Saturday</td><td>\$ 75.00 / day</td></tr><tr><td>Sunday</td><td>\$ 75.00 / day</td></tr><tr><td>District Holidays</td><td>\$ 30.00 / day</td></tr></table>	Regular Work Days	\$ 30.00 / day	Friday	\$ 75.00 / day	Saturday	\$ 75.00 / day	Sunday	\$ 75.00 / day	District Holidays	\$ 30.00 / day																				
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Saturday	\$ 75.00 / day																														
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District Holidays	\$ 30.00 / day																														
Carmichael Water District	<p>Assignments of a tour of standby duties will be for seven day period, and additional compensation will be paid for a standby duty assignment at the flat rate shown below for each seven day tour of standby duty. If a standby assignment duty is for less than a week, the amount of compensation to be paid will be proportionately adjusted.</p> <table><tr><th colspan="3">Standby - Flat Rate</th></tr><tr><th></th><th>Daily Rate</th><th>Weekly Rate</th></tr><tr><td>T4</td><td>\$83.00</td><td>\$581.00</td></tr><tr><td>T3</td><td>\$71.00</td><td>\$497.00</td></tr><tr><td>T2*</td><td>n/a</td><td>n/a</td></tr><tr><td>T1*</td><td>n/a</td><td>n/a</td></tr><tr><td>D3</td><td>\$71.00</td><td>\$497.00</td></tr><tr><td>D2</td><td>\$60.00</td><td>\$420.00</td></tr><tr><td>D1*</td><td>n/a</td><td>n/a</td></tr><tr><td colspan="3">* D1/T1/T2 are not eligible for Standby</td></tr></table>	Standby - Flat Rate				Daily Rate	Weekly Rate	T4	\$83.00	\$581.00	T3	\$71.00	\$497.00	T2*	n/a	n/a	T1*	n/a	n/a	D3	\$71.00	\$497.00	D2	\$60.00	\$420.00	D1*	n/a	n/a	* D1/T1/T2 are not eligible for Standby		
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	Daily Rate	Weekly Rate																													
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T3	\$71.00	\$497.00																													
T2*	n/a	n/a																													
T1*	n/a	n/a																													
D3	\$71.00	\$497.00																													
D2	\$60.00	\$420.00																													
D1*	n/a	n/a																													
* D1/T1/T2 are not eligible for Standby																															
City of Citrus Heights	None																														
City of Davis	Employees represented by DCEA Association may be eligible for Standby Pay. Current Standby Pay is defined by the Public Works Emergency Standby Pay Handbook. The																														

**APPENDIX B - TABLE 10**  
**Standby Pay Policy**

	City and Association agree to continue meeting regarding Standby Pay policy. Until such time as a side letter agreement is reached on this matter, the status quo shall be maintained. (The MOU is expired and there is no side letter).
City of Folsom	<p>When the City places an employee on Standby Duty, the City agrees to assign twelve (12) hours of Standby Duty per week; except that when one of the following holidays occur during the period of Standby Duty the City will assign fifteen (15) hours of standby: Christmas Day, New Year's Day, Thanksgiving, and July 4th. Standby Duty shall be assigned on a rotating basis. Compensation for Standby Duty shall be at one and one half times the employee's hourly rate of pay.</p> <p>A. Standby duty requires the employee so assigned:</p> <ul style="list-style-type: none"> <li>i. To be ready to respond immediately to calls for service;</li> <li>ii. To be reachable by telephone/pager;</li> <li>iii. To remain within a reasonable distance of the work location; and;</li> <li>iv. To refrain from activities which might impair their ability to perform assigned duties.</li> </ul>
City of Lincoln	<p>The department head or designee may place an employee on standby duty as necessary. Standby duty requires an employee so assigned:</p> <ul style="list-style-type: none"> <li>(a) To be ready to respond immediately to calls from the City and to be called into work;</li> <li>(b) To be reachable by telephone/pager;</li> <li>(c) To remain within a reasonable distance of the work location; and</li> <li>(d) To refrain from activities which might impair their ability to perform any assigned duties.</li> </ul> <p>Employees assigned to standby duty shall receive compensation of \$48.00 per 24 hours of standby duty. For those employees assigned to standby duty on approved holidays shall receive compensation of \$75 per 24 hours (one day) of standby duty. Employees assigned to standby duty and who are called in to work shall be compensated at the overtime rate pursuant to the applicable provisions of the MOU and City Rules.</p> <p><b>6.8 DISTRIBUTION OF SCHEDULED STANDBY AND SCHEDULED OVERTIME ASSIGNMENTS</b></p> <p>Scheduled Standby and Scheduled Overtime assignments shall be distributed equally insofar as possible among any qualified career employees in the Classified Unit in accordance with the following:</p> <ul style="list-style-type: none"> <li>(a) Qualified career employees may submit their names to be placed on a list for Scheduled Standby or Scheduled Overtime assignments. The list shall be established by seniority based on total City service, with the employee with the most seniority at the top of the list. Opportunities for Scheduled Standby and Scheduled Overtime</li> </ul>



**APPENDIX B - TABLE 10**  
**Standby Pay Policy**

	<p>assignments shall be offered by the City to the employee at the top of the list.</p> <p>(b) After an employee works a Scheduled Standby or Scheduled Overtime assignment, the employee's name shall be moved to the bottom of the list. The second employee on the list then becomes the name at the top of the list and is eligible for the next assignment, and so forth.</p> <p>(c) If an employee refuses a Scheduled Standby or Schedule Overtime assignment, that employee shall be deemed to have worked the assignment and he/she shall be placed at the bottom of the list.</p> <p>(d) If an employee is deemed by the City to not be qualified for a particular assignment, the employee will remain at the top of the list and the City will continue to offer the assignment to each qualified employee on the list until the first qualified employee accepts the assignment.</p> <p>(e) If all employees on the list do not accept a Scheduled Standby or Scheduled Overtime assignment, the City may assign any qualified employee to work the Scheduled Standby or Scheduled Overtime assignment by inverse seniority. Emergency standby and unscheduled overtime may be assigned by the City to any employee at any time.</p> <p>(f) Those employees called back to work shall first be the employees listed on the standby rosters for the specific period of time. It will be the judgement of the individual calling back the employee(s) to determine the staff needed based on their (staff) areas of expertise given the circumstances.</p>						
City of Roseville	<p align="center">Local 39</p> <p>City agrees to the following standby provision concerning represented employees:</p> <p>A. Employees assigned to standby duty shall be compensated per the following schedule:</p> <table border="0"> <tr> <td>Monday-Friday Standby</td><td>1.5 hours straight time rate per day</td></tr> <tr> <td>Saturday, Sunday &amp; Holiday Standby</td><td>3 hours straight time rate per day</td></tr> <tr> <td>Weekly Standby</td><td>13.5 hours straight time rate per week</td></tr> </table> <p>B. Such payment shall be in addition to the overtime payments, which may be payable for call backs pursuant to City Personnel Rules and Regulations. However, employees shall not be compensated at a minimum of two (2) hours of overtime pay for incidents occurring within the time frame of an original call. For example, an employee has been called back, completes the task in one-half (1/2) hour and gets another call before leaving to return home. In this case, the employee would not receive a minimum of two (2) hours of overtime pay for the second and subsequent calls. If the employee returns home and receives subsequent callbacks, the employee would be entitled to a minimum of two (2) hours pay for that (those) call(s). An employee on weekend standby may be authorized to take a City vehicle home, provided the employee lives within the area bound by heavy black lines</p>	Monday-Friday Standby	1.5 hours straight time rate per day	Saturday, Sunday & Holiday Standby	3 hours straight time rate per day	Weekly Standby	13.5 hours straight time rate per week
Monday-Friday Standby	1.5 hours straight time rate per day						
Saturday, Sunday & Holiday Standby	3 hours straight time rate per day						
Weekly Standby	13.5 hours straight time rate per week						

**APPENDIX B - TABLE 10**  
**Standby Pay Policy**

	<p>on the attached map (Appendix B).</p> <p>C. Cumulative time spent in excess of fifteen (15) minutes or more shall be compensable as a call back. Cumulative time spent from eight (8) to fifteen (15) minutes on work calls during standby shall be rounded to 15 minutes and compensated as overtime. This applies only to phone calls received while on standby which do not require call out.</p> <p>D. Departments shall make standby assignments voluntary whenever practical.</p> <p align="center"><b>IBEW</b></p> <p>The following provisions and EOP 2.0 City Standby Policy apply to represented employees. The number of available employees assigned to serve the standby needs of the department determines the application of provision A below.</p> <p>A . Employees assigned to standby duty shall be compensated per the following schedule:</p> <table border="0"> <tr> <td>Monday-Friday Standby</td><td>1.5 hours straight time rate per day</td></tr> <tr> <td>Saturday, Sunday &amp; Holiday Standby</td><td>3 hours straight time rate per day</td></tr> <tr> <td>Weekly Standby</td><td>13.5 hours straight time rate per week</td></tr> </table> <p>Employees shall not be assigned standby on their flex day, unless such employee volunteers.</p> <p>B. Employees will be provided a cell phone when assigned to standby.</p> <p>C. The department shall make standby assignments voluntary whenever practical.</p> <p>D. The City reserves the right to schedule standby as needed.</p> <p>E. Such payment shall be in addition to the overtime payments, which may be payable for call backs, pursuant to City Personnel Rules and Regulations. An employee on standby may be authorized to take a City vehicle home, provided the employee lives within the area bounded by heavy black lines on the attached map (Appendix "X").</p>	Monday-Friday Standby	1.5 hours straight time rate per day	Saturday, Sunday & Holiday Standby	3 hours straight time rate per day	Weekly Standby	13.5 hours straight time rate per week
Monday-Friday Standby	1.5 hours straight time rate per day						
Saturday, Sunday & Holiday Standby	3 hours straight time rate per day						
Weekly Standby	13.5 hours straight time rate per week						
City of Sacramento	<p align="center"><b>Plumbers and Pipefitters</b></p> <p>a. Employees required to be on standby assignment for emergency work shall be paid at the rate of \$245.00 per week or the daily pro rata rate in addition to their regular compensation.</p> <p>b. An employee who has completed their regular shift and has left the premises and is called back to work from their home shall receive a minimum of two (2) hours pay, or actual hours worked, whichever is greater, at the overtime rate of one and one-half (1.5) times their regular rate of pay. All paid time shall count as time worked for the purposes of calculating overtime with the exception of sick leave.</p> <p>c. With the exception of sick leave, employees may use any type of authorized leave, including, but not limited to, vacation; CTO; holiday credit; etc., during their standby</p>						

**APPENDIX B - TABLE 10**  
**Standby Pay Policy**

assignment so long as they remain available for their standby assignment. An employee utilizing sick leave who is unable to work due to a personal illness, shall not receive standby pay for the day(s) out sick. Employees who fall ill after hours while they are on standby, shall notify the Standby Supervisor who will find a replacement for the day(s) the employee is out sick. The standby assignment may resume when the employee returns to work.

d. Employees who are on standby assignment on Christmas Day, New Year's Day, Thanksgiving Day, and July 4, holidays, shall receive twelve (12) hours holiday credit.

e. Employees who are issued a City cell phone, laptop and/or pager are not on standby unless assigned by the appointing authority.

f. Standby assignments are an essential function and will be staffed first from a voluntary sign-up list which will include all classifications within Field Services. If there are not enough volunteers to staff standby assignments within a Section of the Field Services Division, all classifications within the Section where there are not enough volunteers to staff standby assignment(s) shall be assigned on a rotational basis, in accordance with classification seniority, beginning with the Utilities Operations and Maintenance Serviceworker or Utilities Operations and Maintenance Leadworker with the least classification seniority who has passed probation as a Utilities Operations and Maintenance Serviceworker. The rotational standby assignments shall continue until such time as there again are volunteers within the affected Section.

**Local 39**

a. An employee who is required to remain on standby for emergency work shall be paid \$245 per week, or the daily pro rata rate of \$35.00, in addition to their regular compensation. Employees who are called out while on standby shall receive two (2) hours minimum pay at their regular rate of pay, or consistent with Article 10.1, one and one-half (1 ½) times their regular rate of pay, whichever is greater. Non-career employees shall not be on standby for emergency work. Any employee who is on standby New Year's Day, Christmas Day, Thanksgiving Day, or the 4th of July shall receive twelve (12) hours of holiday credit.

b. Employees who are issued a City cell phone, laptop, and/or pager are not on standby unless assigned by the appointing authority.

c. With the exception of sick leave, employees may use any type of authorized leave, including, but not limited to, vacation; CTO; holiday credit; etc., during their standby assignment so long as they remain available for their standby assignment. An employee utilizing sick leave who is unable to work due to a personal illness, shall not

**APPENDIX B - TABLE 10**  
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	<p>receive standby pay for the day(s) out sick. Employees who fall ill after hours while they are on standby, shall notify the Standby Supervisor who will find a replacement for the day(s) the employee is out sick. The standby assignment may resume when the employee returns to work.</p> <p>d. If an employee is assigned to standby and receives telephone contacts, and is engaged in a problem resolution which exceeds fifteen (15) minutes, the employee shall receive the two-hour minimum, or actual time worked, whichever is greater. Additional calls within the two-hour period are covered under that minimum time.</p>
City of Woodland	<p>2.6.1 Standby assignments shall be governed by the City stand-by policy dated May 2010.</p> <p>2.6.2 Employees assigned and required to be on stand-by status shall be compensated at the flat rate of \$38 per weekday and \$55 each Saturday, Sunday and Holiday.</p>
El Dorado Irrigation District	<p>Standby Pay</p> <p>(1) Standby pay shall be \$4.20 per hour beginning the first full pay period in January 2022, or upon ratification of this MOU, whichever occurs later. Commencing the first full pay period in January 2023, any time that represented employees receive an across-the-board Cost of Living Adjustment increase, the hourly rate for standby shall be increased by the same percentage.</p> <p>(2) Employees in designated classifications whose job duties require Internet connectivity or the use of a District laptop and air card while on standby must provide and utilize, at their sole expense, a functionally reliable personal Internet connection or District provided reliable air card with a District-provided laptop to facilitate District stand-by business.</p>
Elk Grove Water District	<p>On-Call Duty</p> <p>A schedule is maintained by a designated supervisor or designee whereby qualified operation employees are assigned on a rotational basis to be on-call on weekends, holidays, and other times outside of regular business hours for the District. Employees assigned to on-call duty are paid \$85 per day.</p> <p>Employees who are assigned to on-call duty are required to receive calls, report for work whenever needed and to keep their supervisor informed of the telephone number where they can be reached. The on-call employee must respond by telephone within five minutes of receiving notification of a call-out event and must respond in person within 45 minutes. Additionally, employees shall monitor the on-call phone four (4) times per day over even time increments for water waste complaints sent to the District's "Report Water Waste" email. The purpose of this monitoring shall be to determine if a customer has mistakenly reported a significant leak as a water waste event that requires the District's urgent attention.</p>

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	<p>Each qualified operation employee is eligible for on-call duty. Employees may volunteer to be added to the on-call list. If required, the District can mandate an employee to serve on-call duty. Any employees who would like to switch their scheduled on-call week(s) must find their own replacement, except in cases of illness or emergency. The employee must obtain approval from the designated supervisor or designee at least seven (7) days in advance of his or her scheduled on-call shift.</p> <p>Employees serving on-call will be scheduled for weekend service for routine operations and maintenance activities necessary outside of regular business hours. Employees will be compensated from the time of their arrival at the Railroad Water Treatment and Storage Facility (RRWTSF) to the completion of their daily activities, which shall end at the RRWTSF.</p>
Fair Oaks Water District	On-call-Standby pay as outlined in the Employee Handbook may be included in the compensation the received by employee – requested but have not received
Rancho Murieta Community Services District	<p>Standby</p> <p>1. Standby duty is defined as that circumstance which requires the employee so assigned by the District to:</p> <ul style="list-style-type: none"> <li>a. Be ready to respond in a reasonable time to calls for her/his service;</li> <li>b. Be readily available at all hours by telephone or other communication devices; and</li> <li>c. Refrain from activities which might impair her/his assigned duties upon call.</li> </ul> <p>2. Standby duty shall be assigned in writing and shall be compensated at the rate of \$60.00 per day of such assignment.</p>
Regional Water Authority	None
Rio Linda Elverta Community Water District	<p>Section 10.01 Compensation for assuming Standby Duty shall be \$50.00 per day. Additionally, employees assigned Standby Duty on District observed holidays will be provided 8-hours of additional Floating Holiday paid leave for each full day of stand by duty.</p> <p>Section 10.02 To provide for and take care of problems and emergencies that occur outside regular work hours, certain employees shall be assigned to Standby Duty. Employees on Standby Duty are subject to call whenever needed. They shall keep themselves available for call and shall answer the after-hours emergency contact system. They shall keep assigned cellular phones in a location in which they can readily answer it at all times. The Standby employee must respond to after-hours emergencies within 30 minutes of call. Employees are expressly prohibited from being intoxicated while on Standby Duty.</p>

**APPENDIX B - TABLE 10**  
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Sacramento County	<p align="center">Unit 17</p> <ul style="list-style-type: none"> <li>a. Any employee who is required to remain on standby for emergency work shall be paid two (2) hours' straight time pay for each standby shift, whether or not the employee is called to work. A standby shift shall be eight (8) hours or less.</li> <li>b. The employee who performs emergency work on standby duty shall be compensated therefore as overtime work. A minimum of two (2) hours' overtime compensation per shift shall be paid to an employee who is called back, in addition to the standby pay to which such employee is entitled pursuant to Subsection a.</li> <li>c. Any employee who is not on standby pursuant to Subsections a. and b. above and is called into work shall be compensated at the overtime rate established for the job class in the following manner: <ul style="list-style-type: none"> <li>(1) Office/field work - for overtime work which requires the employee to come to the office site or perform field work due to an emergency, the employee shall be paid a minimum of two (2) hours and up to the actual hours worked outside of the employee's normally scheduled work hours.</li> <li>(2) Non-office/non-field work - for overtime work which does not require the employee to come to the office site to perform field work due to an emergency but is conducted, for example, by telephone from the employee's residence, the employee shall be paid based on the actual time worked.</li> </ul> </li> </ul>
Sacramento Suburban Water District	In order to respond to customer requests and system emergencies that occur outside standard work hours, Distribution and Production Operators will be assigned to perform Standby Duty a minimum of twice per calendar year. Operators are required

**APPENDIX B - TABLE 10**  
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	<p>to read, understand and comply with the District's Standby Duty Procedure (PR - O&amp;M 001). Additional compensation will be paid an employee for Standby Duty at the rate of fourteen (14) hours straight time for each seven (7) day period. If Standby Duty is less than seven (7) days, the amount of compensation paid will be proportionately reduced. Standby Duty pay will be in addition to any overtime pay for Standby Duty actually worked. Actual time worked while on Standby Duty will be compensated at the overtime rate subject to a two (2) hour minimum for each call-out that requires a field response. Overtime worked for each field response call-out after the first two (2) hours will be measured in fifteen (15) minute (.25 hour) increments. Responses that can be handled by telephone or electronically through the District's SCADA/GIS system and do not require a field visit will be compensated at the overtime rate subject to a five (5) minute minimum for each response. For purposes of overtime, travel time from the employee's home to the reporting station and return home will be included in the overtime pay period. An exception will occur if the employee is required to remain on duty until the start of the next regularly scheduled workday; in that case, travel time will not be paid. A log will be provided by the employee's immediate supervisor or department manager for the express purpose of reporting all call-out time while on Standby Duty. These call-out hours should also be listed on the weekly timesheets for review and approval by the employee's immediate supervisor. All employees performing Standby Duty are required to be appropriately certified by the California State Water Resources Control Board/Division of Drinking Water as determined by the District. The District will compensate in-lieu holiday(s) for the Standby Duty employee whose shift includes District recognized holiday(s) by giving the employee additional vacation hours equal to the number of holiday hours within the assigned Standby Duty shift. Employees may not take any personal holidays while on Standby Duty.</p>
San Juan Water District	<p>Stand-By Pay refers to compensation to the On-Call employee during off-duty hours for the time waiting for or in-between "Call-Outs" during which time the employee is ready to respond to a District related call.</p> <p>Employees who are assigned to On-Call duty shall be entitled to daily Stand-By Pay in addition to their regular compensation and overtime pay equal to two hours of regular pay at the employee's regular rate of pay for each weekday assigned to On-Call duty and four hours of regular pay at the employee's regular rate of pay for each weekend day assigned to On-Call duty.</p> <p>The On-Call employee working a District recognized holiday will receive four hours of Stand-By Pay at the employee's regular rate of pay for On-Call duty on the recognized holiday.</p>

# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

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SUBJECT : Discussion and Possible Action to Adopt Information Technology Policy  
10101.00

STATUS : Action Item

REPORT DATE : August 8, 2022

PREPARED BY : Bryan Abaya, Principal Information Technology Analyst

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**OBJECTIVE:**

Consider a motion to approve the adoption and implementation of an Information Technology Policy (10,000 series).

**BACKGROUND AND ANALYSIS:**

The District currently maintains guidelines concerning employees' use of technology in the workplace through Human Resources Policies and Administrative Procedures. These rules cover, among other things, technology hardware purchasing, software purchasing, software use, a "bring your own device" policy, and information technology security requirements. As the District continues to evolve, IT policies and procedures require updating as technology continues to change and become more complex at a fast pace. To address changing technology and security best practices, the District staff has prepared an Information Technology Policy and Procedures, which accompanies this report for Board consideration. The policy and procedures were drafted in accordance with industry standards sourced from various districts under the Municipal Information Systems Association of California (MISAC) and other public agencies with the guidance of CHWD's General Counsel.

**RECOMMENDATION:**

Adopt the Information Technology policy (Exhibit A) accompanying this Board report.

**ATTACHMENTS:**

1. Exhibit A: Information Technology Policy
2. Exhibit B: Information Technology Procedures (For Board information purposes only)

**ACTION:**

Moved by Director \_\_\_\_\_, Seconded by Director \_\_\_\_\_, Carried \_\_\_\_\_

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# **ATTACHMENT 1**

## **Exhibit A, Information Technology Policy**

CITRUS HEIGHTS WATER DISTRICT  
POLICY MANUAL

10101.00                    INFORMATION TECHNOLOGY POLICY

Consistent with applicable legal requirements, the General Manager or the official designee shall develop, implement, and update information technology procedures applicable to the purchase, disposition, and use of information technology equipment and software. Such procedures shall be consistent with other applicable Board of Directors' policies.

## **ATTACHMENT 2**

### **Exhibit B, Information Technology Procedures**

# CITRUS HEIGHTS WATER DISTRICT

## INFORMATION TECHNOLOGY PROCEDURES

The Citrus Heights Water District (“District”) IT Procedures provides the procedures for the selection and use of IT within the District which must be followed by all staff. It also provides guidelines the District will use to administer these procedures.

The District will keep all IT procedures current and relevant. Therefore, from time to time it will be necessary to modify and amend some sections of the procedures, or to add new ones.

Any suggestions, recommendations or feedback on the procedures specified in this document are welcome.

These procedures and procedures apply to all District employees.

## 10101.00     Technology Hardware Purchasing Procedures

These Procedures provide guidelines for the purchase of hardware for the District to ensure that all hardware technology for the District is appropriate, value for money and where applicable integrates with other technology for the District. The objective of these Procedures is to ensure that there is minimum diversity of hardware within the District.

### 10101.10     Purchase of Hardware

The purchase of all workstations, servers, printers, scanners, networking equipment, accessories, mobile devices, and peripherals must adhere to the procedures detailed in this section.

### 10101.20     Purchasing Workstation Computer Systems

The workstation computer systems purchased must run Windows 10 or newer and/or Windows Server 2016 or newer, to integrate with existing hardware.

The workstation computer systems must be purchased as standard desktop system bundle and must be from the brands Lenovo, Dell, or Microsoft.

The workstation computer system bundle must include:

Workstation (laptop or desktop)

Workstation screen of at least 24" (at least 1 screen per user)

- Docking station
- Wired keyboard and mouse, unless specifically requested
- Windows 10 (or 11) with Microsoft Office 365 and TrendMicro client
- Accessories less than \$100 in value may be available for request

The minimum capacity of the workstations must be:

- Intel i5-i7 (for regular users) and i7-i9 (for power users)
- 8GB-16GB (for regular users) and 16GB-32GB (for power users)
- Docking stations should have at least the following ports: 1 for HDMI (Display Port is also acceptable), 2 USB, 1 power

Any change from the above requirements must be authorized by the General Manager or the official designee.

All purchases of workstations must be supported by the General Manager or the official designee and be compatible with the District's server system.

All purchases for workstations must be in line with the purchasing procedure number [6500 – Purchasing & Procurement](#).

#### 10101.30      Purchasing Mobile Computing Systems

The purchase of mobile computing systems includes cellular phones, tablets, and hotspot devices.

Mobile computing systems purchased must run iOS or Android OS and integrate with existing hardware Mobile Device Management System (MDM) of the District.

The mobile computing systems purchased must be Apple, Samsung, Google, Lenovo, Dell, T-Mobile, and Verizon branded devices.

The mobile computing system must include the following software provided:

- MDM management software (including approved apps)

Any change from the above requirements must be authorized by the General Manager or the official designee.

All purchases of all mobile computing systems must be supported by manufacturer warranty and be compatible with the District's server system.

All purchases for mobile computing systems must be in line with the purchasing Procedures in the [6500 – Purchasing & Procurement](#).

#### 10101.40      Purchasing Server Systems

Server systems can only be purchased by the General Manager or the official designee.

Server systems purchased must be compatible with all other computer hardware in the District.

All purchases of server systems must be supported by manufacturer warranty and be compatible with the District's other server systems.

Any change from the above requirements must be authorized by the General Manager or the official designee.

All purchases for server systems must be in line with the purchasing Procedures in the [6500 – Purchasing & Procurement](#).

#### 10101.50      Purchasing Computer Peripherals

Computer system peripherals include monitors, modems, routers, switches, cameras, keyboards, mice, microphones, headphones/headsets, laptop docks, phones, data storage devices (e.g., hard drives, USB drives), and any other computer peripherals that would attach or work with the District's approved systems.

Computer peripherals can only be purchased where they are not included in any hardware purchase or are considered to be an additional requirement to existing peripherals.

Computer peripherals purchased must be compatible with all other computer hardware and software in the District.

The purchase of computer peripherals can only be authorized by the General Manager or the official designee and/or department heads.

All purchases of computer peripherals must be supported by manufacturer warranty and be compatible with the District's other hardware and software systems.

Any change from the above requirements must be authorized by the General Manager or the official designee.

All purchases for computer peripherals must be in line with the purchasing procedures in the [6500 – Purchasing & Procurement](#).

#### 10101.60      Additional Procedures for Purchasing Hardware

Any additional computer hardware not covered by this Procedures, please consult with your supervisor or the General Manager or the official designee.

## 10102.00

### Procedures for Getting Software

These Procedures provides guidelines for the purchase of software for the District to ensure that all software used by the District is appropriate, value for money and where applicable integrates with other technology for the District. These Procedures apply to software obtained as part of hardware bundle or pre-loaded software.

#### 10102.10      Request for Software

All software, including Apple/Android apps used with District own/managed equipment, must be approved by the General Manager or the official designee prior to the use or download of such software.

#### 10102.20      Purchase of Software

The purchase of all software must adhere to this procedure.

All purchased software must be purchased by the General Manager or the official designee.

All purchased software must be purchased from approved vendors (see list of approved IT vendors).

All purchases of software must be supported by the General Manager or the official designee and be compatible with the District's server and/or hardware system.

Any changes from the above requirements must be authorized by the General Manager or the official designee.

All purchases for software must be in line with the purchasing procedure in the [6500 – Purchasing & Procurement](#).

#### 10102.30      Obtaining Open Source or Freeware Software

Open source or freeware software can be obtained without payment and usually downloaded directly from the internet.

In the event that open source or freeware software is required, approval from the General Manager or the official designee must be obtained prior to the download or use of such software.

All open source or freeware must be compatible with the District's hardware and software systems.

Any change from the above requirements must be authorized by General Manager or the official designee.



10102.40      Additional Procedure for Obtaining Software

Any additional computer software not covered by this procedure, please consult with your supervisor or the General Manager or the official designee.

## 10103.00     Procedures for Use of Software

These Procedures provide guidelines for the use of software for all employees within the District to ensure that all software use is appropriate. Under these Procedures, the use of all open source and freeware software will be conducted under the same procedures outlined for commercial software.

### 10103.10     Software Licensing

All computer software copyrights, and terms of all software licenses will be followed by all employees of the District.

Where licensing states limited usage (i.e., number of computers or users etc.), then it is the responsibility of the General Manager or the official designee to ensure these terms are followed.

The General Manager or the official designee is responsible for completing a software audit of all hardware at least once a year to ensure that software copyrights and license agreements are adhered to.

### 10103.20     Software Installation

All software must be appropriately registered with the supplier where this is a requirement.

The District is to be the registered owner of all software.

Only software obtained in accordance with the getting software Procedures is to be installed on the District's computers.

All software installation is to be carried out or with approval from the General Manager or the official designee.

A software upgrade shall not be installed on a computer that does not already have a copy of the original version of the software loaded on it.

### 10103.30     Software Usage

Only software purchased in accordance with the getting software procedure is to be used within the District.

Prior to the use of any software, the employee must receive instructions on any licensing agreements relating to the software, including any restrictions on use of the software.

All employees are entitled to receive training for all new software. This includes new employees to be trained to use existing software appropriately. This will be the responsibility of the department heads that the employee is a part of.

Employees are prohibited from bringing software from home and loading it onto the District's computer hardware.

Unless express approval from the General Manager or the official designee is obtained, software cannot be taken home or downloaded and loaded on an employee's home computer.

Where an employee is required to use software at home, the employee is entitled to bring their workstations home. If an employee does not have mobile workstations, an evaluation of providing the employee with a portable computer should be undertaken in the first instance. Where it is found that software can be used on the employee's home computer, authorization from the General Manager or the official designee is required to purchase separate software if licensing or copyright restrictions apply. Where software is purchased in this circumstance, it remains the property of the District and must be recorded on the software register by the General Manager or the official designee.

Unauthorized software is prohibited from being used in the District. This includes the use of software owned by an employee and used within the District.

The unauthorized duplicating, acquiring or use of software copies is prohibited. Any employee who makes, acquires, or uses unauthorized copies of software will be referred to their corresponding supervisor for proper discipline. The illegal duplication of software or other copyrighted works is not condoned within this the District and the General Manager or the official designee is authorized to undertake disciplinary action where such event occurs.

#### 10103.40      Breach of Procedures

Where there is a breach of these procedures by an employee, that employee will be referred to their supervisor or human resources (HR) for appropriate disciplinary actions.

Where an employee is aware of a breach of the use of software in accordance with this procedure, they are obliged to notify their immediate supervisor or the General Manager or the official designee immediately. In the event that the breach is not reported, and it is determined that an employee failed to report the breach, then that employee will be referred to their supervisor or HR for the appropriate disciplinary actions.

## 10104.00      Bring Your Own Device Procedures

At the District we acknowledge the importance of mobile technologies in improving the District's communication and productivity. In addition to the increased use of mobile devices, staff members have requested the option of connecting their own mobile devices to the

District's network and equipment. We encourage you to read this document in full and to act upon the recommendations. These Procedures should be read and carried out by all staff.

These Procedures provide guidelines for the use of personally owned notebooks, smart phones, tablets and any electronic devices for the District's purposes. All staff who use or access the District's technology equipment and/or services are bound by the conditions of these Procedures.

### 10104.10      Current Mobile Devices Approved for the District Use

The following personally owned mobile devices are approved to be used for the District purposes:

- Personal laptops, Chromebooks, and tablets
- Apple iPhones and Android phones
- Internet radios, smart watches, and smart devices

### 10104.20      Registration of Personal Mobile Devices for the District Use

Employees when using personal devices for the District use will register the device with the General Manager or the official designee. The General Manager or the official designee will record the device and all applications used by the device.

Personal mobile devices would need to adhere to the same standards and procedures of use provided herewith.

Each employee who utilizes personal mobile devices agrees:

- Not to download or transfer the District or personal sensitive information to the device. Sensitive information includes customer data and information, District information that are deemed confidential, and similar data
- Not to use the registered mobile device as the sole repository for District's information. All the District information stored on mobile devices should be backed up
- To make every reasonable effort to ensure that District's information is not compromised through the use of mobile equipment in a public place, screens

displaying sensitive or critical information should not be seen by unauthorized persons and all registered devices should be password protected

- To maintain the device with the latest updates from its manufacturers and software vendors
- Not to share the device with other individuals to protect the District data access through the device
- To abide by District's internet Procedures for appropriate use and access of internet sites etc.
- To notify District immediately in the event of loss or theft of the registered device
- Not to connect USB memory sticks (or similar data storage devices) from an untrusted or unknown source to District's equipment.

All employees who have a registered personal mobile device for the District use acknowledge that the District:

- Owns all intellectual property created on the device
- Can access all data held on the device, including personal data
- Will regularly back-up data held on the device
- Will delete all data held on the device in the event of loss or theft of the device
- Has first right to buy the device where the employee wants to sell the device
- Will delete all data held on the device upon termination of the employee. The terminated employee can request personal data be reinstated from back up data
- Has the right to deregister the device for the District use at any time.

#### 10104.30      Keeping Mobile Devices Secure

The following must be observed when handling mobile computing devices (such as notebooks, tablets, and cellular phones):

- Mobile computer devices must never be left unattended in a public place, or in an unlocked house, or in an unlocked motor vehicle. Wherever possible they should be kept on the person or securely locked away.
- Mobile devices should be carried as hand luggage when travelling by aircraft.

#### 10104.40      Exemptions

These Procedures is mandatory unless the General Manager grants an exemption. Any requests for exemptions from any of these directives, should be referred to the General Manager or the official designee.

#### 10104.50      Breach of Procedures

Any breach of these Procedures will be referred to Human Resources who will review the breach and determine adequate consequences, which can include confiscation of the device and or appropriate disciplinary actions.

#### 10104.60      Indemnity

District bears no responsibility whatsoever for any legal action threatened or started due to conduct and activities of staff in accessing or using these resources or facilities. All staff indemnify District against any and all damages, costs and expenses suffered by District arising out of any unlawful or improper conduct and activity, and in respect of any action, settlement or compromise, or any statutory infringement. Legal prosecution following a breach of these conditions may result independently from any action by District.

## 10105.00     Information Technology Security Procedures

These Procedures provide guidelines for the protection and use of information technology assets and resources within the District to ensure integrity, confidentiality and availability of data and assets.

### 10105.10     Physical Security

For all servers and mainframes, the area must be secured with adequate ventilation and appropriate access through keypad or badge sensors.

It will be the responsibility of the General Manager or the official designee to ensure that this requirement is followed at all times. Any employee becoming aware of a breach to this security requirement is obliged to notify the Director of Administration Services immediately.

All security and safety of all portable technology, such as laptops, tablets, cellular phones, etc. will be the responsibility of the employee who has been issued with the appropriate device/s. Each employee is required to use security measures, such as locks, passwords, etc., and to ensure the asset is kept safe at all times to protect the security of the asset issued to them.

In the event of loss or damage, the General Manager or the official designee will assess the security measures undertaken to determine if the employee will be required to reimburse the District for the loss or damage.

All devices such as laptop, tablets, cellular phones, etc., when kept at the office desk is to be secured by a strong password.

### 10105.20     Information Security

All customer information, District software (e.g., Cityworks, Cogsdale, ESRI, etc.) is to be backed-up regularly.

It is the responsibility of the General Manager or the official designee to ensure that data back-ups are conducted daily and the backed-up data is kept secured but accessible at any time.

All District technology that has internet access must have anti-virus software installed. It is the responsibility of the General Manager or the official designee to install all anti-virus software and ensure that this software remains up to date on all technology used by the District.

All information used within the District is to adhere to the privacy laws and the District's confidentiality requirements. Any employee breaching this will be reported to the Human Resources for appropriate actions.

10105.30      Technology Access

Every employee will be issued with a unique identification code (username) to access the District technology and will be required to set a password for access.

Each password is to be at least 8 characters long, with alphanumeric characters and preferably with special characters and is not to be shared with any employee within the District aside from the General Manager or the official designee.

The General Manager or the official designee is responsible for the issuing of the identification code and initial password for all employees.

The employee will then be responsible to set a contact number for Multi-factor Authentication or MFA, whenever applicable.

Where an employee forgets the password or is 'locked out' after five attempts, then the General Manager or the official designee is authorized to reissue a new password.

The following table provides the authorization of access:

<b>Technology – Hardware/ Software</b>	<b>Persons authorized for access</b>
Servers, switches, routers, and other networking devices	General Manager or the official designee and Partners
Workstations, printers, phones, cellular phones	General Manager or the official designee /Partners and Employee issued the device
Network printers, scanners, fax machines	Any authorized employee

Employees are only authorized to use the District computers for personal use if agreed upon during onboarding and determined from standard business needs.

It is the responsibility of the General Manager or the official designee (in coordination with the proper HR personnel) to keep all procedures up to date.



## 10106.00     Information Technology Administration Procedures

These Procedures provide guidelines for the administration of information technology assets and resources within the District.

### 10106.10     Inventory

All software installed and the license information must be registered on the current inventory system. It is the responsibility of the General Manager or the official designee to ensure that this registry is maintained and updated every year. The register must record the following information:

- What software is installed on every machine
- What license agreements are in place for each software package
- Renewal/expiration dates (if applicable)

The General Manager or the official designee is responsible for the maintenance and management of all service agreements for the District technology. Any service requirements must first be approved by the General Manager or the official designee and corresponding department heads associated with the software.

The General Manager or the official designee is responsible for maintaining adequate technology spare parts and other requirements including consumables, such as toners, cables, adapters, etc.

A technology audit is to be conducted yearly to ensure that all information technology procedures are being adhered to.

Any unspecified technology administration requirements should be directed to the General Manager or the official designee.

## 10107.00 Website Procedures

These Procedures provide guidelines for the maintenance of all relevant technology issues related to the District website.

### 10107.10 Website Register

The website register must record the following details:

- List of domain names registered to the District
- Dates of renewal for domain names
- List of hosting service providers
- Expiry dates of hosting

Keeping the register up to date will be the responsibility of the General Manager or the official designee.

The General Manager or the official designee will be responsible for any renewal of items listed in the register.

### 10107.20 Website Content

All content on the District website is to be accurate, appropriate and current. This will be the responsibility of the General Manager or the official designee, Communications Manager or vendors the District is currently contracted with.

The content of the website is to be reviewed the General Manager or the official designee, Human Resources, Communications, and Administration heads.

The following persons are authorized to make changes to the District website:  
General Manager or the official designee & Communications Manager

Basic branding guidelines must be followed on websites to ensure a consistent and cohesive image for the District.

All data collected from the website is to adhere to the [Privacy Act](#)

## 10108.00     Electronic Transactions Procedures

These Procedures provide guidelines for all electronic transactions undertaken on behalf of the District.

The objective of these Procedures is to ensure that use of electronic funds transfers and receipts are started, carried out, and approved in a secure manner.

### 10108.10     Electronic Purchases

All electronic purchases by any authorized employee must adhere to the purchasing Procedures in the [Financial Policies and Procedures manual](#).

Where an electronic purchase is being considered, the person authorizing this transaction must ensure that the internet sales site is secure and safe and be able to demonstrate that this has been reviewed.

All electronic purchases must be undertaken using the District credit cards only and therefore adhere to the District credit card procedure in the [Financial Policies and Procedures manual](#).

## 10109.00 IT Service Agreements Procedures

These Procedures provide guidelines for all IT service agreements entered into on behalf of the District.

### 10109.10 IT Services

The following IT service agreements can be entered into on behalf of the District:

- Provision of general IT services
- Provision of network, hardware, and software
- Repairs and maintenance of IT equipment
- Provision of the District software
- Provision of mobile phones and relevant plans
- Website design, maintenance etc.
- Specialized IT projects and services

All major IT service agreements must be reviewed by the General Manager or the official designee and Director of Administrative Services before the agreement is entered into. Once the agreement has been reviewed and recommendation for execution received, then the agreement must be approved by the General Manager.

All IT service agreements, obligations and renewals must be recorded in accordance to the [Financial Policies and Procedures manual](#)

Where an IT service agreement renewal is required, in the event that the agreement is substantially unchanged from the previous agreement, then this agreement renewal can be authorized by the General Manager or the official designee.

Where an IT service agreement renewal is required, in the event that the agreement has substantially changed from the previous agreement, the Director of Administrative Services before the renewal is entered into. Once the agreement has been reviewed and recommendation for execution received, then the agreement must be approved by the General Manager or the official designee.

In the event that there is a dispute to the provision of IT services covered by an IT service agreement, it must be referred to the District's General Counsel who will be responsible for the settlement of such dispute.

## 10110.00     Emergency Management of Information Technology

These Procedures provide guidelines for emergency management of all information technology within the District.

### 10110.10     IT Hardware Failure

Where there is failure of any of the District's hardware, this must be referred to the General Manager or the official designee immediately by submitting a Helpdesk ticket.

It is the responsibility of the General Manager or the official designee to inform all affected users and vendors in the event of IT hardware failure.

It is the responsibility of the General Manager or the official designee (and/or contracted third-party consultants) to undertake tests on planned emergency procedures at least once every year to ensure that all planned emergency procedures are appropriate and minimize disruption to the District operations.

### 10110.20     Point of Sale Disruptions

In the event that point of sale (POS) system is disrupted, the following actions must be immediately undertaken:

- POS provider to be notified
- Accounting Manager must be notified immediately
- All POS transactions to be redirected to online payment

### 10110.30     Virus or Other Security Breach

In the event that the District's information technology is compromised by software virus or malware, such breaches are to be reported to the General Manager or the official designee immediately.

The General Manager or the official designee is responsible for ensuring that any security breach is dealt with within the same business day to minimize disruption to the District operations.

### 10110.40     Website Disruption

In the event that the District website is disrupted, the following actions must be immediately undertaken:

- Website host to be notified
- Communications Manager must be notified immediately
- Online payment provider to be notified immediately

# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

SUBJECT : 2022 STRATEGIC PLAN UPDATE AND 2023 STRATEGIC PLAN APPROVAL  
 STATUS : Discussion and Action Item  
 REPORT DATE : August 9, 2022  
 PREPARED BY : Brittney C. Moore, Administrative Services Manager

### **OBJECTIVE:**

Receive an update to the 2022 Strategic Plan and consider approval of the Citrus Heights Water District's 2023 Strategic Plan.

### **BACKGROUND AND ANALYSIS:**

This is the seventh year that CHWD has engaged in a Strategic Planning process to help shape the development of its annual budget. The goal of Strategic Planning is to bring the Board of Directors and key District staff together to identify and prioritize the District's high priority policy, program and project issues, and to identify what items, given limited resources (i.e., funding, time and staffing resources) the District should be working on over and above daily operations in the coming year.

The Strategic Planning process includes three major components: 1) Education/Issues Briefing; 2) Team Building; 3) Work Program Development.

The *Education/Issues Briefing Component* consisted of a 2022 Strategic Plan Update by CHWD staff in a Consent Calendar report to the Board at its April 20, 2022 Regular Board Meeting. In addition, staff provides project and Strategic Planning updates in the monthly FYI Report.

The *Team Building* and *Work Program Development* components took place on May 25, 2022, in a session attended by the Board of Directors and key District staff, facilitated by Laura Mason-Smith.

Accompanying this staff report are additional 2022 Strategic Plan updates (Attachment 1), along with the 2023 Strategic Planning notes (Attachment 2), prepared by facilitator Laura Mason-Smith. In January, leadership staff will present a 2023 Strategic Plan Preview, including who will serve as the Executive responsible for the project, the Project Lead, a project timeline, and who will serve on the Project Team to accomplish each objective within a projected timeframe.

District leadership staff will be reviewing progress on the Strategic Plan several times each month and will update the Board of Directors quarterly or more often as required.

### **RECOMMENDATION:**

1. Receive and file an update of the 2022 Strategic Plan.
2. Approve the 2023 Strategic Plan, and direct that Strategic Planning Objectives be included in the 2023 proposed budget, which will be considered by the Board of Directors for adoption later in 2022 for the 2023 budget year.

### **ATTACHMENT:**

1. 2022 Strategic Plan Update
2. 2023-2026 Strategic Plan Session Summary

Moved by Director \_\_\_\_\_, Seconded by Director \_\_\_\_\_, Carried \_\_\_\_\_

# **ATTACHMENT 1**

## **2022 Strategic Plan Update**

## **CITRUS HEIGHTS WATER DISTRICT ☼ 2022 STRATEGIC OBJECTIVES**

**THREE-YEAR GOAL:     MANAGE AND DIVERSIFY A DEPENDABLE WATER SUPPLY**

<i>Objectives to be Completed in the 2022 Year</i>					
<b>#</b>	<b>START</b>	<b>END</b>	<b>WHAT</b>	<b>WHO</b>	<b>COMMENTS</b>
<b>1</b>	<b>Q1</b>	<b>Q4</b>	<b><i>Participate in the Hinkle Reservoir Cover Replacement Project</i></b>	<b><i>Brian Hensley (Lead); Hilary Straus; Rebecca Scott; Steve Anderson</i></b>	<b><i>SJWD has awarded a contract for the project, which is expected to start this November.</i></b>
<b>2</b>	<b>Q1</b>		<b><i>Develop one intertie with a neighboring agency contingent upon their participation</i></b>	<b><i>Brian Hensley (Lead); Hilary Straus; Rebecca Scott; Steve Anderson</i></b>	<b><i>Staff was interested in developing an intertie with the City of Roseville, but they did not receive grant funding for the intertie project.</i></b>
<b>3</b>	<b>Q1</b>		<b><i>Complete design for Well Site 7</i></b>	<b><i>Brian Hensley (Lead); Hilary Straus; Rebecca Scott; Steve Anderson</i></b>	<b><i>Design is 50% complete (drilling design is 100% complete, but well equipping is the larger portion of the project and is ongoing), and staff has secured a contractor for drilling of the well.</i></b>



## CITRUS HEIGHTS WATER DISTRICT ☼ 2022 STRATEGIC OBJECTIVES

**THREE-YEAR GOAL:**    **MANAGE WATER EFFICIENCY EFFECTIVELY AND EMPOWER CUSTOMERS TO USE WATER IN AN EFFICIENT MANNER**

<i>Objectives to be Completed in the 2022 Year</i>					
#	START	END	WHAT	WHO	COMMENTS
1	Q1	Q4	<i>Increase CHWD Customer attendance by 10% at Water Smart Classes</i>	<i>Lea Park-Kim (Lead); Rebecca Scott</i>	<i>2/3 webinar: 42 attendees with 97% customers; 3/5 in-person class: 19 attendees with 79% customers; 4/7 webinar: 35 attendees with 75%* customers. *32 out of 35 attendees answered the poll question.</i>
2	Q1	Q4	<i>Increase participants in the Pressure Reduction Valve Rebate Program by 10%</i>	<i>Lea Park-Kim; Rebecca Scott (Lead)</i>	<i>Jan-June 2021: 14 Jan-June 2022: 12</i>
3	Q1	Q4	<i>Increase participants in the Irrigation Efficiency Review and Smart Controller Program by 10%</i>	<i>Lea Park-Kim; Rebecca Scott (Lead)</i>	<i>Jan-June 2021: 115 Jan-June 2022: 123</i>
4	Q1	Q4	<i>Develop a Community Garden page for the CHWD Website</i>	<i>Lea Park-Kim; Rebecca Scott (Lead)</i>	<i>Completion scheduled for Q4 2022.</i>

## CITRUS HEIGHTS WATER DISTRICT ☼ 2022 STRATEGIC OBJECTIVES

**THREE-YEAR GOAL: MANAGE THE EFFICIENT IMPROVEMENT OF AND REINVESTMENT IN DISTRICT  
INFRASTRUCTURE AND FACILITIES**

<i>Objectives to be Completed in the 2022 Year</i>					
#	START	END	WHAT	WHO	COMMENTS
1	Q1	Q4	<i>Implement a District meter testing program</i>	<i>Rebecca Scott (Lead); Hilary Straus</i>	<i>Pending the Water Meter Study's transition to the RWA subscription program.</i>
2			<i>Work with the Regional Water Authority to complete the transition of leadership for the Water Meter Replacement Program</i>	<i>Rebecca Scott (Lead); Hilary Straus</i>	<i>Ongoing: targeting mid-2023</i>
3	Q1	Q4	<i>Start Corporation Yard Pre-Architectural Study and develop design alternatives for consideration</i>	<i>Tamar Dawson; Paul Dietrich; Missy Pieri; Rebecca Scott; Hilary Straus</i>	<i>Kick-off meeting occurred with Williams Paddon</i>
4	Q1	Q4	<i>Complete the District-wide Easement Project</i>	<i>Tamar Dawson; Paul Dietrich; Missy Pieri (Lead); Hilary Straus,</i>	<i>Project is 80% complete.</i>
5	Q3	On-going	<i>Perform non-invasive condition assessment on selected District transmission mains</i>	<i>Paul Dietrich; Missy Pieri (Lead)</i>	<i>Completed Phase 1 condition assessment on 42" transmission main.</i>

## CITRUS HEIGHTS WATER DISTRICT ☼ 2022 STRATEGIC OBJECTIVES

**THREE-YEAR GOAL: PROMOTE ORGANIZATIONAL EFFECTIVENESS TO ENHANCE CUSTOMER SERVICE**

<i>Objectives to be Completed in the 2022 Year</i>					
#	START	END	WHAT	WHO	COMMENTS
1	Q3	Q4	<i>Complete development of Information Technology Policies (10,000's)</i>	<i>Bryan Abaya; Brittney Moore</i>	<i>To Board August 2022</i>
2	Q1	Q4	<i>Complete update of the Operations Policies (5,000's)</i>	<i>Brittney Moore; Rebecca Scott; Hilary Straus</i>	<i>Policies under review. Tentative date to Board, November 2022</i>
3	Q3	Q4	<i>Complete update and development of engineering design standards/procedures for development projects (8,000's-Water Service and 9,000's-Water Distribution Facilities)</i>	<i>Brittney Moore; Missy Pieri (Lead); Rebecca Scott; Hilary Straus</i>	<i>Completed kick-off meetings. Received Needs Assessment Technical Memo. Next step is to prepare agreement to develop standards.</i>
4	Q2	Q3	<i>Implement study for information technology (IT) federated services and single sign on</i>	<i>Bryan Abaya</i>	<i>Process evaluation in progress; Infrastructure preparations in progress</i>
5	Q2	Q3	<i>Research virtual desktop options for potential implementation</i>	<i>Bryan Abaya</i>	<i>On hold: re-evaluating business needs; Not suitable for our current business needs</i>
6	Q3	Q4	<i>Implement Enterprise Resource Planning (ERP) software migration</i>	<i>Bryan Abaya; Alberto Preciado</i>	<i>On hold: re-evaluating business needs</i>

**THREE-YEAR GOAL: PROMOTE ORGANIZATIONAL EFFECTIVENESS TO ENHANCE CUSTOMER SERVICE CONT'D**

<b>Objectives to be Completed in the 2022 Year</b>					
<b>#</b>	<b>START</b>	<b>END</b>	<b>WHAT</b>	<b>WHO</b>	<b>COMMENTS</b>
<b>7</b>	<b>Q1</b>	<b>Q4</b>	<b>Implement outreach and engagement plan on the preferred alternative from the Project 2030 Water Main Replacement Study</b>	<b>Lea Park-Kim (Lead); Missy Pieri; Hilary Straus;</b>	<b>Traditional and digital media activities include promotion on the local newspaper website, social media posts, bill inserts, and email alerts.</b>
<b>8</b>	<b>Q1</b>	<b>Q2</b>	<b>Implement Board-directed rebranding or brand refresh</b>	<b>Lea Park-Kim; Hilary Straus; Brittney Moore</b>	<b>Board presentation provided in January 2022. Continuing to highlight the CHWD brand connected to Board-directed work program priorities.</b>
<b>9</b>	<b>Q1</b>	<b>Q4</b>	<b>Increase number of emails of email listserv by 5%</b>	<b>Lea Park-Kim; Alberto Preciado</b>	<b>Started a new Constant Contact account to create and manage emails sent to the listserv. The current count is 8,654.</b>
<b>10</b>	<b>Q1</b>	<b>Q4</b>	<b>Educate customers on policy, operations, and finance issues with SJWD-Wholesale</b>	<b>Brittney Moore; Lea Park-Kim; Hilary Straus</b>	<b>Surface-level education done on social media (ex. Where the water comes from video). More in-depth public education strategy is being developed.</b>
<b>11</b>	<b>Q1</b>	<b>Q4</b>	<b>Increase online bill pay enrollment by 5%</b>	<b>Lea Park-Kim; Alberto Preciado</b>	<b>Registered accounts as of 11/29/2021: 11,208 Registered accounts as of 7/31/2022: 12,426</b>
<b>12</b>	<b>Q3</b>	<b>Q4</b>	<b>Research new options for Automated Clearing House (ACH)</b>	<b>Alberto Preciado</b>	<b>Research phase completed as of 6/2022. Currently evaluating three options.</b>
<b>13</b>	<b>Q1</b>	<b>Q3</b>	<b>Implement redistricting/district division update</b>	<b>Brittney Moore (Lead); Hilary Straus</b>	<b>District Resolution approving boundaries for the District's Electoral Divisions sent to Sacramento and Placer County 01/06/2022. This item is complete.</b>

<i>Objectives to be Completed in the 2022 Year</i>					
<b>#</b>	<b>START</b>	<b>END</b>	<b>WHAT</b>	<b>WHO</b>	<b>COMMENTS</b>
<b>14</b>	<b>Q2</b>	<b>Q3</b>	<b><i>Enhance employee recruitment and retention initiatives by providing additional resources (e.g., an advanced training and education program)</i></b>	<b><i>Brittney Moore (Lead); Hilary Straus</i></b>	<b><i>Staff has completed the training materials for the Leadership Essentials Training for the 21st Century. Training date tentative for Q4 2022.</i></b>  <b><i>Task Order executed with Regional Government Services to begin work on Career Mapping for CHWD's staff team members.</i></b>

## **ATTACHMENT 2**

### **2023-2026 Strategic Plan Session Summary**



# ***2023-2026 STRATEGIC PLAN SESSION SUMMARY***

Wednesday, May 25, 2022

*designed and facilitated by*

**Mason***Smith*  
**S U C C E S S  
S T R A T E G I E S**

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**Citrus Heights Water District**  
**2023-2026 STRATEGIC PLAN SESSION SUMMARY**  
Wednesday, May 25, 2022

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**Citrus Heights Water District**  
**2023-2026 STRATEGIC PLAN SESSION SUMMARY**  
Wednesday, May 25, 2022

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**OVERVIEW**

On Wednesday, May 25, 2022, the following members of the Board and Management of the Citrus Heights Water District met to develop the District's 2023-2026 Strategic Plan:

Caryl Sheehan	President of the Board
Raymond Riehle	Vice President of the Board
David Wheaton	Board Member
Hilary Straus	General Manager
Steve Anderson	General Counsel
Tim Cutler	Water Distribution Supervisor
Paul Dietrich	Project Manager
Brittney Moore	Senior Management Analyst/Deputy Board Clerk
Brian Hensley	Water Resources Supervisor
Jace Nunes	Management Analyst
Lea Park-Kim	Communications and Public Engagement Manager
Missy Pieri	Director of Engineering
Alberto Preciado	Accounting Manager
Bryan Abaya	Principal Information Technology Analyst
Rebecca Scott	Director of Operations
Susan Talwar	Director of Finance and Administrative Services

Also participating were the following members of the District's Customer Advisory Committee (CAC):

Jodi Ash  
Julie Beyers  
Andrew Johnson  
Richard Moses  
Jenna Moser  
Mike Nishimura

The session was facilitated by Laura Mason-Smith of Mason-Smith SUCCESS STRATEGIES. Outlined on the following pages is a summary of the Strategic Plan Session.

## ***INTRODUCTION***

Board Chair Caryl Sheehan welcomed everyone, called the meeting to order, and explained that the purpose of the session was to develop the District's 2023-2026 Strategic Plan.

## ***DISTRICT ACCOMPLISHMENTS AND STRENGTHS***

The participants identified the following District accomplishments and strengths over the past year (not in priority order):

1. Completed the Project 2030 Study and implemented the dedicated charge
  - a. Foresight and vision to think ahead and position the District to fund both current and future needs
  - b. The staff relayed the Project 2030 Study information to the customers in the water bills, which was very helpful for the customers to know the status of the Study
  - c. All the equipment brought into meetings and demonstrations of how the equipment works was very helpful and interesting to the CAC members
2. Committed and active Customer Advisory Committee (CAC):
  - a. Several CAC members participated actively in the annual Strategic Planning Process
  - b. The staff has been consistently warm and welcoming to the CAC, providing outstanding information/training, and demonstrating appreciation for all the CAC work on the Project 2030 Study, the Meter Replacement Program Study, and all their additional contributions
3. Advocated for and received Congressional funding for the Ella Well Project
4. Increased customer awareness of Federal funding
5. Many examples of quick customer service when customers have a water issue
6. Completed bid specs for the Ella Well project, which is our next well
7. Deepened working relationships with other local agencies
8. Continue to work with our regional water agency partners on the Meter Replacement Program; this is a Program that the District initiated that can benefit all our regional partners

***DISTRICT ACCOMPLISHMENTS AND STRENGTHS*** *(continued)*

9. The annual Poster Contest engages 4th-6th grade students:
  - a. Increases students' knowledge of water issues
  - b. Since the students are at such an impressionable age, this experience will hopefully shape their and their families' use of water
10. Achieved a 10 percent increase in customer attendance in Water Smart classes
11. Demonstrated forward thinking to acquire well sites for future expansion to benefit residents
12. Obtained easements for several of the District's Capital Improvement Projects, and began the District-wide Easement Project
13. Building a large water main at Mesa Verde High school to improve redundancy
14. Completed the Infrastructure Vulnerability Assessment
15. Rebecca was appointed to the Regional Water Authority (RWA) Regional Purchasing Committee
16. It is very impressive to legal counsel that there were no negative internal legal issues
17. Proactive approach to reducing use of surface water
18. Research and development of the District's Base Rate Model

## ***DISTRICT MISSION, VISION AND CORE VALUES***

The participants reviewed the District's Mission, Vision, and Core Values as the foundation of their strategic planning work.

### ***MISSION STATEMENT***

*It is the mission of the Citrus Heights Water District to furnish a dependable supply of safe, quality water delivered to its customers in an efficient, responsive, and affordable manner.*

### ***VISION STATEMENT***

*The Citrus Heights Water district will continue to evolve as a dynamic provider of municipal water service to assure that our customers receive the best value without giving it a second thought.*

### ***CORE VALUES***

not in priority order

*Integrity*

*Teamwork*

*Dependability*

*Accountability*

*Professionalism*

### ***ISSUES, FACTORS, AND TRENDS***

The participants identified the following key issues, factors, and trends that do or could affect the District:

1. State and Federal regulations and unfunded mandates; potential water budgets are an example.
2. State and Federal decisions related to the operation of Folsom Lake and how much water is released.
3. Lead/Copper Rule changes are a big burden.
4. Impacts of the Federal administration and likely expansion of environmental regulations.
5. Impact of Voluntary Agreements, which are very likely to return.
6. Increased construction costs and the availability of building materials impact all District construction projects.
7. Water supply and availability, especially with the drought.
8. San Juan Water District's future costs and impacts to retail agencies; the need for a cost-benefit analysis for San Juan Wholesale sales of water to agencies outside the San Juan Family of Agencies.
9. Recruitment and retention challenges—staff, Board, and community leaders.
10. Challenges related to being an employer of choice.
11. Unfunded CalPERS and OPEB (Other Post-Employment Benefits) liabilities, system changes, and city/county/district impacts.
12. A trend toward collaborative partnerships for mutual benefit while maintaining agency autonomy.
13. More alternative water technologies/impacts and the need for more attention to Aquifer Storage.
14. Increasing need for public engagement and challenges in connecting with customers on key issues about their water system when they cannot see it (it is buried underground); customers also have additional competing priorities related to COVID and the drought.
15. Increased public awareness of the value of quality water.
16. Talks at a Federal level related to water, potential funding opportunities, and the return of earmark funding.
17. Water Agencies have different business models; for example, wholesale and retail.
18. Proposed water district merger talks between Sacramento Suburban and Carmichael Water Districts.
19. Non-San Juan family of water agencies making claim to SJWD Water.
20. Reliance on rate-payer funding for Irrigation Districts.

***ISSUES, FACTORS, AND TRENDS*** *(continued)*

21. Utilizing the press to highlight local issues.
22. Emerging groundwater contaminant issues, and more groundwater regulations.
23. Increase in Statewide activity regarding well drilling; drillers are so busy that it is difficult to get a well drilled.
24. Competition for contractors and supply chain issues.
25. Price increases of 30-40 percent on standard parts.
26. Economic downturn.
27. Sunrise Mall redevelopment.
28. City of Citrus Heights pavement restoration requirements.
29. Cybersecurity issues.
30. Analytics related to response rates to electronic bill pay options.
31. Delivering water continues to be more and more complicated.

***THREE-YEAR GOALS – 2023-2026***

*(not in priority order)*

After discussion, the participants prioritized the District's four top Three-Year Goals as:

- ***Manage and Diversify a Dependable Water Supply and Empower Customers to Use Water in an Efficient Manner***
- ***Manage the Improvement of and Reinvestment in District Infrastructure and Facilities***
- ***Promote Organizational Effectiveness to Enhance Customer Service***
- ***Engage Customers and Communicate the District's Value-Added Services/Benefits and Key Factors Affecting its Operations***

**CITRUS HEIGHTS WATER DISTRICT ☼ 2023 STRATEGIC OBJECTIVES**

- **THREE-YEAR GOAL:** ***Manage and Diversify a Dependable Water Supply and Empower Customers to Use Water in an Efficient Manner***

<i><b>Objectives to be Completed in the 2023 Year</b></i>					
<b>#</b>	<b>START</b>	<b>END</b>	<b>WHAT</b>	<b>WHO</b>	<b>COMMENTS</b>
1			Participate in the Hinkle Reservoir Cover Replacement Project	<b>Water Resources Supervisor</b> (Lead), Director of Operations	
2			Complete construction for Well Site 7, which will include Aquifer Storage and Recovery (ASR) technology	<b>Water Resources Supervisor</b> (Lead), Director of Operations	
3			Pursue acquisition of 1-2 potential sites for wells/water storage	<b>Water Resources Supervisor</b> (Lead), Director of Operations	
4.			Develop and promote Water Smart classes to increase CHWD customer attendance by 10%	<b>Communications and Public Engagement Manager</b> (Lead), Management Analyst, Director of Operations	

**CITRUS HEIGHTS WATER DISTRICT ⚙ 2023 STRATEGIC OBJECTIVES**

- **THREE-YEAR GOAL:** ***Manage the Improvement of and Reinvestment in District Infrastructure and Facilities***

<i><b>Objectives to be Completed in the 2023 Year</b></i>					
<b>#</b>	<b>START</b>	<b>END</b>	<b>WHAT</b>	<b>WHO</b>	<b>COMMENTS</b>
1			Implement a District meter testing program	<b>Director of Operations</b> (Lead), Senior Water Efficiency Specialist, Water Distribution Supervisor	
2			Establish a regional water meter program or participate in selected agency partnerships	<b>Director of Operations</b> (Lead)	
3			Complete the Corporation Yard Pre-Architectural Study and develop design alternatives for consideration	<b>Director of Engineering</b> (Lead)	
4			Pursue Easement Acquisitions as identified by the District-wide Easement Needs Assessment/Study	<b>Director of Engineering</b> (Lead)	
5.			Continue non-invasive condition assessments on selected District transmission mains	<b>Director of Engineering</b> (Lead)	
6.			Pursue acquisition of 1-2 potential sites for Project 2030 material storage and staging	<b>Director of Engineering</b> (Lead)	



**Citrus Heights Water District**  
**2023-2026 STRATEGIC PLAN SESSION SUMMARY**  
Wednesday, May 25, 2022

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**CITRUS HEIGHTS WATER DISTRICT ✨ 2023 STRATEGIC OBJECTIVES**

- **THREE-YEAR GOAL:** ***Promote Organizational Effectiveness to Enhance Customer Service***

<i><b>Objectives to be Completed in the 2023 Year</b></i>					
<b>#</b>	<b>START</b>	<b>END</b>	<b>WHAT</b>	<b>WHO</b>	<b>COMMENTS</b>
1			Implement study for information technology (IT) federated services and single sign on	<b>Principal IT Analyst (Lead)</b>	
2			Increase number of customer emails on email listserv by 5%	<b>Accounting Manager (Lead)</b>	
3			Implement new solution for Automated Clearing House (ACH) vendor payments	<b>Accounting Manager (Lead)</b>	
4			Continue to enhance employee recruitment and retention initiatives by providing additional resources (e.g., an advanced training and education program)	<b>Administrative Services Manager (Lead), General Manager</b>	
5			Continue analyses of regional water agency activity and impacts on CHWD	Administrative Services Manager, <b>General Manager (Lead)</b> , Communications and Public Engagement Manager	

**CITRUS HEIGHTS WATER DISTRICT ☼ 2023 STRATEGIC OBJECTIVES**

- **THREE-YEAR GOAL:** ***Engage Customers and Communicate the District's Value-Added Services/Benefits and Key Factors Affecting its Operations***

<i><b>Objectives to be Completed in the 2023 Year</b></i>					
<b>#</b>	<b>START</b>	<b>END</b>	<b>WHAT</b>	<b>WHO</b>	<b>COMMENTS</b>
1			Increase customer contact through traditional and digital media and in-person opportunities and evaluate effectiveness	<b>Communications and Public Engagement Manager (Lead)</b>	
2			Continue outreach and engagement on Project 2030 by publishing at least two relevant communications materials every month	<b>Communications and Public Engagement Manager (Lead),</b> Director of Engineering	
3			Educate customers through traditional and digital media and in-person opportunities on State and regional policies, operations, capital, and finances that impact CHWD's operations and water supply	<b>Communications and Public Engagement Manager (Lead)</b>	

**ATTACHMENT A**  
**BENEFITS OF THE STRATEGIC PLANNING PROCESS**

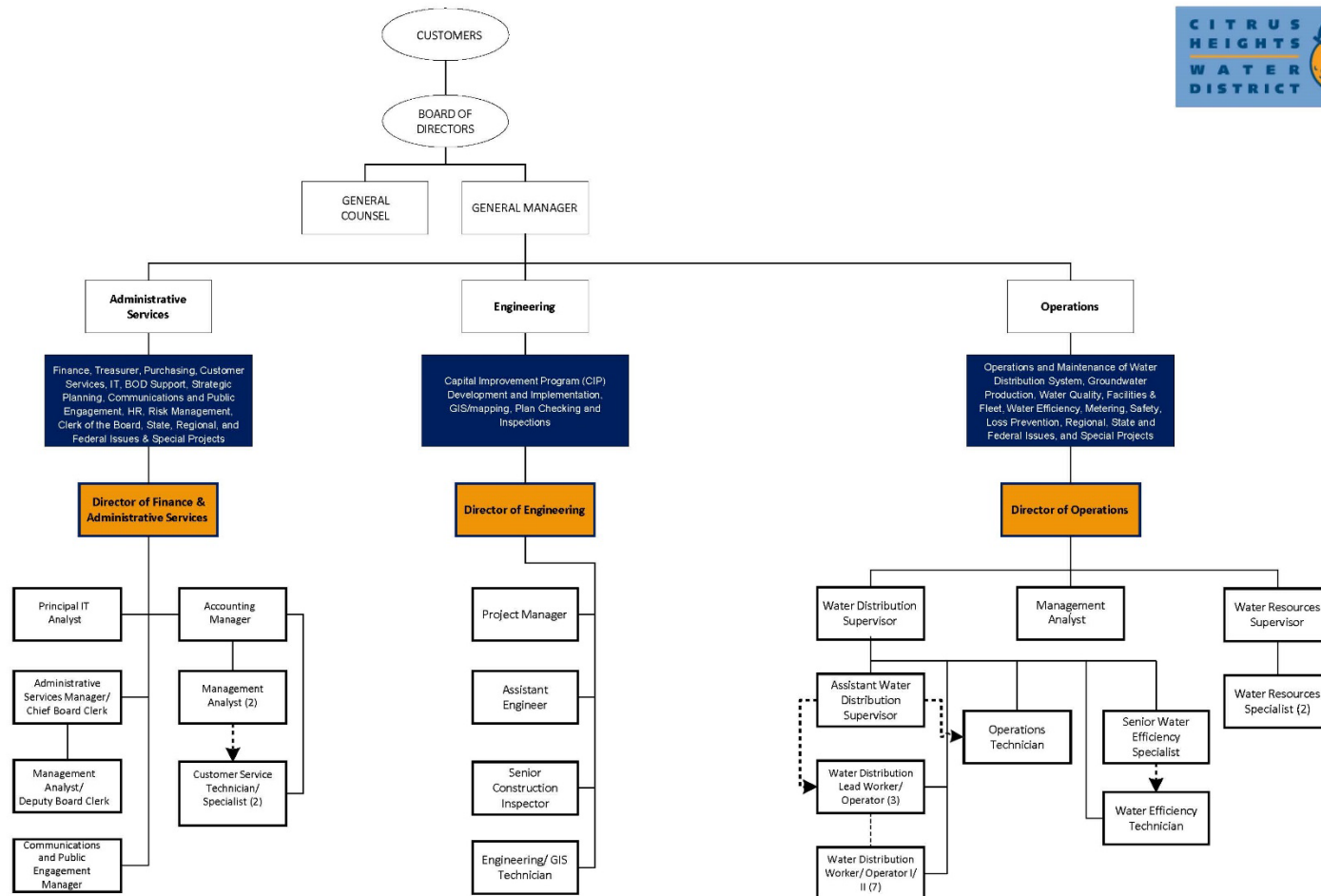
The participants identified their learnings and take-aways from the Strategic Planning process as:

1. The CAC involvement is so valuable, and the perspectives they share are very helpful to Board decision making.
2. The continual work to purchase and develop land is impressive.
3. It is very helpful to hear everyone's perspectives.
4. The District's forward thinking is impressive and unique when compared to other organizations.
5. We have done a great job in identifying issues.
6. As a new person to the strategic planning process, building an understanding of all the issues is extremely helpful.
7. It is motivating to see the big picture of where the District has been and where it is headed.
8. It's great to see the continued work of the staff and their results.
9. It was interesting to see all the interrelationships with all the other districts—very impressive.
10. Enjoyed hearing all the accomplishments and strengths.
11. As a staff person, seeing how people appreciate the work of the staff is appreciated.
12. This strategic planning process gets better each year; the staff is doing so well that we are only making minor adjustments.
13. So appreciate the work of the staff in the office and the field.
14. The field staff always show up when there are issues and do all the big and little things that are needed at all levels really well.
15. Excited to see the level of involvement by so many people.
16. We have so many dedicated staff, which is so great.
17. I am so grateful for all the people who do such incredible work as part of the District – the Board, the staff team, and the CAC members.
18. Intentional decisions make this agency such a success.

***BENEFITS OF THE STRATEGIC PLANNING PROCESS*** *(continued)*

19. Small, incremental changes are so important; every link in the chain is important.
20. I have appreciated what I've learned on the CAC and also tonight, and I am open to learning more!
21. The CAC's involvement in Project 2030 was a long and very interesting process.
22. Teamwork makes the dream work, and everyone is doing such a good job.
23. Knowing more about what the District does has been very helpful.
24. We want our customers to have a "second thought" about how their water gets there; we are really lucky to have such a great District.
25. It's exciting to see the consistency and engagement of the CAC and that the CAC members are still providing helpful input.
26. The Board members and CAC members learn so much from the people doing the work on a day-to-day basis, and we thank them.
27. I am so impressed with the number of high performers in the District; it is a strong, well-knit, and committed team and organization.
28. The District has the proper vision and goals and is building a strong framework to get the important work done.
29. The legal team continues to help the District and is so appreciated.
30. Our District really stands out in thinking about and implementing projects that benefit our District and our other regional water districts; it is a special and amazing organization.

**ATTACHMENT B**  
**DISTRICT ORGANIZATION CHART**



# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 MEETING

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SUBJECT	: CAPITAL IMPROVEMENT PROGRAM UPDATE
STATUS	: Information Item
REPORT DATE	: August 4, 2022
PREPARED BY	: Missy Pieri, Director of Engineering/District Engineer

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Staff will provide a presentation and an update on the 2022 Capital Improvement Program.

# CITRUS HEIGHTS WATER DISTRICT

## DISTRICT STAFF REPORT TO BOARD OF DIRECTORS AUGUST 17, 2022 REGULAR MEETING

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SUBJECT : AGREEMENT WITH STONEHOUSE DRILLING AND CONSTRUCTION, LLC. FOR TEST HOLE DRILLING  
 STATUS : Action Item  
 REPORT DATE : August 1, 2022  
 PREPARED BY : Brian Hensley, Water Resources Supervisor  
 Rebecca Scott, Director of Operations

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### **OBJECTIVE:**

Consider approving an agreement with Stonehouse Drilling for the drilling, logging, testing, and abandonment of a test hole on Sayonara Drive.

### **BACKGROUND AND ANALYSIS:**

The 2022 Test Hole Drilling Project went out to bid on June 30, 2022 and closed on July 21, 2022. The Scope of Work for this Project consists of furnishing all materials, labor, equipment, fuel, tools, transportation and services for drilling, logging, zone testing and abandoning one test hole on Sayonara Drive. A copy of the proposed agreement with Stonehouse Drilling accompanies this staff report.

The District received two (2) sealed proposals. The low bidder is Stonehouse Drilling and Construction, LLC of Reno, Nevada. Bids received are as follows:

	Base Bid
1. Stonehouse Drilling	\$221,900.00
2. ABC Liovin Drilling, Inc.	\$261,000.00

### **RECOMMENDATION:**

Approve the accompanying agreement with Stonehouse Drilling and Construction, LLC for the amount of \$221,900.00 and establish a change order contingency fund for the amount of \$22,190.00 (10%). Authorize total expenditure of not-to-exceed \$244,090.00. Authorize the General Manager to execute the agreement and issue a Notice to proceed.

### **ATTACHMENT:**

Agreement with Stonehouse Drilling and Construction, LLC. for Test Hole Drilling

### **ACTION:**

Moved by Director \_\_\_\_\_, Seconded by Director \_\_\_\_\_, Carried \_\_\_\_\_

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**CITRUS HEIGHTS WATER DISTRICT**  
**2022 TEST HOLE DRILLING PROJECT**

**1. PARTIES AND DATE.**

This Contract is made and entered into this [\*\*\*INSERT DAY\*\*\*] day of August, 2022 by and between Citrus Heights Water District, an irrigation district organized and operating under the laws of the State of California (“District”) and Stonehouse Drilling & Construction, a CORPORATION with its principal place of business at 7801 Lakeside Dr., Reno, Nevada 89511 (“Contractor”). District and Contractor are sometimes individually referred to as “Party” and collectively as “Parties” in this Contract.

**2. RECITALS.**

2.1 District. District is a public agency organized under the laws of the State of California, with power to contract for services necessary to achieve its purpose.

2.2 Contractor. Contractor desires to perform and assume responsibility for the provision of certain construction services required by the District on the terms and conditions set forth in this Contract. Contractor represents that it is duly licensed and experienced in providing test hole drilling related construction services to public clients, that it and its employees or subcontractors have all necessary licenses and permits to perform the services in the State of California, and that it is familiar with the plans of District. The following license classifications are required for this project: C-57 Well Drilling Contractor.

2.3 Project. District desires to engage Contractor to render such services for the 2022 TEST HOLE DRILLING PROJECT (“Project”) as set forth in this Contract.

2.4 Project Documents & Certifications. Contractor has obtained, and delivers concurrently herewith, a performance bond, a payment bond, and all insurance documentation, as required by the Contract.

**3. TERMS**

3.1 Incorporation of Documents. This Contract includes and hereby incorporates in full by reference the following documents, including all exhibits, drawings, specifications and documents therein, and attachments and addenda thereto:

- General Specifications (Exhibit “A”)
- Special Conditions(Exhibit “B”)
- Contractor’s Certificate Regarding Workers’ Compensation (Exhibit “C”)



- Public Works Contractor Registration Certification (Exhibit “D”)
- Payment and Performance Bonds (Exhibit “E”)
- Addenda
- Change Orders executed by the District
- Most Recent Edition of the Standard Specifications for Public Works Construction (The Greenbook), Excluding Sections 1-9
- Notice Inviting Bids, if any
- Instructions to Bidders, if any
- Contractor’s Bid

3.2 Contractor’s Basic Obligation; Scope of Work. Contractor promises and agrees, at its own cost and expense, to furnish to the District all labor, materials, tools, equipment, services, and incidental and customary work necessary to fully and adequately complete the Project, including all structures and facilities necessary for the Project or described in the Contract (hereinafter sometimes referred to as the “Work”), for a total contract price as specified pursuant to this Contract. All Work shall be subject to, and performed in accordance with the above referenced documents, as well as the exhibits attached hereto and incorporated herein by reference. The plans and specifications for the Work are further described in Exhibit “B” attached hereto and incorporated herein by this reference. Special Conditions, if any, relating to the Work are described in Exhibit “C” attached hereto and incorporated herein by this reference.

3.2.1 Change in Scope of Work. Any change in the scope of the Work, method of performance, nature of materials or price thereof, or any other matter materially affecting the performance or nature of the Work shall not be paid for or accepted unless such change, addition or deletion is approved in writing by a valid change order executed by the District. Should Contractor request a change order due to unforeseen circumstances affecting the performance of the Work, such request shall be made within five (5) business days of the date such circumstances are discovered or shall waive its right to request a change order due to such circumstances. If the Parties cannot agree on any change in price required by such change in the Work, the District may direct the Contractor to proceed with the performance of the change on a time and materials basis.

3.2.2 Substitutions/“Or Equal”. Pursuant to Public Contract Code Section 3400(b), the District may make a finding that designates certain products, things, or services by specific brand or trade name. Unless specifically designated in this Contract, whenever any material, process, or article is indicated or specified by grade, patent, or proprietary name or by name of manufacturer, such Specifications shall be deemed to be used for the purpose of facilitating the description of the material, process or article desired and shall be deemed to be followed by the words “or equal.”

Contractor may, unless otherwise stated, offer for substitution any material, process or article which shall be substantially equal or better in every respect to that so indicated or specified in this Contract. However, the District may have adopted certain uniform standards for certain materials, processes and articles. Contractor shall submit requests, together with substantiating data, for substitution of any “or equal” material, process or article no later than

thirty-five (35) days after award of the Contract. To facilitate the construction schedule and sequencing, some requests may need to be submitted before thirty-five (35) days after award of Contract. Provisions regarding submission of “or equal” requests shall not in any way authorize an extension of time for performance of this Contract. If a proposed “or equal” substitution request is rejected, Contractor shall be responsible for providing the specified material, process or article. The burden of proof as to the equality of any material, process or article shall rest with Contractor.

The District has the complete and sole discretion to determine if a material, process or article is an “or equal” material, process or article that may be substituted. Data required to substantiate requests for substitutions of an “or equal” material, process or article shall include a signed affidavit from Contractor stating that, and describing how, the substituted “or equal” material, process or article is equivalent to that specified in every way except as listed on the affidavit. Substantiating data shall include any and all illustrations, specifications, and other relevant data including catalog information which describes the requested substituted “or equal” material, process or article, and substantiates that it is an “or equal” to the material, process or article. The substantiating data must also include information regarding the durability and lifecycle cost of the requested substituted “or equal” material, process or article. Failure to submit all the required substantiating data, including the signed affidavit, to the District in a timely fashion will result in the rejection of the proposed substitution.

Contractor shall bear all of the District’s costs associated with the review of substitution requests. Contractor shall be responsible for all costs related to a substituted “or equal” material, process or article. Contractor is directed to the Special Conditions (if any) to review any findings made pursuant to Public Contract Code Section 3400.

3.3 Period of Performance and Liquidated Damages. Contractor shall perform and complete all Work under this Contract within 60 days, beginning the effective date of the Notice to Proceed (“Contract Time”). Contractor shall perform its Work in strict accordance with any completion schedule, construction schedule or Project milestones developed by the District. Such schedules or milestones may be included as part of Exhibits “A” or “B” attached hereto, or may be provided separately in writing to Contractor. Contractor agrees that if such Work is not completed within the aforementioned Contract Time and/or pursuant to any such completion schedule, construction schedule or Project milestones developed pursuant to provisions of the Contract, it is understood, acknowledged and agreed that the District will suffer damage. Pursuant to Government Code Section 53069.85, Contractor shall pay to the District as fixed and liquidated damages the sum of TWO-HUNDRED (\$200) per day for each and every calendar day of delay beyond the Contract Time or beyond any completion schedule, construction schedule or Project milestones established pursuant to the Contract.

3.4 Standard of Performance; Performance of Employees. Contractor shall perform all Work under this Contract in a skillful and workmanlike manner, and consistent with the standards generally recognized as being employed by professionals in the same discipline in the State of California. Contractor represents and maintains that it is skilled in the professional calling necessary to perform the Work. Contractor warrants that all employees and subcontractors shall

have sufficient skill and experience to perform the Work assigned to them. Finally, Contractor represents that it, its employees and subcontractors have all licenses, permits, qualifications and approvals of whatever nature that are legally required to perform the Work, including a district business license, and that such licenses and approvals shall be maintained throughout the term of this Contract. As provided for in the indemnification provisions of this Contract, Contractor shall perform, at its own cost and expense and without reimbursement from the District, any Work necessary to correct errors or omissions which are caused by Contractor's failure to comply with the standard of care provided for herein. Any employee who is determined by the District to be uncooperative, incompetent, a threat to the safety of persons or the Work, or any employee who fails or refuses to perform the Work in a manner acceptable to the District, shall be promptly removed from the Project by Contractor and shall not be re-employed on the Work.

3.5 Control and Payment of Subordinates; Contractual Relationship. District retains Contractor on an independent contractor basis and Contractor is not an employee of District. Any additional personnel performing the Work governed by this Contract on behalf of Contractor shall at all times be under Contractor's exclusive direction and control. Contractor shall pay all wages, salaries, and other amounts due such personnel in connection with their performance under this Contract and as required by law. Contractor shall be responsible for all reports and obligations respecting such additional personnel, including, but not limited to: social security taxes, income tax withholding, unemployment insurance, and workers' compensation insurance.

3.6 District's Basic Obligation. District agrees to engage and does hereby engage Contractor as an independent contractor to furnish all materials and to perform all Work according to the terms and conditions herein contained for the sum set forth above. Except as otherwise provided in the Contract, the District shall pay to Contractor, as full consideration for the satisfactory performance by Contractor of the services and obligations required by this Contract, the below-referenced compensation in accordance with compensation provisions set forth in the Contract.

3.7 Compensation and Payment.

3.7.1 Amount of Compensation. As consideration for performance of the Work required herein, District agrees to pay Contractor the total contract price of two-hundred twenty-one thousand nine hundred Dollars (\$221,900.00) ("Total Contract Price") provided that such amount shall be subject to adjustment pursuant to the applicable terms of this Contract or written change orders approved and signed in advance by the District.

3.7.2 Payment of Compensation. If the Work is scheduled for completion in thirty (30) or less calendar days, District will arrange for payment of the Total Contract Price upon completion and approval by District of the Work. If the Work is scheduled for completion in more than thirty (30) calendar days, District will pay Contractor on a monthly basis as provided for herein. On or before the fifth (5th) day of each month, Contractor shall submit to the District an itemized application for payment in the format supplied by the District indicating the amount of Work completed since commencement of the Work or since the last progress payment. These applications shall be supported by evidence which is required by this Contract and such other documentation as the District may require. The Contractor shall certify that the Work for which payment is requested has been done and that the materials listed are stored where indicated.

Contractor may be required to furnish a detailed schedule of values upon request of the District and in such detail and form as the District shall request, showing the quantities, unit prices, overhead, profit, and all other expenses involved in order to provide a basis for determining the amount of progress payments.

3.7.3 Prompt Payment. District shall review and pay all progress payment requests in accordance with the provisions set forth in Section 20104.50 of the California Public Contract Code. However, no progress payments will be made for Work not completed in accordance with this Contract. Contractor shall comply with all applicable laws, rules and regulations relating to the proper payment of its employees, subcontractors, suppliers or others.

3.7.4 Contract Retentions. From each approved progress estimate, five percent (5%) will be deducted and retained by the District, and the remainder will be paid to Contractor. All contract retention shall be released and paid to Contractor and subcontractors pursuant to California Public Contract Code Section 7107.

3.7.5 Other Retentions. In addition to Contract retentions, the District may deduct from each progress payment an amount necessary to protect District from loss because of: (1) liquidated damages which have accrued as of the date of the application for payment; (2) any sums expended by the District in performing any of Contractor's obligations under the Contract which Contractor has failed to perform or has performed inadequately; (3) defective Work not remedied; (4) stop notices as allowed by state law; (5) reasonable doubt that the Work can be completed for the unpaid balance of the Total Contract Price or within the scheduled completion date; (6) unsatisfactory prosecution of the Work by Contractor; (7) unauthorized deviations from the Contract; (8) failure of Contractor to maintain or submit on a timely basis proper and sufficient documentation as required by the Contract or by District during the prosecution of the Work; (9) erroneous or false estimates by Contractor of the value of the Work performed; (10) any sums representing expenses, losses, or damages as determined by the District, incurred by the District for which Contractor is liable under the Contract; and (11) any other sums which the District is entitled to recover from Contractor under the terms of the Contract or pursuant to state law, including Section 1727 of the California Labor Code. The failure by the District to deduct any of these sums from a progress payment shall not constitute a waiver of the District's right to such sums.

3.7.6 Substitutions for Contract Retentions. In accordance with California Public Contract Code Section 22300, the District will permit the substitution of securities for any monies withheld by the District to ensure performance under the Contract. At the request and expense of Contractor, securities equivalent to the amount withheld shall be deposited with the District, or with a state or federally chartered bank in California as the escrow agent, and thereafter the District shall then pay such monies to Contractor as they come due. Upon satisfactory completion of the Contract, the securities shall be returned to Contractor. For purposes of this Section and Section 22300 of the Public Contract Code, the term "satisfactory completion of the Contract" shall mean the time the District has issued written final acceptance of the Work and filed a Notice of Completion as required by law and provisions of this Contract. Contractor shall be the beneficial owner of any securities substituted for monies withheld and shall receive any interest thereon. The escrow agreement used for the purposes of this Section shall be in the form provided by the District.

3.7.7 Title to Work. As security for partial, progress, or other payments, title to Work for which such payments are made shall pass to the District at the time of payment. To the extent that title has not previously been vested in the District by reason of payments, full title shall pass to the District at delivery of the Work at the destination and time specified in this Contract. Such transferred title shall in each case be good, free and clear from any and all security interests, liens, or other encumbrances. Contractor promises and agrees that it will not pledge, hypothecate, or otherwise encumber the items in any manner that would result in any lien, security interest, charge, or claim upon or against said items. Such transfer of title shall not imply acceptance by the District, nor relieve Contractor from the responsibility to strictly comply with the Contract, and shall not relieve Contractor of responsibility for any loss of or damage to items.

3.7.8 Labor and Material Releases. Contractor shall furnish District with labor and material releases from all subcontractors performing work on, or furnishing materials for, the Work governed by this Contract prior to final payment by District.

3.7.9 Prevailing Wages. Contractor is aware of the requirements of California Labor Code Section 1720 et seq., and 1770 et seq., as well as California Code of Regulations, Title 8, Section 16000 et seq., (“Prevailing Wage Laws”), which require the payment of prevailing wage rates and the performance of other requirements on “public works” and “maintenance” projects. Since the Services are being performed as part of an applicable “public works” or “maintenance” project, as defined by the Prevailing Wage Laws, and since the total compensation is \$1,000 or more, Contractor agrees to fully comply with such Prevailing Wage Laws. District shall provide Contractor with a copy of the prevailing rates of per diem wages in effect at the commencement of this Contract. Contractor shall make copies of the prevailing rates of per diem wages for each craft, classification or type of worker needed to execute the Services available to interested parties upon request, and shall post copies at Contractor’s principal place of business and at the Project site. Contractor shall defend, indemnify and hold the District, its officials, officers, employees and agents free and harmless from any claim or liability arising out of any failure or alleged failure to comply with the Prevailing Wage Laws. Contractor and any subcontractor shall forfeit a penalty of up to \$200 per calendar day or portion thereof for each worker paid less than the prevailing wage rates.

3.7.10 Apprenticeable Crafts. When Contractor employs workmen in an apprenticeable craft or trade, Contractor shall comply with the provisions of Section 1777.5 of the California Labor Code with respect to the employment of properly registered apprentices upon public works. The primary responsibility for compliance with said section for all apprenticeable occupations shall be with Contractor. The Contractor or any subcontractor that is determined by the Labor Commissioner to have knowingly violated Section 1777.5 shall forfeit as a civil penalty an amount not exceeding \$100 for each full calendar day of noncompliance, or such greater amount as provided by law.

3.7.11 Hours of Work. Contractor is advised that eight (8) hours labor constitutes a legal day’s work. Pursuant to Section 1813 of the California Labor Code, Contractor shall forfeit a penalty of \$25.00 per worker for each day that each worker is permitted to work more than eight (8) hours in any one calendar day and forty (40) hours in any one calendar week, except when payment for overtime is made at not less than one and one-half (1-1/2) times the basic rate for that worker.

3.7.12 Payroll Records. Contractor and each subcontractor shall keep an accurate payroll record, showing the name, address, social security number, work classification, straight time and overtime hours worked each day and week, and the actual per diem wages paid to each journeyman, apprentice, worker, or other employee employed by him or her in connection with the public work. The payroll records shall be certified and shall be available for inspection at all reasonable hours at the principal office of Contractor in the manner provided in Labor Code Section 1776. In the event of noncompliance with the requirements of this section, Contractor shall have 10 days in which to comply subsequent to receipt of written notice specifying in what respects such Contractor must comply with this section. Should noncompliance still be evident after such 10-day period, Contractor shall, as a penalty to District, forfeit not more than \$100.00 for each calendar day or portion thereof, for each worker, until strict compliance is effectuated. The amount of the forfeiture is to be determined by the Labor Commissioner. A contractor who is found to have violated the provisions of law regarding wages on Public Works with the intent to defraud shall be ineligible to bid on Public Works Contracts for a period of one to three years as determined by the Labor Commissioner. Upon the request of the Division of Apprenticeship Standards or the Division of Labor Standards Enforcement, such penalties shall be withheld from progress payments then due. The responsibility for compliance with this section is on Contractor. The requirement to submit certified payroll records directly to the Labor Commissioner under Labor Code section 1771.4 shall not apply to work performed on a public works project that is exempt pursuant to the small project exemption specified in Labor Code Section 1771.4.

3.7.13 Contractor and Subcontractor Registration. Except as otherwise exempted pursuant to Labor Code Sections 1725.5 and 1771.1, all contractors and subcontractors that wish to bid on, be listed in a bid proposal, or enter into a contract to perform public work must be registered with the Department of Industrial Relations. No bid will be accepted nor any contract entered into without proof of the Contractor's and subcontractors' current registration with the Department of Industrial Relations to perform public work. Contractor is directed to review, fill out and execute the Public Works Contractor Registration Certification attached hereto as Exhibit "E" prior to contract execution. Notwithstanding the foregoing, the contractor registration requirements mandated by Labor Code Sections 1725.5 and 1771.1 shall not apply to work performed on a public works project that is exempt pursuant to the small project exemption specified in Labor Code Sections 1725.5 and 1771.1.

3.7.14 Labor Compliance; Stop Orders. This Project is subject to compliance monitoring and enforcement by the Department of Industrial Relations. It shall be the Contractor's sole responsibility to evaluate and pay the cost of complying with all labor compliance requirements under this Contract and applicable law. Any stop orders issued by the Department of Industrial Relations against Contractor or any subcontractor that affect Contractor's performance of Work, including any delay, shall be Contractor's sole responsibility. Any delay arising out of or resulting from such stop orders shall be considered Contractor caused delay subject to any applicable liquidated damages and shall not be compensable by the District. Contractor shall defend, indemnify and hold the District, its officials, officers, employees and agents free and harmless from any claim or liability arising out of stop orders issued by the Department of Industrial Relations against Contractor or any subcontractor.

### 3.8 Performance of Work; Jobsite Obligations.

#### 3.8.1 Water Quality Management and Compliance.

3.8.1.1 Water Quality Management and Compliance. Contractor shall keep itself and all subcontractors, staff, and employees fully informed of and in compliance with all local, state and federal laws, rules and regulations that may impact, or be implicated by the performance of the Work including, without limitation, all applicable provisions of the Federal Water Pollution Control Act (33 U.S.C. §§ 1300); the California Porter-Cologne Water Quality Control Act (Cal Water Code §§ 13000-14950); local ordinances regulating discharges of storm water; and any and all regulations, policies, or permits issued pursuant to any such authority regulating the discharge of pollutants, as that term is used in the Porter-Cologne Water Quality Control Act, to any ground or surface water in the state.

3.8.1.2 Compliance with the statewide Construction General Permit. Contractor shall comply with all conditions of the most recent iteration of the National Pollutant Discharge Elimination System General Permit for Storm Water Discharges Associated with Construction Activity, issued by the California State Water Resources Control Board ("Permit"). It shall be Contractor's sole responsibility to file a Notice of Intent and procure coverage under the Permit for all construction activity which results in the disturbance of more than one acre of total land area or which is part of a larger common area of development or sale. Prior to initiating Work, Contractor shall be solely responsible for preparing and implementing a Storm Water Pollution Prevention Plan (SWPPP) as required by the Permit. Contractor shall be responsible for procuring, implementing and complying with the provisions of the Permit and the SWPPP, including the standard provisions, and monitoring and reporting requirements as required by the Permit. The Permit requires the SWPPP to be a "living document" that changes as necessary to meet the conditions and requirements of the job site as it progresses through different phases of construction and is subject to different weather conditions. It shall be Contractor's sole responsibility to update the SWPPP as necessary to address conditions at the Project site.

3.8.1.3 Other Water Quality Rules Regulations and Policies. Contractor shall comply with the lawful requirements of any applicable municipality, drainage District, or local agency regarding discharges of storm water to separate storm drain systems or other watercourses under their jurisdiction, including applicable requirements in municipal storm water management programs.

3.8.1.4 Cost of Compliance. Storm, surface, nuisance, or other waters may be encountered at various times during construction of the Work. Therefore, the Contractor, by submitting a Bid, hereby acknowledges that it has investigated the risk arising from such waters, has prepared its Bid accordingly, and assumes any and all risks and liabilities arising therefrom.

3.8.1.5 Liability for Non-Compliance. Failure to comply with the Permit is a violation of federal and state law. Pursuant to the indemnification provisions of this Contract, Contractor hereby agrees to defend, indemnify and hold harmless the District and its officials, officers, employees, volunteers and agents for any alleged violations. In addition, District may seek damages from Contractor for any delay in completing the Work in accordance with the Contract, if such delay is caused by or related to Contractor's failure to comply with the Permit.

3.8.1.6 Reservation of Right to Defend. District reserves the right to defend any enforcement action brought against the District for Contractor's failure to comply with the Permit or any other relevant water quality law, regulation, or policy. Pursuant to the indemnification provisions of this Contract, Contractor hereby agrees to be bound by, and to reimburse the District for the costs (including the District's attorney's fees) associated with, any settlement reached between the District and the relevant enforcement entity.

3.8.1.7 Training. In addition to the standard of performance requirements set forth in paragraph 3.4, Contractor warrants that all employees and subcontractors shall have sufficient skill and experience to perform the Work assigned to them without impacting water quality in violation of the laws, regulations and policies described in paragraph 3.8.1. Consultant further warrants that it, its employees and subcontractors will receive adequate training, as determined by District, regarding the requirements of the laws, regulations and policies described in paragraph 3.8.1 as they may relate to the Work provided under this Agreement. Upon request, District will provide the Contractor with a list of training programs that meet the requirements of this paragraph.

3.8.2 Safety. In the performance of this Contract the Contractor shall comply with all applicable federal, state and local statutory and regulatory requirements including, but not limited to California Department of Industrial Relations (Cal/OSHA) regulations; and the U.S. Department of Transportation Omnibus Transportation Employee Testing Act, related to their scope of work and operations. In case of conflict in regulations, the most stringent shall apply. The Contractor shall provide all safeguards, safety devices and protective equipment and take any other needed actions necessary to protect the life and health of employees on the job and the safety of the public and to protect property in connection with the performance of the Work covered by the Contract. Safety precautions shall include but shall not be limited to: adequate life protection and lifesaving equipment; adequate illumination; instructions in accident prevention for all employees, such as the use of machinery guards, safe walkways, scaffolds, ladders, bridges, gang planks, confined space procedures, trenching and shoring, fall protection, and other safety devices; equipment and wearing apparel as are necessary or lawfully required to prevent accidents, injuries, or illnesses (including but not limited to exposure to the Coccidioides fungus and Valley Fever); and adequate facilities for the proper inspection and maintenance of all safety measures.

Contractor must obtain all applicable Division of Occupational Safety and Health (CAL-OSHA) permit(s) and others required by California Labor Code and California Government Code, prior to the initiation of any practices, work, method, operation, or process related to the Work covered in the Contract. Permits required by governmental authorities will be obtained at Contractor's expense.

It is a condition of this Contract, and shall be made a condition of each subcontract which the Contractor enters into pursuant to this Contract, that the Contractor and any subcontractor shall not permit any employee, in performance of the Contract, to work in surroundings or under conditions which are unsanitary, hazardous or dangerous to his/her health or safety, as determined under Cal/OSHA safety and health standards.

The Contractor shall be responsible for the safeguarding of all utilities. At least two working days before beginning Work, the Contractor shall call the Underground Service Alert (USA) in order to



determine the location of sub-structures. The Contractor shall immediately notify District and the utility owner if he/she disturbs, disconnects, or damages any utility.

In accordance with Section 6705 of the California Labor Code, the Contractor shall submit to District specific plans to show details of provisions for worker protection from caving ground during excavations of trenches of five feet or more in depth. The excavation/trench safety plan shall be submitted to and accepted by District prior to starting excavation. The trench safety plan shall have details showing the design of shoring, bracing, sloping or other provisions to be made for worker protection from the hazard of caving ground. If such a plan varies from the shoring system standards established by the Construction Safety Orders of the California Department of Industrial Relations (Cal/OSHA), the plan shall be prepared by a California registered civil or structural engineer. As part of the plan, a note shall be included stating that the registered civil or structural engineer certifies that the plan complies with the Cal/OSHA Construction Safety Orders, or that the registered civil or structural engineer certifies that the plan is not less effective than the shoring, bracing, sloping or other provisions of the Safety Orders. In no event shall the Contractor use a shoring, sloping, or protective system less effective than that required by said Construction Safety Orders. Submission of this plan in no way relieves the Contractor of the requirement to maintain safety in all areas. If excavations or trench work requiring a Cal/OSHA permit are to be undertaken, the Contractor shall submit his/her permit with the excavation/trench work safety plan to District before Work begins.

3.8.3 Laws and Regulations. Contractor shall keep itself fully informed of and in compliance with all local, state and federal laws, rules and regulations in any manner affecting the performance of the Contract or the Work, including all Cal/OSHA requirements, and shall give all notices required by law. Contractor shall be liable for all violations of such laws and regulations in connection with Work. If Contractor observes that the drawings or specifications are at variance with any law, rule or regulation, it shall promptly notify the District in writing. Any necessary changes shall be made by written change order. If Contractor performs any Work knowing it to be contrary to such laws, rules and regulations and without giving written notice to the District, Contractor shall be solely responsible for all costs arising therefrom. District is a public entity of the State of California subject to certain provisions of the Health & Safety Code, Government Code, Public Contract Code, and Labor Code of the state. It is stipulated and agreed that all provisions of the law applicable to the public Contracts of a municipality are a part of this Contract to the same extent as though set forth herein and will be complied with. Contractor shall defend, indemnify and hold District, its officials, officers, employees and agents free and harmless, pursuant to the indemnification provisions of this Contract, from any claim or liability arising out of any failure or alleged failure to comply with such laws, rules or regulations.

3.8.4 Permits and Licenses. Contractor shall be responsible for securing district permits and licenses necessary to perform the Work described herein, including, but not limited to, a county or city business license. While Contractor will not be charged a fee for any district permits, Contractor shall pay the District's applicable business license fee. Any ineligible contractor or subcontractor pursuant to Labor Code Sections 1777.1 and 1777.7 may not perform Work on this Project.

3.8.5 Trenching Work. If the Total Contract Price exceeds \$25,000 and if the Work governed by this Contract entails excavation of any trench or trenches five (5) feet or more

in depth, Contractor shall comply with all applicable provisions of the California Labor Code, including Section 6705. To this end, Contractor shall submit for District's review and approval a detailed plan showing the design of shoring, bracing, sloping, or other provisions to be made for worker protection from the hazard of caving ground during the excavation of such trench or trenches. If such plan varies from the shoring system standards, the plan shall be prepared by a registered civil or structural engineer.

3.8.6 Hazardous Materials and Differing Conditions. As required by California Public Contract Code Section 7104, if this Contract involves digging trenches or other excavations that extend deeper than four (4) feet below the surface, Contractor shall promptly, and prior to disturbance of any conditions, notify District of: (1) any material discovered in excavation that Contractor believes to be a hazardous waste that is required to be removed to a Class I, Class II or Class III disposal site; (2) subsurface or latent physical conditions at the site differing from those indicated by District; and (3) unknown physical conditions of an unusual nature at the site, significantly different from those ordinarily encountered in such Contract work. Upon notification, District shall promptly investigate the conditions to determine whether a change order is appropriate. In the event of a dispute, Contractor shall not be excused from any scheduled completion date and shall proceed with all Work to be performed under the Contract, but shall retain all rights provided by the Contract or by law for making protests and resolving the dispute.

3.8.7 Underground Utility Facilities. To the extent required by Section 4215 of the California Government Code, District shall compensate Contractor for the costs of: (1) locating and repairing damage to underground utility facilities not caused by the failure of Contractor to exercise reasonable care; (2) removing or relocating underground utility facilities not indicated in the construction drawings; and (3) equipment necessarily idled during such work. Contractor shall not be assessed liquidated damages for delay caused by failure of District to provide for removal or relocation of such utility facilities.

3.8.8 Air Quality. Contractor must fully comply with all applicable laws, rules and regulations in furnishing or using equipment and/or providing services, including, but not limited to, emissions limits and permitting requirements imposed by the California Air Resources Board (CARB). Although CARB limits and requirements are more broad, Contractor shall specifically be aware of their application to "portable equipment," which definition is considered by CARB to include any item of equipment with a fuel-powered engine. Contractor shall indemnify District against any fines or penalties imposed by CARB, or any other governmental or regulatory agency for violations of applicable laws, rules and/or regulations by Contractor, its subcontractors, or others for whom Contractor is responsible under its indemnity obligations provided for in this Agreement.

3.8.9 State Recycling Mandates. Contractor shall comply with state recycling mandates. Any recyclable materials/debris collected by the Contractor that can be feasibly diverted via reuse or recycling must be hauled by the appropriate handler for reuse or recycling.

3.9 Completion of Work. When Contractor determines that it has completed the Work required herein, Contractor shall so notify District in writing and shall furnish all labor and material releases required by this Contract. District shall thereupon inspect the Work. If the Work is not acceptable to the District, the District shall indicate to Contractor in writing the specific portions

or items of Work which are unsatisfactory or incomplete. Once Contractor determines that it has completed the incomplete or unsatisfactory Work, Contractor may request a reinspection by the District. Once the Work is acceptable to District, District shall pay to Contractor the Total Contract Price remaining to be paid, less any amount which District may be authorized or directed by law to retain. Payment of retention proceeds due to Contractor shall be made in accordance with Section 7107 of the California Public Contract Code.

### 3.10 Claims; Government Code Claim Compliance.

3.10.1 Effective January 1, 1991, Section 20104 et seq., of the California Public Contract Code prescribes a process utilizing informal conferences, non-binding judicial supervised mediation, and judicial arbitration to resolve disputes on construction claims of \$375,000 or less. Effective January 1, 2017, Section 9204 of the Public Contract Code prescribes a process for negotiation and mediation to resolve disputes on construction claims. The intent of this Article is to implement Sections 20104 et seq. and Section 9204 of the California Public Contract Code. This Article shall be construed to be consistent with said statutes.

3.10.2 The following requirements apply to all contracts entered into after January 1, 1991, and all claims to which this section applies:

3.10.2.1 Prerequisites. If any dispute shall arise between District and Contractor regarding performance of the work, or any alleged change in the work, Contractor shall timely perform the disputed work and shall give written notice of a claim for additional compensation for the work to District within three (3) days after commencement of the disputed work. Contractor's failure to give written notice within the three (3)-day period constitutes an agreement by Contractor that it will receive no extra compensation for the disputed work and shall constitute a waiver of the right to these procedures.

3.10.2.2 Claim Submittal. The claim shall be in writing and include the documents necessary to substantiate the claim. Claims governed by this procedure must be filed on or before the date of final payment. Nothing in this subdivision is intended to extend the time limit or supersede notice requirements otherwise provided by contract for the filing of claims, including all requirements pertaining to compensation or payment for extra work, disputed work, and/or changed conditions. Failure to follow such contractual requirements shall bar any claims or subsequent lawsuits for compensation or payment thereon.

3.10.2.3 Supporting Documentation: The Contractor shall submit all claims in the following format:

- (1) Summary of claim merit and price, reference Contract Document provisions pursuant to which the claim is made
- (2) List of documents relating to claim:
  - (A) Specifications
  - (B) Drawings

- (C) Clarifications (Requests for Information)
- (D) Schedules
- (E) Other
- (3) Chronology of events and correspondence
- (4) Analysis of claim merit
- (5) Analysis of claim cost
- (6) Time impact analysis in CPM format

3.10.2.4 District's Response. Upon receipt of a claim pursuant to this Article, District shall conduct a reasonable review of the claim and, within a period not to exceed 45 days, shall provide the Contractor a written statement identifying what portion of the claim is disputed and what portion is undisputed. Any payment due on an undisputed portion of the claim will be processed and made within 60 days after the public entity issues its written statement.

- (1) If District needs approval from its governing body to provide the Contractor a written statement identifying the disputed portion and the undisputed portion of the claim, and the governing body does not meet within the 45 days or within the mutually agreed to extension of time following receipt of a claim sent by registered mail or certified mail, return receipt requested, District shall have up to three days following the next duly publicly noticed meeting of the governing body after the 45-day period, or extension, expires to provide the Contractor a written statement identifying the disputed portion and the undisputed portion.
- (2) Within 30 days of receipt of a claim, District may request in writing additional documentation supporting the claim or relating to defenses or claims District may have against the Contractor. If additional information is thereafter required, it shall be requested and provided pursuant to this subdivision, upon mutual agreement of District and the Contractor.
- (3) District's written response to the claim, as further documented, shall be submitted to the Contractor within 30 days (if the claim is less than \$50,000, within 15 days) after receipt of the further documentation, or within a period of time no greater than that taken by the Contractor in producing the additional information or requested documentation, whichever is greater.

3.10.2.5 Meet and Confer. If the Contractor disputes District's written response, or District fails to respond within the time prescribed, the Contractor may so notify District, in writing, either within 15 days of receipt of District's response or within 15 days of District's failure to respond within the time prescribed, respectively, and demand an informal conference to meet and confer for settlement of the issues in dispute. Upon receipt of a demand, District shall schedule a meet and confer conference within 30 days for settlement of the dispute.

3.10.2.6 Mediation. Within 10 business days following the conclusion of the meet and confer conference, if the claim or any portion of the claim remains in dispute, District shall provide the Contractor a written statement identifying the portion of the claim that remains in dispute and the portion that is undisputed. Any payment due on an undisputed portion of the claim shall be processed and made within 60 days after District issues its written statement. Any disputed portion of the claim, as identified by the Contractor in writing, shall be submitted to nonbinding mediation, with District and the Contractor sharing the associated costs equally. District and Contractor shall mutually agree to a mediator within 10 business days after the disputed portion of the claim has been identified in writing, unless the parties agree to select a mediator at a later time.

- (1) If the Parties cannot agree upon a mediator, each Party shall select a mediator and those mediators shall select a qualified neutral third party to mediate with regard to the disputed portion of the claim. Each Party shall bear the fees and costs charged by its respective mediator in connection with the selection of the neutral mediator.
- (2) For purposes of this section, mediation includes any nonbinding process, including, but not limited to, neutral evaluation or a dispute review board, in which an independent third party or board assists the Parties in dispute resolution through negotiation or by issuance of an evaluation. Any mediation utilized shall conform to the timeframes in this section.
- (3) Unless otherwise agreed to by District and the Contractor in writing, the mediation conducted pursuant to this section shall excuse any further obligation under Section 20104.4 to mediate after litigation has been commenced.
- (4) The mediation shall be held no earlier than the date the Contractor completes the Work or the date that the Contractor last performs Work, whichever is earlier. All unresolved claims shall be considered jointly in a single mediation, unless a new unrelated claim arises after mediation is completed.
- (5) If following the mediation, the claim or any portion remains in dispute, the Contractor must file a claim pursuant to

Chapter 1 (commencing with Section 900) and Chapter 2 (commencing with Section 910) of Part 3 of Division 3.6 of Title 1 of the Government Code. For purposes of those provisions, the running of the period of time within which a claim must be filed shall be tolled from the time the Contractor submits his or her written claim pursuant to subdivision (a) until the time the claim is denied, including any period of time utilized by the meet and confer conference or mediation.

3.10.2.7 Civil Actions. The following procedures are established for all civil actions filed to resolve claims subject to this Section:

- (1) Within 60 days, but no earlier than 30 days, following the filing or responsive pleadings, the court shall submit the matter to non-binding mediation unless waived by mutual stipulation of both parties or unless mediation was held prior to commencement of the action in accordance with Public Contract Code section 9204 and the terms of these procedures.. The mediation process shall provide for the selection within 15 days by both parties of a disinterested third person as mediator, shall be commenced within 30 days of the submittal, and shall be concluded within 15 days from the commencement of the mediation unless a time requirement is extended upon a good cause showing to the court.
- (2) If the matter remains in dispute, the case shall be submitted to judicial arbitration pursuant to Chapter 2.5 (commencing with Section 1141.10) of Title 3 of Part 3 of the Code of Civil Procedure, notwithstanding Section 1114.11 of that code. The Civil Discovery Act of 1986 (Article 3 (commencing with Section 2016) of Chapter 3 of Title 3 of Part 4 of the Code of Civil Procedure) shall apply to any proceeding brought under this subdivision consistent with the rules pertaining to judicial arbitration.
- (3) In addition to Chapter 2.5 (commencing with Section 1141.10) of Title 3 of Part 3 of the Code of Civil Procedure, (A) arbitrators shall, when possible, be experienced in construction law, and (B) any party appealing an arbitration award who does not obtain a more favorable judgment shall, in addition to payment of costs and fees under that chapter, also pay the attorney's fees on appeal of the other party.

3.10.3 Government Code Claims. In addition to any and all contract requirements pertaining to notices of and requests for compensation or payment for extra work,

disputed work, claims and/or changed conditions, Contractor must comply with the claim procedures set forth in Government Code sections 900 et seq. prior to filing any lawsuit against the District. Such Government Code claims and any subsequent lawsuit based upon the Government Code claims shall be limited to those matters that remain unresolved after all procedures pertaining to extra work, disputed work, claims, and/or changed conditions have been followed by Contractor. If no such Government Code claim is submitted, or if any prerequisite contractual requirements are not otherwise satisfied as specified herein, Contractor shall be barred from bringing and maintaining a valid lawsuit against the District. A Government Code claim must be filed no earlier than the date the work is completed or the date the Contractor last performs work on the Project, whichever occurs first. A Government Code claim shall be inclusive of all unresolved claims unless a new unrelated claim arises after the Government Code claim is submitted.

3.10.4 District's Responses. District's failure to respond to a claim from the Contractor within the time periods described in this Article or to otherwise meet the time requirements of this Section shall result in the claim being deemed rejected in its entirety. District's failure to respond shall not waive District's rights to any subsequent procedures for the resolution of disputed claims.

3.11 Loss and Damage. Except as may otherwise be limited by law, Contractor shall be responsible for all loss and damage which may arise out of the nature of the Work agreed to herein, or from the action of the elements, or from any unforeseen difficulties which may arise or be encountered in the prosecution of the Work until the same is fully completed and accepted by District. In the event of damage proximately caused by an Act of God, as defined by Section 7105 of the Public Contract Code, the District may terminate this Contract pursuant to Section 3.17.3; provided, however, that the District needs to provide Contractor with only one (1) day advanced written notice.

### 3.12 Indemnification.

3.12.1 Scope of Indemnity. To the extent permitted by law, Contractor shall defend, indemnify and hold harmless the District, its directors, officers, employees, and authorized volunteers from and against all claims, damages, losses and expenses, including reasonable attorneys' fees and costs to defend arising out of the performance of the Work described herein, and caused in whole or in part by any negligent act or omission of the Contractor, any subcontractor, anyone directly or indirectly employed by any of them, or anyone whose acts any of them may be liable, except where caused by the active negligence, sole negligence, or willful misconduct of the District, its directors, officers, employees, and authorized volunteers.

### 3.13 Insurance.

3.13.1 Time for Compliance. Contractor shall not commence Work under this Contract until it has provided evidence satisfactory to the District that it has secured all insurance required under this Section. In addition, Contractor shall not allow any subcontractor to commence work on any subcontract until it has provided evidence satisfactory to the District that the subcontractor has secured all insurance required under this Section. Failure to provide and maintain all required insurance shall be grounds for the District to terminate this Contract for cause.

3.13.2 Minimum Scope and Limits of Insurance. Contractor shall procure and maintain for the duration of the Contract, and for 5 years thereafter, 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 by the Contractor, his agents, representatives, employees, or subcontractors.

3.13.3 Coverage. Coverage shall be at least as broad as the following:

3.13.3.1 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 five 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 District) or the general aggregate limit shall be twice the required occurrence limit.

3.13.3.2 Automobile Liability. Insurance Services Office (ISO) Business Auto Coverage (Form CA 00 01), covering Symbol 1 (any auto) with limit of one million dollars (\$1,000,000) for bodily injury and property damage each accident.

3.13.3.3 Workers' Compensation Insurance. The Contractor shall provide workers' compensation coverage 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. Waiver of Subrogation (also known as Transfer of Rights of Recovery Against Others to Us): The Contractor hereby agrees to waive rights of subrogation to obtain endorsement necessary to affect this waiver of subrogation in favor of the District, its directors, officers, employees, and authorized volunteers, for losses paid under the terms of this coverage which arise from Work performed by the Named Insured for the District; this provision applies regardless of whether or not the District has received a waiver of subrogation from the insurer.

3.13.3.4 Builder's Risk. (Course of Construction) If necessary, insurance utilizing an "All Risk" (Special Perils) coverage form with limits equal to the completed value of the Project and no coinsurance penalty provision. See Responsibility of Work.

3.13.3.5 Contractor's Pollution Liability. (Optional: if Project involves environmental hazards) with limits no less than \$5,000,000 per occurrence or claim, and \$10,000,000 policy aggregate.

If the Contractor maintains broader coverage and or/higher limits than the minimums described herein, the District requires and shall be entitled to the broader coverage and/or higher limits maintained by the Contractor. Any available insurance proceeds in excess of the specified minimum of insurance and coverage shall be available to the District.

3.13.4 Other Required Provisions. The Commercial General Liability policy, Automobile Liability policy and Contractors Pollution (if necessary) are to contain, or be endorsed to contain, the following provisions:



3.13.4.1 Additional Insured Status. District, its directors, officers, employees, and authorized volunteers are to be given insured status (at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10 10 01 and CG 20 37 10 01 for the Commercial General Liability policy) with respect to liability arising out of Work or operations performed by or on behalf of the Contractor including materials, parts, or equipment furnished in connection with such Work or operations. General liability coverage can be provided in the form of an endorsement to the Contractor's insurance.

3.13.4.2 Primary Coverage and Non-Contributory Coverage. For any claims related to this Project, the Contractor's insurance coverage shall be primary, at least as broad as ISO CG 20 01 04 13 for the Commercial General Liability policy, as respects to the District, its directors, officers, employees, and authorized volunteers. Any insurance or self-insurance maintained by the District, its directors, officers, employees, and authorized volunteers shall be excess of the Contractor's insurance and shall not contribute with it.

3.13.4.3 Waiver of Subrogation. All policies shall permit and Contractor does hereby waive any right of subrogation which any insurer of Contractor may acquire from Contractor by virtue of the payment of any loss.

3.13.5 Notice of Cancellation. Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to the District.

3.13.6 Acceptability of Insurers. Insurance is to be placed with insurers having a current A.M. Best rating of no less than A: VII or equivalent or as otherwise approved by District.

The Contractor agrees and he/she will comply with such provisions before commencing Work. All of the insurance shall be provided on policy forms and through companies satisfactory to District. The District reserves the right to obtain complete, certified copies of all required insurance policies, including the policy declarations page with endorsement number. Failure to continually satisfy the Insurance requirements is a material breach of contract.

3.13.7 Responsibility for Work. Until the completion and final acceptance by District of all the Work under and implied by this Contract, the Work shall be under the Contractor's responsible care and charge. The Contractor shall rebuild, repair, restore and make good all injuries, damages, re-erections, and repairs occasioned or rendered necessary by causes of any nature whatsoever.

The Contractor shall provide and maintain builder's risk (course of construction) or an installation floater (for materials and equipment) covering all risks of direct physical loss, damage or destruction to the Work in the amount specified in the General Conditions, to insure against such losses until final acceptance of the Work by District. Such insurance shall insure at least against the perils of fire and extended coverage, theft, vandalism and malicious mischief, and collapse. The Policy shall be endorsed with District, its directors, officers, employees, and authorized volunteers named as loss payee, as their interest may appear. The making of progress payments to the Contractor shall not be construed as creating an insurable interest by or for District or be construed as relieving the Contractor or his/her subcontractors of responsibility for loss from any

direct physical loss, damage or destruction occurring prior to final acceptance of the Work by District.

3.13.8 Deductibles and Self-Insured Retentions. Insurance deductibles or self-insured retentions must be declared by the Contractor, and approved by the District. At the election of District the Contractor shall either cause the insurer to reduce or eliminate such self-insured retentions as respects the District, its directors, officers, employees, and authorized volunteers or the Contractor shall provide a financial guarantee satisfactory to the District guaranteeing payment of losses and related investigations, claim administration, and defense expenses. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or the District.

3.13.9 Verification of Coverage – Evidence of Insurance. Contractor shall furnish the District with copies of certificates and amendatory endorsements effecting coverage required by this Contract. All certificates and endorsements are to be received and approved by the District before Work commences. However, failure to obtain the required documents prior to the Work beginning shall not waive the Contractor's obligation to provide them. The District reserves the right to require complete, certified copies of all required insurance policies, including policy Declaration pages and Endorsement pages, required by these specifications, at any time. Failure to continually satisfy the Insurance requirements is a material breach of contract.

3.13.10 Continuation of Coverage. The Contractor shall, upon demand of District deliver evidence of coverage showing continuation of coverage for at least (5) years after completion of the Project. Contractor further waives all rights of subrogation under this Contract. When any of the required coverages expire during the term of this Contract, the Contractor shall deliver the renewal certificate(s) including the general liability additional insured endorsement and evidence of waiver of rights of subrogation against District (if builder's risk insurance is applicable) to District at least ten (10) days prior to the expiration date.

3.13.11 Subcontractors. In the event that the Contractor employs other contractors (subcontractors) as part of the Work covered by this Contract, it shall be the Contractor's responsibility to require and confirm that each subcontractor meets the minimum insurance requirements specified above (via as broad as ISO CG 20 38 04 13). The Contractor shall, upon demand of District, deliver to District copies such policy or policies of insurance and the receipts for payment of premiums thereon.

### 3.14 Bond Requirements.

3.14.1 Payment Bond. If required by law or otherwise specifically requested by District in Exhibit "E" attached hereto and incorporated herein by reference, Contractor shall execute and provide to District concurrently with this Contract a Payment Bond in an amount required by the District and in a form provided or approved by the District. If such bond is required, no payment will be made to Contractor until the bond has been received and approved by the District.

3.14.2 Performance Bond. If specifically requested by District in Exhibit "E" attached hereto and incorporated herein by reference, Contractor shall execute and provide to

District concurrently with this Contract a Performance Bond in an amount required by the District and in a form provided or approved by the District. If such bond is required, no payment will be made to Contractor until the bond has been received and approved by the District.

3.14.3 Bond Provisions. Should, in District's sole opinion, any bond become insufficient or any surety be found to be unsatisfactory, Contractor shall renew or replace the effected bond within (ten) 10 days of receiving notice from District. In the event the surety or Contractor intends to reduce or cancel any required bond, at least thirty (30) days prior written notice shall be given to the District, and Contractor shall post acceptable replacement bonds at least ten (10) days prior to expiration of the original bonds. No further payments shall be deemed due or will be made under this Contract until any replacement bonds required by this Section are accepted by the District. To the extent, if any, that the Total Contract Price is increased in accordance with the Contract, Contractor shall, upon request of the District, cause the amount of the bond to be increased accordingly and shall promptly deliver satisfactory evidence of such increase to the District. If Contractor fails to furnish any required bond, the District may terminate the Contract for cause.

3.14.4 Surety Qualifications. Only bonds executed by an admitted surety insurer, as defined in California Code of Civil Procedure Section 995.120, shall be accepted. If a California-admitted surety insurer issuing bonds does not meet these requirements, the insurer will be considered qualified if it is in conformance with Section 995.660 of the California Code of Civil Procedure, and proof of such is provided to the District.

3.15 Warranty. Contractor warrants all Work under the Contract (which for purposes of this Section shall be deemed to include unauthorized Work which has not been removed and any non-conforming materials incorporated into the Work) to be of good quality and free from any defective or faulty material and workmanship. Contractor agrees that for a period of one year (or the period of time specified elsewhere in the Contract or in any guarantee or warranty provided by any manufacturer or supplier of equipment or materials incorporated into the Work, whichever is later) after the date of final acceptance, Contractor shall within ten (10) days after being notified in writing by the District of any defect in the Work or non-conformance of the Work to the Contract, commence and prosecute with due diligence all Work necessary to fulfill the terms of the warranty at its sole cost and expense. Contractor shall act sooner as requested by the District in response to an emergency. In addition, Contractor shall, at its sole cost and expense, repair and replace any portions of the Work (or Work of other contractors) damaged by its defective Work or which becomes damaged in the course of repairing or replacing defective Work. For any Work so corrected, Contractor's obligation hereunder to correct defective Work shall be reinstated for an additional one year period, commencing with the date of acceptance of such corrected Work. Contractor shall perform such tests as the District may require to verify that any corrective actions, including, without limitation, redesign, repairs, and replacements comply with the requirements of the Contract. All costs associated with such corrective actions and testing, including the removal, replacement, and reinstitution of equipment and materials necessary to gain access, shall be the sole responsibility of Contractor. All warranties and guarantees of subcontractors, suppliers and manufacturers with respect to any portion of the Work, whether express or implied, are deemed to be obtained by Contractor for the benefit of the District, regardless of whether or not such warranties and guarantees have been transferred or assigned to the District by separate agreement and Contractor agrees to enforce such warranties and guarantees, if necessary, on behalf of the

District. In the event that Contractor fails to perform its obligations under this Section, or under any other warranty or guaranty under this Contract, to the reasonable satisfaction of the District, the District shall have the right to correct and replace any defective or non-conforming Work and any Work damaged by such Work or the replacement or correction thereof at Contractor's sole expense. Contractor shall be obligated to fully reimburse the District for any expenses incurred hereunder upon demand.

### 3.16 Employee/Labor Certifications.

3.16.1 Contractor's Labor Certification. By its signature hereunder, Contractor certifies that he is aware of the provisions of Section 3700 of the California Labor Code which require every employer to be insured against liability for Worker's Compensation or to undertake self-insurance in accordance with the provisions of that Code, and agrees to comply with such provisions before commencing the performance of the Work. A certification form for this purpose, which is attached to this Contract as Exhibit "D" and incorporated herein by reference, shall be executed simultaneously with this Contract.

3.16.2 Equal Opportunity Employment. Contractor represents that it is an equal opportunity employer and that it shall not discriminate against any employee or applicant for employment because of race, religion, color, national origin, ancestry, sex, age or other interests protected by the state or federal Constitutions. Such non-discrimination shall include, but not be limited to, all activities related to initial employment, upgrading, demotion, transfer, recruitment or recruitment advertising, layoff or termination.

3.16.3 Verification of Employment Eligibility. By executing this Contract, Contractor verifies that it fully complies with all requirements and restrictions of state and federal law respecting the employment of undocumented aliens, including, but not limited to, the Immigration Reform and Control Act of 1986, as may be amended from time to time, and shall require all subcontractors and sub-subcontractors to comply with the same.

### 3.17 General Provisions.

3.17.1 District's Representative. The District hereby designates the General Manager, or his or her designee, to act as its representative for the performance of this Contract ("District's Representative"). District's Representative shall have the power to act on behalf of the District for all purposes under this Contract. Contractor shall not accept direction or orders from any person other than the District's Representative or his or her designee.

3.17.2 Contractor's Representative. Before starting the Work, Contractor shall submit in writing the name, qualifications and experience of its proposed representative who shall be subject to the review and approval of the District ("Contractor's Representative"). Following approval by the District, Contractor's Representative shall have full authority to represent and act on behalf of Contractor for all purposes under this Contract. Contractor's Representative shall supervise and direct the Work, using his best skill and attention, and shall be responsible for all construction means, methods, techniques, sequences and procedures and for the satisfactory coordination of all portions of the Work under this Contract. Contractor's Representative shall devote full time to the Project and either he or his designee, who shall be acceptable to the District,

shall be present at the work site at all times that any Work is in progress and at any time that any employee or subcontractor of Contractor is present at the work site. Arrangements for responsible supervision, acceptable to the District, shall be made for emergency Work which may be required. Should Contractor desire to change its Contractor's Representative, Contractor shall provide the information specified above and obtain the District's written approval.

3.17.3 Termination. This Contract may be terminated by District at any time, either with or without cause, by giving Contractor three (3) days advance written notice. In the event of termination by District for any reason other than the fault of Contractor, District shall pay Contractor for all Work performed up to that time as provided herein. In the event of breach of the Contract by Contractor, District may terminate the Contract immediately without notice, may reduce payment to Contractor in the amount necessary to offset District's resulting damages, and may pursue any other available recourse against Contractor. Contractor may not terminate this Contract except for cause. In the event this Contract is terminated in whole or in part as provided, District may procure, upon such terms and in such manner as it may determine appropriate, services similar to those terminated. Further, if this Contract is terminated as provided, District may require Contractor to provide all finished or unfinished documents, data, diagrams, drawings, materials or other matter prepared or built by Contractor in connection with its performance of this Contract.

3.17.4 Contract Interpretation. Should any question arise regarding the meaning or import of any of the provisions of this Contract or written or oral instructions from District, the matter shall be referred to District's Representative, whose decision shall be binding upon Contractor.

3.17.5 Anti-Trust Claims. This provision shall be operative if this Contract is applicable to California Public Contract Code Section 7103.5. In entering into this Contract to supply goods, services or materials, Contractor hereby offers and agrees to assign to the District all rights, title, and interest in and to all causes of action it may have under Section 4 of the Clayton Act (15 U.S.C. Section 15) or under the Cartwright Act (Chapter 2, commencing with Section 16700, of Part 2 of Division 7 of the Business and Professions Code) arising from purchases of goods, services, or materials pursuant to the Contract. This assignment shall be made and become effective at the time the District tender final payment to Contractor, without further acknowledgment by the Parties.

3.17.6 Notices. All notices hereunder and communications regarding interpretation of the terms of the Contract or changes thereto shall be provided by the mailing thereof by registered or certified mail, return receipt requested, postage prepaid and addressed as follows:

**CONTRACTOR:** Stonehouse Drilling & Construction, LLC  
Attn: Stephanie Tompkins, Managing Member

Citrus Heights Water District  
6230 Sylvan Road

**DISTRICT:**

Citrus Heights, California 95610  
Attn: General Manager

Any notice so given shall be considered received by the other Party three (3) days after deposit in the U.S. Mail as stated above and addressed to the Party at the above address. Actual notice shall be deemed adequate notice on the date actual notice occurred, regardless of the method of service.

3.17.7 Time of Essence. Time is of the essence in the performance of this Contract.

3.17.8 Assignment Forbidden. Contractor shall not, either voluntarily or by action of law, assign or transfer this Contract or any obligation, right, title or interest assumed by Contractor herein without the prior written consent of District. If Contractor attempts an assignment or transfer of this Contract or any obligation, right, title or interest herein, District may, at its option, terminate and revoke the Contract and shall thereupon be relieved from any and all obligations to Contractor or its assignee or transferee.

3.17.9 No Third Party Beneficiaries. There are no intended third-party beneficiaries of any right or obligation assumed by the Parties.

3.17.10 Laws, Venue, and Attorneys' Fees. This Agreement shall be interpreted in accordance with the laws of the State of California. If any action is brought to interpret or enforce any term of this Agreement, the action shall be brought in a state or federal court situated in the County of Sacramento, State of California.

3.17.11 Counterparts. This Contract may be executed in counterparts, each of which shall constitute an original.

3.17.12 Successors. The Parties do for themselves, their heirs, executors, administrators, successors, and assigns agree to the full performance of all of the provisions contained in this Contract.

3.17.13 [Reserved]

3.17.14 Solicitation. Contractor maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Contractor, to solicit or secure this Contract. Further, Contractor warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Contractor, any fee, commission, percentage, brokerage fee, gift or other consideration contingent upon or resulting from the award or making of this Contract. For breach or violation of this warranty, District shall have the right to terminate this Contract without liability.

3.17.15 Conflict of Interest. Contractor maintains and warrants that it has not employed nor retained any company or person, other than a bona fide employee working solely for Contractor, to solicit or secure this Agreement. Further, Contractor warrants that it has not paid nor has it agreed to pay any company or person, other than a bona fide employee working solely for Contractor, any fee, commission, percentage, brokerage fee, gift or other consideration contingent upon or resulting from the award or making of this Agreement. For breach or violation

of this warranty, District shall have the right to rescind this Agreement without liability. For the term of this Contract, no official, officer or employee of District, during the term of his or her service with District, shall have any direct interest in this Contract, or obtain any present or anticipated material benefit arising therefrom. In addition, Contractor agrees to file, or to cause its employees or subcontractors to file, a Statement of Economic Interest with the District's Filing Officer as required under state law in the performance of the Work.

3.17.16 Certification of License.

3.17.16.1 Contractor certifies that as of the date of execution of this Contract, Contractor has a current contractor's license of the classification indicated below under Contractor's signature.

3.17.16.2 Contractors are required by law to be licensed and regulated by the Contractors' State License Board which has jurisdiction to investigate complaints against contractors if a complaint regarding a patent act or omission is filed within four (4) years of the date of the alleged violation. A complaint regarding a latent act or omission pertaining to structural defects must be filed within ten (10) years of the date of the alleged violation. Any questions concerning a Contractor may be referred to the Registrar, Contractors' State License Board, P.O. Box 26000, Sacramento, California 95826.

3.17.17 Authority to Enter Contract. Each Party warrants that the individuals who have signed this Contract have the legal power, right and authority to make this Contract and bind each respective Party.

3.17.18 Entire Contract; Modification. This Contract contains the entire agreement of the Parties with respect to the subject matter hereof, and supersedes all prior negotiations, understandings or agreements. This Contract may only be modified by a writing signed by both Parties.

3.17.19 Non-Waiver. None of the provisions of this Agreement shall be considered waived by either Party, unless such waiver is specifically specified in writing.

3.17.20 District's Right to Employ Other Contractors. District reserves right to employ other contractors in connection with this Project or other projects.

**[SIGNATURES ON NEXT PAGE]**

**SIGNATURE PAGE FOR CONSTRUCTION CONTRACT  
BETWEEN THE CITRUS HEIGHTS WATER DISTRICT  
AND STONEHOUSE DRILLING & CONSTRUCTION,  
LLC.**

IN WITNESS WHEREOF, the Parties have entered into this Agreement as of  
the [\*\*\*INSERT DAY\*\*\*] day of [\*\*\*INSERT MONTH\*\*\*], 2022.

CITRUS HEIGHTS WATER DISTRICT

STONEHOUSE DRILLING & CONSTRUCTION, LLC

By: \_\_\_\_\_

Hilary M. Straus  
General Manager

By: \_\_\_\_\_

Its: \_\_\_\_\_

Printed Name: \_\_\_\_\_

ATTEST:

By: \_\_\_\_\_

Clerk of the Board



**General Specifications**

The work described herein shall be performed according to the Citrus Heights Water District General Specifications as follows:

**Scope of Work**

The work to be completed under this Contract will consist of furnishing all materials, labor, equipment, fuel, tools, transportation and services for direct rotary drilling, sampling and logging, zone sampling, and abandonment of one (1) test hole. The purpose of the work is to obtain geologic, hydrologic, and water quality information concerning the water-bearing formations at the specified site. A drillers' log will be prepared to describe the lithology encountered during drilling; drill cuttings of the formations encountered will be collected, and a suite of electric geophysical surveys will be run in the test hole. The District or its representative will identify depth intervals to be sampled using the zone sampling method. The test hole shall be abandoned by sealing in accordance with these general specifications.

The Work shall be complete, and all work, materials, and services not expressly shown or called for in the Contract Documents which may be necessary for the complete and proper completion of the Work in good faith shall be performed, furnished, and installed by the Contractor as though originally so specified or shown, at no increase in cost to the District.

**Protection of Site, Disposal and Control of Waste Water**

All project activities (drilling, development, sampling, abandonment) will be conducted in such a manner as to prevent the introduction of drilling fluids, drill cuttings, or any other pollutants to the ground surface offsite drainages, or storm sewer inlets during the work. Accordingly, any equipment and/or materials brought to the project area must be managed in accordance with the following procedures:

- Plastic sheeting that is bermed or drip pans will be used to catch leaks and residual material in hoses and spigots under all stationary equipment. The plastic sheeting or drip pans will be checked daily and emptied or replaced as needed by reusing the substance or disposing of it properly at the Contractor's expense.
- Spilled hazardous materials will be contained immediately using sand, dirt, and/or absorbent materials. Such spills will be cleaned up promptly along with the contaminant material and will be disposed of properly at the Contractor's expense.
- Outdoor storage of all fuels, oils, solvents, cleaners and other liquid materials shall be within secondary containment. The areas should be covered, as necessary, to prevent storm water accumulation in the containment.

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- Bentonite, cement, and any other powdered product shall be stored on pallets and away from any drainage path. The storage area should be covered and protected, if necessary, to prevent pollution runoff by wind or storm water.
- Chemicals, bagged material, or drums shall be stored on pallets within secondary containment.

Waste products generated during the work must be managed in accordance with the following procedures:

- All drilling fluids and cuttings generated during the project will be contained in roll off bins. DUG CIRCULATION OR FLUID CONTAINMENT PITS WILL NOT BE ALLOWED.
- Containerized waste will not be allowed to overflow. Any waste that requires storage in containers shall be removed from the project areas on a regular basis and disposed of at an approved facility at the Contractor's expense.
- Cleaning of the drill pipe, tremie pipe and any other equipment shall be conducted within a fully contained area within the area of the well site only. Any deviation from these locations must be approved by the Owner or Owner's representative.
- All waste products must be removed from the project area prior to completion of the Work.

The use and maintenance of pump equipment and support vehicles shall be in accordance with the following procedures:

- If the vehicles or equipment cannot be filled at a commercial fueling station, fueling will be performed on site at designated areas. During fueling operations, drip pans or bermed plastic sheeting will be used to catch leaks. "Topping off" of fuel tanks is not allowed.
- Maintenance of vehicles will be performed within designated areas to be approved by the Owner. Drip pans will be used during maintenance activities to catch any leaks.
- Daily inspections of pump rigs, support vehicles, and equipment will be made to check for leaks. Any leaks detected shall be reported to the Owner or Owner's representative and fixed immediately.
- All Contractor employees and subcontractors shall be educated in the proper handling and storage of construction materials used during the project.

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- All spills shall be soaked up using absorbent materials and disposed of properly at the Contractor's expense. Washing down or burial of spills is not allowed. Any spill, no matter how small, is to be reported to the Owner or Owner's representative.
- If required, steam cleaning of the drilling rig and support equipment must be carried out within designated areas. The cleaning areas shall be bermed or otherwise contained to prevent runoff to storm drains. All wastewater generated from cleaning equipment must be containerized and disposed of at the Contractor's expense. Any soap used during cleaning must be phosphate-free and biodegradable.

The Contractor shall protect all pipelines, trees, landscaping, curbs, ramps and other structures located within the public right-of-way during the progress of the Work. Upon completion of the Work, the Contractor shall restore the site to its original condition. The Contractor shall use Best Management Practices (BMPs) for the protection of the well site during his work and shall take whatever measures necessary to ensure that his activities do not impact surrounding areas.

All costs incurred in the disposal of wastewater and removal of drill cuttings shall be at the Contractor's expense. All costs involved with temporary containment, conveyance, and monitoring of fluids generated during testing shall be at the Contractor's expense. Unless otherwise approved, no discharge or runoff of fluids to adjacent properties or streets shall be permitted.

All discharge water generated from the development and testing process shall be disposed of in accordance with District's NPDES permit. Prior to discharge, all fluids from the well shall be initially conveyed to a temporary storage tank of sufficient capacity to allow for settling of suspended sediments prior to discharge. Water from the temporary holding tank that meets permit requirements for discharges to the storm drain will be conveyed in above-ground piping to a discharge point approved by the Owner. The Contractor shall provide and be responsible for all necessary connections and shall assure that the conveyance line will remain securely in place during high rates of flow. All costs incurred in the disposal of discharged water, unless otherwise indicated, shall be at the Contractor's expense.

A sampling port shall be made available at the point of discharge for water quality sampling to occur. All discharges shall be closely monitored for quantity and quality, as required by the District's discharge permit, and recorded hourly on the Contractor's daily notes for the site. These daily notes shall be submitted to the District or District's representative on a daily basis.

Under no circumstances shall water from any source related to the Work or storm runoff be allowed to leave the site. If necessary the Contractor shall use sand bags and straw wattles to form a barrier to prevent the runoff of water from the site.

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**District Furnished Items**

The District shall furnish water for construction at no cost to the Contractor.

The District will collect water samples for analysis during discrete zone testing.

**Drilling Fluid Control Program**

A drilling fluid control program for direct rotary drilling shall be established by the Contractor prior to the commencement of drilling operations and throughout the drilling and abandonment work. Selection and use of the drilling fluid materials shall be a part of this agreement. The Contractor shall be responsible for maintaining the quality of the drilling fluid to assure: 1) protection of water bearing and potential water bearing formations exposed in the bore hole, and 2) the ability to obtain reliable representative samples of the formation materials.

Material used by the Contractor to prepare the drilling fluid shall be composed of water from the assigned source and drilling additives processed to meet or surpass the specification.

The drilling fluid shall be made up of high grade bentonite clays or organic polymer additives, in common drilling usage in the water well industry, and shall possess such characteristics as are required to condition the walls of the borehole to prevent caving of the formation and excessive loss of circulation, facilitate removal of the cuttings, and produce a thin filter cake. The Contractor shall be responsible for mixing and conditioning the requisite quantities of clay base and additives to obtain a drilling fluid with the following average drilling fluid properties:

1. Weight 8.3- 9.0 lbs. /gal
2. Marsh Funnel Viscosity 28 - 35 sec/qt.
3. API Cake Thickness 1/32 - 3/32 inch
4. Sand Content of Return Fluid 0 - 2% by volume

The drill rig must be provided with equipment to measure the drilling fluid weight, viscosity, and sand content.

The drilling fluid shall be maintained in such a manner as not to exceed specified drilling fluid properties above for weight, viscosity, and sand content without the approval of the District. The Contractor shall maintain the minimum viscosity of the drilling fluid that will raise cuttings and

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adequately condition the walls of the borehole.

All drilling fluid additives will be NSF certified and approved for water well drilling use.

The Contractor shall maintain current records on the site at all times to show:

1. Time, depth and results of all drilling fluid tests;
2. All materials added to the system; type, amount, time and depth; and
3. Variances or modifications from the specified drilling fluid program (time, depth, reason and authorization).

Proper control of the drilling fluid must be maintained to the satisfaction of the District. Contractor will be required, at the Contractor's expense, to retain or employ an experienced, qualified drilling fluid engineer to supervise and maintain drilling fluid characteristics to the satisfaction of the District if such control cannot be maintained by the Contractor.

If at any time the drilling fluid is not in compliance with these Specifications or the recommendations of the drilling fluid engineer, as approved by the District, the properties shall be adjusted and the tests rerun until the drilling fluid obtains the specified characteristics. If the properties cannot be achieved and maintained to the satisfaction of the District, the drilling fluid shall be replaced at the Contractors expense.

A drilling fluid tank of sufficient capacity to provide a volume of at least two times the final borehole volume shall be employed by the Contractor. EARTHEN PITS ARE NOT ALLOWED FOR THIS PROJECT.

**OTHER WORK REQUIRED**

Other work to be done by the Contractor shall include obtaining all necessary local permits, performing an Underground Service Alert (USA), keeping a time-drilling log, proper cleaning and restoration of the drilling site upon completion of work, and doing all things necessary for the efficient drilling and completion of the work called for under this contract. The Contractor shall make available to the District all daily drilling records and shall furnish reports as specified at the completion of work. If required, the Contractor shall furnish a Traffic Control Plan approved by the City of Citrus Heights, County of Sacramento, County of Placer, or the City of Roseville as applicable.

Prior to the commencement of drilling, the Contractor shall furnish to the District the names and contact information of supervisory personnel and the on-site driller responsible for the daily work activities in accordance with this Exhibit.

**Construction Schedule**

A Construction Schedule shall be prepared and submitted by the Contractor to the District for review and approval prior to the issuance of the Notice to Proceed. Weekly updates shall be provided thereafter and until completion of the project. Full compensation for preparing the Construction Schedule and weekly updates thereto shall be considered as included in the contract prices paid for the various items of work, and no additional payment will be allowed therefor.

**Construction Inspection**

The District or its Representative will inspect the work specified in these Specifications at various stages of the project. The Contractor shall provide access to the site to the District, the District Representative, and local permitting agencies requiring inspection at all times.

**California Contractors License Classification**

The District has determined that the Contractor must possess a valid California State Contractor's "C-57" Water Well Drilling Contractor License at the time that the Contract is awarded and throughout the duration of the project. Failure to possess the specified license shall render any bid as non-representative and shall not be considered for award.

**Drilling Permit**

The Contractor is responsible for obtaining the necessary drilling permit from the Sacramento County Environmental Health Management Department:

Sacramento County Environmental Management Department  
8475 Jackson Road  
2<sup>nd</sup> Floor – Suite 230/240  
Sacramento, CA 95826-3913  
Phone: (916) 875-8484

**HOURS OF WORK**

The Contractor shall schedule all work activities per the City of Citrus Heights, Encroachment Permit, Monday through Friday, with Saturdays, Sundays, and District Holidays being excluded. The Contractor shall indicate the need for non-normal work hours in the various schedules submitted during the progress of the Project.

Normal working hours shall be from 7:00 am to 7:00 pm Monday through Sunday unless directed otherwise in the City of Citrus Heights.

Overtime work shall not entitle the Contractor to any compensation for any contract item in addition to that stipulated in the contract for the kind of work performed. In case of extra work ordered by the District, no additional payment shall be made to the Contractor because of the payment by the Contractor of overtime wage rates for such work, unless the use of overtime work in connection with such extra work is specifically ordered in writing by the District, and then only to such extent as extra payment is regularly being made by the Contractor to his personnel for overtime work of a similar nature in the same locality. If, due to Contractor negligence, the District is called out after hours, the Contractor shall be back charged at a rate of \$75 per hour per District employee for said call out.

### **TERMINATION**

The District reserves the right to terminate the work on a test hole at any time. In such an event, the Contractor shall be paid for work completed at that time on the basis of the unit bid prices. The District reserves the right to select an alternate test hole site to replace an abandoned test hole. If the District chooses an alternate site, the Contractor shall be paid for the work done on the alternate test hole on the basis of the unit bid prices.

### **WORK AREAS**

Project Area – The District has obtained access to a project site. It is the responsibility of the Contractor to become familiar with the site and provide equipment appropriate for the existing conditions. The Contractor shall assume sole responsibility for all equipment and materials during the course of the contract. By submitting a bid it is assumed that the Contractor has inspected the site and is aware of the site conditions.

Disposal Area – The Contractor shall locate, make arrangements, and pay all applicable fees for the use of an off-site disposal area for excess materials, trash and unsuitable material resulting from the contract work. Handling of drilling fluid and cuttings shall be the responsibility of the Contractor.

Security – The Contractor shall provide suitable means of protecting the borehole from the entrance of foreign objects at all times during the duration of the contract. The Contractor shall also provide adequate site security, such as temporary fencing, to insure public safety and to protect equipment and facilities on the site. In particular, security of mud tanks, and cutting storage shall be the responsibility of the Contractor.

### **EMERGENCY CONTACT AND CONTRACTOR RESPONSE**

Prior to commencement of the Project, the Contractor shall designate a competent person to be responsible for responding to emergencies during non-work hours resulting from the Contractor's work. Said person shall be available at all hours and shall be housed near the Project site. The maximum allowable response time shall be 30-minutes as determined by Google maps. The District shall be provided with a cellular telephone number and other relevant

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contact information for said designated competent person. The Contractor is solely responsible for informing the District of any changes in designation of the responsible person or contact information during the course of the Project.

**Bid Item 1 – Mobilization**

Scope - Mobilization shall include acquisition of necessary permits (including performing USA); transportation of personnel, equipment, and operating supplies to and from the site; installation of temporary fencing; temporary sound attenuation (sound walls); establishment of portable sanitary facilities; providing a work site sufficient to support equipment and personnel in a safe and workman-like manner; and other preparatory work at the site required by the Contractor to conduct operations.

The Contractor shall provide one complete direct rotary drilling unit; all tools, accessories, power, fuel, materials, supplies, and lighting required to conduct safe and efficient drilling operations. The drilling unit shall be in good condition and of such capacity as to drill the test hole required by this exhibit.

Direct Circulation Rotary Drilling Equipment - Direct circulation rotary drilling equipment will be equipped with drilling fluid property evaluation equipment as defined in this exhibit.

The Contractor will provide a drilling fluid tank having a minimum capacity of two times the volume of the borehole to be constructed. Solids removal equipment will be placed in such a manner as to assure that the fluid properties reaching the drilling fluid pump meet those properties defined in these general specifications.

Noise Mitigation Measures – Temporary Sound Attenuation (sound walls), capable of reducing sound generated during operations to meet the City of Citrus Heights noise ordinance shall be installed prior to any drilling and removed after completion of test hole abandonment. The length of the sound attenuation structure will be approximately 200 linear feet. The height of the sound walls shall be a minimum of 16 feet. Every effort shall be made by the contractor to minimize noise originating from the site. Final design and placement of the sound walls shall be approved by the District or its Representative before commencement of test hole drilling.

**Bid Item 2 – Test Hole Drilling**

Scope- This item shall consist of drilling a test hole having a diameter of 8-3/4 inches. The final depth of the test hole will depend on the lithology encountered in the test hole as assessed by the District's representative. For bidding and planning purposes, the test hole depth is specified to be up to 600 feet. The Contractor shall take all measures necessary to protect the test hole from caving and will be responsible for the maintenance of the borehole in a manner that will provide for the successful collection of drill cutting samples and geophysical surveys.



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TEST HOLE DRILLING SERVICES**

**EXHIBIT A**

Drilling Methods - The test hole shall be drilled using the direct circulation rotary drilling method of construction. The work shall be performed with equipment which is adequate to perform all phases of the work defined in these Specifications. If, in the opinion of the District, the Contractor's equipment is not capable of satisfactorily performing the specified work, the Contractor, at his/her own expense, shall substitute equipment satisfactory to the District. The Contractor shall take all measures necessary to protect the top portions of the test hole from caving or raveling.

The Contractor must keep records providing the following information:

1. A log of drilling bit types and depths of changes.
2. A record of drilling fluid properties at 4-hour intervals during drilling operations.

The record shall show drilling fluid weights, Marsh Funnel viscosity, sand content, drilling fluid losses, and any drilling fluid additives used.

3. A drilling log that will define and classify the type of formation encountered during the drilling. The log will consist of the depth at which each change in formation is encountered, the classification of the material encountered, its color and particle size. Classification of silt, sand, gravel, cobbles, etc. shall be based on the size of material encountered in accordance with the established and accepted geologic standard for classification of these materials. If more than one size of material is encountered in a formation such as "sand and clay", an estimate of the quantity of each shall be recorded, such as "20% sand, 80% clay".
4. All measurements for depths shall be referenced to the existing ground surface at the test hole site.
5. A record of construction activities for each shift shall be prepared by the Contractor including a time-drilling log of the test hole consisting of the time (in minutes) required to drill down each stem of drill pipe.

During the drilling of the test hole, at 10-foot intervals and at formational changes, the Contractor shall collect representative samples of the drill cuttings. These cuttings shall be taken from a steel or plastic flow line between the borehole and the drilling fluid tank or pit. The samples collected shall not be washed. They may be carefully drained of excess drilling fluid but in a manner that will preserve the finer particle size of the sample. Two (2) portions, one (1) pint each, of each sample taken, shall be preserved in quart-size Ziplock plastic freezer bags and marked as to date, depth, and well number. One (1) set of samples shall be retained on the job for inspection. The Contractor shall deliver one (1) set of samples to the District. The samples shall be properly stored by the Contractor in a manner as to prevent breakage or loss until they are accepted by the District.

Drilling shall proceed until the District's representative has evaluated the cuttings and provided notice to log the hole as specified in Item 3.

**Bid Item 3 – Geophysical logging (E-LOG)**

Scope- This item shall consist of conditioning the borehole and conducting geophysical surveys in the test hole. The geophysical surveys to be run in the test hole are the spontaneous potential, gamma, and long, short, and single point and resistivity surveys.

Methods - The Contractor shall furnish geophysical logging services. Commercial logging service companies acceptable to the District include Stewart Well Logging and Pacific Surveys. Borehole geophysical logs consisting of spontaneous potential (SP) and multiple resistivity shall be conducted in the test hole as directed by the District.

The spontaneous potential survey shall be plotted on a scale of one-inch equal to plus or minus 20 millivolts. The multiple resistivity survey shall consist of a point resistivity curve and a multiple resistivity curves employing 16-inch short normal and 64-inch long normal spacings on one-inch equal to 20- or 40-ohm scale. All surveys will be plotted on a footage scale of one-inch equal to 20 feet.

The Contractor is responsible for the integrity of the borehole to assure that the geophysical logging can be successfully accomplished to the completed hole depth. The Contractor shall maintain circulation in the borehole with tools on the bottom of the hole until the logging equipment is on location and prepared to conduct the survey. The logging service company shall obtain a ditch sample of the circulating fluid for calibration of the logs prior to the securing of the drilling fluid circulating pump. Tools shall then be pulled by the Contractor and the logging services immediately commenced. If the logging probe fails to descend to the total drilled depth, of the test hole the Contractor, at his/her own expense, shall rerun the drilling tools in the test hole to clear/recondition the hole.

Upon completion of logging, the Contractor will deliver to the District one field prints, six final prints, and one electronic file of the geophysical log. The field copies of the electrical log shall be approved by the District before the logging service is released from the site by the Contractor.

**Bid Item 4 - Discrete Zone Sampling:**

Scope - Upon drilling to the final depth and completion of geophysical testing, up to three discrete zone samples will be taken. The Contractor shall build a temporary well or discrete zone to the depth requested by the District's Representative. The borehole shall be reamed to the proper diameter, if needed, to complete isolation zone testing and backfilled with bentonite grout below the discrete zone to allow installation of bentonite seals and filter pack across the screened interval. A 3 or 4-inch nominal diameter riser pipe with a 20 feet length of slotted screen, as determined by the District's Representative, shall be placed at the requested depth. Screen slot shall be of suitable size to retain 90% of the chosen filter pack.

A 10-feet thick, high solids bentonite chip seal shall be installed 10 feet below the bottom of the screen, followed by filter pack and at least 10 feet of bentonite placed 10 feet above the top of

screen. Final depths and thickness will be based on borehole encountered geology.

As the temporary well is built, depths of the seals and filter pack shall be verified by tagging with the tremie pipe sand line or tape measure to ensure that the sample zone is isolated. After the temporary well is installed, the well shall be developed using air lift and submersible pump techniques until discharge water is free of fine-grained sediment and a water volume equivalent to at least 10 well casing volumes have been removed. The turbidity goal is 5 NTUs. Samples shall be taken using the submersible pump. Areas between the sampling zones shall be abandoned by pumping bentonite grout through a tremie pipe. Depending upon borehole conditions, filter pack and bentonite seals may be left in place and must be approved by the District's Representative. Alternatively, discrete zone sampling may be completed using a submersible pump with inflatable packers or other suitable method. Sampling method shall be capable of collecting representative groundwater samples and must be approved by the District's Representative. The District's Representative will provide sample bottles and arrange delivery of water samples to a laboratory. Time schedules shall be coordinated with the laboratory by the District's Representative to provide efficient turnaround time.

#### **Bid Item 5 – Test Hole Abandonment**

General - Following completion of discrete zone sampling operations, the test hole shall be abandoned with cement grout in accordance with State and local regulations and all provisions of the well permit obtained by the Contractor.

Prior to the commencement of the abandonment work, the Contractor shall notify the permitting agency and arrange for the required inspection. Any delay or costs caused by inadequate notice to the permitting agency shall be borne by the Contractor.

Sealing Materials - The test hole shall be filled with a slurry of sand-cement grout. The cementing material shall conform to API Class A cement. The cement mixture shall comply with State and local regulations.

Abandonment Methods – The borehole shall be reamed to the original depth drilled during test hole drilling using a drill bit of equal or larger size used to ream the borehole prior to discrete zone sampling activities. Cement grout shall be pumped into the bottom of the borehole by means of a tremie pipe. The tremie pipe must be installed to within ten feet of the bottom of the borehole prior to pumping cement grout. Cement grout material shall be placed by a positive displacement method using pumping equipment. The tremie pipe may be raised as the grout is placed but the discharge end must be submerged in grout at all times until the grouting is completed. The test

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TEST HOLE DRILLING SERVICES**

**EXHIBIT A**

hole shall be filled with cement grout to within five feet of the land surface. The balance of the hole shall be filled with native material to the ground surface.

Rejected Borehole - Non-Payment - No payment will be made for any labor or materials involved in the construction of any borehole when such a hole fails to reach the specified or directed final depth and/or diameter for any preventable cause, or when such a test hole fails to meet these Specifications. Such holes will be rejected and shall be replaced as specified herein. Preventable failures include any failure caused by faulty or inadequate drilling equipment, failure caused by negligence or improper drilling operations or techniques, failure caused by the installation of faulty or non-approved materials, or failure caused by improperly protecting drill holes and drilling work from the natural elements, including cave-ins resulting from existing soil conditions.

Sealing and Replacement of a Rejected Borehole - Any rejected borehole shall be sealed at no cost to the District and in accordance with provisions of these Specifications. Any rejected borehole shall be replaced by another hole adjacent to the first, or at a location as directed by the District at no cost to the District.

Records - The item consists of preparing final records of the test hole. No separate payment for the preparation of the State of California Water Well Driller's Report and for preparation of the final prints shall be made.

California Water Well Driller's Report - The Driller's Report form shall be fully completed in the format required by the State of California.

Final Prints - The Contractor shall provide two final prints of the daily tour reports and the drilling logs.

**Bid Item 6 – Standby Time**

Scope - During the progress of drilling operations, it may be necessary for the District to perform work that will require the drilling crew and equipment to stand idle. In such an event, the District shall request the Contractor in writing to cease operations and shall state the anticipated extent or duration thereof.

**Bid Item 7 – Site Restoration**

Scope - This item shall consist of maintaining the well site in a professional manner during drilling, and restoring the site to pre-drilling conditions after work is completed.

Methods - The Contractor shall keep the premises free from accumulations of waste materials, rubbish, and other debris resulting from the work, and at completion of the work, he/she shall remove all waste materials, rubbish, and debris from and about the site as well as all tools, construction equipment, fuel tanks, machinery and surplus materials. The Contractor shall restore to their original condition all temporary work areas. The Contractor is responsible for any damages

**2022 CITRUS HEIGHTS WATER DISTRICT  
TEST HOLE DRILLING SERVICES**

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to properties adjacent to the site caused by drilling or construction activities associated with the work described herein.

**2022 CITRUS HEIGHTS WATER DISTRICT  
TEST HOLE DRILLING SERVICES**

**EXHIBIT A**

**PROJECT LOCATION : 7794-7804 Sayonara Dr., Citrus Heights, CA 95610**

A map is provided to show the Project location.



## **EXHIBIT “B”**

### **SPECIAL CONDITIONS**

#### **ARTICLE 1. BONDS**

Within ten (10) calendar days from the date the Contractor is notified of award of the Contract, the Contractor shall deliver to the District four identical counterparts of the Performance Bond and Payment Bond on the forms supplied by the District and included as Exhibit “F” to the Contract. Failure to do so may, in the sole discretion of District, result in the forfeiture of Contractor’s bid security. The surety supplying the bond must be an admitted surety insurer, as defined in Code of Civil Procedure Section 995.120, authorized to do business as such in the State of California and satisfactory to the District. The Performance Bond and the Payment Bond shall be for one hundred percent (100%) of the Total Contract Price.

**EXHIBIT "C"**

**CONTRACTOR'S CERTIFICATE REGARDING WORKERS' COMPENSATION**

I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this Contract.

Name of Bidder Stonehouse Drilling & Construction LLC.

Signature 

Name Stephanie Tompkins

Title Managing Member

Dated 7/19/2022

**END OF CONTRACTOR'S CERTIFICATE REGARDING WORKERS' COMPENSATION**



## EXHIBIT "D"

### PUBLIC WORKS CONTRACTOR REGISTRATION CERTIFICATION

If this bid is due on or after March 1, 2015, then pursuant to Labor Code sections 1725.5 and 1771.1, all contractors and subcontractors that wish to bid on, be listed in a bid proposal, or enter into a contract to perform public work must be registered with the Department of Industrial Relations. See <http://www.dir.ca.gov/Public-Works/PublicWorks.html> for additional information.

No bid will be accepted nor any contract entered into without proof of the contractor's and subcontractors' current registration with the Department of Industrial Relations to perform public work.

Contractor hereby certifies that it is aware of the registration requirements set forth in Labor Code sections 1725.5 and 1771.1 and is currently registered as a contractor with the Department of Industrial Relations.

Name of Contractor: Stonehouse Drilling & Construction, LLC

DIR Registration Number: 1000037498

Contractor further acknowledges:

1. Contractor shall maintain a current DIR registration for the duration of the project.
2. Contractor shall include the requirements of Labor Code sections 1725.5 and 1771.1 in its contract with subcontractors and ensure that all subcontractors are registered at the time of bid opening and maintain registration status for the duration of the project.
3. Failure to submit this form or comply with any of the above requirements may result in a finding that the bid is non-responsive.

Signature: \_\_\_\_\_

Name and Title: \_\_\_\_\_

Dated: \_\_\_\_\_

**EXHIBIT "E"**

**PAYMENT AND PERFORMANCE BONDS**

**PERFORMANCE BOND**

KNOW ALL PERSONS BY THESE PRESENTS:

THAT WHEREAS, the Citrus Heights Water District (hereinafter referred to as "District") has awarded to \_\_\_\_\_, (hereinafter referred to as the "Contractor") \_\_\_\_\_ an agreement for \_\_\_\_\_ (hereinafter referred to as the "Project").

WHEREAS, the work to be performed by the Contractor is more particularly set forth in the Contract Documents for the Project dated \_\_\_\_\_, (hereinafter referred to as "Contract Documents"), the terms and conditions of which are expressly incorporated herein by reference; and

WHEREAS, the Contractor is required by said Contract Documents to perform the terms thereof and to furnish a bond for the faithful performance of said Contract Documents.

NOW, THEREFORE, we, \_\_\_\_\_, the undersigned Contractor and \_\_\_\_\_ as Surety, a corporation organized and duly authorized to transact business under the laws of the State of California, are held and firmly bound unto the District in the sum of \_\_\_\_\_ DOLLARS, (\$ \_\_\_\_\_), said sum being not less than one hundred percent (100%) of the total amount of the Contract, for which amount well and truly to be made, we bind ourselves, our heirs, executors and administrators, successors and assigns, jointly and severally, firmly by these presents.

THE CONDITION OF THIS OBLIGATION IS SUCH, that, if the Contractor, his or its heirs, executors, administrators, successors or assigns, shall in all things stand to and abide by, and well and truly keep and perform the covenants, conditions and agreements in the Contract Documents and any alteration thereof made as therein provided, on its part, to be kept and performed at the time and in the manner therein specified, and in all respects according to their intent and meaning; and shall faithfully fulfill all obligations including the one-year guarantee of all materials and workmanship; and shall indemnify and save harmless the District, its officers and agents, as stipulated in said Contract Documents, then this obligation shall become null and void; otherwise it shall be and remain in full force and effect.

As a condition precedent to the satisfactory completion of the Contract Documents, unless otherwise provided for in the Contract Documents, the above obligation shall hold good for a period of one (1) year after the acceptance of the work by District, during which time if Contractor shall fail to make full, complete, and satisfactory repair and replacements and totally protect the District from loss or damage resulting from or caused by defective materials or faulty workmanship, Surety shall undertake and faithfully fulfill all such obligations. The obligations of Surety hereunder shall continue so long as any obligation of Contractor remains. Nothing herein

shall limit the District's rights or the Contractor or Surety's obligations under the Contract, law or equity, including, but not limited to, California Code of Civil Procedure section 337.15.

Whenever Contractor shall be, and is declared by the District to be, in default under the Contract Documents, the Surety shall remedy the default pursuant to the Contract Documents, or shall promptly, at the District's option:

- (1) Take over and complete the Project in accordance with all terms and conditions in the Contract Documents; or
- (2) Obtain a bid or bids for completing the Project in accordance with all terms and conditions in the Contract Documents and upon determination by Surety of the lowest responsive and responsible bidder, arrange for a Contract between such bidder, the Surety and the District, and make available as work progresses sufficient funds to pay the cost of completion of the Project, less the balance of the contract price, including other costs and damages for which Surety may be liable. The term "balance of the contract price" as used in this paragraph shall mean the total amount payable to Contractor by the District under the Contract and any modification thereto, less any amount previously paid by the District to the Contractor and any other set offs pursuant to the Contract Documents.
- (3) Permit the District to complete the Project in any manner consistent with local, California and federal law and make available as work progresses sufficient funds to pay the cost of completion of the Project, less the balance of the contract price, including other costs and damages for which Surety may be liable. The term "balance of the contract price" as used in this paragraph shall mean the total amount payable to Contractor by the District under the Contract and any modification thereto, less any amount previously paid by the District to the Contractor and any other set offs pursuant to the Contract Documents.

Surety expressly agrees that the District may reject any contractor or subcontractor which may be proposed by Surety in fulfillment of its obligations in the event of default by the Contractor.

Surety shall not utilize Contractor in completing the Project nor shall Surety accept a bid from Contractor for completion of the Project if the District, when declaring the Contractor in default, notifies Surety of the District's objection to Contractor's further participation in the completion of the Project.

The Surety, for value received, hereby stipulates and agrees that no change, extension of time, alteration or addition to the terms of the Contract Documents or to the Project to be performed thereunder shall in any way affect its obligations on this bond, and it does hereby waive notice of any such change, extension of time, alteration or addition to the terms of the Contract Documents or to the Project, including but not limited to the provisions of sections 2819 and 2845 of the California Civil Code.

IN WITNESS WHEREOF, we have hereunto set our hands and seals this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_.

(Corporate Seal)

\_\_\_\_\_  
Contractor/ Principal

By \_\_\_\_\_

Title \_\_\_\_\_

(Corporate Seal)

\_\_\_\_\_  
Surety

By \_\_\_\_\_

Attorney-in-Fact

Signatures of those signing for the Contractor and Surety must be notarized and evidence of corporate authority attached.

(Attach Attorney-in-Fact Certificate)

Title \_\_\_\_\_

The rate of premium on this bond is \_\_\_\_\_ per thousand. The total amount of premium charges, \$ \_\_\_\_\_.

(The above must be filled in by corporate attorney.)

THIS IS A REQUIRED FORM

Any claims under this bond may be addressed to:

(Name and Address of Surety)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

(Name and Address of Agent or Representative for service of process in California, if different from above)

\_\_\_\_\_  
\_\_\_\_\_

(Telephone number of Surety and Agent or Representative for service of process in California)

\_\_\_\_\_  
\_\_\_\_\_

NOTE: A copy of the Power-of-Attorney authorizing the person signing on behalf of the Surety to do so must be attached hereto.

### Notary Acknowledgment

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

STATE OF CALIFORNIA

COUNTY OF \_\_\_\_\_

On \_\_\_\_\_, 20\_\_\_\_, before me, \_\_\_\_\_, Notary Public, personally appeared \_\_\_\_\_, who proved to me on the basis of satisfactory

evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

\_\_\_\_\_  
Signature of Notary Public

### OPTIONAL

*Though the information below is not required by law, it may prove valuable to persons relying on the document and could prevent fraudulent removal and reattachment of this form to another document.*

#### CAPACITY CLAIMED BY SIGNER

#### DESCRIPTION OF ATTACHED DOCUMENT

☐ Individual

☐ Corporate Officer

\_\_\_\_\_  
Title(s)

\_\_\_\_\_  
Title or Type of Document

☐ Partner(s)

☐ Limited

☐ General

\_\_\_\_\_  
Number of Pages

☐ Attorney-In-Fact

☐ Trustee(s)

☐ Guardian/Conservator

☐ Other:

\_\_\_\_\_  
Date of Document

Signer is representing:

Name Of Person(s) Or Entity(ies)

\_\_\_\_\_  
Signer(s) Other Than Named Above

## PAYMENT BOND

KNOW ALL MEN BY THESE PRESENTS That

WHEREAS, the Citrus Heights Water District (hereinafter designated as the "District"), by action taken or a resolution passed \_\_\_\_\_, 20\_\_\_\_ has awarded to \_\_\_\_\_ hereinafter designated as the "Principal," a contract for the work described as follows:

\_\_\_\_\_ (the "Project"); and

WHEREAS, the work to be performed by the Principal is more particularly set forth in the Contract Documents for the Project dated \_\_\_\_\_ ("Contract Documents"), the terms and conditions of which are expressly incorporated by reference; and

WHEREAS, said Principal is required to furnish a bond in connection with said contract; providing that if said Principal or any of its Subcontractors shall fail to pay for any materials, provisions, provender, equipment, or other supplies used in, upon, for or about the performance of the work contracted to be done, or for any work or labor done thereon of any kind, or for amounts due under the Unemployment Insurance Code or for any amounts required to be deducted, withheld, and paid over to the Employment Development Department from the wages of employees of said Principal and its Subcontractors with respect to such work or labor the Surety on this bond will pay for the same to the extent hereinafter set forth.

NOW THEREFORE, we, the Principal and \_\_\_\_\_ as Surety, are held and firmly bound unto the District in the penal sum of \_\_\_\_\_

\_\_\_\_\_ Dollars (\$ \_\_\_\_\_) lawful money of the United States of America, for the payment of which sum well and truly to be made, we bind ourselves, our heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

THE CONDITION OF THIS OBLIGATION IS SUCH that if said Principal, his or its subcontractors, heirs, executors, administrators, successors or assigns, shall fail to pay any of the persons named in Section 9100 of the Civil Code, fail to pay for any materials, provisions or other supplies, used in, upon, for or about the performance of the work contracted to be done, or for any work or labor thereon of any kind, or amounts due under the Unemployment Insurance Code with respect to work or labor performed under the contract, or for any amounts required to be deducted, withheld, and paid over to the Employment Development Department or Franchise Tax Board from the wages of employees of the contractor and his subcontractors pursuant to Section 18663 of the Revenue and Taxation Code, with respect to such work and labor the Surety or Sureties will pay for the same, in an amount not exceeding the sum herein above specified.

This bond shall inure to the benefit of any of the persons named in Section 9100 of the Civil Code so as to give a right of action to such persons or their assigns in any suit brought upon this bond.

It is further stipulated and agreed that the Surety on this bond shall not be exonerated or released from the obligation of this bond by any change, extension of time for performance, addition, alteration or modification in, to, or of any contract, plans, specifications, or agreement pertaining or relating to any scheme or work of improvement herein above described, or pertaining or relating to the furnishing of labor, materials, or equipment therefore, nor by any change or modification of any terms of payment or extension of the time for any payment pertaining or relating to any scheme or work of improvement herein above described, nor by any rescission or attempted rescission of the contract, agreement or bond, nor by any conditions precedent or subsequent in the bond attempting to limit the right of recovery of claimants otherwise entitled to

recover under any such contract or agreement or under the bond, nor by any fraud practiced by any person other than the claimant seeking to recover on the bond and that this bond be construed most strongly against the Surety and in favor of all persons for whose benefit such bond is given, and under no circumstances shall Surety be released from liability to those for whose benefit such bond has been given, by reason of any breach of contract between the owner or District and original contractor or on the part of any obligee named in such bond, but the sole conditions of recovery shall be that claimant is a person described in Section 9100 of the Civil Code, and has not been paid the full amount of his claim and that Surety does hereby waive notice of any such change, extension of time, addition, alteration or modification herein mentioned and the provisions of sections 2819 and 2845 of the California Civil Code.

IN WITNESS WHEREOF, we have hereunto set our hands and seals this \_\_\_\_\_ day of \_\_\_\_\_, 20\_.

(Corporate Seal)

\_\_\_\_\_  
Contractor/ Principal

By \_\_\_\_\_

Title \_\_\_\_\_

(Corporate Seal)

\_\_\_\_\_  
Surety

By \_\_\_\_\_

Attorney-in-Fact

Title \_\_\_\_\_

Signatures of those signing for the Contractor and Surety must be notarized and evidence of corporate authority attached. A Power-of-Attorney authorizing the person signing on behalf of the Surety to do so much be attached hereto.

NOTE: A copy of the Power-of-Attorney authorizing the person signing on behalf of the Surety to do so must be attached hereto.

### Notary Acknowledgment

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

STATE OF CALIFORNIA

COUNTY OF \_\_\_\_\_

On \_\_\_\_\_, 20\_\_\_\_, before me, \_\_\_\_\_, Notary Public, personally appeared \_\_\_\_\_, who proved to me on the basis of satisfactory

evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

\_\_\_\_\_  
Signature of Notary Public

### OPTIONAL

*Though the information below is not required by law, it may prove valuable to persons relying on the document and could prevent fraudulent removal and reattachment of this form to another document.*

#### CAPACITY CLAIMED BY SIGNER

#### DESCRIPTION OF ATTACHED DOCUMENT

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☐ General

\_\_\_\_\_  
Number of Pages

☐ Attorney-In-Fact

☐ Trustee(s)

☐ Guardian/Conservator

☐ Other:

\_\_\_\_\_  
Date of Document

Signer is representing:

Name Of Person(s) Or Entity(ies)

\_\_\_\_\_  
Signer(s) Other Than Named Above



## NOTICE INVITING BIDS

Citrus Heights Water District ("District") will receive bids for the 2022 TEST HOLE DRILLING PROJECT no later than Thursday, July 21 2022 at 2:00 p.m. at the Citrus Heights Water District, Attn: Brian Hensley, [bhensley@chwd.org](mailto:bhensley@chwd.org). The District will not accept late bids. Bids shall be valid for 60 calendar days after the bid opening date.

The Project must be completed within **60** calendar days, beginning ten (10) calendar days after the date on which the notice to proceed ("Notice to Proceed") is sent by the District to the contractor that is awarded a bid for this Project ("Contractor").

The Scope of Work for this Project consists of furnishing all materials, labor, equipment, fuel, tools, transportation and services for drilling, logging, zone testing and abandoning one test hole within the Citrus Heights Water District Service Area. The Citrus Heights Water District Service Area is within four local jurisdictions which include the City of Citrus Heights, Sacramento County, Placer County and the City of Roseville.

CHWD is currently in discussions with the City of Citrus Heights regarding acquiring the site. If those discussions are finalized, site access will be obtained by July 31, 2022.

Amendments or changes to the Contract Documents, Plans and Specifications prior to the date and time specified of the opening of bids will be performed and validated in writing and distributed by the District to the plan holders of record.

Complete sets of the Bid Forms must be used in preparing bids. The District does not assume responsibility for errors or misinterpretations resulting from the use of incomplete sets of Contract Documents. Modifications to or withdrawal of bids may be made by the bidder prior to the bid closing deadline. Bids must be accompanied by cash, a certified or cashier's check, or a Bid Bond in favor of the District in an amount not less than (10%) of the submitted Total Bid Price.

Bid results are automatically made public upon bid closing. The District reserves the right to reject any or all Bids and to waive any informality or irregularity in any Bid.

An optional Pre-Bid Meeting will be held at the Project site located at **7794 Sayonara Dr., Citrus Heights, CA 95621** on the following date and time: Thursday, July 7, 2022 at 9 a.m.

Written questions must be submitted by 5 p.m. on Tuesday July 12, 2022. Submissions must be sent via email to Brian Hensley at [bhensley@chwd.org](mailto:bhensley@chwd.org). An addendum addressing all questions will be sent to all attendees of the Pre-Bid Meeting and respondents via email by end-of-day on Thursday July 14, 2022.

The Director of Industrial Relations has determined the general prevailing rate of per diem wages in the locality in which this work is to be performed for each craft or type of worker needed to execute the Contract which will be awarded to the successful bidder, copies of which are on file and will be made available to any interested party upon request at the District's offices, 6230 Sylvan Road, Citrus Heights, California 95610, or online at <http://www.dir.ca.gov/dlsr>. A copy of these rates shall be posted by the successful bidder at the job site. The successful bidder and all subcontractor(s) under him, shall comply with all applicable Labor Code provisions, which include, but are not limited to the payment of not less than the required prevailing rates to all workers employed by them in the execution of the Contract, the employment of apprentices, the hours of labor and the debarment of contractors and subcontractors.

All contractors and subcontractors that wish to bid on, be listed in a bid proposal, or enter into a contract to perform public work must be registered with the Department of Industrial Relations. No bid will be accepted nor any contract entered into without proof of the contractor's and subcontractors' current registration with the Department of Industrial Relations to perform public work. This Project will be subject to compliance monitoring and enforcement by the Department of Industrial Relations.

Each bidder shall be a licensed contractor pursuant to the Business and Professions Code and shall be licensed in the following appropriate classification(s) of contractor's license(s), for the work bid upon, and must maintain the license(s) throughout the duration of the Contract: California C-57 Well Drilling Contractor.

This Project is subject to compliance monitoring and enforcement by the Department of Industrial Relations. In bidding on this project, it shall be the Bidder's sole responsibility to evaluate and include the cost of complying with all labor compliance requirements under this contract and applicable law in its bid.

Award of Contract: The District may award the Contract for the Project to the lowest responsible bidder as determined from the Base Bid by the District. The District reserves the right to reject any or all bids or to waive any irregularities or informalities in any bids or in the bidding process.

The District reserves the right to reject any or all bids or to accept any bid. The District reserves the right to determine which proposal is, in its judgment, the most responsive bid of a responsible bidder and which proposal should be accepted in the best interest of the District. The District also reserves the right to waive any informality in any proposal or bid.

For further information, contact Brian Hensley at 916-735-7730 or via e-mail ([bhensley@chwd.org](mailto:bhensley@chwd.org)).

**END OF NOTICE INVITING BIDS**

## **INSTRUCTIONS TO BIDDERS**

### **1. AVAILABILITY OF CONTRACT DOCUMENTS**

Bids must be submitted to the District on the Bid Documents which are a part of the Bid Package for the Project. Prospective bidders may obtain a complete set of Contract Documents as stated in the Notice Inviting Bids.

### **2. EXAMINATION OF CONTRACT DOCUMENTS**

The District has made copies of the Contract Documents available, as indicated above. Bidders shall be solely responsible for examining the Project Site and the Contract Documents, including any Addenda issued during the bidding period, and for informing itself with respect to local labor availability, means of transportation, necessity for security, laws and codes, local permit requirements, wage scales, local tax structure, contractors' licensing requirements, availability of required insurance, and other factors that could affect the Work. Bidders are responsible for consulting the standards referenced in the Contract. Failure of Bidder to so examine and inform itself shall be at its sole risk, and no relief for error or omission will be given except as required under State law.

### **3. INTERPRETATION OF CONTRACT DOCUMENTS**

Discrepancies in, and/or omissions from the Plans, Specifications or other Contract Documents or questions as to their meaning shall be immediately brought to the attention of the District by submission of a written request for an interpretation or correction to the District. Such submission, if any, must be sent via email to Brian Hensley at [bhensley@chwd.org](mailto:bhensley@chwd.org) and received no later than 5 p.m. on Thursday, July 14, 2022.

Any interpretation of the Contract Documents will be made only by written addenda duly issued. All plan holders will be notified by e-mail when an addendum is posted. The District will not be responsible for any explanations or interpretations provided in any other manner. No person is authorized to make any oral interpretation of any provision in the Contract Documents to any Bidder, and no Bidder should rely on any such oral interpretation.

Bids shall include complete compensation for all items of work to be performed under the Contract Documents.

### **4. INSPECTION OF SITE; PRE-BID CONFERENCE AND SITE WALK**

Each prospective bidder is responsible for fully acquainting itself with the conditions of the Project Site, as well as those relating to the construction and labor of the Project, to fully understand the facilities, difficulties and restrictions which may impact the cost or effort required to complete the Project. To this end, a Pre-Bid Conference and Site Walk will be held on the date(s) and time(s) indicated in the Notice Inviting Bids.

## **5. ADDENDA**

The District reserves the right to revise the Contract Documents prior to the bid opening date. Revisions, if any, shall be made by issuing Addenda. All plan holders will be notified by e-mail when an addendum is issued. All addenda issued by the District shall be included in the bid and made part of the Contract Documents. Pursuant to Public Contract Code Section 4104.5, if the District issues an Addendum which includes material changes to the Project less than **72 hours** prior to the deadline for submission of bids, the District will extend the deadline for submission of bids. The District may determine, in its sole discretion, whether an Addendum warrants postponement of the bid submission date. Announcement of any extension shall be made via e-mail to all plan holders.

## **6. ALTERNATE BIDS**

If alternate bid items are called for in the Contract Documents, the lowest bid will be determined on the basis of the base bid only, unless otherwise specified in the notice Inviting Bids. The time required for completion of the alternate bid items has been factored into the Contract Time and no additional time will be awarded for any of the alternate bid items. The District may elect to include one or more of the alternate bid items, or to otherwise remove certain work from the Project scope of work, accordingly each Bidder must ensure that each bid item contains a proportionate share of profit, overhead and other costs or expenses which will be incurred by the Bidder.

## **7. COMPLETION OF BID FORMS**

Bids shall only be prepared using copies of the Bid Forms which are included in the Contract Documents. The use of substitute bid forms will not be permitted. Bids shall be executed by an authorized signatory as described in these Instructions to Bidders. Deviations in the bid form may result in the bid being deemed non-responsive.

## **8. MODIFICATIONS OF BIDS**

Each Bidder shall submit its Bid in strict conformity with the requirements of the Contract Documents. Unauthorized additions, modifications, revisions, conditions, limitations, exclusions or provisions attached to a Bid may render it non-responsive and may cause its rejection. Bidders shall neither delete, modify, nor supplement the printed matter on the Bid Forms, nor make substitutions thereon. Oral, telephonic and electronic modifications will not be considered, unless the Notice Inviting Bids authorizes the submission of electronic bids and modifications thereto and such modifications are made in accordance with the Notice Inviting Bids.

## **9. DESIGNATION OF SUBCONTRACTORS**

Pursuant to State law, the Bidders must designate the name and location of each subcontractor who will perform work or render services for the Bidder in an amount that exceeds one-half of one percent (1/2%) of the Bidder's Total Bid Price, as well as the portion of work each such subcontractor will perform on the form provided herein by the District. No additional time will be

provided to bidders to submit any of the requested information in the Designation of Subcontractor form.

#### **10. LICENSING REQUIREMENTS**

Pursuant to Section 7028.15 of the Business and Professions Code and Section 3300 of the Public Contract Code, all bidders must possess proper licenses for performance of this Contract. Subcontractors must possess the appropriate licenses for each specialty subcontracted. Pursuant to Section 7028.5 of the Business and Professions Code, the District shall consider any bid submitted by a contractor not currently licensed in accordance with state law and pursuant to the requirements found in the Contract Documents to be nonresponsive, and the District shall reject the Bid. The District shall have the right to request, and Bidders shall provide within five (5) calendar days, evidence satisfactory to the District of all valid license(s) currently held by that Bidder and each of the Bidder's subcontractors, before awarding the Contract.

Notwithstanding anything contained herein, if the Work involves federal funds, the Contractor shall be properly licensed by the time the Contract is awarded, pursuant to the provisions of Public Contract Code Section 20103.5.

#### **11. SIGNING OF BIDS**

All Bids submitted shall be executed by the Bidder or its authorized representative. Bidders may be asked to provide evidence in the form of an authenticated resolution of its Board of Directors or a Power of Attorney evidencing the capacity of the person signing the Bid to bind the Bidder to each Bid and to any Contract arising therefrom. Hard copy bids must be submitted at the District's office.

If a Bidder is a joint venture or partnership, it may be asked to submit an authenticated Power of Attorney executed by each joint venturer or partner appointing and designating one of the joint venturers or partners as a management sponsor to execute the Bid on behalf of Bidder. Only that joint venturer or partner shall execute the Bid. The Power of Attorney shall also: (1) authorize that particular joint venturer or partner to act for and bind Bidder in all matters relating to the Bid; and (2) provide that each venturer or partner shall be jointly and severally liable for any and all of the duties and obligations of Bidder assumed under the Bid and under any Contract arising therefrom. The Bid shall be executed by the designated joint venturer or partner on behalf of the joint venture or partnership in its legal name.

#### **12. BID GUARANTEE (BOND)**

Each bid shall be accompanied by: (a) cash; (b) a certified check made payable to the District; (c) a cashier's check made payable to the District; or (d) a bid bond payable to the District executed by the bidder as principal and surety as obligor in an amount not less than 10% of the maximum amount of the bid. Personal sureties and unregistered surety companies are unacceptable. The surety insurer shall be California admitted surety insurer, as defined in Code of Civil Procedure Section 995.120. The cash, check or bid bond shall be given as a guarantee that the bidder shall

execute the Contract if it be awarded to the bidder, shall provide the payment and performance bonds and insurance certificates and endorsements as required herein within ten (10) calendar days after notification of the intent to award the Contract to the bidder. Failure to provide the required documents may result in forfeiture of the bidder's bid deposit or bond to the District and the District may award the Contract to the next lowest responsible bidder, or may call for new bids.

### **13. SUBMISSION OF SEALED BIDS**

Bidders may submit their bids via delivery to the District's office at **6230 Sylvan Rd., Citrus Heights, CA 95610**. The District shall not accept bids otherwise transmitted. **No oral, telephonic, electronic, or facsimile bids will be considered.**

### **14. DELIVERY AND OPENING OF BIDS**

Bids will be received by the District by delivery to the District's office up to the date and time shown in the Notice Inviting Bids. It is the Bidder's sole responsibility to ensure that its Bid is received as specified. Bids may be submitted earlier than the dates(s) and time(s) indicated.

Bids will be opened at the date and time stated in the Notice Inviting Bids, and the amount of each Bid will be read aloud and recorded. The District may in its sole discretion, elect to postpone the opening of the submitted Bids. District reserves the right to reject any or all Bids and to waive any informality or irregularity in any Bid. In the event of a discrepancy between the written amount of the Bid Price and the numerical amount of the Bid Price, the written amount shall govern.

### **15. WITHDRAWAL OF BID**

Prior to the bid closing deadline, a Bid may be withdrawn by the Bidder. Any request to withdraw a bid after bid opening must be made in accordance with Public Contract Code section 5100 *et seq.* and must be submitted in writing within five (5) working days, excluding Saturday, Sundays and State holidays, specifying in detail how the mistake was made.

### **16. BASIS OF AWARD; BALANCED BIDS**

The District shall award the Contract to the lowest responsible Bidder submitting a responsive Bid. The District may reject any Bid which, in its opinion when compared to other bids received or to the District's internal estimates, does not accurately reflect the cost to perform the Work. The District may reject as non-responsive any bid which unevenly weights or allocates costs, including but not limited to overhead and profit to one or more particular bid items.

## **17. DISQUALIFICATION OF BIDDERS; INTEREST IN MORE THAN ONE BID**

No bidder shall be allowed to make, submit or be interested in more than one bid. However, a person, firm, corporation or other entity that has submitted a sub-proposal to a bidder, or that has quoted prices of materials to a bidder, is not thereby disqualified from submitting a sub-proposal or quoting prices to other bidders submitting a bid to the District. No person, firm, corporation, or other entity may submit sub-proposal to a bidder, or quote prices of materials to a bidder, when also submitting a prime bid on the same Project.

## **18. INSURANCE REQUIREMENTS**

The successful bidder shall procure the insurance in the form and in the amount specified in the Contract Documents.

## **19. AWARD PROCESS**

Once all Bids are opened and reviewed to determine the lowest responsive and responsible Bidder, the District may award the contract, or reject all bids. The apparent successful Bidder should begin to prepare the following documents: (1) the Performance Bond; (2) the Payment Bond; and (3) the required insurance certificates and endorsements. Once the District notifies the Bidder of the intent to award, the Bidder will have ten (10) consecutive calendar days from the date of this notification to execute the Contract and supply the District with all of the required documents and certifications. Regardless whether the Bidder supplies the required documents and certifications in a timely manner, the Contract time will begin to run ten (10) calendar days from the date of the notification. Once the District receives all of the properly drafted and executed documents and certifications from the Bidder, the District shall issue a Notice to Proceed to that Bidder.

## **20. FILING OF BID PROTESTS**

Any bid protest relating to the form or content of the Bid or Contract Documents must be submitted in writing at least ten (10) business days before the original date set for the bid opening. Any bidder who submits a bid without making a protest shall be deemed to have waived any objection to the form or content of the Bid or Contract Documents not previously stated in writing.

Submitted bids will be timely made available for review upon written request of any bidder.

Bidders may file a "protest" of a Bid with the District's General Manager. In order for a Bidder's protest to be considered valid, the protest must:

- A. Be filed in writing not later than 5:00 p.m. on the fifth business day after the bid opening date;
- B. Clearly identify the specific irregularity or basis for the protest;
- C. Specify, in detail, the factual and legal grounds for the protest; and
- D. Include all relevant supporting documentation with the protest at time of filing.

If the protest does not meet all of these requirements, the District may reject it without further review.

If the protest is timely and complies with all of the above requirements, the District's General Manager, or other designated District staff or representative, shall review the protest, any response from the challenged bidder, and all other relevant information. The District will provide a written response to the protester.

The procedure and time limits set forth in this section are mandatory and are the sole and exclusive remedy in the event of a bid protest. Failure to comply with these procedures shall constitute a failure to exhaust administrative remedies and a waiver of any right to further pursue the bid protest, including filing a Government Code Claim or legal proceedings.

#### **21. WORKERS COMPENSATION**

Each bidder shall submit the Contractor's Certificate Regarding Workers' Compensation form.

#### **22. RETENTION AND SUBSTITUTION OF SECURITY**

The Contract Documents call for monthly progress payments based upon the percentage of the work completed. Unless the District has made findings pursuant to Public Contract Code section 7201 (that the work included in this Contract is substantially complex, and therefore a retention of 10% shall be withheld from each progress payment as provided by the Contract Documents), the District will retain five percent (5%) of each progress payment as provided by the Contract Documents. At the request and expense of the successful Bidder, the District will substitute securities for the amount so retained in accordance with Public Contract Code Section 22300.

#### **23. PREVAILING WAGES**

The District has obtained from the Director of the Department of Industrial Relations the general prevailing rate of per diem wages in the locality in which this work is to be performed for each craft or type of worker needed to execute the Contract. These rates are on file and available at the District's offices, 6230 Sylvan Road, Citrus Heights, CA 95610, or may be obtained online at <http://www.dir.ca.gov/dlsr>. Bidders are advised that a copy of these rates must be posted by the successful Bidder at the job site(s).

If the Work involves federal funds or otherwise requires compliance with the Davis-Bacon Fair Labor Standards Act, the Contractor and all its subcontractors shall pay the higher of the state or federal prevailing wage rates.

#### **24. DEBARMENT OF CONTRACTORS AND SUBCONTRACTORS**

In accordance with the provisions of the Labor Code, contractors or subcontractors may not perform work on a public works project with a subcontractor who is ineligible to perform work on a public project pursuant to Section 1777.1 or Section 1777.7 of the Labor Code. Any contract on a public works project entered into between a contractor and a debarred subcontractor is void as a matter of law. A debarred subcontractor may not receive any public money for performing work as a subcontractor on a public works contract. Any public money that is paid to a debarred



subcontractor by the Contractor for the Project shall be returned to the District. The Contractor shall be responsible for the payment of wages to workers of a debarred subcontractor who has been allowed to work on the Project.

**25. IRAN CONTRACTING ACT CERTIFICATION**

Each bidder shall submit the certification required by the Iran Contracting Act of 2010, Public Contract Code section 2200 *et seq.* with its bid. The certification is included in the Contract Documents.

**26. PERFORMANCE BOND AND PAYMENT BOND REQUIREMENTS**

Within the time specified in the Contract Documents, the Bidder to whom a Contract is awarded shall deliver to the District four identical counterparts of the Performance Bond and Payment Bond in the form supplied by the District and included in the Contract Documents. Failure to do so may, in the sole discretion of District, result in the forfeiture of the Bid Guarantee. The surety supplying the bond must be an admitted surety insurer, as defined in Code of Civil Procedure Section 995.120, authorized to do business as such in the State of California and satisfactory to the District. The Performance Bond and the Payment Bond shall be for one hundred percent (100%) of the Total Bid Price.

**27. REQUEST FOR SUBSTITUTIONS**

The successful bidder shall comply with the substitution request provisions set forth in the Special Conditions, including any deadlines for substitution requests **which may occur prior to the bid opening date**.

**28. SALES AND OTHER APPLICABLE TAXES, PERMITS, LICENSES AND FEES**

Contractor and its subcontractors performing work under this Contract will be required to pay California sales tax and other applicable taxes, and to pay for permits, licenses and fees required by the agencies with authority in the jurisdiction in which the work will be located, unless otherwise expressly provided by the Contract Documents. Bidders shall include all applicable taxes and fees that are in effect or reasonably anticipated on the bid date in their bid price.

**29. EXECUTION OF CONTRACT**

As required herein, the Bidder to whom an award is made shall execute two identical counterparts of the Contract in the amount determined by the Contract Documents. The District may require appropriate evidence that the persons executing the Contract are duly empowered to do so.

**END OF INSTRUCTIONS TO BIDDERS**

## BID FORM

**NAME OF BIDDER:** Stonehouse Drilling & Construction LLC.

The undersigned, hereby declare that we have carefully examined the location of the proposed Work, and have read and examined the Contract Documents, including all plans, specifications, and all addenda, if any, for the following Project:

### 2022 TEST HOLE DRILLING SERVICES

We hereby propose to furnish all labor, materials, equipment, tools, transportation, and services, and to discharge all duties and obligations necessary and required to perform and complete the Project in strict accordance with the Contract Documents for the TOTAL BID PRICE.

In the event the bid schedule requires unit pricing, final payment shall be determined by the District from measured quantities of work performed based upon the unit price.

### CONTRACT BID ITEMS

ITEM	DESCRIPTION	UNIT OF MEASURE	ESTIMATED QUANTITY	UNIT PRICE	TOTAL PRICE
1	Mobilization of Equipment and Personnel	Lump Sum	1	\$76,000	\$76,000
2	Test Hole Drilling	Lineal Feet	600	\$95	\$57,000
3	Geophysical Logging (E-Log)	Lump Sum	1	\$6,500	\$6,500
4	Discrete Zone Sampling	Each	3	\$9,000	\$27,000
5	Test Hole Abandonment	Lump Sum	1	\$32,000	\$32,000
6	Standby Time	Per Hour	8	\$300	\$2,400
7	Site Restoration	Lump Sum	1	\$21,000	\$21,000
<b>Grand Total All Items</b>					<b>\$221,900</b>

Bidders must provide pricing for every bid item.

Quantities are not guaranteed. Payments will be based on actual installed quantities measured in the field. The estimate of construction quantities set forth above is approximate only, being given as a basis for the comparison of bids, and the District does not expressly or by implication agree that the actual amount of work will correspond therewith, but reserves the right to increase the

amount of any class or portion of the work or to omit portions of the work as may be deemed necessary or expedient by the District.

The bid item as listed is meant to encompass all construction and work items as called out in these contract specifications.

All incidental and overhead costs such as administration, permits, mobilization, demobilization, bonds and insurance, etc., shall be included in the bid item.

All bids will be compared on the basis of the District's estimate of the quantities of the work to be done.

The undersigned has checked carefully all of the above figures and understands that the District shall not be responsible for any errors or omissions on the part of the undersigned in making up this bid.

In case a discrepancy or error exists between the bid item extensions totals and the grand total, the sum of the extensions shall prevail as the basis for award. In case of a discrepancy between words and figures, the words shall prevail.

**TOTAL BID PRICE (BASED ON BID SCHEDULE TOTAL OF UNIT PRICES):**

\$ 221,900

Total Bid Price in Numbers

Two hundred twenty-one thousand nine hundred dollars

Total Bid Price in Written Form

In case of discrepancy between the written price and the numerical price, the written price shall prevail.

The undersigned agrees that the bid accompanied by this Bid Form constitutes a firm offer to the District which cannot be withdrawn for the number of calendar days indicated in the Notice Inviting Bids from and after the bid opening, or until a Contract for the Work is fully executed by the District and a third party, whichever is earlier.

If the Contract Documents specify alternate bid items, the Alternate Additive or Deductive Bid amounts shall be added to or deducted from the Total Bid Price at the District's sole option. The District can choose to include one or more of the Alternate Bids in the Project. If any of the Alternate Bids are selected by the District, the resulting amount shall be added to or deducted from Total Bid Price for the Project. The District may select one or more of the Alternate Bids at the stated Bid Price up to sixty (60) days following award of the Contract. The District can award/select Alternate Bid items at any time(s).

The Contract duration shall commence on the date stated in the District's Notice to Proceed, and shall be completed by the Contractor in the time specified in the Contract Documents. In no case

shall the Contractor commence construction prior to the date stated in the District's Notice to Proceed, or before providing the required bonds and evidence of insurance.

Bidder certifies that it is licensed in accordance with the law providing for the registration of Contractors, License No. 904639, Expiration Date 10/31/2023, class of license C57. Bidder certifies that it is registered with the Department of Industrial Relations to perform public work, Registration No. 1000037498. If the bidder is a joint venture, each member of the joint venture must include the above information.

The undersigned acknowledges understanding and full consideration of the electronically issued addenda to the Contract Documents.

1. Attached is the required bid security in the amount of not less than 10% of the Total Bid Price.
2. Attached is the completed Public Works Contractor Registration Certification.
3. Attached is the completed Contractor's Certificate Regarding Workers' Compensation form.

I hereby certify under penalty of perjury under the laws of the State of California that all of the information submitted in connection with this Bid and all of the representations made herein are true and correct.

Name of Bidder Stonehouse Drilling & Construction LLC.

Signature 

Name and Title Stephanie Tompkins, Managing Member

Dated 7/19/2022

**END OF BID FORM**

## BID BOND

The makers of this bond are, Stonehouse Drilling & Construction, LLC, as Principal, and Great American Insurance Company, as Surety and are held and firmly bound unto Citrus Heights Water District, hereinafter called the District, in the penal sum of TEN PERCENT (10%) OF THE TOTAL BID PRICE of the Principal submitted to District for the work described below, for the payment of which sum in lawful money of the United States, well and truly to be made, we bind ourselves, our heirs, executors, administrators, successors and assigns, jointly and severally, firmly by these presents.

THE CONDITION OF THIS OBLIGATION IS SUCH that whereas the Principal has submitted the accompanying bid dated July 21, 2022, for 2022 Test Hole Drilling Project (INSERT PROJECT NAME).

If the Principal does not withdraw its bid within the time specified in the Contract Documents; and if bid is rejected or, in the alternate, the Principal is awarded the Contract, signs the Contract and provides all documents to the District as required by the Contract Documents; then this obligation shall be null and void. Otherwise, this bond will remain in full force and effect and upon default of the Principal shall be forfeited to the District, it being expressly understood and agreed that the liability of the Surety for any and all default of the Principal shall be the amount of this obligation as herein stated, as liquidated damages.

Surety, for value received, hereby stipulates and agrees that no change, extension of time, alteration or addition to the terms of the Contract Documents shall affect its obligation under this bond, and Surety does hereby waive notice of any such changes.

IN WITNESS WHEREOF, the above-bound parties have executed this instrument under their several seals this 21 day of July, 2022, the name and corporate seal of each corporation.

(Corporate Seal)

Stonehouse Drilling & Construction, LLC  
Contractor/ Principal

By [Signature]  
Title managing member  
Great American Insurance Company

(Corporate Seal)

Surety

By [Signature]  
Stephanie Garahana Attorney-in-Fact

(Attach Attorney-in-Fact Certificate)

Title Attorney-in-Fact



# GREAT AMERICAN INSURANCE COMPANY®

Administrative Office: 301 E 4TH STREET • CINCINNATI, OHIO 45202 • 513-369-5000 • FAX 513-723-2740

The number of persons authorized by  
this power of attorney is not more than FIVE

No. 0 14862

## POWER OF ATTORNEY

**KNOW ALL MEN BY THESE PRESENTS:** That the GREAT AMERICAN INSURANCE COMPANY, a corporation organized and existing under and by virtue of the laws of the State of Ohio, does hereby nominate, constitute and appoint the person or persons named below, each individually if more than one is named, its true and lawful attorney-in-fact, for it and in its name, place and stead to execute on behalf of the said Company, as surety, any and all bonds, undertakings and contracts of suretyship, or other written obligations in the nature thereof; provided that the liability of the said Company on any such bond, undertaking or contract of suretyship executed under this authority shall not exceed the limit stated below.

Name	Address	Limit of Power
KEVIN W. ANDREWS	ALL OF	ALL
STEPHANIE GARAHANA	SANDY, UTAH	\$100,000,000
BRETT D. MAYER		
GAYLE WOOD		
STACIE R. HANSON		

This Power of Attorney revokes all previous powers issued on behalf of the attorney(s)-in-fact named above.

IN WITNESS WHEREOF the GREAT AMERICAN INSURANCE COMPANY has caused these presents to be signed and attested by its appropriate officers and its corporate seal hereunto affixed this 1st day of OCTOBER, 2020.

Attest

GREAT AMERICAN INSURANCE COMPANY



*Stephen C. Beraha*

Assistant Secretary

*Mark V. Vicario*

Divisional Senior Vice President

STATE OF OHIO, COUNTY OF HAMILTON - ss:

MARK VICARIO (877-377-2405)

On this 1st day of OCTOBER, 2020, before me personally appeared MARK VICARIO, to me known, being duly sworn, deposes and says that he resides in Cincinnati, Ohio, that he is a Divisional Senior Vice President of the Bond Division of Great American Insurance Company, the Company described in and which executed the above instrument; that he knows the seal of the said Company; that the seal affixed to the said instrument is such corporate seal; that it was so affixed by authority of his office under the By-Laws of said Company, and that he signed his name thereto by like authority.



SUSAN A KOHORST  
Notary Public  
State of Ohio  
My Comm. Expires  
May 18, 2025

*Susan A. Kohorst*

This Power of Attorney is granted by authority of the following resolutions adopted by the Board of Directors of Great American Insurance Company by unanimous written consent dated June 9, 2008.

**RESOLVED:** That the Divisional President, the several Divisional Senior Vice Presidents, Divisional Vice Presidents and Divisional Assistant Vice Presidents, or any one of them, be and hereby is authorized, from time to time, to appoint one or more Attorneys-in-Fact to execute on behalf of the Company, as surety, any and all bonds, undertakings and contracts of suretyship, or other written obligations in the nature thereof; to prescribe their respective duties and the respective limits of their authority; and to revoke any such appointment at any time.

**RESOLVED FURTHER:** That the Company seal and the signature of any of the aforesaid officers and any Secretary or Assistant Secretary of the Company may be affixed by facsimile to any power of attorney or certificate of either given for the execution of any bond, undertaking, contract of suretyship, or other written obligation in the nature thereof, such signature and seal when so used being hereby adopted by the Company as the original signature of such officer and the original seal of the Company, to be valid and binding upon the Company with the same force and effect as though manually affixed.

## CERTIFICATION

I, STEPHEN C. BERAHA, Assistant Secretary of Great American Insurance Company, do hereby certify that the foregoing Power of Attorney and the Resolutions of the Board of Directors of June 9, 2008 have not been revoked and are now in full force and effect.

Signed and sealed this

21

day of

July

, 2022



*Stephen C. Beraha*

Assistant Secretary

## NON-COLLUSION DECLARATION

TO BE EXECUTED BY BIDDER AND SUBMITTED WITH BID

The undersigned declares:

I am the Mananging Member of Stonehouse Drilling & Construction LLC., the party making the foregoing bid.

The bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The bid is genuine and not collusive or sham. The bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid. The bidder has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or to refrain from bidding. The bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder. All statements contained in the bid are true. The bidder has not, directly or indirectly, submitted his or her bid price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a bidder that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the bidder.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on 7/19/2022 [date], at Reno [city], Nevada [state].

  
(Signature)

Stephanie Tompkins

(Print Name)

Mananging Member

(Print Title)

7/19/2022

(Date)

END OF NON-COLLUSION DECLARATION

## Contractor Information

**Legal Entity Name**

STONEHOUSE DRILLING & CONSTRUCTION, LLC

**Legal Entity Type**

LLC

**Status**

Active

**Registration Number**

1000037498

**Registration effective date**

7/1/2022

**Registration expiration date**

6/30/2025

**Mailing Address**

7801 LAKESIDE DRIVE RENO 89511 NV United S...

**Physical Address**

7801 LAKESIDE DRIVE RENO 89511 NV United S...

**Email Address**
**Trade Name/DBA**

STONEHOUSE DRILLING & CONSTRUCTION, LLC

**License Number(s)**

CSLB:904639

## Registration History

Effective Date	Expiration Date
5/31/2018	6/30/2019
6/2/2017	6/30/2018
7/29/2016	6/30/2017
4/26/2016	6/30/2016
7/1/2019	6/30/2022
7/1/2022	6/30/2025

## Legal Entity Information

**Corporation Number:**

result[iCtr].License\_RegistrationRoot.Registration\_Accounts\_\_[regAccts].Corp\_or\_LLC\_ID\_\_c

**Federal Employment Identification Number:Member Name(s):**
**Agent of Service Name:**

Northwest Registered Agent Inc

**Agent of Service Mailing Address:**

2108 N Street, Suite N Sacramento 95816-5712 CA United States of America

## Workers Compensation

Do you lease employees No

through Professional

Employer Organization

(PEO)?:

Please provide your

current workers

compensation insurance

information below:



PEO	PEO	PEO
PEO InformationName	Phone	Email

Insured by Carrier  
**Policy Holder Name:**STONEHOUSE DRILLING & CONSTRUCTION, LLC**Insurance Carrier:**  
EMPLOYERS MUTUAL CASUALTY COMPANY**Policy Number:**5H66924**Inception date:**  
5/7/2019**Expiration Date:**5/7/2023

## EXHIBIT "C"

### CONTRACTOR'S CERTIFICATE REGARDING WORKERS' COMPENSATION

I am aware of the provisions of Section 3700 of the Labor Code which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of that code, and I will comply with such provisions before commencing the performance of the work of this Contract.

Name of Bidder Stonehouse Drilling & Construction LLC.

Signature 

Name Stephanie Tompkins

Title Managing Member

Dated 7/19/2022

END OF CONTRACTOR'S CERTIFICATE REGARDING WORKERS' COMPENSATION

## CONTRACTOR INFORMATION AND EXPERIENCE FORM

### A. INFORMATION ABOUT BIDDER

Failure to completed all information may render your bid non-responsive. [\*\*Indicate not applicable ("N/A") where appropriate.\*\*]

NOTE: Where Bidder is a joint venture, pages shall be duplicated and information provided for all parties to the joint venture.

1.0 Name of Bidder: Stonehouse Drilling & Construction LLC.

2.0 Type, if Entity: LLC.

3.0 Bidder Address: 7801 Lakeside Drive, Reno, NV, 89511

(775) 331-8284

Facsimile Number

(775) 432-2900

Telephone Number

4.0 How many years has Bidder's organization been in business as a Contractor? 18

5.0 ~~How~~ How many years has Bidder's organization been in business under its present name? 18

5.1 Under what other or former names has Bidder's organization operated?: N/A

6.0 If Bidder's organization is a corporation, answer the following:

6.1 Date of Incorporation: N/A

6.2 State of Incorporation: N/A

6.3 President's Name: N/A

6.4 Vice-President's Name(s): N/A

N/A

6.5 Secretary's Name: N/A

- 6.6 Treasurer's Name: N/A
- 7.0 If an individual or a partnership, answer the following:
- 7.1 Date of Organization:  
N/A
- 7.2 Name and address of all partners (state whether general or limited partnership):  
N/A
- 8.0 If other than a corporation or partnership, describe organization and name principals:  
LLC.  
Bret Tompkins (Managing Member), Stephanie Tompkins (Managing Member)
- 9.0 List other states in which Bidder's organization is legally qualified to do business.  
Nevada, Oregon
- 10.0 What type of work does the Bidder normally perform with its own forces?  
Water well drilling and pump installation
- 11.0 Has Bidder ever failed to complete any work awarded to it? If so, note when, where, and why:  
No
- 12.0 Within the last five years, has any officer or partner of Bidder's organization ever been an officer or partner of another organization when it failed to complete a contract? If so, attach a separate sheet of explanation:  
No

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13.0 List Trade References:

Attached

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14.0 List Bank References (Bank and Branch Address):

Marci Spearman

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Nevada State Bank

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1001 W Moana Lane Reno, NV 89509

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15.0 Name of Bonding Company and Name and Address of Agent:

Great American Insurance Company

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Stephanie Garahana

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9980 South 300 West #320 Sandy, Utah 84070

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***Additional Bidder's Statements:***

If the Bidder feels that there is additional information which has not been included in the questionnaire above, and which would contribute to the qualification review, it may add that information in a statement here or on an attached sheet, appropriately marked:

N/A

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**B. VERIFICATION AND EXECUTION**

These Bid Forms shall be executed only by a duly authorized official of the Bidder:

I declare under penalty of perjury under the laws of the State of California that the foregoing information is true and correct:

Name of Bidder Stonehouse Drilling & Construction LLC.

Signature 

Name Stephanie Tompkins

Title Managing Member

Dated 7/19/2022



PROJECT NAME	DATES	CLIENT	ENGINEER	CONTRACT AMOUNT	TOTAL DEPTH	SCOPE OF WORK	CASING & MATERIALS USED
UIN Pahump Well 8	12/5/16 to 12/15/16	Utilities Inc of Central Nevada - James Easton 775-432-3184	Mike Hardy - Lumos & Associates 775-827-1611	\$511,960	970	Drill test hole, e log, drill borehole, install casing, gravel, cement seal, and develop well.	14" HSLA Casing & 14" HSLA Louver
California Water Service STK87	7/8/15 to 8/11/15	California Water Service - John Puccinelli 408-367-8200	Eli Ludwig - Groundwater Partners 505-999-7535	\$680,147	580	Drill test hole, run geophysical logging, conduct isolated zone sampling, ream borehole, install casing, gravel, cement seal, and develop well.	16" Casing & Screen
TMWA Innovation Well	9/9/15- 9/17/15	Truckee Meadows Water Authority - Chris Struffert 775-834-8047	Randy VanHoozer - Truckee Meadows Water Authority 775-834-8011	\$478,774	300	Drill borehole, run geophysical logging, install casing, gravel, cement seal, and develop well.	14" Stainless Steel Blank Casing & 14" 0.080 inch slot Stainless Steel Wire Wrap
TMWA Army Aviation Well	9/23/15- 10/3/15	Truckee Meadows Water Authority - Chris Struffert 775-834-8047	Randy VanHoozer - Truckee Meadows Water Authority 775-834-8011	\$956,696	610	Drill borehole, run geophysical logging, install casing, gravel, cement seal, and develop well.	18" Stainless Steel Blank Casing & 18" 0.090 inch slot Stainless Steel Wire Wrap
City of Sacramento Shasta Park	10/16/17- 11/12/17	City of Sacramento - Marc Lee 916-808-7481	Larry Ernst - Wood Rodgers 916-361-7447	\$465,000	915	Drill pilot hole, run geophysical logging, ream borehole, install casing, gravel, cement seal, and develop well.	Stainless Steel Casing
Deodar Well Replacement	11/26/17- 1/25/18	Silver Springs Mutual Water Company - Matt Martensen 775-684-9380	Dwight Smith - Interflow 530-582-1622	\$629,615	360	Drill borehole, run geophysical logging, install casing, gravel, cement seal, and develop well.	14" Stainless Steel Blank Casing & 14" Continuous Slot Stainless Steel Wire Wrap
Lander County Mountain View Golf Course Well 9-A	04/13/18- 05/13/18	Lander County Public Works - Bert Ramos 775-455-6869	Dwight Smith - Interflow 530-582-1622	\$925,431	200	Drill test hole, run geophysical logging, conduct isolated zone sampling, drill borehole, install casing, gravel, cement seal, and develop well.	16" Stainless Steel Blank Casing & 16" 0.050 inch slot Stainless Steel Wire Wrap
Lyon County Production Well 21	4/26/18- 5/20/18	Lyon County Utilities Department - Scott Fleckenstein 775-721-8001	Kirk Swanson - Farr West Engineering 775-853-7257	\$529,736	510	Drill borehole, run geophysical logging, install casing, silibeads, cement seal, and develop well.	14" Stainless Steel Blank Casing & 14" 0.080 inch slot Stainless Steel Wire Wrap
Las Vegas Valley Water District Replacement Well W029A	3/12/18- 4/26/18	Las Vegas Valley Water District - Don Bittle 702-822-3383	Jason Mace - Las Vegas Valley Water District 702-822-3309	\$1,379,720	1000	Drill pilot hole, run geophysical logging, ream borehole, install casing, gravel, cement seal, and develop well.	20" Stainless Steel Louvered Casing & 20" Mild Steel Blank Casing
Las Vegas Valley Water District LUVW001, LUVN004, & LUVN005	02/07/19- 03/24/19	Las Vegas Valley Water District - Don Bittle 702-822-3383	Las Vegas Valley Water District - Jeff Johnson 702-290-6832	\$736,630	680 & 1080	Drill test holes, run geophysical logging, construct monitoring wells, and develop wells.	6 5/8" SDR 17 PVC Certa-Lok Blank & Screen Well Casing, and 2" monitoring well PVC
Mason Valley Fish Hatchery Well R-1	04/22/19- 05/15/19	Nevada Department of Wildlife - Rodd Lighthouse 775-688-1586	Dwight Smith - Interflow 530-582-1622	\$450,977	360	Drill borehole, run geophysical logging, install casing, gravel, cement seal, and develop well.	14" HSLA Casing, 14" Continuous Wire Wrap Stainless Steel Casing
Carson City Well 3 Redrill	08/09/19- 09/13/19	Carson City Purchasing & Contracts - 775-283-7362	David Carlson - Aqua Groundwater 775-250-9700	\$483,524	500	Drill pilot hole, run geophysical logging, ream borehole, install casing, gravel, cement seal, and develop well.	18 625" Stainless Steel Blank Casing & 18 625" Stainless Steel Wire Wrap Screen
Tarr Well 8	09/06/19- 11/15/2019	City of El Paso Robles - Kristin Ferravanti 805-237-3861	Tim Cleath - Cleath Harris Geologist 805-543-1413	\$505,162	935	Drill pilot hole, run geophysical logging, ream borehole, install casing, gravel, cement seal, and develop well.	16" Blank Casing & 16" Stainless Steel Wire Wrap Casing
Gardnerville Ranchos GID Well 4	10/12/18- 11/30/18	Gardnerville Ranchos GID - 775-265-2048	Lumos & Associates - 775-883-7077	\$525,284	525	Drill pilot hole, run geophysical logging, ream borehole, install casing, gravel, cement seal, and develop well.	16" HSLA Blank Casing & 16" HSLA Louvered Casing
LUVWD W125	06/01/2020- 01/01/2021	Las Vegas Valley Water District - Michael Langen 702-691-5356	Jason Mace - Las Vegas Valley Water District 702-822-3309	\$1,500,000	920	Drill pilot hole, run geophysical logging, ream borehole, install casing, gravel, cement seal, and develop well.	20" I.D. Blank Casing & 20" I.D. Stainless Steel Louvered Casing
North Las Vegas Well Rehabilitation Project (4 Wells)	6/1/2020	City of North Las Vegas - Mauricio Cardenas 702-633-2010	HDR Engineers - Donald Pelissier 702-935-6065	\$5,200,000	1,000 Each	Drill test holes, run geophysical logging, plug test holes. Drill pilot holes, ream boreholes, install casing, gravel, cement seal, and develop well.	20" Blank Casing & 20" HSLA Blank and Louvered Casing

## IRAN CONTRACTING ACT CERTIFICATION

(Public Contract Code section 2200 *et seq.*)

As required by California Public Contract Code section 2204, the Contractor certifies subject to penalty for perjury that the option checked below relating to the Contractor's status in regard to the Iran Contracting Act of 2010 (Public Contract Code section 2200 *et seq.*) is true and correct:

- ☒ The Contractor is not:
- (i) identified on the current list of persons and entities engaging in investment activities in Iran prepared by the California Department of General Services in accordance with subdivision (b) of Public Contract Code section 2203; or
  - (ii) a financial institution that extends, for 45 days or more, credit in the amount of \$20,000,000 or more to any other person or entity identified on the current list of persons and entities engaging in investment activities in Iran prepared by the California Department of General Services in accordance with subdivision (b) of Public Contract Code section 2203, if that person or entity uses or will use the credit to provide goods or services in the energy sector in Iran.
- ☐ District has exempted the Contractor from the requirements of the Iran Contracting Act of 2010 after making a public finding that, absent the exemption, District will be unable to obtain the goods and/or services to be provided pursuant to the Contract.
- ☒ The amount of the Contract payable to the Contractor for the Work does not exceed \$1,000,000.

Signed

Titled Mananging Member

Firm Stonehouse Drilling & Construction LLC.

Date 7/19/2022

**Note:** In accordance with Public Contract Code section 2205, false certification of this form shall be reported to the California Attorney General and may result in civil penalties equal to the greater of \$250,000 or twice the Contract Price, termination of the Contract and/or ineligibility to bid on contracts for three years.

**END OF IRAN CONTRACTING ACT CERTIFICATION**



**CITRUS HEIGHTS WATER DISTRICT**  
**2022 TEST HOLE DRILLING PROJECT**  
**ADDENDUM #1**

On June 30, 2022, the Citrus Heights Water District ("CHWD") issued a Notice Inviting Bids for the 2022 Test Hole Drilling Project.

Pursuant to the Notice Inviting Bids, CHWD issues this Addendum #1 addressing the following questions regarding the bid package as further described and attached herein.

- 1) The specs call to drill an 8.75" borehole, elog, ream, then do zone samples. Is it acceptable to drill a larger 10"-12.25" borehole initially so reaming is not necessary? **Yes, this is acceptable.**
- 2) It states working hours to be 7:30-4:30 Monday-Friday excluding holidays. I would like to request Monday -Sunday 7:00-7:00 as typical for drilling projects. **Mon - Fri 7:00 am to 7:00 pm is acceptable.**
- 3) Please confirm the discharge water goes to a frac tank then out of frac tank directly to storm drain on corner, with no other BMP's or discharge requirements necessary. **All discharge water generated from the development and testing process shall be disposed of in accordance with District's NPDES permit (ORDER WQ 2014-0194-DWQ GENERAL ORDER NO. CAG140001). Before discharge, all fluids from the well shall be initially conveyed to a temporary storage tank of sufficient capacity to allow for settling of suspended sediments before discharge. Per the State Discharge Requirements, water may enter the storm drain if it is less than 100 NTU without BMPs in place. If the water is greater than 100 NTU, BMPs must be used (straw waddles, filter sock, filter fabric, etc.). A copy of the permit is available.**
- 4) Please confirm bentonite pellets will be allowed in place of bentonite grout and between zones, gravel is allowed instead of a bentonite material. **This is acceptable.**
- 5) Please confirm estimated idea of receiving an NTP. **The District's Board of Directors can elect to hold a "Special Meeting" outside of the monthly meeting (3rd Wednesday of each month) to approve the agreement and issue a Notice to Proceed. The time and date of this meeting will be coordinated with the winning bidder.**
- 6) Dependent on when we receive an NTP and current backlog, 60 days may not be sufficient to do this project. Can either the issuance of the NTP be renegotiated or a longer performance time

to do the work be allowed? The District would prefer the Project be completed within the allotted timeframe, but can add days to the Project or change the issuance of the Notice to Proceed at its discretion if needed.

- 7) Does the site have an unobstructed 20' x 80' area with the hole being in the middle of the area?  
Yes
- 8) Are there access road limitations? No
- 9) Are any of the locations on a slope? The area does have minor slopes (see attached street level view)
- 10) Please email boring logs of nearby borings if available. Nothing available nearby.
- 11) Please email well logs of the existing well if available. No existing well.
- 12) Please email well completion reports of the existing well if available. N/A
- 13) Can we pump development water onsite or does it need to be disposed of offsite? All discharge water generated from the development and testing process shall be disposed of in accordance with District's NPDES permit (ORDER WQ 2014-0194-DWQ GENERAL ORDER NO. CAG140001). Before discharge, all fluids from the well shall be initially conveyed to a temporary storage tank of sufficient capacity to allow for settling of suspended sediments before discharge. Per the State Discharge Requirements, water may enter the storm drain if it is less than 100 NTU without BMPs in place. If the water is greater than 100 NTU, BMPs must be used (straw waddles, filter sock, filter fabric, etc.). A copy of the permit is available.
- 14) If known what is the current depth to water? Unknown
- 15) Are restrooms available onsite or should we provide a Portable restroom? No restrooms are onsite.
- 16) Is weekend work possible? No
- 17) Can equipment and materials be placed onsite for the duration of this project? Yes, additional temporary fencing would be advised.
- 18) What are the liquidated damages? \$200 per day.

- 19) What is the start date? The District's Board of Directors can elect to hold a "Special Meeting" outside of the monthly meeting (3rd Wednesday of each month) to approve the agreement and issue a Notice to Proceed. The time and date of this meeting will be coordinated with the winning bidder.

Citrus Heights Water District,

By: 

Title: Water Resources Supervisor

ACKNOWLEDGEMENT BY BIDDER,

By: Stephanie Tompkins 

Title: Managing Member


**CITRUS HEIGHTS WATER DISTRICT**  
**2022 TEST HOLE DRILLING PROJECT**  
**ADDENDUM #2**

On June 30, 2022, the Citrus Heights Water District ("CHWD") issued a Notice Inviting Bids for the 2022 Test Hole Drilling Project.

Pursuant to the Notice Inviting Bids, CHWD issues this Addendum #2 clarifying "HOURS OF WORK" in the General Specifications regarding the bid package as further described and attached herein.

1. Normal working hours shall be from 7:00 am to 7:00 pm Monday through Friday. The Contractor may request additional working hours on Saturday and Sunday from 7:00 am to 7:00 pm if needed.

Citrus Heights Water District,

By: 

Title: Water Resources Supervisor

ACKNOWLEDGEMENT BY BIDDER,

By: Stephanie Tompkins 

Title: Managing Member

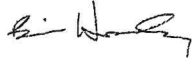
**CITRUS HEIGHTS WATER DISTRICT**  
**2022 TEST HOLE DRILLING PROJECT**  
**ADDENDUM #3**

On June 30, 2022, the Citrus Heights Water District ("CHWD") issued a Notice Inviting Bids for the 2022 Test Hole Drilling Project.

Pursuant to Section 5 of the Instructions to Bidders, CHWD issues this Addendum #3 adding the following documents to the bid package as further described and attached herein.

1. Page 22 of "INSTRUCTIONS TO BIDDERS": LIST OF SUBCONTRACTORS FORM

Citrus Heights Water District,

By: 

Title: Water Resources Supervisor

ACKNOWLEDGEMENT BY BIDDER,

By: 

Title: Managing Member

### LIST OF SUBCONTRACTORS FORM

In compliance with the Subletting and Subcontracting Fair Practices Act of the Public Contract Code of the State of California, each bidder shall set forth below: (a) the name, contractor's license number and the location of the place of business of and (b) the portion of the work which will be done by each subcontractor who will perform work or labor or render service to the Contractor in or about the construction of the work in an amount in excess of one-half of one percent (1/2%) of the Contractor's Total Bid Price. Notwithstanding the foregoing, if the work involves streets and highways, then the Contractor shall list each subcontractor who will perform work or labor or render service to Contractor in or about the work in an amount in excess of one-half of one percent (1/2%) of the Contractor's Total Bid Price or \$10,000, whichever is greater. The District may, within its sole discretion, grant additional time to provide the below requested information.

If no subcontractor is specified for a portion of the Work, or if more than one subcontractor is specified for the same portion of Work, to be performed under the Contract in excess of one-half of one percent (1/2%) of the Contractor's Total Bid Price or \$10,000, whichever is greater, or if the work involves streets or highways, then the Contractor shall be deemed to have agreed that it is fully qualified to perform that Work, and that it shall perform that portion itself.

The completed form shall include a Department of Industrial Relations registration number for all subcontractors. Failure to include a registration number may cause the bid to be non-responsive.

Portion of the Work	Subcontractor	Location of Business	% of the Work	License & Registration Numbers
All Work To Be Performed by Stonehouse Drilling				

Name of Bidder Stonehouse Drilling & Construction, LLC

Signature 

Name and Title Stephanie Tompkins, Managing Member

Dated 7/19/22

END OF LIST OF SUBCONTRACTORS FORM